

**“DISNEY IS THE TIFFANY’S AND I AM THE WOOLWORTH’S OF  
THE BUSINESS”: A CRITICAL RE-ANALYSIS OF THE BUSINESS  
PHILOSOPHIES, PRODUCTION VALUES AND STUDIO  
PRACTICES OF ANIMATOR-PRODUCER PAUL HOULTON  
TERRY**

A dissertation submitted for the degree of Doctor of Philosophy

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June 2011

Abstract of the Dissertation

“Disney is the Tiffany’s and I am the Woolworth’s of the Business”:

A Critical Re-Analysis of the Business Philosophies, Production Values and Studio Practices of  
Animator-Producer Paul Houlton Terry

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Brunel University, 2011

Animator-producer Paul Houlton Terry has been portrayed as having little passion for the animation he produced and being more concerned with making a profit than producing entertaining cartoons with high production values. The purpose of the dissertation is to re-evaluate Terry’s legacy to animated cartooning by analyzing his business philosophies, production values, and studio practices.

Application of four psychodynamic factors to the early life and career of Terry, 1887-1929, found that his economic decision making was characterized by: an external locus of control, risk-averse financial behaviour, extreme saving behaviour through precaution, and shrewd money management practices. Based on Terry’s historical responses to twelve major economic, technological, or institutional forces of change for the period 1929-1955, the psychodynamic factors were found to provide accurate explanations for his studio practices and production decisions.

There was no evidence to support the conclusion that three early career disappointments undermined Terry’s intrinsic motivation to create animated cartoons. Rather, Terry’s lack of risk taking, external locus of control, tight studio production schedule, desire to compete with neighbour studio Fleischer, difficulty in separating financial rewards from creative processes in animation, and practice of undertaking surveillance measures on staff may have undermined his and his studio’s creativity. Archival research found Terry to possess strong passions for and to have made significant creative contributions to the field of animation.

Biographical research found that Terry retained a stable nucleus of highly talented artists who dedicated a significant portion of their working careers to the studio. An analysis of the cel aesthetics of a random sample of animated cartoons produced during the years 1930-1955 found that Terry created animated cartoons with above average cel aesthetics when compared to the other studios thereby supporting an inference that Terry was motivated to producing quality crafted animation. Further research is suggested into the role psychodynamic factors and economic decision-making play in the film production process and a clarification of Terry's legacy to the field of animated cartoons.

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## ACKNOWLEDGEMENTS

I would like to express my deepest appreciation to Pat Terry who allowed me access to her family's private collection of materials chronicling the career and personal life of her late father. As some of this archival documentation had never been made available to other researchers and scholars, I was able to acquire special insight into the economic psychology, managerial practices, and artistic motivations of Paul Terry. Without her assistance, this dissertation would not have been possible.

Special thanks must go to Dr. Ron Smith from Thompson Rivers University who has with a spirit of adventure inspired me to pursue doctorate work despite my initial hesitations. Many thanks to Dr. Paul Ward for providing his supervision and genius in animated film studies while keeping me focused on developing a paper that would make a lasting contribution to the existing body of knowledge. I would also like to thank Jerry Beck who provided me with important contacts in the animation community and made available his immense animated cartoon archive for my private viewing.

Although I disagree with Leonard Maltin's conclusions about the legacy Terry left to animated cartooning, I am indebted to him for his work on *Of Mice and Magic*, a book which has opened the door for many animation fans to the fascinating history of American animated cartoons and provided me the opportunity to challenge his assertions. Above all I must thank all the former Terrytoon employees who agreed to share their stories with me and provided critical, detailed first-hand accounts and anecdotal information on the working conditions and production methods at the New Rochelle studio while Terry was in control. Unfortunately, it is not possible to list all of them in this limited space but special mention must go to the patience and efforts of Dayton Allen, Alexander Anderson, Clifford Augustson, Howard Beckerman, Johnny Gentilella, Conrad Rasinski, Jr., and Mary (Mathewson) Zaffo.

## DECLARATION

I hereby declare that the work in this doctoral dissertation has been carried out in accordance with the rules and regulations of Brunel University. The work is completely original except where indicated by quotes or special reference in the text, and no part of the dissertation has been submitted for any other academic degree.

The views expressed in the dissertation are those of the writer and do not in any way represent those of Brunel University. The dissertation has not been presented to any other university for review or examination either in the United Kingdom or overseas.

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Wynn G. Hamonic

**June 1, 2011**

**Wynn G. Hamonic**

**Date**

## I. INTRODUCTION

### A. *Of Mice and Magic* (1980): The First Comprehensive Source Book on United States Cartoon Studios during the “Golden Age of American Animation”

In 1906, American director J. Stuart Blackton produced what many film historians consider to be the first animated cartoon, *Humorous Phases of Funny Faces* (1906).<sup>1</sup> Yet seventy years later outside of a few books on Walt Disney<sup>2</sup> and some experimental filmmakers such as Norman McLaren and Lotte Reiniger<sup>3</sup>, published information on the studios (e.g., Warner Bros., Fleischer, Van Beuren, Terrytoons, Columbia, Charles Mintz) from the “Golden Age of American Animation”<sup>4</sup> was scarce.<sup>5</sup> By the close of the 1970s, a comprehensive reference book surveying the American animated cartoon studios had not yet been published and, consequently, little could be found on the producers and artists who created such memorable cartoon characters as Bugs Bunny, Woody Woodpecker, Mighty Mouse, Casper the Friendly Ghost, and Betty Boop.

In 1980, film historian Leonard Maltin wrote the first definitive source book on both well-known and obscure American cartoon studios, *Of Mice and Magic: A History of American Animated Cartoons*,<sup>6</sup> and his work was well-received by film historians, book critics, and the media.<sup>7</sup> Over the next quarter century Maltin’s text would become one of the best selling and most consulted texts by critics, scholars, and fans in the study of the animated film genre as evidenced by the fact that it is widely cited by scholars and that it has never been out of print. One reason for the popularity of Maltin’s work may be that to date there has never been another text published that comprehensively surveys the histories of many of the American animated cartoon studios during its Golden Age.

Despite the popularity of the monograph, after turning the first page of the book an obvious textual flaw is apparent and that is the work lacks notes and references to the sources consulted, an omission that has been highlighted by many reviewers of the text.<sup>8</sup> Consequently, without references, notes, and other citations to research sources in his text, much of what Maltin writes on Paul Terry and Terrytoons, or any of the other studio personalities, cannot be verified without painstaking primary research. At the same time, Maltin has made it extremely difficult to challenge his work on the basis that he has drawn inaccurate conclusions from the sources he had consulted. The task to verify information on some of the lesser known cartoon studios such as Ub Iwerks or the Van Beuren Studio is even more difficult because very little has been published or made widely available to the

public on these production companies. The end result is that the scholar's quest for discernment of fact from opinion is a difficult task.

## **B. Critical Opinions Held by Scholars and Writers on the Life and Career Work of Paul H. Terry**

### **1. 1980 to Present: Maltin and Afterwards**

In *Of Mice and Magic* Leonard Maltin wrote the first comprehensive chronicle on the life of Paul Terry and the Terrytoons studio, a 33-page chapter titled "Paul Terry and Terrytoons" covering the life of animator-producer Paul Houlton Terry and his forty-year career in animated cartoons (1915-1955), including the workings of the studio under the control of CBS through to close of production in 1968. The text provides the opportunity for the reader to examine the business philosophies, production values, and studio practices of Paul Terry. Maltin opens up his chapter on Terrytoons setting the tone for the rest of the section as follows:

Several generations of Terrytoons employees came to know Paul Terry's oft-repeated motto: "Disney is the Tiffany's in this business, and I am the Woolworth's." Terry's candid boast clearly revealed his attitude toward the cartoons he made. There was no love involved, and no artistic motivation. It was a product, which he manufactured on an uncompromising schedule...and sold with remarkable success. The chronicle of Terry's career is not one of artistic growth and achievement, but rather the story of survival and prosperity in the business of making animated cartoons.<sup>9</sup>

While Maltin gives a direct and unapologetic portrayal of Terry as one having no love for the cartoons he produced and no artistic motivation, he fails to provide context for the quote. To Maltin, Terry was simply in the business from the profit perspective working on the theory of earnings before artistry, who expected his staff to work hard to meet production deadlines, and who spent as little money on the films as possible.<sup>10</sup>

According to Maltin Terry frowned on new innovative ideas and he relied on formulas and repetition in his cartoons often reusing animation from earlier films.<sup>11</sup> Maltin states that "outstanding creative talents could not survive at this studio, and the few who passed through its doors soon left for greener pastures."<sup>12</sup> Maltin posits that Terry's attitude and lack of artistic ambitions were formed by three early experiences in the film business:

- (1) Producer Lewis J. Selznick offering Terry one dollar a foot for *Little Herman* (1915), the first cartoon he produced. When Terry told Selznick that the raw film cost him more than a dollar a foot, Selznick replied that the raw film was worth more than the finished product;
- (2) An exhibitor telling Terry that they use his cartoons as a cathartic after the feature to drive the people out of the theatre to make room for the people in the line outside; and
- (3) Some theatre owners using only a portion of the 26 Terrytoons cartoons produced annually as they did not have room for all of them in their regular showings forcing Terry to cancel the contract so that the owners could be induced to sign a new contract for the following year. The end result was that Terry became “cold-blooded about the animation field” and felt that the quality of the pictures did not matter as the shorts produced towards the end of the year may never be exhibited and viewed.<sup>13</sup>

By describing these three incidents that influenced Terry’s career in animation, Maltin establishes the foundation to justify his assertions later on in the text relating to Terry’s business philosophies, productions values, and studio practices.

Maltin provides a linear historical narrative of Terry’s life and professional career moving seamlessly from his childhood and career in newspaper photography, to his early years in animation at the Bray Studio where he learned the secrets of assembly-line production, to his animation work while at George Washington University from 1917-1918, and later to his creative output for Paramount through to 1920.<sup>14</sup> Terry’s next stop was a lengthy one. From 1921-1929 he was employed at Fables Pictures Inc. (Fables Studios) where he incorporated his Farmer Al Falfa character into the Aesop’s Fables series of cartoons for Amedee Van Beuren.

Using the efficient production methods he learned working for Bray, and adding his own labour saving techniques, Terry was able to produce one short a week for eight years. Maltin’s critical review on the Terry produced series is that they “have nothing distinctive or remarkable to recommend them.”<sup>15</sup> He later adds: “At best, the Fables are pleasant, fast-moving time-fillers, but...their story lines are virtually nil.”<sup>16</sup> Maltin opines that the sheer volume of work coupled with his staff’s tenure at the studio conspired against any opportunities for improvement in the product quality.

With respect to Terry's business philosophies, he is described as a cautious individual with little appetite to change the cartoon product his studio was producing. In 1928 he was reluctant to move into sound but did release the first synchronized sound track for a cartoon (*Dinner Time* (1928)) before Disney. However, when Terry was content with continuing to add simple sound tracks to the silent product and Van Beuren was not, Terry was fired in 1929.<sup>17</sup> After Terry formed a partnership with Frank Moser to release his Terry-Toons in the early 1930's, Maltin notes that these Terrytoons were "virtually indistinguishable from the 1920s Aesop's Fables" with "no discernible difference in story or animation values."<sup>18</sup>

While other studios were trying to keep pace with Disney, "Paul Terry was content to just keep cranking out the same little time-fillers he'd always made"<sup>19</sup> with the cartoons following a repetitious unimaginative formula.<sup>20</sup> In fact, according to Maltin, the Terry cartoons of the 1950s did not look much different from the Terry cartoons of the 1930s.<sup>21</sup> When 20<sup>th</sup> Century-Fox executives approached Terry with the idea of doing a full-length cartoon, "Terry knew that making a feature-length cartoon was a gamble, and he never gambled on anything."<sup>22</sup> Terry was also late in filming his product in CinemaScope in the early 1950s which novelty effect would have made the company a lot of money if he had got in earlier.<sup>23</sup>

Regarding studio conditions and practices, according to Maltin, in the early 1930s the atmosphere at Terrytoons was oppressive and creatively "stifling." Animators such as Babbitt and Tytla gladly left when given an opportunity to do so and those who stayed behind "either didn't care about quality and innovation or trained themselves not to."<sup>24</sup> Maltin does make mention of Terry experimenting with a second-hand camera and devising an early matte system which the background would be photographed separately and then the characters and action layered together to make a print.<sup>25</sup> With respect to the overall quality of the Terry product, the character animation and design was primitive, only the backgrounds had some visual distinction, and Philip Scheib's music scores did not change through the years.<sup>26</sup>

From the perspective of production values, Maltin describes Terry as a man who was very conservative with respect to studio finances. He would save drawings,<sup>27</sup> have his musician Philip Scheib write original music or use public domain materials that "saved the company many thousands of dollars in music rights by never once using a popular song,"<sup>28</sup> was against using colour due to the higher costs of production,<sup>29</sup> and postponed the inevitable movement to colour by releasing cartoons in sepia for a short duration.<sup>30</sup> The author does give credit to Terry for expanding the facilities, organizing a story department, purchasing new

equipment, appointing new directors, and hiring new talent (Jack Zander, Dan Gordon, Ray Kelley, and Joe Barbera) after he bought out Frank Moser in 1936 which leads to the question as to how much an effect his partner had on the studio conditions in the 1930s.<sup>31</sup> Maltin also notes that Terry did pay his loyal long-time senior employees well.<sup>32</sup> Maltin also mentions that Terry even went against studio tradition by purchasing the rights of an established comic-strip character, Ernie Bushmiller's Nancy.<sup>33</sup> Maltin adds that the Terry product was good enough to earn an Academy Award nomination, and that Terry respected the work of animator Bill Tytla to the point that he lured him from Disney for a short period of time.<sup>34</sup>

With regards to Terry's managerial style and humour, Maltin writes that he considered himself to be "Mr. Story Department" for Terrytoons only partly relinquishing these duties when he put Tommy Morrison in charge of the story department. Even in the early 1940s Terry was still feeding his ideas to the story department.<sup>35</sup> When Supermouse was created by I. Klein, Terry was intent on taking the creative credit for the character.<sup>36</sup> Maltin does mention that the studio's other star characters, Heckle and Jeckle, were Terry's creation.<sup>37</sup>

Terry is also noted to be interested in jokes and bought the large gag collection of Joe Laurie, Jr.<sup>38</sup> Terry also had strange notions of what was humorous (if one mouse was funny in a cartoon, two mice would be twice as funny).<sup>39</sup> Maltin comments on Terry's departure from animation with a negative tone by stating that when Terry finally left the animation business in 1956 after selling his cartoon library to CBS for \$3,500,000 "he shared his good fortune with no one."<sup>40</sup> He closes his remarks with the cynical comment that by producing a simple saleable product, "he [Bill Weiss] and Terry have had the last laugh on a lot of creative, talented people who will never know the kind of success Terrytoons has enjoyed."<sup>41</sup>

Maltin is not alone in his criticisms of Terry's business practices and lack of motivation to produce a quality product. Since the publication of *Of Mice and Magic* there has been a number of other historians who have stepped forward and written, albeit sparingly, about aspects of Terry's managerial philosophies, production values, cartoon product, artistic motivations and creative impact on the animated cartoon industry. Donald Crafton's work *Before Mickey*, published two years after the Maltin text, focused on the thirty year period of silent cartoons from 1898 to 1928.

Like Maltin, Crafton also mentions the Selznick incident<sup>42</sup> but he fails to comment upon the significance of the event to Terry's career. Rather, Crafton focuses upon Terry's work and his contributions to the development of the silent cartoon: his one year period

working for J.R. Bray in 1916,<sup>43</sup> his confrontation with Mrs. Bray over her husband's animation patent and subsequent lawsuit settled out of court in September 1926,<sup>44</sup> his work in the Surgeon-General's office during 1917-1918, and his tenure at Fables Pictures, Incorporated until the advent of the sound cartoon.<sup>45</sup> While Crafton called the Fables Studio "the most proficient and profitable one of the decade", Crafton's critical opinion of the Terry product during his time at the studio was quite uncomplimentary labelling the shorts "potboilers."<sup>46</sup>

In 1994, film historian Giannalberto Bendazzi published *Cartoons: One Hundred Years of Cinema Animation*, a detailed chronological history analyzing animated film on a global scale. In the book, the career of Paul Terry is briefly mentioned. The Terry-Selznick incident is alluded to by Bendazzi as simply a "rejection," and Terry is described as a "modestly gifted artist" and "a hard-headed independent spirit" who persevered in the animation business despite setbacks.<sup>47</sup>

In his 1997 book *Serious Business: The Art and Commerce of Animation in America from Betty Boop to Toy Story*, author and long-time editor of *Time* magazine, Stefan Kanfer, writes that Terry's experiences working with John Randolph Bray and his Henry Ford assembly-line techniques where mass production methods and streamlined animation techniques (e.g., simplified costumes) increased output and reduced costs dramatically causing a sacrifice in quality during his time at Fables Pictures Inc. (1921-1929). "At a time when exhibitors demanded 'product' to round out the movie program, Terry had little reason to improve or enliven the adventures of Al Falfa."<sup>48</sup>

Kanfer also mentions the Selznick-Terry incident but like Bendazzi views the event slightly different than Maltin giving Terry credit for his indomitability of spirit for overcoming not just Selznick's comment, but also accepting rejection both from Bud Fisher (Terry tried to have him produce Fisher's Mutt and Jeff strip for the screen) and later William Randolph Hearst (Terry failed to convince the mogul to have him run Hearst's animation studio).<sup>49</sup> Kanfer spends a good deal describing the tough early years in animation when many studios experienced financial difficulties. He notes that by 1927 Bray had shut his doors, the Fleischers had gone in and out of bankruptcy and "Terry was treading water."<sup>50</sup> He closes his comments on Paul Terry by detailing Terry's sale to CBS in 1955 then stating that he left no creative or artistic legacy to the animated film genre, and that his biggest claim to fame was being a survivor.<sup>51</sup>

In 1998, film professor Gene Walz's book, which chronicled the life of cartoonist, commercial artist, illustrator, and animation artist Charles G. Thorson,<sup>52</sup> was published.<sup>53</sup> Much of what Walz writes about Thorson's life is drawn from family history sources, the Canadian National Archives, the University of Winnipeg's Icelandic Collection, anecdotal information, interviews with animation historians, but very little studio production documentation.<sup>54</sup> Consequently, Walz is left with the onerous task of fitting pieces of the puzzle together on what cartoons Thorson worked on at the studios and which characters he designed. When discussing Thorson's time at Terrytoons, Walz describes Terry as a cautious and conservative studio head who had come to "accept Disney's production-line methods of animation production."<sup>55</sup> Like Maltin, Walz fails to include reference notes or a bibliography to support his claims.

Lawyer, journalist, political aide, and animated film historian Michael Barrier authored *Hollywood Cartoons: American Animation in its Golden Age* published in 1999. While Barrier devoted the greater portion of the text to the Hollywood studios, he did spend some time analyzing the personalities and animated products of the New York studios (i.e., Terrytoons, Van Beuren Studio and Fleischers), if only for purposes of placing the California studios in greater context to the United States animation industry. Barrier found Terry as the cartoon producer of the 1920s who most successfully accommodated himself to the demands of the marketplace<sup>56</sup> and disagrees with Maltin's comments on Bray as "It was Terry, far more than Bray, who established cartoon production on an industrial basis."<sup>57</sup> Terry, unlike Bray, while at Fables Studio used cost-saving shortcuts such as cycles and repeat animation to produce entertaining cartoons with furious action.<sup>58</sup> Barrier gave some credence to Maltin's assertions about Terry's reluctance to spend money on the cartoons he produced by noting that Terrytoons had only half as many employees as other studios with comparable output and these other studios were spending twice as much on each cartoon.<sup>59</sup>

Like Maltin, Barrier was also unimpressed with the quality of the Terry cartoon product. For example, he found the short *Two Headed Giant* (1939) a disappointing and awkward copy of Disney's *Brave Little Tailor* (1938).<sup>60</sup> The author also gives a less than favourable description of studio conditions at Terrytoons in 1943 referencing animator Johnny Gentilella's remark that the studio was a "loft-type place," by calling the studio "shabby."<sup>61</sup> Barrier then relates the story of master animator Tytla's frustration while working for Terry, 1943-1944, at not being able to perfect the animation he was working on.<sup>62</sup> Further, when Terry was facing collective bargaining problems, he laid off both Tytla and I. Klein, his two higher paid employees. Barrier agreed with John Gentilella's conclusion that Terry was

trying to skim the top a little bit to recoup some of his financial losses after he signed the union agreement.<sup>63</sup>

John Grant in *Masters of Animation* (published in 2001) provides a small peek into the life of Paul Terry and the Terrytoons studio, some of it favourable. Terry's efficient operations at Fables Pictures Incorporated were a strategy employed by Terry to produce cartoons that generated a profit. Terry is also seen as an innovator by releasing the first synchronized cartoon. When Terry struck out on his own in 1929, it was Moser and Terry that agreed not to get paid until the cartoons they produced for their distributor, Audio-Cinema, generated a profit.<sup>64</sup>

In Grant's opinion, Terry was one of the first animation producers to realize that the animated theatrical short was in due time going to disappear with the rise of television. While Grant concluded that the studio conditions at Terry's were less than ideal, after Terry sold his studio keeping the "massive windfall to himself," the sweatshop conditions only got worse. Grant is also of the opinion that Terry's cartoons were less than stellar by stating "it is fair to say that most of Terrytoons enduring work – almost all for television – was done between Terry's departure in 1955 and the final closure of the studio by the CBS subsidiary Viacom in 1971."<sup>65</sup>

## **2. 1928 – 1979: Before Maltin**

For the fifty year period prior to the publication of the text *Of Mice and Magic*, there was very little written on the life and career of Paul Terry and even fewer negative reviews on his studio. One of the very first reviews on the work of Paul Terry was a *New York Times* article published in 1928, a very complimentary portrait of Mr. Terry's work at Fables Pictures. The article details the process of creating an animated short at the studio. The journalist describes the studio environment and the careful attention paid by Terry to character design, story development and animated work.<sup>66</sup> Twelve years later, the newspaper published a similarly flattering article on the Terrytoons operations. In the feature, Terrytoons is described as a fun place to work and Paul Terry is characterized as a generous, accommodating producer who "permits the boys to go to town on any idea if it's amusing."<sup>67</sup> While obviously written using attention-grabbing news writing style, the two articles clearly reveal Terrytoons as a studio concerned with production values based on quality craftsmanship that contemporary writers have failed to mention.

The first book published that examined the inner workings of Terrytoons was *How to Make Animated Cartoons* written by Nat Falk with a foreword by Paul Terry. Published in 1941, the book featured information from all of the major studios of the day including Disney, Warner Bros., Terrytoons, Fleischer, Screen Gems, Lantz and Harman-Ising. The first chapter of the book details the early history of animated cartooning and the “Big Four” (J.R. Bray, Earl Hurd, Paul Terry, Raoul Barré) who pioneered the art form. Like Maltin, Falk also mentions the Terry-Selznick incident but casts the event in a different light. This time the cartoon Terry was trying to interest the producer in purchasing is labelled a “masterpiece”, and Selznick is cast as a poor businessman “blind to the possibilities of this new medium.”<sup>68</sup> Falk writes that in the making of animated cartoons Terry has made “countless revolutionary changes” including a number of creative accomplishments. Terry was “the first ever to use celluloid for action drawings,” and “the first screen artist to draw animal characters in humanized form.”<sup>69</sup>

While Maltin was the first to devote an entire chapter to the Terrytoons studio in a reference survey book, it was Stephen Becker who first wrote a relatively substantial (i.e., 4-5 page) biographical portrait of Paul Terry in Chapter IV “Added Attractions” of his book *Comic Art in America*, published in 1959. Becker doesn’t mention the Selznick event but he does note the third of the three events that Maltin contends helped shape Terry’s outlook on animation. Rather than viewing the event as a blow to Terry’s creative ambitions, Becker sees the episode as exemplifying Terry as both a “benevolent and shrewd” businessman, one who wisely secured another contract by generously allowing the owner only pay for the cartoons that were played.<sup>70</sup> Becker summed up Terry’s managerial style as follows: “An intelligent businessman, Terry proved a boon to many foreign distributors: he was scrupulously fair, helped them often when business slumped and never called for advance guarantees. He was therefore personally liked and admired.”<sup>71</sup>

Similarly, Les Daniels’ comments on Paul Terry’s executive capacities in his 1971 published work *Comix: A History of Comic Books in America* were positive ones. Daniels viewed Terry as a wise businessman who consolidated the concepts of the animated film business “into a consistently marketable commodity.”<sup>72</sup> With respect to the Terrytoons cartoon product, he found the adventures of both Mighty Mouse and Heckle and Jeckle highly energetic and entertaining.<sup>73</sup> Ralph Stephenson in his widely distributed 206-page book *The Animated Film*, published in 1973, examined the history of international animation from silent film to time of writing. In his short (approximately 200-word) review of Paul Terry and the Terrytoons studio, he found the Terry product “very average” while the shorts (e.g., *Flebus* (1957), *The Juggler of Our Lady* (1958)) produced after Terry sold to CBS to be

“excellent” cartoons.<sup>74</sup> Based on some inaccuracies in the dates (e.g., he has Audio-Cinema (the distributor of early Terrytoons) failing in 1928 rather than in 1931), the quality and integrity of the research undertaken by Stephenson comes into question.

The first chapter written on Terry (albeit a small 8-page overview titled “Mr. Terry’s Toons”) in any monograph must be credited to Donald Heraldson for his work *Creators of Life* published in 1975. Unfortunately, the small portrait is riddled with laughable typographical and historical errors.<sup>75</sup> Heraldson’s critical opinion of Terry and his cartoon product is generally favourable although with the inherent research errors it is questioned whether he in fact ever viewed a Terrytoons animated short or researched primary source materials on the studio or its creator. Heraldson does give Terry credit for experimenting with “new ideas for the medium” including “trying cross marks on the paper sheets for registration.”<sup>76</sup> Heraldson’s opinion is that the cartoons of Terry and “Barrié” in the late teens were the best drawn of the era.<sup>77</sup> He also found the vocal parts in the Terry Toons of the early 1930s as “excellent.”<sup>78</sup>

Heraldson also alleges that Terry “was eyeing the use of the color medium and anticipating the time when his studio could use it” and “several cartoons were drawn and opaqued in color and stored away until Technicolor was available” (allegedly Disney had the rights to Technicolor for cartoons sewed up until 1934).<sup>79</sup> If this assertion is true then this would support the proposition that Terry was interested in improving his product and was anxiously awaiting the opportunity to release in colour contradicting what Maltin (and others) would later claim in their publications. By 1940 Heraldson opined that Terrytoons had “reached a quality of artwork similar to the other studio output; color and animation had weathered the crudity period and now were excellent.”<sup>80</sup> However, Heraldson notes that later the Terrytoons product began to become less artistic.

When the Terrytoons character Dinky Duck was introduced Heraldson comments that he was “immensely popular.”<sup>81</sup> Like Maltin, Heraldson did not find Scheib’s music impressive being very repetitious sounding with “an overindulgence in saxophones and cymbals in every cartoon.”<sup>82</sup> Further, Heraldson also mentions the story of the theatre owners not having to pay Terry for unprojected cartoons and gives credit to Terry for his fairness. Heraldson also notes that Paul Terry also allowed distributors to cancel their contracts when overseas business fell in World War Two and by doing so “Paul Terry was escalated immensely in popularity overseas by such business practices.”<sup>83</sup> Heraldson included one former Terrytoons animator’s comment that Terry remained small for a purpose: to avoid any temptation of having to do something underhanded to survive.<sup>84</sup>

With regards to the cartoon product, Heraldson states that Terrytoons “were never really works of art” some of which were drawn by unskilled students. He saw Terry as never refining his product and conceiving no great “firsts” in film cartoons (although this is again in error as Terry had a number of animation firsts noted supra). Further, Heraldson was not aware of any “pioneering” or research for improvement in the cartoon product. The animation and colour could both be near perfection and near disaster in the same cartoon. Heraldson concludes that Paul Terry had great respect for Disney but did not try to copy him and “Terry was well liked, and his product, like Disney’s, retains his name even after he no longer was associated with it.”<sup>85</sup>

In *The Great Movie Cartoon Parade*, published a year after Heraldson’s book, in a short paragraph on the studio, author David Rider’s opinion of the Terrytoons studio was that it turned out low budget shorts. When CBS assumed control there was an improvement in style and some promising material was produced but gradually the output became “stereotyped and uninspired as it had been while Terry was still in charge.”<sup>86</sup> It should be noted that it only took 22 words into the paragraph before Rider had incorrectly stated that Paul Terry produced *Aesop’s Fables* for Paramount release when in fact it was for Pathé release.<sup>87</sup> In Maurice Horn’s *The World Encyclopedia of Cartoons* first published in 1979, the author provides a five paragraph summary on the life and career of Paul Terry. Horn makes a number of errors in his historiography of Terry and his studio.<sup>88</sup> While refraining from analyzing the cartoon product, Horn describes Terry as “one of the unsung pioneers of early animation... [who] did contribute significantly to the nascent medium of animated film...perfecting the method of cel animation.”<sup>89</sup>

In Lewis J. Krohn’s 1979 article on Paul Terry and his studio for the journal *Classic Images*, he begins his article with the comment that despite Paul Terry’s activity in the animation field for so many years he has been generally ignored by film scholars. While he amusingly notes that the air around the city of New Rochelle “seems to deaden the imagination of cartoonists,”<sup>90</sup> he casts the blame on Terry’s age (15 years older than Disney) for his lack of imagination.<sup>91</sup> Krohn did his research detailing little known facts on Terry and his staff with few errors.<sup>92</sup> His general opinion of Terry was that while Terry never achieved a high grade form of musical scoring, dubbing or sound effects and was not an innovator, he was one of the pioneers of the animated film in the United States and had made significant contributions to the animated film sector.<sup>93</sup>

### **3. Reasons for Differing Critical Opinions on the Life and Career Work of Paul H. Terry**

The evidence collected on the critical opinions of the career and studio product of Terry leads to the conclusion that writers, scholars and critics have held a more positive opinion on the managerial style, studio practices and cartoon product of Paul Terry prior to the publication of Maltin's *Of Mice and Magic* in 1980 than after the text was printed. The pre-1980 image of Terry as animation pioneer and wise benevolent businessman had been replaced by one of miserly taskmaster ruling over an underpaid, amateurish staff in a threadbare studio producing second-rate cartoons on a micro-budget.<sup>94</sup>

What were the underlying causes of the division of opinion between the pre-Maltin and post-Maltin writers on the studio practices of Paul Terry and the quality of his cartoon product? A number of explanations are proffered. The first three possibilities relate to errors in research methodology where the researcher fails to ensure that insufficient, irrelevant, or invalid data are not collected. The first potentiality is an error in research design (e.g., asking leading questions while collecting oral histories).<sup>95</sup> The second possibility involves the researcher failing to acknowledge sources of bias. For example, during his career Paul Terry had faced a number of professional and personal adversities with co-workers and competition. Therefore, there may be issues surrounding some of the interviews conducted that may have compromised the veracity of the interviewee's statements.<sup>96</sup> The third likelihood refers to improper interpretation of the results (e.g., through faulty communications between interviewer and interviewee, or jumping to hasty conclusions based on insufficient evidence).

Another explanation may be that there were different source materials consulted by the writers, authorities that may have different opinions on Terry's legacy. There are a number of major research sources that the historian can access to help explore the business philosophies, production values, and studio practices of Paul Houlton Terry including the following:

1. The Paul Terry Family Collection, 1887- Present<sup>97</sup>

Over the course of the last 120 years the Terry family has carefully collected a large and broad range of personal and professional documents and ephemera on Paul Terry.

2. The Harvey Deneroff Interviews, 1969-1970<sup>98</sup>

From 1969-1970, consultant, animation festival/conference organizer and writer Harvey Deneroff conducted a series of interviews of Paul Terry and other key Terry personnel while undertaking his graduate work.

3. The Moser-Terry lawsuit (1936-1938) transcripts<sup>99</sup>

The trial documentation of Frank Moser's unsuccessful action against Paul Terry, William M. Weiss, Earl W. Hammons and Terrytoons, Inc. for conspiring to defraud him of 50 percent of the cartoon business which details the legal proceedings but also contains a wealth of information on the business philosophies of Paul Terry and Frank Moser, as well as their studio practices, 1929-1936.

4. The Terrytoons Labour Strike materials, 1947<sup>100</sup>

This compilation of documents by the Screen Cartoonists Guild chronicles the unsuccessful 28-week strike by Terrytoons employees who attempted to negotiate a union contract with Terry.

5. National Labor Relations Board (NLRB) - In the Matter of Terrytoons Inc. documents<sup>101</sup>

The matters addressed in these materials concern collective bargaining issues and grievances between Screen Cartoonists Local 1461 and Terrytoons, Inc.

Besides the above sources, there are interviews undertaken by other animation researchers, the Disney Archives in California, the Museum of Modern Art's small collection of early Terrytoons story materials and notes, library journal and newspaper databases, the local history section at the New Rochelle Public Library, newspaper clipping files, obituary information, and other sources. Researchers who were able to access deeper sources of information with a wealth of background data should better be able to gain stronger insight into the life and career of Paul Terry. Based on the published sources to date only Barrier was aware of or took the time and effort to access the Paul Terry Family Collection.<sup>102</sup> In order to write his book *Hollywood Cartoons*, he devoted nearly three decades to research thousands of pages of documentation, and interviewed or accessed oral histories of over 200 individuals

involved in the animated film industry through the Golden Age of American Animation, some of whom were former Terrytoons employees.<sup>103</sup>

After reading Maltin's chapter on Terry it is clear he reviewed the Deneroff materials and the acknowledgements in his monograph corroborate this analysis. However, correspondence from his research associate<sup>104</sup> confirmed that he did not access any of the other five major sources cited supra. The research associate acknowledges that based on time restraints and financial resources they did their best under the circumstances.<sup>105</sup> Maltin had only 30 months to write a comprehensive survey book on American animation studios when at the time information gathering would require labour intensive primary research. It also does not appear that any of the other writers did much, if any, primary research before writing their articles as evidenced by the numerous errors and inconsistencies.

Another explanation for the differing critical opinions could be related to the level of access to the Terrytoons shorts. A limited number of Terrytoons cartoons were released on video in the 1980's by CBS/FOX Home Video. In the early 1990's, some shorts were re-released by Video Treasures, but unfortunately since then shorts have not been commercially available. Therefore, one can conjecture that very few critics or scholars and even fewer members of the general public have seen a large enough sample of shorts that would fairly represent the quality of the Terrytoons product. Paul Terry can claim that his studio had garnered three Academy Award Nominations during the 1940s yet this fact is never mentioned by contemporary historians.<sup>106</sup> Stephen Worth has stated that: "...the Terry cartoons have been out of circulation so long, most animation fans have forgotten (or never knew) how great the studio once was."<sup>107</sup>

In order to effectively critique the Terrytoons cartoons Barrier viewed a very high percentage of the studio's shorts produced during the period 1930-1950, and a substantial number of later releases. Unfortunately he only brought forward five titles to comment upon although his general opinion was that the Terrytoons cartoons were not on par with the other major animation studios.<sup>108</sup> Both Maltin and his research associate were able to view a number of Terry shorts available at the time on 16mm filmstrip although there is no indication that this amount was a representative sample.<sup>109</sup> Maltin's overall views on the Terry cartoon product as previously noted were unfavourable primarily due to their repetitious storylines,<sup>110</sup> music, timing, and drawing style.<sup>111</sup>

However, he found *String Bean Jack* (1938) to have enough gags to overcome the shortcomings,<sup>112</sup> *The Magic Pencil* (1940) to be "an entertaining and imaginative cartoon,"<sup>113</sup>

*Dingbat Land* (1949) and *Comic Book Land* (1950) to have “intriguing fantasy or dream premises,<sup>114</sup> and found the personalities of Heckle and Jeckle in cartoons such as *The Power of Thought* (1948) to be enjoyable.<sup>115</sup> The other writers that provided critical analyses of the cartoons did not mention any specific shorts they screened. Without title listings and reviews of specific features of shorts there is no evidence that these writers screened any shorts and may have simply drawn upon memories of cartoons previously viewed.

### C. A Closer Look at Terry’s “Woolworth’s” Quote

#### 1. Interpretations

Another reason that may account for the differing critical opinions between pre- and post-Maltin writers may be that the Maltin chapter on Terry influenced the writers and researchers that referenced his text to espouse similar viewpoints. Rather than undertake primary research, scholars have simply accepted Maltin’s interpretation of Terry’s famous “Woolworth’s” quote at face value. Although Maltin did not reference the quotation to a source, the nephew of Paul Terry, Alex Hume Anderson,<sup>116</sup> confirmed to the writer that Terry uttered the famous line.<sup>117</sup>

Anderson took the remark as a humorous comment from his uncle but there was no reasons given by Terry for equating himself with the Woolworth department store chain and Disney with Tiffany’s. Maltin’s interpretation of the quote is that Terry’s statement revealed his attitude where there was no love and no artistic motivation in producing the cartoons. Animation historian Stephen Worth disagrees with Maltin:

Maltin quotes Paul Terry as saying, “If Disney is the Tiffany of animation, I’m the Woolworth’s.” But he misinterprets what Terry meant by that...He didn’t mean that his studio was cheap...He meant that Disney saw itself as being “highbrow”, with artsy Silly Symphonies and very mild humor designed for “refined audiences.”<sup>118</sup>

Adrian Bailey, as noted in his work *Walt Disney’s World of Fantasy*, views the famous quote as Terry admitting “to being more interested in quantity than in quality.”<sup>119</sup> When making the comparison was Terry referring to the business or managerial practices of the founders of the companies, the corporate images and business philosophies or values of the companies, the product manufactured, produced or sold, or other factors? By accessing the biographical literature on the company heads, the writer was able to find three major similarities between the business careers, managerial practices, and economic behaviours of Terry and

Woolworth, as well as some parallels between the artistic motivations of Disney and the Tiffany families which greatly clarify the meaning behind Terry's famous quote.<sup>120</sup>

## **2. Biographical Comparisons**

### **a) Paul Terry and Frank W. Woolworth**

First, both Terry and Woolworth can be considered shrewd businessmen who carefully watched their finances. While Terry's frugality has been documented earlier and much criticized by Maltin and others, Woolworth also kept a very close watch over the company finances, and would go to great lengths to save a few pennies. When the Manhattan banks imposed a collection charge of a tenth of one percent for clearing checks outside of the city, Woolworth immediately switched company accounts to Philadelphia. He ordered staff bonuses not to be handed out until December 24<sup>th</sup> or even 26<sup>th</sup> in order to secure the services of his employees over the holiday season at a time when competitors were tempting them with higher wages. He did grant boost in wages for good employees in fear of them moving to the competition. Woolworth always insisted in the money being well earned and if an employee worked late they were not to be paid extra but rather could come in later the next day.<sup>121</sup>

Second, both men saw themselves as a supplier of goods that would be attractive to the common man. Woolworth is characterized as a store magnate who viewed himself as a commonplace man sensing the wants of a commonplace people.<sup>122</sup> Similarly, Terry's business motive was to produce a cartoon product that was attractive enough to meet the entertainment demands of the common man thereby satisfying his distributor and accomplish this task as efficiently and economically as possible. Stephen Worth captured some of these features when he referred to Terry's business philosophy by stating that unlike Disney "Terry himself was aiming at a different audience. His films were designed not to impress, but to entertain the common working man."<sup>123</sup>

Finally, the strategic business plan of both men was to sell in quantity. By making a few cents profit on each product he sold, Woolworth could generate sizeable profits over large quantities of sales.<sup>124</sup> According to Woolworth's biographer, the department store head fostered the idea that: "In turn, a penny or two of profits from items anyone could buy would surely add up to dimes and quarters and dollars, perhaps even hundreds of dollars."<sup>125</sup> Terry's business philosophy appears to be very similar and supports Adrian Bailey's interpretation of Terry's quote that the cartoon producer was interested in quantity. By producing a large

number of animated shorts on a tight budget Terry could generate a profit. Long-time Terrytoons employee Thomas Morrison believed that Terry's business philosophy was "volume and price"<sup>126</sup> Evidence of Terry's philosophy in practice can be traced to his early years as producer for Fables Studio. From 1921 to 1929, Terry was able to produce approximately 460 Aesop's Fables cartoons for Fables Pictures, one a week for nine years with a production staff of 18 to 20.

#### **b) Walt Disney and Charles Lewis Tiffany**

Conversely, Disney, like both Charles and Louis Tiffany who headed the famous fine jewellery concern, was concerned with improving the aesthetics of the product produced.<sup>127</sup> All men were trying to impress their audiences with quality craftsmanship and fine attention to detail. In 1937, Leon Schlesinger, at the time head of Leon Schlesinger Productions producing animated shorts on the Warner Bros. lot, observed: "We're businessmen. Walt Disney's an artist. With us, the idea with shorts is to hit 'em and run. With us, Disney is more of a Rembrandt."<sup>128</sup> Disney's strategic marketing plan was to make shorts so good that the public will demand more forcing exhibitors to pay higher rentals.<sup>129</sup>

### **3. Critical Re-Analysis of the Quote**

Unlike what Maltin opines, when comparing himself to Woolworth's Terry was not referring to his artistic motivation or the love of the cartoons he produced because Woolworth was not an artist, not involved in managing artists, and not creating or producing an artistic creation for consumers. Rather, he was a retailer of manufactured goods, the middleman between producer and consumer. Based on a survey of the biographical literature, Terry likely was making comparisons to Woolworth's shrewd business behaviour, his commercial practice of producing a product for the common working man, and/or his business philosophy of producing on volume and price. Finally, another parallel which Terry may have been aware of was that each company head believed in employing friends and family members in their business enterprises as keys to their success.<sup>130</sup>

#### **D. Re-Analysis of the Life and Career of Paul Terry: Importance and Necessity**

The paucity of published information on the life and career of Paul Terry along with numerous scholarly errors and inconsistencies in much of the published sources on the studio head have resulted in Terry's legacy and contributions to the nascent medium of animated cartoons being overlooked or distorted. Scholarly errors include failing to cite sources,

neglecting to access primary sources, relying on information that is more opinion than fact, and citing secondary sources also replete with inaccuracies. For example, Maryann Oshana appears to have conducted no primary research in coming to her conclusions in her biographical article on Paul Terry. She cites five secondary sources,<sup>131</sup> including three journal articles, a newspaper article, and Leonard Maltin's chapter on Terry. Oshana even goes to the extent of borrowing some of Maltin's wording by her reference to animators being stifled at Terry's and moving on to "greener creative pastures."<sup>132</sup>

J. Douglas Gomery writes in his challenge of the traditional opinion that Warner Brothers introduced sound in the late 1920s to avoid bankruptcy: "We must not simply trust the old bibliographies or faulty recollections, but go out and seek the evidence wherever it may be."<sup>133</sup> Gomery provides a convincing argument after accessing "mounds of data" that the movement to sound by Warner Bros. was part of expansionary activities and not avoidance of bankruptcy, and that any financial indebtedness was short-term to secure funds for production, distribution, exhibition and promotion.<sup>134</sup> Similarly, animation historian Mark Langer called into question the dominant model in animation film scholarship where the studio head is looked upon as the force that drove the creative processes, and turned his attention to studio practices and the *Standard Production Reference*, the procedural and technical manual that outlined rules of studio animation practice to persuasively illustrate, for example, the key role the text played in controlling production costs.<sup>135</sup>

Lewis J. Krohn writes that film history has ignored the cartoons of Paul Terry.<sup>136</sup> Many contemporary animation historians are unaware of his pioneering efforts including Heraldson<sup>137</sup> and Kanfer.<sup>138</sup> However, Paul Terry made significant advances in the use of animated cels in cartoon production in the late teens. Further, under oath, when sued by Disney for producing a cartoon character that resembled Mickey Mouse, Van Beuren swore in his April 1931 deposition that it was Paul Terry who was the first to use mice cartoon characters in animated film.<sup>139</sup> With such ignorance of Terry's accomplishments by film scholars, Terry's life and career must be re-examined to place his contributions and legacy in proper perspective.

Further, while Maltin writes that artists such as Babbitt and Tytla gladly left the stifling atmosphere of Terrytoons when given an opportunity to move to another studio,<sup>140</sup> his assertions don't explain why studio veterans such as J. Conrad "Connie" Rasinski, Philip A. Scheib, Emanuel "Mannie" Davis, Thomas Morrison, Eddie Donnelly and others remained with the studio long after Terry's retirement. Furthermore, interviews by the writer of most of the remaining artists still alive at time of the research, such as Johnny Gentilella and Sid

Raymond, found that employees enjoyed their experiences at Terrytoons working for Terry.<sup>141</sup> With such divergence in opinion between what Maltin has written about employee satisfaction at Terrytoons and the interviews of surviving production staff, the issue of studio working conditions needs to be revisited.

Maltin's comments that Terry's staff did not care about quality of shorts they produced raises a number of issues related to the creative motivations and artistic abilities of Terry's staff of employees.<sup>142</sup> A number of key animation artists such as Connie Rasinski and Eddie Donnelly remained with the Terrytoons studio for the bulk of their careers. If Terry was interested in producing quality animated shorts, he would have endeavoured to retain a staff of talented artists and production personnel. While this supposition cannot be statistically tested, an examination of the credentials and artistic abilities of Terry's key staff should bring better insight into studio conditions and Terry's studio practices and business philosophies. One can reasonably infer that if these artists were well esteemed in the animation community and remained at the studio for many years that not only did Terry desire to produce quality cartoons but that the studio conditions were acceptable to them or they would have left for greener pastures.

The most common contemporary critical opinion of Paul Terry is that he applied budget-conscious studio practices to produce animated shorts when he had the financial resources to produce shorts more like Disney's. Critics charge that Terry was more interested in making money than producing quality animated cartoons. Whether this is true or not will be explored later, but, if true, what could be said about Terry could be said about most of the other studio heads. When animator Larry Silverman was questioned about whether the staff was warned about the impending closure at the Van Beuren studio in 1937, Silverman responded that Van Beuren "was into dollars" and "...Walt [Disney], Hugh [Harman] and Rudy [Ising], were really the only ones who were interested in making good cartoons than in making all the money."<sup>143</sup>

For example, Leon Schlesinger<sup>144</sup> was also a producer that would be characterized as very tight with the dollar. Schlesinger's harsh business practices cannot be overemphasized. His production staff worked in a dilapidated studio (Avery's unit were briefly assigned to a bungalow they affectionately dubbed "Termite Terrace"). In 1941 and 1942, when unionized employees demanded a pay raise, Schlesinger briefly shut down the studio. Schlesinger also boycotted the Academy Awards for what he believed was preferential treatment given to Walt Disney Studios. He also farmed some of the production work on the Looney Tunes shorts out to his brother-in-law, Ray Katz, for tax break reasons. Animated cartoonist and

producer John R. McCrory was so tight with his dollar that he had his employees use the men's room as a darkroom and he would use short ends of old films to photograph his animated shorts.<sup>145</sup> With so many of the animated shorts producers carefully watching their budgets rather than concerned about producing expensive Disney-like cartoons, possibly the issue lies not with Terry but rather with the economic conditions inherent in the animation industry and other institutional factors.

## **E. Models of Film Production and Practice: Methods of Critical Analysis**

### **1. Traditional Models: Auteurism, the Great Man Theory and Masterpiece Histories**

In François Truffaut's landmark 1954 essay "Une Certaine Tendance du Cinema Français" published in the film journal *Cahiers du Cinema*, Truffaut coined a new phrase *la politique des auteurs*. The major tenets of this new doctrine was that the director was perceived as being central to film art creation with the necessity for the creative product becoming an expression of the personal vision of the director. In the view of Truffaut and filmmaker friends Jean-Luc Godard and Jacques Rivette, the director and not the screenwriter or novelist was the controlling force behind the film.

In his 1962 essay "Notes on the Auteur Theory," film critic Andrew Sarris defined the term "auteur" popularizing the term in the United States. In "Toward a Theory of Film History," Sarris' introductory essay in his 1968 book *The American Cinema: Directors and Directions 1929-1968*,<sup>146</sup> he coined the term "auteur theory" while describing the work of "true film auteurs" and identifying fourteen directors who were able to overcome the impediments and obstacles imposed by studio personnel and production methods as well as the limitations of the various film genres to express a consistent film style and stamp a personal vision on each film they directed. Between 1965 and 1980, most American film histories either unabashedly took a wholly auteurist position or show its influences.<sup>147</sup>

Auteur theory, which focuses on film, a highly collaborative art, as the creative force of a single person, is somewhat akin to the model of the "Great man" theory of history, a theory followed by some historians that attempts to explain history by the impact of "Great men" of history, or heroes: highly influential individuals, either through personality, genius, or political might have changed the course of history. The theory is linked to the work of Thomas Carlyle who commented that "The history of the world is but the biography of great men." For example, a scholarly proponent of the theory would focus on the big personalities

and view all of the historical events as being tied directly to their own individual decisions and orders.

To Mast and Sarris, while industry, technology and culture have influenced the history of film as art, it has been the “great film minds” that have been the determining factor in the history of the aesthetics of film. Both Allen and Gomery coin a new term that follows this auteur theory view, “masterpiece histories” where film history is episodic, organized around the “great film minds,” and where film art depends on the vision and skills of the great artists.<sup>148</sup> Supported by the impact of auteurism on film studies during the late 1960’s and throughout the decade of the 1970’s, the masterpiece view towards cinematic history remained an influential model for how film history classes were to be taught, textbooks were structured, and knowledge was to be disseminated.

In the discipline of animated film studies, scholarship has traditionally followed the theoretical views held by scholars of live-action cinema studies. The effects of studio organization, technological advances, and the economics of the marketplace on the studio product were either ignored or glossed over in favour of attributing characteristic features of the animated films to particular achievements of the individual. However, a key difference is noted. While in motion pictures, the emphasis is on the directors as the central creative force, in animation the true artists are seen either as the individuals that ran the cartoon studio or the producers who were able to transcend the studio system to craft their own vision to the films produced.

The concept of animation producer or studio head as artist and guiding creative force behind the studio’s success extends as far back as the 1930’s. In *The Rise of the American Film; A Critical History* by Lewis Jacobs, the author chronicled the motion picture companies, film genres, significant motion pictures, and a number of influential directors paying particular homage to Walt Disney describing the producer as one who has “a zeal for quality, an appreciation of artistry” and “stands as the virtuoso of the film medium.”<sup>149</sup> Similarly, about 1940, film director and film theorist Sergei Eisenstein began a series of landmark articles on individuals he considered to be masters of the cinema: D.W. Griffith, Charlie Chaplin, and Walt Disney. Based on his visit to the Disney Studio about 1930, Eisenstein’s opinion was that Disney was the giant among all American artists, concluding that: “The work of this master is the greatest contribution of the American people to art.”<sup>150</sup>

Similarly, American author, playwright, and cultural critic Gilbert Seldes, who championed the works of Irving Berlin, Charlie Chaplin, Walt Disney, George Gershwin,

George Herriman, and Al Jolson in columns for emerging publications like *Esquire*, *The New Yorker*, *The Saturday Evening Post*, and *Vanity Fair*, viewed Disney as a revolutionary by expanding the industrial systems of modern America into the field of popular entertainment while praising Disney's artistry as "the perfection of the movie."<sup>151</sup> For Seldes, Disney could masterfully orchestrate men and machinery to produce a magical world of complete enchantment.<sup>152</sup>

By the early 1960s, the study and analysis of the work of animator and live-action director Frank Tashlin<sup>153</sup> began to appear in journals devoted primarily to live-action cinema (*Cahiers du Cinema*, *Movie* and *Film Comment*).<sup>154</sup> Mark Langer notes that this new appreciation of Tashlin's work in the field of animation provided an important transitional point where many comparisons were being made between unheralded artists of animation and their live-action counterparts.<sup>155</sup> By the 1970s, studies on animation auteurs were being published frequently in publications such as *Funnyworld* and *Mindrot*.<sup>156</sup>

In Langer's article "The Disney-Fleischer dilemma: product differentiation and technological innovation," the author examined problems surrounding the competing three-dimensional animation technologies at the Disney and Fleischer studios during the 1930s. Langer concluded that the development of the Stereoptical Process and Multiplane camera involve either a belief in the 'great man' theory of history and were introduced through the imagination of an inventive genius, or a belief that animation history followed an evolutionary or teleological progression towards mimesis and these inventions developed as a result of a movement towards greater realism in animation.<sup>157</sup> With respect to the "Great man" theory of history, Langer listed a number of their proponents, authors who gave credit to the inventive geniuses behind these inventions, writers including Leonard Maltin, Richard Schickel, Ralph Stephenson, Frank Thomas, Ollie Johnston, G. Michael Dobbs, and Leslie Cabarga.<sup>158</sup> For example, Maltin in *Of Mice and Magic* structures his studio chapters around the men who headed these production concerns and examines the influence these individuals had on their studio's success, and their influences on the development of the animated cartoon giving highest praise to Disney for changing the course of cartoon production through creating and perfecting ideas and techniques thereby defining the medium.<sup>159</sup>

Other notable works that took a "Great man" theory of history approach to animation studies include Gerald and Danny Peary's 1980 published anthology *The American Animated Cartoon: A Critical Anthology*<sup>160</sup> which focused on the leading figures in the animated cartoon business and their impacts on the animated film business. John Halas in *Masters of Animation* concentrated on the leading masters of the art in his text while equating the name

of Walt Disney with the meaning of animation itself.<sup>161</sup> The “Great man” theory has extended to studies of all types of animation: United States and international, studio and non-studio, and cel animation and experimental methods. For example, Valliere Richard’s book on Scottish-born Canadian animator and film director Norman McLaren<sup>162</sup> details the films and techniques of the Academy Award winning animation pioneer and focuses solely on McLaren’s influence on the animated film genre while overlooking or diminishing other forces of change.<sup>163</sup> By the early 1980’s auteur theory or the ‘Great man’ of history model had been firmly entrenched in animation scholarship as the pre-dominant methodology to study animation history.<sup>164</sup>

## **2. Contemporary Models: Unified Modes of Film Practice and the “Theory of Technological Innovation”**

In the 1960s, some film critics, even former proponents of auteur theory, began attacking Sarris and auteur theory's central focus on film being the product of the director’s personal vision. One reason for the rising criticism was a movement by some film critics towards recognizing that producing a film requires collaboration from scores of production personnel. For example, in Pauline Kael's review of *Citizen Kane* (1941), a classic film used by auteur model proponents to highlight Orson Welles masterful direction, she points out how the film made extensive use of the special talents of co-writer Herman J. Mankiewicz and cinematographer Gregg Toland. Auteur theory was also being challenged by the rise of three schools of thought: (1) New Criticism, (2) psychoanalytic film theory, and (3) reception and cultural studies.

New Criticism is a method of literary criticism having as one of its main tenets the concept of “ambiguity,” that a text can display multiple simultaneous meanings. In 1954, Monroe Beardsley and William K. Wimsatt, published an essay entitled “The Intentional Fallacy”,<sup>165</sup> in which they argued for a text-centered approach to understanding literature and that an author's intention, or importation of meanings from outside the text was not only irrelevant, but potentially distracting. Eventually, this school of criticism had a tremendous influence on the development of film semiotics and structuralist film theory.

In the 1970s, psychoanalytic film theory developed primarily through the work of Laura Mulvey. Psychoanalytic film theory was problematic to auteurism because it raised the issue of the importance of analyzing the unconscious of both the “author” and the text itself. Further, theories of reception<sup>166</sup> and cultural studies drew scholarly attention. These disciplines involved tracing the roots of an individual artist's work back to the collective

creative product of his or her culture and broadened the context of interpretation and meaning. Proponents of these theories argue that to study film, analysis is required of the culturally determined institutions in which authors (i.e., directors) and readers (i.e., spectators) as well as texts (i.e., films) and their meanings are produced and later reproduced.

By the mid-1980s, auteur theory had come under attack on a number of fronts. Allen and Gomery noted that the meaning of a work of art is not entirely inherent in the creative product. Rather, as George Boas noted as early as 1940, the meaning and significance of art changes with the background and perspective of the viewer. Reception theorists like Hans-Robert Jauss and Wolfgang Iser emphasized the active role of the viewer in constructing meaning from any aesthetic experience arguing that the criteria by which masterpieces are chosen themselves are subject to historical change.<sup>167</sup> Edward Buscombe argued that the auteur model fails because it holds the aesthetic aspects of film apart from other concerns that are linked to the film production process including economic and technological factors.<sup>168</sup> In short, valuing art as the personal vision of the artist devalues context in historical analysis, and ignores other causal non-aesthetic factors in film history.<sup>169</sup>

By the late 1970s, auteur theory was becoming supplanted by a new method of film analysis that would soon shape the way film and animated cartoons are appraised today. In *The Classical Hollywood Cinema: Film Style & Mode of Production to 1960*, three “revisionist” film historians, David Bordwell, Janet Staiger and Kristin Thompson, set out their argument that Hollywood filmmaking from 1917-60 must be viewed as a unified mode of film practice. Bordwell, Staiger, and Thompson argue for a coherent system whereby aesthetic and the mode of film production reinforce one another.<sup>170</sup> The authors assert that understanding film production requires articulating a theoretical approach and that this involves outlining the fundamental principles of historical stability and change.<sup>171</sup>

Bordwell, Staiger and Thompson claim that Hollywood cinema was affected by three progressions: (1) changes in the mode of film production, (2) changes in film style, and (3) technological developments.<sup>172</sup> With respect to the first progression, the mode of film production concerns the economic practices of film production which the authors describe as including systems of production, distribution, and exhibition for theatre, vaudeville, side shows.<sup>173</sup> The authors highlight three elements in this relationship: (a) labour force, (b) means of production, and (c) financing of production.

The first term “labour force” includes “all workers involved directly and indirectly in the production of the films or the production of physical means to make them.”<sup>174</sup> The second

term “means of production” includes “all physical capital related to the production of the commodity” including “the physical aspects of the company such as its building, its sets and paints and glue, its costumes.”<sup>175</sup> The third term “financing of production” refers to the provision of (financial) capital to a legal entity (the firm) which purchases labour power and physical capital.<sup>176</sup>

The second progression, changes in film style, concerns stylistic changes visible and audible in Hollywood films. Changes in film style can be described in four ways: (a) direction, (b) function, (c) timing, and (d) causation. Directional change refers to “away from this, toward something else” and may assume an evolutionary pattern.<sup>177</sup> Functional change relates to the intent and aim of the change and what purpose it fulfils. The “timing” refers to “why something happens when it does and not before or after,”<sup>178</sup> and “causation” concerns the attributions of change, usually credited to one of two agents, the invention or the artist.<sup>179</sup>

The third and final progression, technological developments, concerns changes in the methods, theory, and practice in the application of practical science to industry or commerce, such as the development of sound, colour, widescreen, 3-D, and stereophonic sound in motion picture production. The authors argue that three aspects need to be considered: (a) production efficiency, (b) product differentiation, and (c) adherence to standards of quality. Production efficiency refers to ways to save time or capital, or make the production process more predictable.<sup>180</sup> Product differentiation refers to economic advantages to differentiating products,<sup>181</sup> while adherence to standards of quality concerns following, supporting, and reinforcing Hollywood standards and norms.<sup>182</sup>

In their text, Bordwell, Staiger and Thompson demonstrate how the concept of a mode of film practice and aesthetic norms reinforce one another. By doing so, the authors show how mode of film practice can historicize textual analysis and connect the history of film style to the history of the motion picture industry. For example, they noted that Hollywood mode of film production accommodates change in technology by sacrificing flexibility in the filmmaking process (e.g., improvised shooting declined because of sound’s greater expense) and creating new divisions in the work order (e.g., the employment of sound recording experts).<sup>183</sup>

Bordwell and Staiger address how technological change is related to stylistic changes visible and audible in Hollywood film. Both note that the inventor/artist pairing poses a dialogic model of the causes of technological change involving a constant two-way traffic between science and style, technology and technique. The artist/inventor model of the artist

demanding innovation and the technician responding that underlies auteur theory poses problems as it does not explain the large-scale systematic effects of technology upon style, it does not explain why the technician may invent when the artist has articulated no need, and the model has very little control over what stylistic changes occur.<sup>184</sup>

Comolli has argued that style and technology are causally determined by economic factors and ideological processes by proposing that the birth of cinema was caused by economic desires to exploit a new spectacle and ideological pressures to represent life as it really is.<sup>185</sup> Staiger and Bordwell note that when examining the way stylistic change in the period 1917-1960 is tied to technological change, the causation and timing of stylistic change can be explained through business strategies, while direction and functions of the change must usually be constructed by the way that technology permitted innovative technology to fill roles which the classical paradigm had already staked out. The historical agents can be found in specific institutions (manufacturing, supply firms, professional associations) acting as mediating agents shaping relationships between film production and film style.<sup>186</sup>

Closely aligned with the unified mode of film practice is Edwin Mansfield's theory of technological change. In his book *Technological Change*,<sup>187</sup> Mansfield lists several factors governing a decision to innovate once an invention has been produced involving analyzing the expected rate of return.<sup>188</sup> Mansfield also enumerates those conditions affecting the rate at which the innovation will become diffused.<sup>189</sup> The economist also posits a number of factors that might be expected to affect the response time of a firm to a new technique.<sup>190</sup> Buscombe has shown that Mansfield's factors do help explain the arrival of sound and why it was the smaller Warner studio that pioneered sound technology for motion pictures.<sup>191</sup>

Janet Staiger's research has revealed that economic practices significantly influenced film style and technological growth in early Hollywood. The early years found Hollywood simplifying, standardizing and consolidating for efficiency and mass production but differentiating and directing the consumers' attentions to the originality and production values of the feature film. For example, producing standard scripts and preplanning scenes not only saved costs but was a form of quality control.<sup>192</sup> She found that the rise of reviews and critics developed specifiable values in the product and standards of quality that influenced the way films were produced, while the development of trade associations also advanced scientific knowledge in the area promoting quality.<sup>193</sup>

Cost factors promoted the reuse of sets and costumes, thus stimulating serials, genres and series.<sup>194</sup> Rehearsals of actors were preferred over shooting with full crew, and short

takes were preferred over long takes as in the event of error long takes would be more expensive.<sup>195</sup> Economic conditions also promoted a limited number of retakes and are related to techniques of style (e.g., dissolves are used instead of double exposures to indicate a character's thoughts because the former is cheaper, less complicated and less time consuming).<sup>196</sup> Expenditures of funds on trick shots and spectacles were balanced against the effect they produced, and when a film was successful it was followed up by a series or genre thus promoting the use of short-term production plans.<sup>197</sup>

Like live-action film scholarship, only within the last twenty years have animation scholars made significant movement away from the inventive-genius model towards recognizing institutional issues (e.g., studio organization) and the collective contributions of other animation artists and creative personnel on cartoon aesthetics. In the literature, Goldmark and Taylor celebrate the work of cartoon composers,<sup>198</sup> Lawson and Persons give overdue credit to about 40 cartoon voice artists,<sup>199</sup> Neuwirth explores the creative talents of a number of animation artists,<sup>200</sup> and Crafton details the effects of the various institutional and economic forces on early cartoon production.<sup>201</sup> In his autobiography, animator, film director and film producer Shamus Culhane,<sup>202</sup> angrily deconstructs the theory of the producer as auteur by revealing that a cartoon short was the efforts of a variety of production staff working in an industry shaped by sweeping economic forces and technological change.<sup>203</sup> In his follow-up text on the art of animation production, Culhane notes that: "Animated cartoons have been constricted in subject matter and production methods in order to make the optimum amount of profit."<sup>204</sup>

In his 1994 dissertation, Jeffrey Neal-Lunsford provided a framework to analyze animated cartoon shorts in terms of their cel aesthetics qualities.<sup>205</sup> Neal-Lunsford's research found that the aesthetic qualities of cel animation are related to three factors: (1) animation production process, (2) economic factors, and (3) artistic objectives of particular animation studios.<sup>206</sup> With respect to the components which guide the making of a cartoon, Neal-Lunsford mentions four: economics, technology, narrative, and structure<sup>207</sup> with economics being the most important evidenced by the influence of money matters on cartoon aesthetics (e.g., bigger budgeted cartoons are usually of a higher quality) and studio production concerns (e.g., distribution problems during the Golden Age caused studio closures (e.g., Van Beuren, Ub Iwerks, and Fleischer Studios)).<sup>208</sup>

Langer also asserts that non-biographical contextual factors included both technical aspects (e.g., technology, production methods) and organizational features (e.g., hierarchy, job skills, interpersonal relations) should also be considered as potential important

determinants of the final product.<sup>209</sup> Langer describes the influence of the *Standard Production Reference*, the procedural and technical manual that outlined the rules of studio animation practice, on animated film production arguing that because early animation was very expensive and labour-intensive, the technical manual was necessary to control costs. The manual, written by Seymour Kneitel<sup>210</sup> and Isidore Sparber,<sup>211</sup> codified studio procedures, introduced detailed bookkeeping at every production stage, and reinforced a rigid hierarchy of responsibility.<sup>212</sup>

Langer argues that producing animated shorts efficiently and on budget were critical for survival. Emile Cohl and Winsor McCay were unable to control costs or produce animated shorts in large quantities and were no longer producing animated films by 1921.<sup>213</sup> However, producers such as John R. Bray who established Taylorist efficient mass production methods were able to make significant advances in animated film production.<sup>214</sup> However, the assembly-line process caused the work to be repetitive at the entry level. As artistic control was exercised through the use of model sheets and exposure sheets, a level of quality was maintained but at the cost of a high turnover rate for more creatively ambitious artists.<sup>215</sup>

Animation and labour historian Harvey Deneroff details the effect of studio conditions on the quality of the Fleischer product. Deneroff posits that the 1937 labour strike contributed to the decision of the Fleischers to move their studio to Florida, and had a major impact in the loss of control of the company to Paramount.<sup>216</sup> Working conditions such as the studio being cramped, not air-conditioned, and lacking proper ventilation,<sup>217</sup> along with some employees being so pro-management they would monitor staff, were contributing factors in the employees moving to strike.<sup>218</sup>

With respect to studio organization affecting cartoon aesthetics, the Fleischer brothers had adopted the scientific management principles of Taylor resulting in an efficient profitable production system that stressed the studio system over the individual,<sup>219</sup> gave the animator more time for creative work,<sup>220</sup> allowed the hiring of untrained workers, and encouraged a collective attitude toward the production of the shorts as opposed to individual contributions.<sup>221</sup> Further, since Dave Fleischer did not fully utilize script and storyboard to control production but rather left creative responsibilities up to the heads of the animation units he gave more control to the creative staff.<sup>222</sup>

The salaries at Fleischers for lower level employees such as tracers and opaquers were not impressive while the animators were paid extremely well. As a result, the Fleischers

could produce a steady profit because most of the labour intensive work was undertaken by the lower paid staff where high turnover was common but not critical to the quality of the end product.<sup>223</sup> The high wages as well as the attendant glamour of working as an animator also helped ensure that key creative staff members would not seek work elsewhere thereby helping to guarantee a consistent level of quality to the shorts.<sup>224</sup>

Conditions outside the studio also had an effect on the end product. With the closing of Van Beuren Studios in 1936, job opportunities were restricted. Therefore, Van Beuren employees who found work at Fleischer had no choice but to accept lower level positions and pay cuts,<sup>225</sup> and those already employed at Fleischer were less likely to be in a position to demand or seek raises. As a result, the Fleischer brothers were better able to retain a talented animation staff arguably increasing the quality of their animated product.

While the Second World War created war contracts for the studios, this work involved only razor thin profit margins of production. Further, as animator Myron Waldman<sup>226</sup> noted, the large European market for animated shorts for the Fleischers and other studios disappeared during the conflict. “If the war hadn’t happened, Gulliver would have been a smash hit in Europe.”<sup>227</sup> As a result, many studios changed their production methods to cope with the drop in revenues. For example, Disney moved to animating their shorts on twos using twelve composed frames and shooting each frame twice in order to fill each second of film time, rather than previously on ones using twenty-four distinct frames for each second of film time.<sup>228</sup>

### **3. Problems with the Contemporary Models of Film Production and Practice**

While contemporary film scholarship finds the auteur model or “Great man” theory of history with technologies being introduced through the imagination of an inventive genius without an institutional or economic dynamic to be flawed, the unified model of animated film production involving a movement towards greater realism in animation with an institutional dynamic is also unable to effectively address a number of issues. The unified model views animation history following an evolutionary or teleological progression towards mimesis which presumes some sort of continuity of these technologies either through the permanent institutionalization of these technologies, or through their organic relationship to some further development.

Staiger argues that innovation was an economic necessity because competition between different film companies led them to differentiate their products. Innovation and

product differentiation is seen as enhancing the long-term stability of a film company. However, Langer applied Staiger's model to the competition between the Disney and Fleischer organizations in the development of their animation technologies (e.g., Disney's Multiplane camera and Fleischer Studio's Stereoptical Process) and found that the costs in innovation were not in the best financial interests of each institution. Langer viewed the competition between the two animation studios likened to the Prisoner's Dilemma. Each new innovation was presumably met by a response from the competitor resulting in an almost infinite cycle of expensive product differentiations and a consequent erosion of profit where no one wins.<sup>229</sup> While Langer mentions other problems which caused fiscal woes for both studios, the Prisoner's Dilemma suggests that technological innovation was a decisive factor in the financial problems of both companies.<sup>230</sup> Langer has also noted that empirical studies have revealed that product differentiation has been linked with industrial instability in commercial sectors.<sup>231</sup>

Langer also argues quite convincingly that the battle between Disney's innovations such as the Multiplane camera and Fleischer Studio's Stereoptical Process were not evolutionary developments as Staiger would suggest but rather were "more of a dead end than the road to progress."<sup>232</sup> The fact is that the economic consequences of using the technologies did not justify their continued use. With regards to movement towards mimesis, Langer notes that the development of the Multiplane camera was to achieve special effects and not stylistic continuity with the rest of the film which Staiger's theory suggests. When more cartoony elements or live action were juxtaposed with the effects created by the Multiplane camera, discontinuity was also established.<sup>233</sup>

In addition, Langer found serious problems when trying to find continuity in the outputs of the Disney and Fleischer cartoon studios as historians contend. For example, while Disney and Fleischer are characterized as being latecomers to abstraction and stylization after the influence from Warner Bros. or UPA in the 1940s, examples were found of distorted images and un-realistic representations in early Disney and Fleischer cartoons.<sup>234</sup> Langer is left with the need for "alternative historical models of innovation and competition to those used by previous animation historians" which must be able to: (1) not be "so dependent on a rational order governing the behaviour of individuals, institutions, technologies or aesthetic movements," (2) account for strategies of institutional interaction between the various studios, and (3) account for the "coexistence of different film styles within the discourse of each studio."<sup>235</sup>

Furthermore, historian Edward Buscombe found Mansfield's "theory of technological innovation" breaking down upon further analysis. For example, of the seven factors Mansfield lists that affect a firm's willingness to innovate, the only correlations that could be found by Buscombe were company size and the expected rate of profit. Buscombe argues that Gomery is left looking elsewhere for an explanation of Warner Bros.'s actions finding the answer in one man's initiative, either in the business foresight of Waddill Catchings, the entrepreneur who developed the strategy, or the Warner brothers themselves.<sup>236</sup>

## **F. Economic Practices Operating as Received Norms of Managers**

### **1. Unified Model of Film Production: Recognition of the Necessity to Analyze Economic Practices of Managers**

The problems mentioned by Langer and Buscombe leads the animation historian to search for answers as to why current models are unable to effectively address the interrelationships of film style, technology and mode of production through historical change. In her development of the unified mode of film practice detailed in *The Classical Hollywood Cinema*, Staiger raises the issue of how financing affects the product. Staiger questioned how a shift from capitalism (identifiable owner-run firms) to advanced capitalism (manager-run firms and/or joint-stock firms) affected the mode of production. She remarks that Paul A. Baran in *Monopoly Capital* (1966) suggests a new paradigm, one of the analysis of 'control' of the firm. The 'control' theory shifts interest from ownership to management. This model creates a need to theorize managerial goals as distinct from owner goals.<sup>237</sup>

Staiger notes that management goals may not produce direct profit maximization for the owners; rather managerial goals may include retention of profits for corporate and personal use. One of the effects of a structural shift to manager-run firms for Hollywood's mode of production is the managers' concern for the general growth of the firm rather than high dividends. "To control long-term planning and stability, the firm must expand, thus insuring steady supplies of raw materials, provisions for capital, and minimization of risks."<sup>238</sup> Therefore, she states: "Pertinent, then, to a study of Hollywood's mode of production is an analysis of who managed the firms – an analysis which considers the stylistic paradigms and economic practices operating as received norms for these managers."<sup>239</sup> However, after raising the issue Staiger fails to then illustrate through examples how the economic practices operating as received norms for specific managers help to better inform on Hollywood cinema and mode of production.

The author argues that by incorporating an analysis of the economic practices operating as received norms for these managers within (or as an adjunct to) the current unified model, the most widely accepted theoretical approach to film history, one can arrive at a more coherent system whereby aesthetic norms and the mode of film production reinforce one another. The author makes it clear that this is not a “new model” of film analysis but rather a critical re-evaluation and expository analysis, and interpretation of Staiger’s comments on the importance of factoring in the economic practices of managers into the unified model of film practice equation. Chapter 2 will focus on a theoretical interpretation of relevant factors that should be considered when analyzing economic norms for these executives.

Based on the reading of the Bordwell, Thompson and Staiger text, it seems best to place the element of “economic practices operating as received norms of managers” within the first of the three progressions, “changes in the mode of film production” because this is the context wherein Staiger raises the issue. When referring to “economic practices” Staiger specifically provides examples such as “systems of production, distribution, and exhibition for theatre, vaudeville, side shows.”<sup>240</sup> Further, the element addresses economic matters which are the concern of this historical progression (the other two progressions dealing with style and technology). Therefore, the author suggests four elements in this progression: (a) labour force, (b) means of production, (c) financing of production, and (d) economic practices of managers.

## **2. Economic Decisions of Managers as Critical to a Firm’s Success**

Economic decisions regarding financing determine the size of a studio’s budget which in turn affects the quality of the cartoon product. Larger budgets provide management with the option of retaining a highly talented artistic and creative staff and allow the artists and technicians the time and resources to prepare a quality cartoon product. Staiger remarks that financing was integral to a firm’s ability to produce quality films. She states that quality films, as defined by box office success, did not come from variation within the management systems but from overall investment in the top labourers, materials, and technology. She notes that in the 1940s the top three films with respect to box office success ranked in the same order for highest expenditures-per-film.<sup>241</sup>

While financing of films is critical to box office success, strong ticket sales do not guarantee that the film will recoup the investment. Effective management of the studio

involves securing talented artists through adequate remuneration, controlling expenses, and ensuring that production stays on budget in an effort to maximize profits after release of the film. The stronger the financial health of a studio, the better the organization will be in a position to deal with (e.g., cost absorption) some of the other economic and institutional factors noted by Staiger, Bordwell and others such as competition, product innovation, labour turmoil and strikes, increased production costs, decreases in sales due to problems with overseas markets, and changes in public taste for the product.

In highlighting the importance of economic decision making of managers to a firm's success, Staiger cites Sklar in stating that "it is not so important who owns the movie companies but who manages them."<sup>242</sup> Therefore, while financing is important, without strong economic decision-making, no matter how talented the staff and successful the company's films are at the box office, unless gifted with limitless financial resources a studio will soon be facing financial problems. Accordingly, the economic decisions of managers are a critical component of the mode of production and this component is justifiably categorized as a separate and fourth element of the historical progression.

### **3. Economic Practices of Managers: Definition**

When referring to the "economic practices of managers" the author would like to provide a definition as detailed by Staiger as those practices which encompass one or more of the following four functions:

- 1) Direction of Investment: the central function being the calculation of financing (source and level of funds) and guiding investment;
- 2) Production Planning: decisions as to the products, type of production process, general level of production, etc.;
- 3) Production Operation: decisions as to the purchase of raw materials, labour-power, etc., made on the basis of assessment of market conditions within the constraints imposed by the financial strategy; and
- 4) Co-ordination of Supervision: the integration of the phases of a process of production and the maintenance of production performance.<sup>243</sup>

In effect, the economic practices of managers concern their decision making with respect to the other three components of this historical progression, decisions with respect to a firm's labour force, means of production, and financing of production. When Staiger is referring to

the economic practices as “received norms” for these managers, she is referring to economic behaviour a manager considers to be acceptable to follow in their usual course of business.

The level, range or extent of a manager’s economic decision making is not consistent across all studios, firms or production facilities. At the top of this spectrum with the most economic decision making responsibilities would be the central producer. In the ‘central producer’ system of production common in the period of 1914-1931 as noted by Staiger<sup>244</sup> the central producer was the top manager and economic agent for a firm “responsible for the output of a specific number of quality films produced within carefully prepared budgets; the producer selected and coordinated the technical experts.”<sup>245</sup> Staiger notes that the central producer system introduced a new set of top managers – producers such as Thomas Ince and Irving Thalberg who meticulously controlled the making of their firm’s films.<sup>246</sup> In many instances the producer was the studio head.

In the early 1930s, there was a movement away from the ‘central producer’ system in Hollywood as a result of a major rearrangement. The new work structure was a ‘producer-unit’ system and an era of management specialization. As a result, less economic decision making power and influence was wielded by any one individual in a studio as economic decisions were made by a number of management and labour specialists in various branches or departments of the firm.

During the Golden Age of American Animation, this level of decision making control varied from studio to studio, and department to department. For producer-owners, studio heads such as Paul Terry and Amedee Van Beuren, not only were they the top manager and economic agent for the firm responsible for the output of a specific number of quality films produced within carefully prepared budgets, but they owned the firms they operated and were directly responsible for financing each film produced. Much of the creative decisions were also made by both producers. For example, at Terrytoons Terry wrote most of the stories for the cartoons until a story department was created in 1936 and continued to provide gags and story ideas for the animated cartoons produced until he retired.<sup>247</sup>

At the Disney studio, Walt was the creative man who worked closely with his brother Roy who made sure the company was financially stable and made many of the major economic decisions. With respect to creative decisions regarding the animated cartoon product, the focal point of production influence was in the story department where Walt used the script and screenplay as a choke point of control.<sup>248</sup> While at Disney control of production was centred in the story department, at the Fleischer studio Max Fleischer’s role was very

remote with regards to management of production issues and he became more pre-occupied with managing the business while Dave was a very loose supervisor suggesting gags or improvements to animators, devising vague storylines, and acting in a secondary role at story sessions with animators and story writers, a role not much stronger than the Director of Production.<sup>249</sup>

Further, at Fleischer Studios there was more creative freedom given to the heads of the animators at the studio in creating the cartoon product.<sup>250</sup> At the Warner Bros. animation studio in the 1930s, producer Leon Schlesinger was known to follow very hard-nosed business practices and he briefly shut down the studio in mid-1941 when unionized employees demanded a pay raise.<sup>251</sup> Therefore, looking at the unified mode of film production as a whole and the various interactions between the three progressions, managerial decision making structure can account for various strategies of institutional interaction between the studios, as well as for the coexistence of different film styles within the discourse of each studio.

## **G. Exploring Individual Differences in Economic Decision Making Through Explorations and Analyses of Underlying Psychodynamics**

### **1. Economic Decisions of Managers on Same Issue Will Vary**

Hollywood film managers were required to make a number of important economic decisions during the Golden Age, some decisions unique to the studio (e.g., Fleischer's decision to relocate the studio in Miami), and others more common to the industry (e.g., determination whether to add colour to the film product). The type of economic decisions would vary not only from studio to studio depending upon institutional dynamics but the response would vary from decision-maker to decision-maker. Given a similar economic issue to consider within the same studio environment, a decision made by "Manager A" may be entirely inconsistent with the decision made by "Manager B."

For example, a decision on whether to spend money to improve the aesthetics of the cartoon product will involve managerial opinion on how best to improve aesthetics. This statement reinforces the Reception Theory work of Hans-Robert Jauss and Wolfgang Iser, a body of knowledge which emphasized the active role of the viewer in constructing meaning from any aesthetic experience. Therefore, in order to better analyze film, we need to improve our understanding of how the film manager approaches the filmmaking process, their psychodynamics (or underlying psychological processes that underlie their decisions), and

the historical agents that gave rise to their economic behaviour. To better understand why and how a manager makes an economic decision requires understanding the conscious and unconscious mental, emotional and psychological processes that influence and govern the attitudes, behaviour, and personality of the filmmaker.

## **2. Behavioural Economics: the Study of the Psychological Processes Underlying Economic Decision Making**

Behavioural economics is a branch of study that combines the disciplines of psychology and economics to learn how people and institutions make their economic choices by examining the actual decision-making processes that influence the decisions that are reached. Behavioural economics attempts to explain why and how people make seemingly irrational or illogical decisions when they spend, invest, save, and borrow money. The discipline examines which individual and collective, cognitive and emotional biases might affect their decisions and lead to economic anomalies. There are two main fields. On the microeconomic level, behaviours related to categories of economic players (e.g., consumers, producers, workers, business managers) are studied. On the macroeconomic level, effects on main economic aggregates (e.g., consumption, foreign trade, GDP growth, investment) are analyzed.<sup>252</sup>

Some of the sub-disciplines of behavioural economics include studies of consumer behaviour, saving behaviour, business behaviour, earning income, economic behaviour in different market systems, politico-economic behaviour, the process of working, and organizational behaviour.<sup>253</sup> Behavioural economics is closely aligned to the field of behavioural finance which is the study of the behaviour of financial practitioners or investor market behaviour through the application of the principles of individual and collective psychology, including the subsequent effect on financial markets.<sup>254</sup> The objective of behavioural finance is to help investors make better choices in their investment decisions and proposes psychology-based theories to explain stock market anomalies.<sup>255</sup>

The history of behavioural economics can be traced to the writings of Adam Smith who wrote about the psychological principles of individual behaviour including the fundamental principles of loss aversion,<sup>256</sup> and Jeremy Bentham and John Stuart Mill<sup>257</sup> who both wrote extensively on the psychological underpinnings of utility. However, economists began to distance themselves from psychology during the development of neo-classical economics around the turn of the 20th century because of their distaste for the psychology of the period and their dissatisfaction with the hedonistic assumptions of Benthamite utility.

During this period, the concept of homo economicus was developed, the model of man (i.e., a human being) as a rational and self-interested actor who desires wealth, avoids unnecessary labour, and has the ability to make judgments towards those ends.<sup>258</sup>

While psychological explanations for economic behaviour were included in the writings of neo-classical economists such as Francis Edgeworth, Vilfredo Pareto, Irving Fisher, and John Maynard Keynes, by the mid 20th century psychology had largely disappeared from economic discussions. In the second half of the century, a number of factors contributed to the resurgence and development of behavioural economics. First, economists such as George Katona, Harvey Leibenstein, Tibor Scitovsky, and political scientist Herbert Simon authored works suggesting stronger relationships between economics and psychology than previously understood. Second, prominent psychologists of the time were united with economists in rejecting hedonism as the basis of behaviour.

Third, a number of observed and repeatable anomalies challenged hypotheses about decision making under uncertainty (expected utility) and intertemporal consumption (discounted utility). Fourth, during the 1960s, cognitive psychologists began to describe the brain outside of behaviourist models as an information processing device. Fifth, psychologists Ward Edwards, Amos Tversky and Daniel Kahneman began to compare their cognitive models of decision making under risk and uncertainty to economic models of rational behaviour.<sup>259</sup> In 1974, Kahneman and Tversky authored an article in *Science* that argued that heuristic short-cuts created probability judgments which deviated from statistical principles.<sup>260</sup> In 1979, both authors completed one of the most important papers in the development of behavioural finance and economics titled “Prospect Theory: Decision Making under Risk,” that featured the use of psycho-social principles to explain a number of documented divergences of economic decision making from neo-classical theory.<sup>261</sup>

### **3. Challenges to Neo-classical Economic Theory and Homo-Economicus**

Kahneman and Tversky found that by examining the social, cognitive and emotional factors underlying the economic decisions of individuals and institutions performing economic functions, including consumers, borrowers and investors, deducing economic behaviour from the model of man as a psychologically rational being was inaccurate. In 2002, the Nobel Prize in Economics was awarded to Kahneman largely as a result of his pioneering work with Tversky in three areas of decision making under uncertainty: (1) heuristics and biases, (2) framing effects, and (3) prospect theory. Kahneman and Tversky found that decision makers employ a number of heuristics and biases when making decisions. For

example, they found that individuals function using availability heuristics, a cognitive heuristic in which a decision maker relies upon knowledge that is readily available rather than attempting to examine other alternatives or procedures.<sup>262</sup> People also employ “representativeness,” a heuristic that individuals follow based on the subjective probability or the degree to which an event or sample is similar in essential characteristics to its parent population and reflects the essential features of the process by which it is generated.<sup>263</sup> People also follow principles of anchoring during decision making. Anchoring reflects the degree to which the initial judgment about a situation or event prohibits the decision maker from deviating from that position regardless of new information that is contrary to the initial judgment.<sup>264</sup>

Kahneman and Tversky also found framing effects. Framing is a cognitive heuristic in which individuals are inclined to reach conclusions based on the 'framework' within which an event or situation was presented. Both researchers found empirical evidence that variation in the framing of options (e.g., in terms of gains or losses) yield systematically different preferences, decisions or choices.<sup>265</sup> The researchers also coined the term “prospect theory” (also known as “loss-aversion theory”), a theory that people value gains and losses involving risk in different ways. Kahneman and Tversky provided experimental evidence that people will base decisions on perceived gains rather than perceived losses. Thus, if a decision-maker were given two equal choices, one choice expressed in terms of possible gains and the other choice expressed in possible losses, the decision-maker would choose the former over the latter.

Prospect theory provided a major criticism to neo-classical economics which theorized that models of rational behaviour can be used to explain and predict actual (i.e., observed) economic behaviour.<sup>266</sup> An individual is seen as attempting to maximize one’s utility under the constraints faced which can be viewed in economic terms where utility is a measure of the relative satisfaction or “desiredness” from the consumption of goods. The concept of rational economic behaviour allows one to derive optimal economic behaviour (i.e., profit maximization) in a strictly normative sense.

Prospect theory supports the proposition that economic choice is not as easily quantified into empirical laws as neo-classical economists had posited. Since the early 1980s psychology has found a path back into economics with research findings that support the view that human decisions do not follow those predicted by classical economic theory.<sup>267</sup> In 2001, George Akerlof, Michael Spence, and Joseph Stiglitz shared the Nobel Prize “for their analyses of markets with asymmetric information.” Akerlof has argued that economic events

or processes such as unemployment, poverty and the business cycle can be explained by behavioural concepts such as fairness, herding, identity, loss aversion, money illusion, and reciprocity.<sup>268</sup>

The research discoveries of Kahneman, Tversky, Slovic, Akerlof and others in the field of behavioural economics and finance strongly contradict the Homo economicus model of human behaviour.<sup>269</sup> While the conduct of Homo economicus may be functional in a competitive market economy, it has also been criticized on other grounds. From a moral standpoint, theologians argue that an economic amoral man following choices on his own utility function is not only empirically inaccurate but is egoistic and unethical conduct that contradicts human nature.<sup>270</sup> Cross-cultural comparisons by economic anthropologists such as Marcel Mauss, Marshall Sahlins, Karl Polanyi or Maurice Godelier have revealed that traditional societies have been held together on kinship-based reciprocity where the production and exchange of goods follow different patterns of exchange in a marketplace termed a “gift economy.”

Economists John Maynard Keynes, Herbert Simon, and Thorstein Veblen as well as many others from the Austrian School criticized the Homo economicus model on the reasoning that all economic activities involve risk. For the rational man to be fully informed on all factors bearing on the impact of economic decisions maximally optimizing perceived opportunities requires perfect knowledge which never exists and involves too great of an understanding of macroeconomics and economic forecasting in decision making. Swiss economist Bruno Frey highlights the excessive emphasis on extrinsic motivation (external incentives such as rewards and punishments) as opposed to intrinsic motivation (activity for its own sake, without some obvious external incentive present such as a hobby).

Proponents of altruistic economics reject Homo economicus as an actor who is improbably selfish, and contend that all humans perform altruistic acts towards friends and loved ones, and others and argue that a purely self-centred behaviour are signs of psychopathic behaviour. Sociologists posit that Homo economicus does not account for the origins of tastes and preferences. Homo sociologicus is seen as a more realistic model where education, rearing, societal values and other environmental influences help to determine one’s choices. Psychologists criticize the model because the actions of Homo economicus do not account for cognitive conflicts and inner turmoil caused by real-world problems such as decision-making between short and long term goals (e.g., purchasing a car or saving the money for college) or between individual goals and societal values. These inner conflicts

could result in the development of neuroses, inconsistent irrational behaviour, psychic pain, and other abnormal psychological behaviour.

Beginning in the 1990s behavioural economics and finance began receiving empirical support from the nascent field of neuroeconomics, a discipline concerned with the study of the neural mechanisms involved in decision-making and the economic significance of these brain processes. Neuroeconomics takes advantage of neuroscience which concerns the scientific, experimental and theoretical study of the central and peripheral nervous systems of biological organisms through the use of brain imaging and other techniques. Neuroeconomic research chooses formal models of rationality (a decision or game theoretic situation), deduces what decisions should be made by the agents, tests the model behaviourally to see if normative standards are followed, identifies the brain areas and neural mechanisms underlying the decision behaviour, and then tries to explain why the subject followed or failed to follow the normative standards.<sup>271</sup>

One of the main contributions of neuroeconomics has been to discredit Homo economicus. Rather than relying on rational economic logic, man makes decisions based on affective responses where utility maximization is less about profit gain and more about feelings and emotions.<sup>272</sup> Neuroeconomics has discovered that man attempts to maximize positive emotions and minimize negative ones and uses emotions to control behaviour towards these goals.<sup>273</sup> Neuroeconomics reveals that economic decision-making is a complex series of adjustments between multiple goals and values that than can sometimes be irrational from a financial perspective<sup>274</sup> and our behaviour is strongly influenced by affective (emotion) systems, a design common to humans and animals.<sup>275</sup>

In summation, based on the studies in the field of behavioural economics, the work of Keynes, Simon, and Veblen from the Austrian School, the recent empirical research in the field of neuroeconomics, and the growing evidence from the investigations from sociologists and psychologists that contradict the Homo economicus model of human behaviour, the author draws three conclusions with respect to the study of the economic practices of managers under the unified model of film production. First, to effectively analyze the economic practices of managers requires undertaking explorations into non-rational social, cognitive, and emotional factors involved in decision making. Second, economic decisions cannot be standardized across all individuals but are unique to each individual based on their particular psychodynamics. Third, to understand the psychological processes underlying the economic practices of managers requires exploring the root causes of these behaviours which

will help in understanding and predicting future economic conduct. Therefore, the author has factored these conclusions into the research methodology outlined in section H.

## **H. Research Methodology**

The author claims that errors in research methodology, including the failure to consult primary research sources and the reliance on inaccurate information, and the inability of film scholars and critics to access the Terrytoons cartoon library have resulted in Terry's legacy and contributions to the nascent medium of animated cartoons being overlooked or distorted. The author also asserts that contemporary film scholarship has neglected to adequately address issues underlying film interpretation and analysis because of a failure to consider the economic practices operating as received norms of managers, an important component of the mode of production, one of the three historical progressions that form part of the unified mode of film production.

The purpose of this dissertation is to re-evaluate Terry's legacy to animated cartooning by analyzing Terry's business philosophies, production values, studio practices, and animated cartoon product. Paul Terry has been chosen as the subject for this investigation for two reasons: (1) because the author posits that by analyzing the economic practices which operated as received norms for Terry film scholars can better understand Terry's legacy and contribution to the medium of animated cartoons, and (2) because Terry was an owner-producer with a meticulous control over both the economic and creative decisions in the studio his managerial style should provide a strong example of the effect of economic decision making of managers on film practice. In order to identify the economic practices operating as received norms for Terry, the author will probe the psychodynamics of his economic decision making.

The author intends to critically assess the impact and importance of economic decision making of managers on film practice by uncovering major determinants of economic decision making, applying these determinants to Terry's economic behaviour early in his life and career (1887-1929) in order to develop a economic psychodynamic model for Terry, and testing the Terry model to determine whether this behaviour remained consistent for the period he managed his studio, 1929-1955. Terry's artistic and creative motivations will also be analyzed in light of empirical research on motivation and creativity to determine whether Terry was concerned for the quality of the animated cartoons he produced. Finally, using an empirical method, the author will analyze the cartoon aesthetics of a sample of Golden Age cartoons to determine where the Terry product ranked in relation to the other studios. This

will help in resolving whether Terry had a motivation to produce a quality cartoon product and aid in understanding the relative strengths and weaknesses of the Terry product in terms of cel aesthetics.

The writer's research methodology consists of the following seven steps:

- 1) Conducting a literature survey of empirical studies that have examined the determinants of economic behaviour and money management in order to identify the major psychodynamic forces that have been shown to influence financial decision making (Chapter 2).
- 2) Formulating a structured framework for the "Economic Practices Operating as Received Norms" component of the "mode of production," one of the three historical progressions that form part of the "unified mode of film practice" model of film scholarship, that will enable film scholars to apply the model to film managers across cinematic history (Chapter 2).
- 3) Analyzing events in Terry's early life and career, 1887-1929, in relation to the "Economic Practices Operating as Received Norms" framework in order to identify and evaluate Terry's psychodynamics when undertaking economic decisions (Chapter 2).
- 4) Testing the accuracy of conclusions reached in respect to the psychodynamics underlying Terry's economic decision making by analyzing Terry's historical responses to twelve major economic, technological, and institutional forces of change for the period he operated his Terrytoons studio, 1929-1955. In addition, comparing and contrasting Terry's decisions to the economic behaviour of studio heads at the other Golden Age studios (Chapter 3).
- 5) Determining whether Terry was cold-blooded about animation and possessed no artistic motivation or passion for the cartoons he produced by analyzing empirical research on creativity and artistic motivation in relation to Terry's managerial decisions (Chapter 4).
- 6) Examining Terry's contributions to the field of animated cartooning through a biographical survey of Terry's life and career, and briefly surveying the artistic talent at the Terrytoons studio in order to help determine whether Terry was committed to retaining top quality artists at his studio (Chapter 4).
- 7) Applying the framework of analysis and principles of Neal-Lunsford's cel aesthetics on a random sample of animated cartoons produced by the major Golden Age animation studios in order to compare the cel aesthetics qualities of the shorts produced by Terry to the other studios for the purposes of helping to determine

whether Terry was artistically motivated to produce cartoons with high quality aesthetics (Chapter 5).

The author does not contradict the claim that Terry had difficulty spending money nor do his family members.<sup>276</sup> Rather the writer argues that scholarly errors, misinterpretations, and the paucity of research on Terry have necessitated the requirement to critically re-evaluate why he was conservative in his financial affairs. The writer will address such questions as: What were some of the causes of Terry's parsimony? Why did Terry decide not to produce a feature film? Why was Terry's production company able to avoid financial problems that other studios like Van Beuren and Disney were not able to evade? Was Terry dispassionate about animated cartoon making or did he have a desire to create quality well-crafted cartoons for theatrical release? In terms of cel aesthetics, where does Terry's animated product rank in comparison to the other studios, and what were some of the cel aesthetics strengths and weaknesses found in the Terry cartoon shorts?

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<sup>1</sup> Solomon, *Enchanted Drawings*.

<sup>2</sup> Feild, *Art of Walt Disney*. Thomas, *Walt Disney, The Art of Animation*. Finch, *The Art of Walt Disney*.

<sup>3</sup> Lutz, *Animated Cartoons*. Levitan, *Animation Techniques*. Halas and Manvell, *Technique of Film Animation*. Stephenson, *Animated Film*. Russett and Starr, eds., *Experimental Animation*. Collins, *Norman McLaren*. Edera, *Full Length Animated Feature Films*. Schnorr, *Lotte Reiniger*.

<sup>4</sup> The author is aware of the historiographical issues arising from dividing history into certain periods. There is still no general agreement amongst film scholars and critics as to the exact period of the "golden age" of cinema in Hollywood. Jewell argues for the period of 1929-1945, a time when sound film rapidly developed into a prominent and influential business, cultural product and art form (Jewell, *The Golden Age of Cinema*). Another reference source defines the golden age of Hollywood to be from the late 1920s to 1949, a time period in film history that produced many classic films (Singleton and Conrad, *Filmmaker's Dictionary*, 137). Like live-action film critics, animation historians are not in a consensus as to the precise "golden age" period for animated cartoons. There is a general agreement that the "golden age" began with the advent of sound production, about 1928-1929. However, the end of the "golden age" period for animated cartoons is a bit more controversial. While the general consensus among historians is that the golden period ended when theatrical cartoons were slowly losing popularity with the growth in television cartoons, there is no agreement as to an exact date when this occurred. For the purposes of this dissertation, the author will follow the time period accepted by noted historian Mike Barrier who has established himself as one of the premier scholars on the "golden age" period. Barrier's "golden age" time period is from 1928 to 1966 (Barrier, *Hollywood Cartoons*,

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xi). The author also chooses to restrict the “Golden Age” period to American animation for two reasons: (1) the major institutional and creative developments during this period occurred with the animation studios based in the United States, and (2) international developments in animation occurred at different time periods and in different patterns based on country and regional concerns.

<sup>5</sup> Some exceptions include: Adamson, *Tex Avery*; Heraldson, *Creators of Life*; and Rider, *Great Movie Cartoon Parade*.

<sup>6</sup> Maltin, *Of Mice and Magic*. Table of Contents for the book: Chapter 1: Silent Era; Chapter 2: Walt Disney; Chapter 3: Max Fleischer; Chapter 4: Paul Terry and Terrytoons; Chapter 5: Walter Lantz; Chapter 6: Ub Iwerks; Chapter 7: The Van Beuren Studio; Chapter 8: Columbia: Charles Mintz and Screen Gems; Chapter 9: Warner Bros.; Chapter 10: MGM; Chapter 11: Paramount/Famous Studios; Chapter 12: UPA; Chapter 13: The Rest of the Story.

<sup>7</sup> Canemaker, review of *Of Mice and Magic*, 48. Heise, review of *Of Mice and Magic*, 97. Review of *Of Mice and Magic*, *Library Journal*, 1749. Moses, Review of *Of Mice and Magic*, 72.

<sup>8</sup> Canemaker, 48. Review of *Of Mice and Magic*, *Choice*, 538.

<sup>9</sup> Maltin, *Of Mice and Magic*, 121.

<sup>10</sup> Ibid.

<sup>11</sup> Ibid., 122.

<sup>12</sup> Ibid.

<sup>13</sup> Ibid.

<sup>14</sup> Ibid., 122-125.

<sup>15</sup> Ibid., 127.

<sup>16</sup> Ibid.

<sup>17</sup> Ibid.

<sup>18</sup> Ibid., 128.

<sup>19</sup> Ibid., 130.

<sup>20</sup> Ibid., 135.

<sup>21</sup> Ibid., 141-142.

<sup>22</sup> Ibid., 135.

<sup>23</sup> Ibid., 142.

<sup>24</sup> Ibid., 129.

<sup>25</sup> Ibid., 123.

<sup>26</sup> Ibid., 142.

<sup>27</sup> Ibid., 130.

<sup>28</sup> Ibid., 128.

<sup>29</sup> Ibid., 129.

<sup>30</sup> Ibid., 134.

<sup>31</sup> Ibid., 130.

<sup>32</sup> Ibid., 133.

<sup>33</sup> Ibid., 135.

<sup>34</sup> Ibid., 135-136.

<sup>35</sup> Ibid., 137.

<sup>36</sup> Ibid.

<sup>37</sup> Ibid., 140.

<sup>38</sup> Ibid., 126.

<sup>39</sup> Ibid., 130-131.

<sup>40</sup> Ibid., 143.

<sup>41</sup> Ibid., 153.

<sup>42</sup> Crafton, *Before Mickey*, 148.

<sup>43</sup> Ibid., 149.

<sup>44</sup> Ibid., 155-157.

<sup>45</sup> Ibid., 191-192.

<sup>46</sup> Ibid., 191.

<sup>47</sup> Bendazzi, *Cartoons*, 22.

<sup>48</sup> Kanfer, *Serious Business*, 42.

<sup>49</sup> Ibid., 41.

<sup>50</sup> Ibid., 51.

<sup>51</sup> Ibid., 181.

<sup>52</sup> For a book-length biography on Charles Gustav Thorson (born 29 August 1890, Armstrong’s Point in Winnipeg, Manitoba; died 7 August 1966, Vancouver, British Columbia) see Walz, *Cartoon Charlie*. For Thorson’s obituary written by his son see Thorson, “Charles G. Thorson.”

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- <sup>53</sup> Walz, *Cartoon Charlie*.
- <sup>54</sup> *Ibid.*, preface.
- <sup>55</sup> *Ibid.*, 164. In fact, Terry was involved in assembly-line animation in the late teens before Disney had entered the animation business.
- <sup>56</sup> Barrier, *Hollywood Cartoons*, 33.
- <sup>57</sup> *Ibid.*, 35.
- <sup>58</sup> *Ibid.*
- <sup>59</sup> *Ibid.*, 385.
- <sup>60</sup> *Ibid.*, 384.
- <sup>61</sup> *Ibid.*
- <sup>62</sup> *Ibid.*, 385.
- <sup>63</sup> *Ibid.*, 386.
- <sup>64</sup> Grant, *Masters of Animation*, 188.
- <sup>65</sup> *Ibid.*, 184.
- <sup>66</sup> “Aesop on the Screen,” *The New York Times*.
- <sup>67</sup> Strauss, “Mr. Terry and the Animal Kingdom,” *New York Times*.
- <sup>68</sup> Falk, *How to Make Animated Cartoons*, 16.
- <sup>69</sup> *Ibid.*, 17.
- <sup>70</sup> Becker, *Comic Art in America*, 100.
- <sup>71</sup> *Ibid.*, 102.
- <sup>72</sup> Daniels, *Comix*, 50.
- <sup>73</sup> *Ibid.*, 53.
- <sup>74</sup> Stephenson, *Animated Film*, 42. The author never quantifies what he means by “very average” or “excellent.”
- <sup>75</sup> Amongst the many typographical or spelling errors, Raoul Barré is spelled “Barrie” or sometimes “Barrié” (pp. 212, 213), and the Thanhouser Studio is spelled “Tanhauser.”(p. 212). Historical errors abound in the text. A few include Terry being present at the Winsor McCay “Gertie the Dinosaur” cartoon dinner in 1909 (p. 211) when in fact the event was in 1914. Heraldson states the Terrytoons cartoon studio was “anchored firmly in downtown New Rochelle” in 1930 (p. 214) when in fact it was in Long Island City, moved later to the Bronx and only settled in New Rochelle in 1934. Terry’s output was not released solely by Twentieth Century-Fox for the entire “Terry Toon” period (p. 216) but rather Educational Pictures was releasing the shorts in the early 1930s. Heraldson has Terry passing on in November 1971 (p. 219) but in fact it was a month earlier.
- <sup>76</sup> Heraldson, 212.
- <sup>77</sup> *Ibid.*, 213.
- <sup>78</sup> *Ibid.*, 216.
- <sup>79</sup> *Ibid.*
- <sup>80</sup> *Ibid.*, 217.
- <sup>81</sup> *Ibid.*
- <sup>82</sup> *Ibid.*
- <sup>83</sup> *Ibid.*, 218.
- <sup>84</sup> *Ibid.*
- <sup>85</sup> *Ibid.*, 219.
- <sup>86</sup> Rider, 119.
- <sup>87</sup> *Ibid.*
- <sup>88</sup> A few errors are worth mentioning. Terry’s first cartoon *Little Herman* (1915) having a run-time of five-minutes when it was actually around three minutes in length. Audio-Cinema did go bankrupt but this was not due to the 1929 Stock Market crash. *Hungarian Goulash* (1930) was not the first Terrytoons cartoon released in the new studio but rather *Caviar* (1930). Further, Rudy Rooster is highlighted as one of Terry’s most popular creations (he wasn’t even given his own series) while the more popular Gandy Goose, star of 48 cartoons from 1938 to 1955, is not even mentioned.
- <sup>89</sup> Horn, ed., *World Encyclopedia of Cartoons*, 547. The 1979 publication was a 2-volume set comprising 627 pages. The 1981[1983] publication was an unrevised 6-volume set. The publication has since been significantly revised and published in one 945-page volume in 1999.
- <sup>90</sup> If this were true it may explain Walter Lantz’s (born 27 April 1900, New Rochelle, New York) move to California in the late 1920s to produce his series of cartoons.
- <sup>91</sup> Krohn, “Paul Terry and His Terry-Toons.”
- <sup>92</sup> Philip Scheib did not join Terry at 271 North Avenue in New Rochelle. The office building wasn’t constructed until 1934. Scheib was working at the Audio-Cinema facilities with D.W. Griffith at the time. Terry was also releasing his shorts through Educational Pictures before 1934. The copyright

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owners of Superman (D.C. Comics) did not scream their heads off forcing Terry to cease using the Super Mouse creation. More likely Terry simply decided his character should not be confused with the comic book character and changed the name. Mighty Mouse made his first comic book appearance in Marvel /Timely's *Terry-Toons Comics* #38 in November, 1945. Klein, "Mighty Mouse."

<sup>93</sup> Krohn, 52.

<sup>94</sup> Unfortunately this supposition cannot be statistically analyzed due to the paucity of sources and the difficulty in quantifying this type of data into research methodology.

<sup>95</sup> Cohene and Easterbrook, "Contextual Risk Analysis," 1.

<sup>96</sup> Much of the issues surrounding the Deneroff interviews concern settling an old score or rehabilitating a reputation. At the time of the Davis interview on July 28, 1970, Mannie Davis appeared to be very bitter over Paul Terry getting all the credit for the success of Terrytoons. Davis, interview, 8e. Isabel Moser, the wife of Frank Moser, was apparently still angry over the incidents that gave rise to her late husband's lawsuit against Terry in 1937 and the unsatisfactory resolution for the Mosers at trial. Moser, interview, 20b. When Paul Terry retired in 1955 he apparently had promised his long-time staff such as Tommy Morrison a share of the proceeds from the sale which never transpired.

<sup>97</sup> This information is currently housed with the daughter of Paul Terry ("The Paul Terry Papers").

<sup>98</sup> The interviews are part of the John Canemaker Animation Collection in a special collection known as the Fales Library, which is located within the Elmer Holmes Bobst Library at NYU in New York City.

<sup>99</sup> *Moser v. Terry, Weiss, et al.*, 254 A.D. 873 (New York Supreme Court, Appellate Division), copy of the transcript is available at New York State Library, Albany, New York.

<sup>100</sup> The Terrytoons strike and related studio information, 1944-1948, are part of The Motion Picture Screen Cartoonists Guild collection available at the Urban Archives Center, California State University, Northridge.

<sup>101</sup> NLRB/Terry: *In the Matter of Terrytoons, Inc.*; Office of the Executive Secretary, Transcripts, Briefs, and Exhibits 5459, 16 April 1943 (including decisions from 1943 to 1948). These materials can be retrieved through the National Archives facility in Maryland.

<sup>102</sup> Within the last ten years additional documentation has been uncovered by Terry family members that Barrier would not have had access to. This information was forwarded to the writer by Terry's family and has helped shed further light on Paul Terry's life and career.

<sup>103</sup> Barrier, preface to *Hollywood Cartoons*, iv-xiii.

<sup>104</sup> Jerry Beck, electronic correspondence to author, 9 September 2007.

<sup>105</sup> Within the limited time frame to conduct their research, Beck and Maltin were able to interview the producer Bill Weiss as well as a few senior studio artists.

<sup>106</sup> Academy award nominations for Best Short Subject (Cartoon): *All Out for 'V'* (1942), *My Boy Johnny* (1944), *Mighty Mouse in Gypsy Life* (1945). After Terry sold his studio, there was one other nomination: *Sidney's Family Tree* (1958).

<sup>107</sup> Worth, "Filmography: Al Falfa in Pink Elephants."

<sup>108</sup> Barrier, *Hollywood Cartoons*, 384-385.

<sup>109</sup> Leonard Maltin and Jerry Beck had the good fortune to have had access to 16mm film prints provided by a New York camera store (Willoughby Peerless) which, at the time had nearly the entire Terrytoons TV library (colour and black & white) in their holdings.

<sup>110</sup> Maltin, *Of Mice and Magic*, 139.

<sup>111</sup> *Ibid.*, 141.

<sup>112</sup> *Ibid.*, 134.

<sup>113</sup> *Ibid.*, 135.

<sup>114</sup> *Ibid.*

<sup>115</sup> *Ibid.*, 141.

<sup>116</sup> Alexander Hume Anderson (born September 5, 1920 in Berkeley, California; d. October 22, 2010, Carmel, California), director, writer, and artist, most notable for creating the first television cartoon series, Crusader Rabbit. His obituary was published in the *New York Times*. See "Alexander Anderson," *New York Times*.

<sup>117</sup> Anderson, interview. Also see St. Clair, "Of Moose and Men."

<sup>118</sup> Worth, "Filmography: Al Falfa in Pink Elephants."

<sup>119</sup> Bailey, *Walt Disney's World of Fantasy*, 55.

<sup>120</sup> A strong comparison can be drawn assuming that Terry was aware of the basic biographical facts on Woolworth and the Tiffany families, had an accurate interpretation of the core business or personal values of these men, and there was no communication problems between Terry and Anderson (i.e., Anderson accurately recorded Terry's candid statement).

<sup>121</sup> Brough, *The Woolworths*, 16.

- <sup>122</sup> Ibid., 81.
- <sup>123</sup> Worth, "Filmography: Al Falga in Pink Elephants."
- <sup>124</sup> F.W. Woolworth Company, *Woolworth's First 75 Years*.
- <sup>125</sup> Plunkett-Powell, *Remembering Woolworth's*, 38-39.
- <sup>126</sup> Morrison, interview, 14d.
- <sup>127</sup> Koch, *Louis C. Tiffany*. InfoMat Inc., "Charles Lewis Tiffany." Jensen. "H-B: BIO: Charles Lewis Tiffany." Loring, *Tiffany Jewels*. Malone, "Tiffany, Louis Comfort."
- <sup>128</sup> "Mouse & Man," *Time*, 19.
- <sup>129</sup> "Mickey Mouse and the Bankers," *Fortune*, 94.
- <sup>130</sup> Woolworth believed success was "a joint effort, drawing friends and relatives into something akin to a farmers' cooperative." Brough, 64-65. Terry's habit of employing immediate family (his daughter and wife) and friends to create his studio product is well documented in the writer's oral history literature. He also employed members from the same family. For example, the Rasinki, Eletto, and Collier brothers all worked for the studio. Both Tom Morrison and his mother Betty, and Don McKee and his son Robert were employed for Terry.
- <sup>131</sup> Sources cited: *The Cartoonist*, August 1967; *Classic Film/Video Images* (Muscatine, Iowa), July 1979; Maltin, Leonard, in *Of Mice and Magic*, New York, 1980; *Griffithiana* (Gemona), no. 28, December 1986; *Times Literary Supplement*, 16 August 1996.
- <sup>132</sup> Oshana, "Terry, Paul," 426. Same article also found online at: Oshana, "Paul Terry."
- <sup>133</sup> Gomery, "Writing the History of the American Film Industry," 40.
- <sup>134</sup> Gomery, 52.
- <sup>135</sup> Langer, "Institutional Power and the Fleischer Studios," 3-22.
- <sup>136</sup> Krohn, 52.
- <sup>137</sup> Heraldson, 219.
- <sup>138</sup> Kanfer, 181.
- <sup>139</sup> Van Beuren, deposition, 2.
- <sup>140</sup> Maltin, *Of Mice and Magic*, 129.
- <sup>141</sup> Gentilella, interview. Raymond, interview.
- <sup>142</sup> Maltin, *Of Mice and Magic*, 129.
- <sup>143</sup> Silverman, interview, 33.
- <sup>144</sup> A brief biographical profile on Schlesinger can be found in his *New York Times* obituary. See "Leon Schlesinger, Producer," *New York Times*.
- <sup>145</sup> Silverman, interview, 8.
- <sup>146</sup> Sarris, *The American Cinema*.
- <sup>147</sup> For a leading work on film history interpreted by using auteur theory see: Mast, *A Short History of the Movies*. For an article on the influence of auteur theory on film analysis through the 1960s and 1970s see: Gomery, "History of the (Film) World, Part II."
- <sup>148</sup> For a discussion of "masterpiece histories," see Allen and Gomery, *Film History, Theory and Practice*.
- <sup>149</sup> Jacobs, *Rise of the American Film*, vii, 3, 496, 499, 502-505.
- <sup>150</sup> Leyda, *Eisenstein on Disney*, 2-3, 10, 42-44, 54-55. Quoted in: Watts, *The Magic Kingdom*, 128.
- <sup>151</sup> Quoted in: Watts, 129.
- <sup>152</sup> See also: Seldes, "Motion Pictures," 65, 66, 68.
- <sup>153</sup> For biographical information on Frank Tashlin (born Francis Fredrick von Taschlein, 19 February 1913, Weehawken, New Jersey; died 5 May 1972, Los Angeles County, California) (also known as "Tish Tash" or "Frank Tash") see: Johnston and Willeman, *Frank Tashlin*; Garcia, *Frank Tashlin*.
- <sup>154</sup> See Jean-Luc Godard's appreciations in *Cahiers du cinéma*, reprinted in Milne, *Godard on Godard*, 35-36, 57-59; the article by Roger Tailleur in *Positif* no. 29 (1958) translated by Paul Willemen as "Anything Goes" in *Frank Tashlin*, 17-31; Cameron, "Frank Tashlin and the New World," 16-23; Bogdanovich, "Tashlin's Cartoons," 38-39.
- <sup>155</sup> Langer, "Institutional Power and the Fleischer Studios," 4.
- <sup>156</sup> Barrier, "Screenwriter for a Duck," 9-14. Missine, "Walter Lantz: cartune-ist," 13-21.
- <sup>157</sup> Langer, "The Disney-Fleischer dilemma," 344.
- <sup>158</sup> Langer cites: Cabarga, *The Fleischer Story*, 71; Dobbs, "Koko Comments," 35; Maltin, *Of Mice and Magic*, 109-110; Schickel, *The Disney Version*, 164-5; Stephenson, *Animated Film*, 37.
- <sup>159</sup> Maltin, *Of Mice and Magic*, 29.
- <sup>160</sup> G. Peary and D. Peary, eds., *The American Animated Cartoon*.
- <sup>161</sup> Halas, *Masters of Animation*, 26.

- <sup>162</sup> For biographical information on Scottish-Canadian animator and film director Norman McLaren (born 11 April 1914, Stirling, Scotland; died 27 January 1987, Montréal, Québec, Canada) see “McLaren,” *Canadian Who’s Who*, and Richard, *Norman McLaren*.
- <sup>163</sup> Richard, *Norman McLaren*, 13.
- <sup>164</sup> See Adamson’s comments on Avery (Adamson, 27) and his statement that Disney was the “guiding intelligence behind everything that came out with his name” (Ibid, 29).
- <sup>165</sup> Wimsatt and Beardsley, “The Intentional Fallacy.”
- <sup>166</sup> Reception theory, originating from the work of academic Hans-Robert Jauss [Hans Robert Jaub (born 21 December 1921; died 1 March 1997)], noted for his work in medieval and modern French literature, emphasized the reader’s reception of a literary text.
- <sup>167</sup> Allen and Gomery, *Film History, Theory and Practice*, 74-75.
- <sup>168</sup> Ibid.
- <sup>169</sup> Ibid., 76.
- <sup>170</sup> Bordwell, Staiger, and Thompson, *The Classical Hollywood Cinema*, preface, xiv.
- <sup>171</sup> Ibid., preface, xv.
- <sup>172</sup> Ibid., preface, xiv.
- <sup>173</sup> Ibid., 88.
- <sup>174</sup> Ibid., 89.
- <sup>175</sup> Ibid., 90.
- <sup>176</sup> Ibid.
- <sup>177</sup> Ibid., 247.
- <sup>178</sup> Ibid., 248.
- <sup>179</sup> Ibid., 249.
- <sup>180</sup> Ibid., 243.
- <sup>181</sup> Ibid., 244.
- <sup>182</sup> Ibid.
- <sup>183</sup> Ibid., 246-247.
- <sup>184</sup> Ibid., 249, 253.
- <sup>185</sup> Ibid., 250.
- <sup>186</sup> Ibid., 250-251.
- <sup>187</sup> Mansfield, *Technological Change*.
- <sup>188</sup> These factors include: (1) amount of capital investment required to introduce the innovation, (2) the forecasted sales, (3) the estimated costs of production, (4) the effects of the innovation on the costs and sales of the firm’s existing product line, and (5) the risk of innovating. Ibid., 7-8.
- <sup>189</sup> These conditions include: (1) the extent of the economic advantage of the innovation over older methods or products, (2) the extent of the uncertainty associated with using the innovation when it first appears, (3) the extent of the commitment required to try out the innovation, and (4) the rate of reduction of the initial uncertainty regarding the innovation’s performance. See: Ibid., 88.
- <sup>190</sup> Factors: (1) the size of the firm, (2) the degree of expectation of profit from the new technique, (3) the rate of growth of the firm, (4) the firm’s profit level, (5) the age of the firm’s management personnel, (6) the liquidity of the firm, and (7) the firm’s profit trend. Ibid., 93-95.
- <sup>191</sup> Buscombe, “Sound and Color.”
- <sup>192</sup> Staiger, “Mass-Produced Photoplays,” 16-17.
- <sup>193</sup> Ibid., 17.
- <sup>194</sup> Ibid., 21.
- <sup>195</sup> Ibid., 22.
- <sup>196</sup> Ibid.
- <sup>197</sup> Ibid., 22-23.
- <sup>198</sup> Goldmark and Taylor, eds., *Cartoon Music Book*.
- <sup>199</sup> Lawson and Persons, *The Magic Behind the Voices*.
- <sup>200</sup> Neuwirth, *Makin’ Toons*.
- <sup>201</sup> Crafton, *Before Mickey*.
- <sup>202</sup> For a biographical entry on animator Shamus Culhane (born 12 November 1908, Ware, Massachusetts; died 2 February 1996, New York, New York) see “Culhane,” *Contemporary Authors*.
- <sup>203</sup> Culhane, *Talking Animals and Other People*.
- <sup>204</sup> Culhane, *Animation from Script to Screen*.
- <sup>205</sup> Neal-Lunsford, “Cel aesthetics.”
- <sup>206</sup> Ibid., v.
- <sup>207</sup> Ibid., 43.
- <sup>208</sup> Ibid., 53.

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- <sup>209</sup> Langer, "Institutional Power and the Fleischer Studios," 4.
- <sup>210</sup> An obituary on animator, producer, director and story man Seymour Kneitel (born 16 March 1908, New York City; died 30 July 1964, New York) was published in the *New York Times*. See "Seymour Kneitel, Cartoon Producer," *New York Times*.
- <sup>211</sup> For a biographical entry on Isadore Sparber (died 28 August 1958, New York City), storyboard artist, writer, director and producer of animated films, see Lenburg, *Who's Who in Animated Cartoons*.
- <sup>212</sup> Langer, "Institutional Power and the Fleischer Studios," 10.
- <sup>213</sup> *Ibid.*, 5.
- <sup>214</sup> *Ibid.*, 6.
- <sup>215</sup> Deneroff, "'We Can't Get Much Spinach!,'" 3-5.
- <sup>216</sup> *Ibid.*, 1.
- <sup>217</sup> *Ibid.*, 1-2, 7.
- <sup>218</sup> *Ibid.*, 5-6.
- <sup>219</sup> Langer notes that rather than being highly disciplined dictatorships, most animation studios were managed as benevolent, patriarchal oligarchies, where employees were encouraged to contribute whatever was needed. See Langer, "Working at the Fleischer Studio," 14 (note 1).
- <sup>220</sup> Deneroff, 2.
- <sup>221</sup> Langer, "Working at the Fleischer Studio," 4. For a further exploration of the relationship between institutional dynamics in the studio and individual artist in American film animation, refer to: Stahl, *Non-proprietary Authorship*.
- <sup>222</sup> *Ibid.*
- <sup>223</sup> Deneroff, 2.
- <sup>224</sup> *Ibid.*, 3.
- <sup>225</sup> *Ibid.*
- <sup>226</sup> For biographical information on animator Myron Waldman (born 23 April 1908, Brooklyn, New York; died 4 February 2006, Bethpage, New York), see Kehr, "Myron Waldman."
- <sup>227</sup> Langer, "Working at the Fleischer Studio: An Annotated Interview with Myron Waldman," 14.
- <sup>228</sup> *Ibid.*, 17 (note 31).
- <sup>229</sup> Langer, "The Disney-Fleischer dilemma," 351-354.
- <sup>230</sup> *Ibid.*, 355.
- <sup>231</sup> *Ibid.*, 348.
- <sup>232</sup> *Ibid.*, 356.
- <sup>233</sup> *Ibid.*, 358.
- <sup>234</sup> *Ibid.*, 359.
- <sup>235</sup> *Ibid.*, 348.
- <sup>236</sup> Buscombe, "Sound and Color."
- <sup>237</sup> Bordwell, Staiger, and Thompson, *The Classical Hollywood Cinema*, 315-316
- <sup>238</sup> *Ibid.*, 316.
- <sup>239</sup> *Ibid.*, 316-317.
- <sup>240</sup> *Ibid.*, 88.
- <sup>241</sup> *Ibid.*, 325.
- <sup>242</sup> *Ibid.*, 315.
- <sup>243</sup> *Ibid.*, 93-94.
- <sup>244</sup> *Ibid.*, 134.
- <sup>245</sup> *Ibid.*, 136.
- <sup>246</sup> *Ibid.*
- <sup>247</sup> Case on Appeal from Judgment, 540. Tom Morrison provides a detailed description of the creation of the story department at Terrytoons and Terry's creative contributions to and control over the animated cartoon product at the studio in his interview by Harvey Deneroff (Morrison, interview).
- <sup>248</sup> Langer, "Institutional Power and the Fleischer Studios," 7.
- <sup>249</sup> *Ibid.*, 7-8.
- <sup>250</sup> Langer, "Working at the Fleischer Studio," 4.
- <sup>251</sup> Maltin, *Of Mice and Magic*, 229-230.
- <sup>252</sup> Camerer, "Behavioral Economics." Mullainathan and Thaler. "Behavioral Economics."
- <sup>253</sup> Katona, *Essays on Behavioral Economics*, 4-6.
- <sup>254</sup> See Tomer, "What is behavioral economics?"
- <sup>255</sup> See generally: Shefrin, *Beyond Greed and Fear*; Shleifer, *Inefficient Markets*.
- <sup>256</sup> In prospect theory, loss aversion refers to the concept that people strongly prefer avoiding losses than acquiring gains.
- <sup>257</sup> See Mill, *Utilitarianism*.

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- <sup>258</sup> Persky, "Retrospectives."
- <sup>259</sup> Camerer and Loewenstein, "Behavioral Economics: Past, Present and Future," 3-5.
- <sup>260</sup> Tversky and Kahneman, "Judgment under uncertainty."
- <sup>261</sup> Kahneman and Tversky, "Prospect Theory."
- <sup>262</sup> Tversky and Kahneman, "Availability."
- <sup>263</sup> Kahneman and Tversky, "Subjective probability."
- <sup>264</sup> Tversky and Kahneman, "Judgment under uncertainty," 1124-1126.
- <sup>265</sup> Tversky and Kahneman, "Rational Choice."
- <sup>266</sup> For explanations on the foundations of the neo-classical theory of rational economic behaviour, see Savage, *Foundations of Statistics*.
- <sup>267</sup> See generally Sent, "Behavioral Economics."
- <sup>268</sup> Sent, "Behavioral Economics," 755.
- <sup>269</sup> The use of the Latin form *Homo economicus* has been traced by Persky (Persky, "Retrospectives.") back to the work of Pareto but the concept may be much older (Pareto, *Manuale di Economia Politica*).
- <sup>270</sup> Economists supporting the "homo oeconomicus" model have been remarkably unsuccessful in creating "homo oeconomicus" in many Third World developing countries. Empirical evidence supports the conclusion that humans do not behave as the model expects them to behave.
- <sup>271</sup> Hardy-Vallée, "Decision-Making."
- <sup>272</sup> Naqvi, Shiv, and Bechara, "Role of Emotion in Decision Making."
- <sup>273</sup> For a study on the neural activities involved in economic decision-making see Sanfey et al., "The Neural Basis of Economic Decision-Making," 1756. Tom, "Neural Basis of Loss Aversion."
- <sup>274</sup> Camerer, Loewenstein, and Prelec, "Neuroeconomics," 11. Referencing: Bargh et. al., "The Automatic Evaluation Effect."; Bargh and Chartrand, "The Unbearable Automaticity of Being."; and Schneider and Schiffrin, "Controlled and Automatic Human Information Processing."
- <sup>275</sup> LeDoux, *Emotional Brain*. Panksepp, *Affective Neuroscience*. Rolls, *Brain and Emotion*.
- <sup>276</sup> Even Terry's daughter openly admits that her father "was very tight with the dollar." Leahy, interview, Transcript (Part III), 1.

## **II. ECONOMIC PRACTICES OPERATING AS RECEIVED NORMS FOR MANAGERS AND THE PSYCHODYNAMICS OF PAUL TERRY'S ECONOMIC DECISION-MAKING**

### **A. Introduction**

In this chapter, through a literature survey on studies in economic psychology the author has identified four major psychodynamic factors that have shown to have a significant relationship to economic practices and financial decision making: (1) financial locus of control, (2) financial saving attitudes and behaviour, (3) money management skills and ability, and (4) financial risk-taking behaviour. For each psychodynamic factor, the author has defined the concept, detailed the key empirical studies of the term in relation to economic decision making, and applied the factor in relation to the economic practices of Paul Terry for the period 1887-1929. From these analyses, the author has formulated a framework for the “economic practices operating as received norms” for managers, and then applied the framework to determine the economic practices operating as received norms for Terry for the period 1887-1929. In Chapter Three, the author will test the accuracy of conclusions reached on the economic practices operating as received norms for Terry for the period 1887-1929 by analyzing his historical responses to twelve major economic, technological, and institutional forces of change during the period he operated his Terrytoons studio, 1929-1955.

### **B. Locus of Control**

#### **1. General Concepts: Definition and Origination of Term**

The development of the concept of locus of control has generally been credited to psychologist Julian Rotter, who devised the Internal-External Locus of Control Scale (I-E) to assess this dimension of personality in his article for *Psychological Monographs*.<sup>1</sup> The roots of the concept have been traced to the research of Phares<sup>2</sup> whose work was later revised by William H. James<sup>3</sup> who studied expectancy shifts and categorized people into those who attribute to ability (an internal cause) and those who attribute to luck (an external cause).<sup>4</sup> The concept concerns where individuals conceptually place responsibility, choice, and control for events in their lives. “A locus of control orientation is a belief about whether the outcomes of our actions are contingent on what we do (internal control orientation) or on events outside our personal control (external control orientation).”<sup>5</sup> The empirical evidence collected generally supports the reliability and validity of Rotter’s internal-external control construct as a personality variable.<sup>6</sup>

Empirical research has revealed that the construct strongly influences motivation, a sense of self direction, and attitude.<sup>7</sup> The concept of locus of control has also been shown to have a significant effect on an individual's economic decision-making. Research undertaken on decision making under uncertainty confirms that our intuitive judgments are often not consistent with probability theory. For example, Sundali and Croson have empirically demonstrated that human beings follow a number of judgment heuristics when making economic decisions that lead to statistical illusions and suboptimal decisions.<sup>8</sup> The researchers proposed that how a gambler views his relationship to the forces and processes involved in determining the outcome of the wager influenced their betting patterns and strategies, and concluded that the organizing explanation for their behaviour was the concept of locus of control.<sup>9</sup> Langer's work on the concept of illusion of control has supported their research findings.<sup>10</sup>

Stotz and Nitzsch's empirical findings supported their hypothesis that a stronger perception of control results in a higher level of investor overconfidence.<sup>11</sup> Similarly, studying the investment behaviour of traders in Macau, Chui found a significant relationship between locus of control and the disposition effect or the tendency to sell winning transactions too soon and hold onto losing transactions too long. Chui's research found that the disposition effect was much weaker for external subjects than for internal subjects confirming the hypothesis that internal traders would exhibit stronger disposition effects than external traders because internal traders would feel that outcomes are under their control and might make more of a commitment to their investment decisions than external traders who feel that outcomes are out of their control.<sup>12</sup>

## **2. Paul Houlton Terry: Development of Locus of Control**

Based on empirical studies on the effect of locus of control on financial behaviour, the author posits that Paul Terry's locus of control was a major determinant in his economic decisions. Due to the fact that Paul Terry was known to be cautious with spending his company's finances, the author proposes that Terry possessed an external control personality where he believed that his future was largely based on external influences outside of his control. Therefore, he saved money to protect him and his studio against financial dangers he felt he had little control over, and followed a managerial style consistent with external control orientation.

While it is difficult, if not impossible, in a retrospective case study analyzing archival data, to statistically validate that Paul Terry operated under an external control orientation and that this orientation influenced his economic decision making, the author will attempt to bring as much evidence as possible forward to confirm his hypothesis. To accomplish this goal, the writer will examine the research into the factors involved in the development of an external control orientation and then compare these factors to the events and circumstances in Paul Terry's early life and career, 1887-1929. The author posits that by 1929, prior to the establishment of his cartoon studio, Paul Terry had developed an external control orientation and that this locus of control had a significant influence on his economic decision making, managerial style, and studio production practices during the period 1929 to 1955.

**a) Birth to Early Childhood, 1887-1900: The Effect of Birth Order and Parental Antecedents on Terry's Locus of Control**

Paul Terry was born in San Mateo, California on February 19, 1887,<sup>13</sup> the son of Joseph Tripp Terry and Minnie Perrin. Paul Terry was the youngest child of a family of five children (the sixth child, Horatio, had died). The entire Terry family was very artistically inclined. His brother John was a newspaper cartoonist,<sup>14</sup> his sister Carrie was a fine sculptress,<sup>15</sup> and his mother was a gifted artist whom practiced sculpting in the evenings as a form of recreation. Terry was less than a year old when his mother died and had no recollections of her.<sup>16</sup> However, the artistic objects produced by her that were placed around the home inspired him to pursue a career in the arts.<sup>17</sup> When his father was away from the home, the Terry children were raised by housekeepers.<sup>18</sup> After money became sparse due to family financial problems, his youngest sister Olga took over the running of the household<sup>19</sup> and Terry was forced to earn his own money.<sup>20</sup>

While being raised in a single parent family was difficult for the Terry children, Paul Terry's memories of his father were warm ones. He described his father as an actor, psychologist, and one who was robust, kind, sincere, had talent for good-natured bombast, and put the interests of his children at heart.<sup>21</sup> If his father noticed any special inclinations, he would immerse his children in the material.<sup>22</sup> Paul Terry referred to his father as the "Pied Piper of Hamelin" as for five nights a week he would invite the neighbourhood children into the home and teach them subjects that were not taught at school (e.g., poetry, Shakespeare, Bible).<sup>23</sup> Terry recollected that his father taught classes not just for learning for learning's sake, but rather to provide an incentive for creative thinking and the use of their imaginations.<sup>24</sup>

Studies in locus of control orientation and birth order have been conducted under the assumption that children in various ordinal birth positions would perceive differently the degree of responsibility that they would assume for their successes and/or failures. The hypothesis has been that latter born children would be more externally controlled than first-born children because latter born children would take less responsibility for their actions than first-borns. Alfred Adler was one of the first to propose the idea that birth order contributes to the later development of personality.<sup>25</sup>

Adler postulated that last-born children are spoiled thereby developing a dependency pattern that is expressed in the need to be looked after by others.<sup>26</sup> Paul Terry admitted that as a young adult he leaned on the actions of his older siblings providing evidence that he may have developed a habit of seeking the support and guidance of others later in life and an external control orientation.<sup>27</sup> Empirical studies on the relationship of birth order to locus control generally support the conclusion that latter-borns are more external in their orientation than earlier-borns<sup>28</sup> although the findings have not been completely unanimous<sup>29</sup> and further research needs to be conducted to consider a number of related variables (e.g., family size, density, spacing, socioeconomic status, sex of siblings).

Research has also found that internally controlled subjects are more likely to portray their parents as being warm (nurturant), consistent (predictable), and encouraging in efforts to try to control their own reinforcements (achievement pressure). Conversely, externally controlled subjects described their parents as using techniques which give an impression that one's reinforcements are externally controlled (overprotection, deprivation of privileges, affective punishment)<sup>30</sup> using both authoritarian control and hostility rejection tendencies.<sup>31</sup> Several studies have found that permissive, approving parents who expect early independence behaviours from their children encourage internal control orientation, while parents that are more controlling and continue to foster dependence on them encourage external control orientation.<sup>32</sup>

Applying the empirical research on parental antecedents, Terry would have developed an external control orientation. Environmental stimulation and seeking the guidance of others rather than looking inwardly and using one's initiative were used to solve problems. Terry relied heavily on the advice of his father, the "Pied Piper" calling the tunes, into his adulthood.<sup>33</sup> This outward looking orientation was fostered and encouraged by a disciplinary home life, rigidity in family structure, and an overprotective parental childrearing style. His father's influence appears to have had a significant impact on Paul Terry's child rearing beliefs. Terry believed that effective parenting involved shaping or controlling the

environment to help mould the character and personality of the child<sup>34</sup> and that man's thinking was invariably corrupt and only by looking to the God-created perfect outside world (i.e., environment) for direction would individuals arrive at better decisions.<sup>35</sup>

Duke and Lancaster have found that children raised in single parent homes demonstrate more external behaviour than do children from two parent homes.<sup>36</sup> While the researchers concentrated on father-absent homes, there is no reason to believe that this could also apply to mother-absent homes as the development of internal control expectancies has shown to require the kind of nurturant, protective home free of traumatic, incapacitating events that characterizes secure attachments.<sup>37</sup> Therefore, the evidence appears to indicate that due to the fact that Paul Terry was the last-born child, raised in a single-parent home, and reared in a family with an overprotective father where parental guidance and discipline was so important Paul Terry was much more likely to develop an external control orientation than an internal control orientation.

**b) Early Adulthood, the Newspaper Career, and the Move to New York City, 1900 – 1914: The Effect of the 1906 Earthquake on Terry's Locus of Control**

By about 1903, Paul Terry had completed three years of high school at Polytechnic High School,<sup>38</sup> and during this period drew advertisements for a clothing retailer and worked as an usher in a vaudeville house.<sup>39</sup> Terry then began to illustrate for the *Stanford Chaparral* with ambitions of attending Stanford University,<sup>40</sup> and did caricatures for dramatic critic Walter Cavanaugh.<sup>41</sup> By this time the family had moved from San Mateo and was living in the Richmond District of San Francisco near the Cliff House.<sup>42</sup>

During his childhood, Paul Terry began to idolize his brother John C. Terry whom he had a major influence in Terry's career decisions<sup>43</sup> and followed his brother into the newspaper business by first working as an office boy in 1904 for the *San Francisco Bulletin*. In the spring of 1905 the opportunity arose for Terry to work at the rival *San Francisco Chronicle* as a photographer<sup>44</sup> so over a weekend he learned the principles of photography from a friend and on the basis of one photograph was able to win the position at the *Chronicle*.<sup>45</sup> By the spring of 1906 Terry had been with the *Chronicle* for about a year and was taking evening classes in Latin at Grauman's Institute with continued aspirations of attending Stanford.<sup>46</sup>

At 5:12 A.M. on Wednesday, April 18, 1906, a magnitude 7.8 earthquake<sup>47</sup> with a main shock epicentre occurring offshore about 2 miles (3 km) from the city, near Mussel

Rock struck San Francisco. Shaking was felt from Oregon to Los Angeles, and inland as far as central Nevada. The first shock lasted thirty seconds followed by ten seconds of silence before another more intense shock of twenty-five seconds. Buildings collapsed, a hail of brick and glass rained down on the streets, and whole blocks of downtown buildings were laid in ruin.<sup>48</sup>

At the time of the earthquake Terry was sleeping in bed when the chimney from the house next door collapsed and fell through the roof where a brick hit Terry on the head slightly lacerating his skin but not causing any loss of consciousness.<sup>49</sup> Terry's family was living on Steiner Street and so he and sister walked down to Knob Hill about three miles to look at the devastation. Terry decided to leave his sister and proceed down to The Chronicle building. Entering the building Terry noticed the elevators were not functioning so he climbed the stairs to the darkroom on the top floor where he loaded up the plate holders and a couple of cameras.<sup>50</sup>

As he was about to leave the entrance of the building with the photographic equipment he was met by Chronicle managing editor Ernest Simpson.<sup>51</sup> Both Terry and Simpson decided to leave in an automobile to take photographs around the city as the fire slowly spread across city. San Francisco was soon placed under martial law and Terry was issued a pass signed by Governor Pardee and Brigadier General Frederick Funston. Terry was able to cross the bay in a little boat and go over to Oakland where the first newspaper *Call-Chronicle-Examiner* was printed at the *Oakland Herald* office on Thursday the 19<sup>th</sup> later in the week printing under their own banners.<sup>52</sup>

Studies have revealed that how an individual copes with a disaster is related to the individual's personal dynamics and the peculiarities surrounding the event.<sup>53</sup> The specific circumstances of Terry's personal life appear to have buffeted his risk for mental health problems as he had a strong social network in place and suffered no personal or family loss. However, the magnitude and situational aspects surrounding the 1906 event would have put Terry at great risk for psychological damage due to the lack of warning,<sup>54</sup> the fact that it occurred when Terry would have been disoriented (i.e., asleep), the scope of the event (the near destruction of a large city), the effect of displacement, the viewing of distressing stimuli, and the prolonged nature of the recovery. Terry was still in awe over the enormity of the disaster over 60 years later.<sup>55</sup>

During the earthquake aftermath, Paul Terry stated that while he saw people on the street that were distraught and went crazy,<sup>56</sup> he did not suffer personally and actually found

some humour in the event.<sup>57</sup> Terry's family was one of the lucky few whose homes did not burn as a result of the fire.<sup>58</sup> Despite Terry's avowal that he survived the disaster without psychopathology, studies such as the well-documented Buffalo Creek flood disaster<sup>59</sup> and the World Trade Center terrorist attack<sup>60</sup> indicate that psychopathology in events like these are very common.<sup>61</sup> Humans have a natural requirement for physiological homeostasis. When people encounter an event that upsets their characteristic patterns of thought and behaviour, they employ habitual problem-solving strategies until they can restore social and psychological equilibrium.<sup>62</sup> Terry would have likely employed similar coping mechanisms to deal with and make sense of the crisis.

Some of Terry's denial of having suffered psychological trauma as a result of being caught in one of the worst earthquakes of the 20<sup>th</sup> Century<sup>63</sup> could be attributed to the passage of time. Studies have shown that the passage of time acts to reduce anxiety about natural disasters and how the event impacts lives.<sup>64</sup> Evidence to support the proposition that Terry possessed an external locus of control can be found in his reaction to the disaster. If Terry displayed little or no shock shortly after the disaster then the possibility exists that the earthquake confirmed to Terry that the environment and natural physical forces are uncontrollable. Research suggests that traumatic events are more transient for externals than internals because these crises confirm externals' experience of the world and their way of dealing with it.<sup>65</sup>

Empirical research indicates that internals respond better than externals to the disaster situation after assimilating the shock and first confronting the requirements of the external situation because they deal more effectively with both the outer and inner (affective) environment.<sup>66</sup> Externals see the disaster as confirming their beliefs and take a "flight" rather than a "fight" attitude towards the disaster. Rather than trying to formulate solutions that can help the situation, externals have a loss of control, feel helpless, believe that there is little that can be done about the situation, and flee the disaster scene. Another reason that explains why externals are more apt to flee a disaster scene is that studies have found that externals perceive external controlling forces as more malevolent and untrustworthy than internals.<sup>67</sup>

Paul Terry's behaviour in the hours following the 1906 earthquake fits the pattern of an individual operating under an external control orientation. Apparently unnerved by the quake and accepting the event as confirmation of the world around him and the environment as being malevolent and uncontrollable, Terry began photographing the damage and devastation around him rather than fighting the fires prior to his evacuating the city.<sup>68</sup> Meanwhile, the firemen, army and many citizens were trying to take control of the growing

inferno by dynamiting buildings, starting backfires, and keeping buildings wet. The fire raged for three days and nearly one thousand homes were saved because of the efforts of the fire-fighters and over 3,000 volunteers.<sup>69</sup>

Major life crises such as what a natural disaster would bring have also shown to effect locus of control. Studies have found that disaster crises patients overwhelmed by external forces in their lives have had their locus of control shifted to become more externally oriented.<sup>70</sup> Therefore, the San Francisco earthquake of 1906 may have confirmed Terry's view of the world as an uncontrollable force, and/or the magnitude of the crisis may have moved Terry's locus control on the I-E scale towards a more external orientation.

Besides the tremendous devastation caused by the earthquake on a physical scale, another effect of the 1906 earthquake and fire was the economic displacement of thousands of workers that were now unemployed due to loss of their homes or businesses where they were employed. Tens of thousands of San Franciscans woke up not just to a city crumbling around them and on fire but the prospect that they would need to seek work outside the city. While Terry's home suffered no damage, the Chronicle building had suffered enough damage to make employment with the newspaper impossible. Studies of the unemployed, who have undergone unexpected job loss, including a large study completed during the Great Depression,<sup>71</sup> have revealed that a large number of these workers experienced a shift towards an external locus of control<sup>72</sup> which became greater the longer the individual remains unemployed.<sup>73</sup>

High levels of stress at different periods of development are also related to developing shifts in locus of control towards a more external orientation.<sup>74</sup> The facts are that the unemployment was sudden, that Terry had valued his job with the Chronicle, and after the earthquake he was so destitute that he had to obtain a free rail ticket to leave the city, and travel to Portland, Oregon to sell some of his prints to provide the basic necessities. Therefore, the circumstances surrounding the unemployment indicate that Terry was placed in a stressful and financially unstable position. In sum, Terry's actions following the 1906 quake can be seen as confirming his external control orientation, and the quake itself (both in terms of the magnitude of the event and the economic displacement and unemployment and stress that resulted) can be seen as potentially moving Terry's locus of control along the I-E scale in the direction of an external orientation.

On the evening of the 18<sup>th</sup>, Terry and good friend cartoonist Bud Fisher slept in the offices of the *Oakland Tribune* in Alameda. He remained in Alameda for about a week then

having little reason to remain in San Francisco, Terry decided to take some photographic negatives with him to the *Portland Oregonian* based in Portland, Oregon. After travelling overnight by train to the city, through a family friend who worked at the newspaper, he was able to use their darkroom and make some prints of the fire, street scenes and earthquake damage.<sup>75</sup> Terry stayed with the family friend for two or three days while he provided the newspaper with some prints, as well as mailed some prints off to the *Anaconda Standard*, a company his brother was employed with in Anaconda, Montana. Terry also mailed photographs of the earthquake off to several magazines including *Collier's*, and later received financial compensation for these photos. He also sold them to cigar stores and people around Portland.<sup>76</sup>

Having earned some money from the prints, Terry was able to get half fare from the Salvation Army to travel to Butte, Montana eventually arriving in Anaconda. Terry's brother John had moved to Anaconda, Montana in 1901 to work as a cartoonist for the *Anaconda Standard* and John would remain at the newspaper until 1910 when he moved back to San Francisco to continue newspaper work at *The Call*. The photographs of the disaster had made Terry a bit of a celebrity and along with his brother's help, Terry secured a job as a photographer with the newspaper to work alongside his sibling.<sup>77</sup> He worked for the newspaper for a couple of years.<sup>78</sup>

He moved back to Portland to undertake some work for the *Portland Oregonian* and *Portland Evening Journal*. He then returned to San Francisco to work on the *San Francisco Examiner* and then from the *Examiner* to the *San Francisco Call* and finally over to the *Chronicle*.<sup>79</sup> In 1911, Terry decided to come to New York City where he got a job working for Barron G. Collier creating advertising content for subways and streetcars. During his first years in Manhattan he resided with cartoonist Robert Ripley for about two years, 1912-1913.<sup>80</sup> He then went to work for the *New York Press* about 1912 doing Sunday Supplement work illustrating Sunday stories. Thereafter, he drew a comic strip for William R. Hearst's King Features syndicate.<sup>81</sup>

**c) Beginnings of a New Career in Animated Cartooning, Life in the U.S. Army, and the Fables Studio Years, 1914 – 1929: The Effect of the 1918 Spanish Influenza on Terry's Locus of Control**

While with the *New York Press* in late 1914 Terry was invited to dinner at Reisenweber's restaurant along with Robert Ripley,<sup>82</sup> Rube Goldberg, and a number of other artists, to watch Winsor McCay<sup>83</sup> demonstrate his 12-minute animated cartoon *Gertie the*

*Dinosaur*. The McCay presentation inspired Terry to produce his own animated short. After purchasing a used Prestwich camera and experimenting at his home,<sup>84</sup> Terry began production on the short on January 1, 1915<sup>85</sup> in a small studio on 42<sup>nd</sup> street. Terry devoted almost every waking hour over the next three months to produce his first film, *Little Herman*, 300 feet in length, a process involving an overlay of the background on celluloid.<sup>86</sup>

After completing the animated short, he approached Lewis Selznick, general manager of World Film Corporation, and exhibited the film for him, but as Maltin correctly noted, based on Terry's remembrances, Selznick offered him a dollar a foot for it and would have paid him more if he "hadn't put those pictures on it."<sup>87</sup> Terry's response to Selznick's comments was:

I hope he was kidding. But he was a funny old fellow. So, I always thought he had a sense of humor. I'd rather think that than think that the picture was so lousy.<sup>88</sup>

In Terry's words the incident does not appear to have been quite as discouraging to Terry as Maltin had described. Terry seemed to have simply brushed off the incident as a joke by a film mogul with a strange sense of humour.<sup>89</sup>

The Selznick incident can be seen as possibly moving Terry's locus of control towards a stronger external orientation. Research has confirmed that when a person's expectancy for self-directed success becomes diminished, scores on the I-E scale shift in the direction of an external locus of control.<sup>90</sup> Therefore, since Terry invested a tremendous amount of personal energy into a cartoon project that ultimately culminated with a rejection by Selznick, this incident could have been seen by Terry as validating his beliefs that personal initiative, creativity and control does little against the dynamic external forces operating in the environment.

Terry decided to travel to the Thanhouser Studio in New Rochelle, New York to speak to studio boss Edwin Thanhouser about purchasing his animated short. Having just five years earlier taken a bold risk himself and produced a film without guarantees that the film would be sold, Thanhouser likely felt empathy towards Terry's cinematic gamble.<sup>91</sup> After Terry exhibited the film to a screening room full of laughing children, Thanhouser bought the film outright at \$405 (\$1.35 per foot of cartoon).<sup>92</sup>

*Little Herman* was released by Thanhouser Studio on June 19, 1915. Thanhouser found success with the exhibition of the cartoon and asked Terry for another short. Terry

titled the second short *Down on the Phoney Farm* which was released October 16, 1915.<sup>93</sup> Terry then tried to get his friends Bud Fisher<sup>94</sup> and Rube Goldberg interested in helping him produce animated cartoons without success.<sup>95</sup> Although William R. Hearst was forming an animation studio in 1915, he also was not interested in working with Terry.<sup>96</sup>

However, after the wife of John R. Bray<sup>97</sup> viewed Terry's *Little Herman* she convinced her husband to employ Terry to produce a series of cartoons on the Farmer Al Falfa character Terry had developed.<sup>98</sup> In 1916, a total of eleven shorts were produced by Terry and distributed by Paramount under the Paramount-Bray cartoon series. Terry produced these cartoons using a very unique production method: drawing the characters on transparent celluloid which was then used as overlays on the background thereby inventing the celluloid system that is still in use today.<sup>99</sup>

The Farmer Al Falfa character was well received by the public and Terry decided it was in his best interests to register the name as a trademark which he did in November 1917 with a certificate issued under date of January 30, 1917, No. 115, 250.<sup>100</sup> Terry also registered a trademark for "Motion-picture films of animated cartoons issued serially" which was granted by way of letter from the United States Patent Office dated January 4, 1917.<sup>101</sup>

Around 1915 Terry was interested in forming an organization of animators, The Talent, Inc., which included Earl Hurd, Leighton Budd, Frank Moser, Jerry Shields, Terry and his brother John.<sup>102</sup> However, since none of the group could raise the seed capital the company never was formed.<sup>103</sup> In 1917, Terry produced one cartoon for Bray distributed by Thomas A. Edison, Inc.,<sup>104</sup> while another Farmer Al Falfa short was later released by Pathé in 1920.<sup>105</sup> Acting as producer of these Farmer Al Falfa shorts, Terry worked alone including writing the stories, animating the characters and filming the sequences.<sup>106</sup>

In 1917 Terry also directed, produced and wrote four shorts for the *Paul Terry Feature Burlesques* series for the A. Kay Company<sup>107</sup> that he described as "takeoffs on films that had been successful."<sup>108</sup> Later that year, Terry became interested in phrenology<sup>109</sup> making the acquaintance of noted phrenologist Jessie Allen Fowler. Terry directed and produced four animated shorts on the subject of phrenology, stories written by Jessie Fowler and distributed by the A. Kay Company with the last short released in September of that year. According to Terry the shorts "were quite successful."<sup>110</sup>

Phrenology has as an a priori assumption that mental phenomena have natural causes and that the foundation of the discipline is that anatomical and physiological characteristics

directly influence mental behaviour. Personality traits of a person are determined by "reading" bumps and fissures in the skull. The best-known model of phrenology was that of Francois Gall who marked off the places of twenty-six organs on the head.<sup>111</sup>

Both phrenology and external locus of control orientation view one's destiny as lying outside one's control. For the phrenologist, man's personality and behaviour is largely pre-determined based on physical and anatomical features given to one at birth, one's God-given genetic predispositions as indicated on one's cranium.<sup>112</sup> Similarly, for someone possessing an external locus of control, one's destiny was determined by external forces: God, fate, or significant others. Considering the likeness in core beliefs between phrenology and external control orientation, Terry's exposure to phrenology may have confirmed or validated his already held beliefs that man's destiny is determined primarily by forces outside his control. Another possibility is that Terry's external control orientation made him susceptible to generating an interest in phrenology.

With the declaration of war on Germany by the United States in April 1917, the *Selective Service Act* was passed authorizing the President to temporarily increase the military force of the United States and Terry reported to his respective station in New York City to sign his draft registration card.<sup>113</sup> In 1917, the United States Army was planning on using the new medium of motion pictures to create instructional reels and document a variety of medical and surgical procedures and operations in order to help advance medical knowledge. However, using live-action filming was problematic because blood photographed black. Therefore, to effectively illustrate surgical procedures required drawing the practice.

After Terry was inducted in the latter part of 1917 he reported to George Washington University upon the invitation of Thomas L.W. Evans, Major Sanitary Corps working in a new animation unit to produce filmstrips where both animation and live-action photography were combined to create the final product. The animated sequences were used to bridge the gaps between the live action segments.<sup>114</sup> The United States Army surgeons had no problem finding candidates for surgery as they were provided with injured soldiers from the Western Front to practice their surgical techniques. Terry was instructed to witness the operations through the fluoroscope, and then transfer what he saw visually into animated film sequences.<sup>115</sup>

While Terry studied the basics of anatomy from the perspective of a surgeon, a studio was established for Terry in the centre of the Army Medical Museum<sup>116</sup> just beside the Surgeon General's office.<sup>117</sup> During his two years at the university, Terry animated surgical

operations (e.g., transplantation of tendons), medical disease (e.g., venereal disease), injuries and conditions (e.g., umbilical hernias, femoral hernias, inguinal hernias), and bodily processes (e.g., peristaltic motion of intestines).<sup>118</sup> Terry and his staff were also able to produce a whole set of reels on obstetrics.<sup>119</sup> In September 1918, Terry was honourably discharged from military service in the United States Army by reason of Commission, 2<sup>nd</sup> Lieutenant, Sanitary Corps.<sup>120</sup>

During Terry's time in the military, the Spanish Flu, one of the world's greatest influenza pandemics, struck the city of Washington. Despite best efforts to control the spread of the virus through quarantine and other non-drug measures, the virus rapidly spread across the globe.<sup>121</sup> The global mortality rate from the 1918/1919 pandemic is not known, but scientists have estimated that 2.5 to 5% of the human population were lost due to the virus with estimates as high as 50 million to 100 million people worldwide killed and fifty percent of the population infected with 25% suffering clinical infection.<sup>122</sup> By the time the last death by influenza had been recorded in the city of Washington in 1919, 35,000 cases had been reported and ten percent of these resulted in deaths.<sup>123</sup> Approximately 2.3% of the population of the city had been lost.<sup>124</sup> Paul Terry was no exception to these statistics.

Paul Terry was struck down with the flu in a pandemic he called "horrible, horrible, horrible."<sup>125</sup> Terry was in bed for a considerable period of time before recovering. He records his bout with the pandemic in macabre terms.<sup>126</sup> The 1918 influenza strain was highly unusual in that the pandemic killed many young adults and otherwise healthy victims. The virus could strike suddenly. People without symptoms could rapidly develop symptoms within hours and be too fatigued to walk. Many of these individuals died the next day. Symptoms included spewing up blood caused by severe obstruction of the lungs and uncontrollable pulmonary haemorrhaging causing patients to drown in their own body fluids. Pneumonia was a cause of mortality either rapidly (virus-induced consolidation) or slowly (secondary bacterial pneumonias). There were some cases of mental disorders due to neural impairment, and malnourishment led to deaths.<sup>127</sup>

Scientists have confirmed that each individual possesses a locus of control in relation to his or her health.<sup>128</sup> The question arises as to what effect the 1918 pandemic, his infection and subsequent recovery had on the health locus of control orientation of Paul Terry. One study has found that exposure to serious and/or numerous experiences with disease and sickness contribute to the development of an external locus of control orientation in relation to one's health.<sup>129</sup> Therefore, Terry's beliefs about the controllability of his health would be

susceptible to being shifted towards an external orientation because of the magnitude and significance of the 1918 epidemic.<sup>130</sup>

The writer also questions whether Terry's locus of control beliefs in general became more externally oriented due to his sickness. The author suggests that what would have been very informative was whether Terry undertook any precautionary measures to avoid the influenza or whether he simply let external forces determine whether he became infected. Researchers have found that internals undertake more health preventative measures to avoid viruses such as being inoculated.<sup>131</sup> All we do know is that Terry contracted influenza. Whether he took preventive measures and was unsuccessful is unknown.

After Terry was discharged from the United States Army in January 1919, he decided to open an animation studio on Eighth Avenue in downtown Manhattan.<sup>132</sup> However, he wasn't there for very long as he was offered a position as a director and animator for Paramount on the Paramount Magazine series of animated shorts. At Paramount he worked alongside Harry D. Leonard, John Terry, Jerry Shields, Frank Moser and about ten other animated cartoonists. Leonard was directing his Peanut Comedies series, Earl Hurd<sup>133</sup> worked on Bobby Bumps cartoons, Pat Sullivan was directing Felix the Cat shorts, and Frank Moser was working on Bud and Susie shorts. Records do not indicate in which capacity Terry was working while with Paramount although Terry later admitted he spent most of his time writing stories<sup>134</sup> and also indicated that he was working on some Farmer Al Falfa shorts.<sup>135</sup> Terry also mentions that in the later teens he worked on a contractual basis on some Katzenjammer Kids and Maude the Mule shorts for William R. Hearst's International Film Service.<sup>136</sup>

As Paul Terry was in the process of leaving Paramount, he received a phone call from Howard Estabrook. While it is unclear how Terry made his acquaintance with Estabrook, the former stage director suggested to Terry that he make a series of animated cartoons involving Aesop's Fables.<sup>137</sup> Terry agreed to produce two animated cartoon shorts for Estabrook that Estabrook purchased. After viewing the quality of the shorts and upon further discussions between the two parties Estabrook entered into a five-year contractual arrangement with Terry. Terry agreed to produce each week one animated Aesop's Fables cartoon within a certain range of footage up to the same standard as the first two cartoons produced.<sup>138</sup> Terry was to be paid \$300 weekly for his services<sup>139</sup> while Estabrook would be responsible to sell, license or otherwise dispose of the cartoons.<sup>140</sup>

However, by the end of 1920 Estabrook was encountering difficulties in finding a distributor for the cartoon product. A contractual amendment was drafted in December 1920 wherein Terry's weekly salary was to be reduced by 1/3<sup>rd</sup> from \$300 to \$200.<sup>141</sup> While the document referenced for this paper was unsigned, a similar agreement was signed by Terry carrying the parties through to April 1921. Another amendment to carry the two parties under the same terms and conditions from June to August 1921 was also prepared but not entered into by both parties but an agreement through to October 1921 was signed by Terry.<sup>142</sup> Based on the extant documentation it appears that every two or three months Terry was agreeing to enter into an agreement to reduce his salary to \$200 a week until the time when Estabrook could find a party to use or distribute the product.

In about the spring of 1921, Estabrook was able to find a party interested in purchasing the animated cartoon series, the Keith-Albee Theatre Circuit. The Keith-Albee circuit was comprised of theatre owners across the United States thereby assuring that the cartoons would be shown across the country. The Keith-Albee was one of the two largest theatre chains in the United States, the other being the Orpheum chain headed by Morris Meyerfeld Jr. and Martin Beck. The distributor of the cartoon product for Keith-Albee was Pathé.<sup>143</sup>

Terry and Amedee Van Beuren<sup>144</sup> founded Fables Pictures, Inc. to produce the animated shorts with Van Beuren as President and Terry as an employee of the studio in charge of production. On June 19, 1921, Van Beuren announced that Terry's Aesop's Fables would appear every week and would be distributed by Pathé. Estabrook would soon leave the arrangement to move back into live-action motion picture work as writer, director and producer. By way of an agreement entered the 23<sup>rd</sup> day of June 1921, between Fables Pictures, Inc., and Paul Terry, the Terry and Estabrook agreement of the 9<sup>th</sup> day of August 1920 was duly assigned to Fables Pictures, Inc., and Terry agreed to produce the animated shorts as per the Terry-Estabrook agreement for the agreed upon salary plus an additional five percent of the net profits as shown upon the books of Fables Pictures, Inc. The Keith-Albee theatre chain would underwrite the studio's expenses and guarantee bookings.<sup>145</sup>

For the next nine years, beginning on June 19, 1921 with the release of *The Goose That Laid the Golden Egg*, Terry would produce one Fables cartoon a week.<sup>146</sup> The critical reviews on the shorts by newspapers, journals and trade reviews were extremely favourable.<sup>147</sup> There were a number of reasons for the success of the Aesop's Fables cartoons. First, Aesop's Fables cartoons were relatively fast-moving cartoons, filled with sometimes nasty mayhem, and sprinkled with enough surprises to keep one guessing from scene to

scene.<sup>148</sup> Second, each short concluded with a “moral” that usually had nothing to do with the actual cartoon itself. The ambiguity of the moral was what made the short funny.<sup>149</sup> Third, the animation was well rendered and better than most produced by other studios during the 1920s from a staff of gifted artists such as Vladimir “Bill” Tytla,<sup>150</sup> Jesse Sylvester “Vet” Anderson,<sup>151</sup> and Ferdinand Huszti Horvath.<sup>152</sup> Walt Disney would later remark as late as 1930 that “my ambition was to be able to make cartoons as good as the Aesop’s Fables series.”<sup>153</sup>

Terry was able to keep his one short a week commitment employing a small staff of 19 or 20 artists. Terry would write the stories and spend most of his time in the story department even though he officially maintained a directorial role.<sup>154</sup> The relationship between Terry and the Keith-Albee Circuit group was very profitable for both parties, but especially the latter one. In 1924 the Keith-Albee people wanted to ensure that this successful commercial venture continued into the distant future as the five-year contract was set to expire. Accordingly, the agreement between the parties entered into in 1920 was extended a further seven years while Terry was to be paid \$400 weekly during the seven year extension and retained his five-percent interest in Fables. The contract would carry the parties until August 1932.<sup>155</sup> Terry would later claim that he owned ten percent of Fables prior to his departure.<sup>156</sup>

In 1928, Keith-Albee sold their interest in the renamed Fables Studio to Amedee J. Van Beuren. Van Beuren negotiated a new agreement with Terry dated June 28, 1928 wherein Terry was to be paid \$320 weekly to June 30, 1929 and four hundred dollars a week thereafter to August 9, 1932.<sup>157</sup> However, this contract would never expire as a disagreement between Terry and Van Beuren erupted resulting in Terry’s departure. While the conventional story has the dispute centred on Van Beuren wanting to synchronize the sound tracks, and Terry being satisfied with adding simple sound tracks to his silent product, Terry’s exodus was likely the result of financial disagreements between Terry and Radio-Keith-Orpheum (RKO) over the share of the profits due Terry.

In 1928, the distributor of the cartoons, Pathé Exchange, had been bought out by RKO. RKO was generating more earnings than the production company expected. Therefore, to circumvent the strict terms of the 1924 agreement between Terry and the company, the company undertook some creative accounting to try and hide the profits.<sup>158</sup> Terry found out that RKO was generating more earnings than the production company expected. When the company refused to comply with Terry’s demand for a rightful share of the profits, Terry left the studio.

In a letter dated May 25, 1929, Van Beuren, president of the Fables Pictures, Inc., advised Terry that his services with the company were terminated.<sup>159</sup> Terry signed a release on June 13, 1929 releasing Fables Pictures, Inc. and The Van Beuren Corporation from all actions, suits and debts for a sum of \$5,000.<sup>160</sup> Terry then sold his 10% interest in Fables Studios to RKO for \$33,000. In a letter dated September 13, 1929, Terry's lawyer advised him that he is relieved from all contractual obligations with Van Beuren and can even pursue making "Aesop's Fables" for anybody else.<sup>161</sup> Amedee Van Beuren then changed the name of the company from Fables Pictures to Van Beuren Studios.

During his time at Fables Studio, Terry was able to oversee the production of approximately 460 animated shorts for the production company.<sup>162</sup> However, the frantic production schedule did not keep Terry from pursuing other business interests. While Terry was in Washington, D.C. working at George Washington University he had become acquainted with Charles Herliman who was involved in various phases of film laboratory work, had owned a film lab, and was involved in sales work. After Herliman entered the army he was evidently involved with Terry in some aspect of film production for the United States military.<sup>163</sup> A few years later after Terry had begun work at Fables, Herliman approached Terry asking for a job. While Terry refused the request he mentioned to Herliman that he would help him financially if he established a film laboratory.

Not long thereafter, about March 1922, Herliman returned to Terry informing him he and his brother George<sup>164</sup> had acquired a film lab in Fort Lee, New Jersey, the Hirlagraph Motion Picture Company.<sup>165</sup> The Hirlagraph company operated a plant and laboratory that developed and processed raw film stock. The process involved treating the films chemically and mechanically before their exhibition by taking the negatives from the producer, developing them, making prints from them and sending them to the exchanges designated by the distributors.<sup>166</sup> Terry agreed to loan Herliman some money to help buy some film stock. When Terry asked for his investment back and the Herlimans could not return the amount as they had re-invested the money in more film stock, Terry asked for a note.<sup>167</sup> In April 1922 Terry received a promissory note from the Herlimans granting him 1/3<sup>rd</sup> of the stock in Herligragh for his \$3,000 investment.<sup>168</sup> In January 1923 Terry was formally issued, by way of a transfer agreement, 71 shares of the total of 284 shares, or a 25% stake in the company.<sup>169</sup> The company became a very profitable concern over the next few years at one point processing 1.5 million feet of film each month.<sup>170</sup> In 1927, the company was sold to Consolidated Film Laboratories<sup>171</sup> headed by Herbert Yates.

Along with work with the investment in the laboratory, Terry got involved with loaning or financing films for “states rights” producers. In the early 1920s releasing companies were non-existent. The United States was split into territories where films were sold outright in each territory.<sup>172</sup> The person who bought the rights to a picture for a certain territory would pay on a per footage basis with the money then received by the producer used to finance the production of the films. Terry established a company called the Terry Trading Corporation to finance the “states rights” producers. The benefit for Terry was two-fold: the interest and financing charges on the loans to the producers and the fact that these producers used their laboratory to process the films.<sup>173</sup> Terry would finance a number of producers including W. Ray Johnston, the Weiss brothers, Clarion Pictures, and Bud Barsky. Terry ran the Terry Trading Corporation for about four or five years and according to Terry “it worked out pretty well for a while.”<sup>174</sup> Apparently, financing activities ceased when the laboratory was sold.<sup>175</sup>

At the Fables studios, Terry had been using the celluloid process patented by Bray and Hurd without recompense to Bray. For about five years various legal proceedings took place between Terry and Bray. Bray was attempting to force Terry to make payments for using the Bray-Hurd process but was not attempting to exert a monopoly or drive artists out of business.<sup>176</sup> Eventually he and Terry were able to come to a friendly arrangement where Bray agreed to drop the lawsuit if Terry bought a license. Terry later stated that he had “cross-licensing” where he was licensed to produce two shorts a week.<sup>177</sup>

## **C. Economic Behaviour: Saving**

### **1. General Concepts**

The second and third psychodynamic factors the writer has identified that greatly influence economic decision making both involve the concept of saving. The first factor is the psychological underpinnings to financial saving behaviour or, stated otherwise, the causes or reasoning as to why we save. The second factor is money management ability or skill and aptitude involved in saving and increasing financial resources. Economic decisions involve sacrifices made by the decision maker by evaluating present or future benefits of one’s expenditures (spending vs. saving), an evaluation of the expected benefits of the alternatives, and a concrete variable of behaviour.<sup>178</sup> Saving behaviour is part of the larger field of economic psychology which studies the economic behaviour of individuals and is only one aspect of wealth accumulation. Studies have found that there are three general determinants of economic decisions such as saving behaviour:

- (1) Personal factors: involve the personality characteristics of the consumer and his economic psychodynamics;
- (2) Situational factors: involve the conditions and circumstances that restrict economic behaviour within certain boundaries (e.g., personal or studio budget, behaviour of competitors, technological concerns, film style); and
- (3) Economic factors: involve the market conditions at the time of the decision that generate optimistic or pessimistic attitudes and expectations which influence a decision to save or spend money (e.g., rates of inflation, rates of interest, degree of unemployment, the economic policies of the government, costs of production).<sup>179</sup>

Most economic theories assume that the prime motive for saving today is that the funds can be used to consume tomorrow. Much of the economic literature on saving behaviour concerns how individuals handle variations in income across their lifespan. The two most influential economic models of saving are the life-cycle hypothesis and the permanent income hypothesis and both help to explain consumer choices.

According to the life-cycle hypothesis, people are rationally determining how much they can consume over the remainder of their life to maximize utility where the amount saved (or borrowed) is the difference between the level of consumption and income.<sup>180</sup> Individuals spend money from different mental accounts where accounts are hierarchically arranged according to source, type or use of income (i.e., individuals will spend more from current income and almost none of their future income). Therefore, income will be spent differently depending on how it is perceived by the recipient.<sup>181</sup> Conversely, the permanent income-saving hypothesis is based on economic theory where the consumer saves to even out his income over their lifespan to ensure a permanent income.<sup>182</sup>

One methodological issue when determining saving behaviour is how to measure saving. Generally, both economists and social scientists have regarded saving as a residual category, saving is what is left of disposable income once consumption is deducted.<sup>183</sup> Saving in the plain language use of the term refers to money put in banks or financial institutions to protect against future insecurities or to save up for particular goods and services. Instalment payments should also be considered savings because this income is not used directly for consumption. Some economists have argued that personal saving excludes capital gains because these gains represent changes in the prices of assets that are already owned, not unspent portions of income receipts.<sup>184</sup>

Katona introduced three categories of saving: (1) contractual saving resulting from fixed contractual obligations that are fulfilled as a matter of routine requiring no new decisions and include repayment of debts (mortgages, instalments) and payment of life insurance premiums, (2) discretionary saving involving accumulating reserve funds such as deposits to banks, savings and loans associations, and income used to purchase bonds, stocks or shares of mutual funds, and (3) residual saving involving money not spent and therefore saved by default.<sup>185</sup> For the purposes of this dissertation, the writer will use Katona's broader concept of "saving" in order to capture the widest scope of the behaviour.<sup>186</sup>

## **2. Purposes of Saving**

The purposes or the aims toward which one strives to save economic resources vary widely from individual to individual and are expressed in many different ways. Households may set aside funds for categorical objectives such as current income, retirement, bequest, education, emergencies, and tax avoidance.<sup>187</sup> Katona formulates that most of the goals people give for saving may be classified in one of four categories: (1) emergencies, (2) retirement, (3) family expenses, and (4) other purposes (e.g., vacations).<sup>188</sup> Keynes is more specific and lists eight main objectives that people have for saving money: (1) precaution: to build up a reserve against unforeseen contingencies; (2) foresight: to provide for an anticipated future relation between the income and needs of the individual or his or her family different from that which exists in the present (old age, education); (3) calculation: to enjoy interest and appreciation – because larger real consumption in the future is preferable to a present smaller consumption; (4) improvement: to enjoy a gradually improving standard of living; (5) independence: to enjoy a sense of independence and power to do things, though without a clear idea of definite intention of specific action; (6) enterprise: to secure a capital mass to carry out speculative or business enterprise; (7) pride: to bequeath a fortune to others; and (8) avarice: to satisfy pure miserliness.<sup>189</sup> Potter provided evidence that people may have multiple reasons for saving.<sup>190</sup>

There is little contention by animation historians that Terry's practice of keeping production costs at a minimum ensured a sizable profit for his studio. By Terry not reinvesting these profits back into the cartoons, Terry was engaging in a form of saving behaviour, and amassing a small fortune. However, for what purposes was Terry developing a sizable financial reserve? Historians like Maltin contend that the purpose of Terry's saving was not to reinvest his earnings in larger budgets and improve the quality of his cartoon

product (what Keynes would refer to as “enterprise”) but rather to satisfy his own financial interests and retire a very wealthy man (what Keynes would refer to as “avarice”).

During his career Terry would deny that he produced cartoons simply to amass wealth, but rather reinvested his profits back into the company producing more expensive animated shorts.<sup>191</sup> Terry is quoted: “I have always believed that thinking about financial rewards should be secondary to thinking about doing your work in the best way possible.”<sup>192</sup> However, these statements by Terry were carefully prepared as part of a public relations statement. Fifteen years after he had sold his studio to CBS, Terry was given a series of interviews. During these meetings, Terry commented that the secret to good money management is to build up a storehouse of funds large enough to protect you and your family until death.<sup>193</sup> Terry counselled that the key to success in any venture is to be prepared, and accumulating a large bank account to prepare for the unexpected is a wise undertaking. Terry equated the practice to owning an insurance policy.<sup>194</sup> Terry would also comment that building up a reserve of cash takes away fear and provides safety to loved ones.<sup>195</sup>

Accordingly, statements made by Terry late in his life indicate that he may have been stockpiling funds during his career in animation largely for financial security purposes. Terry’s advancement of the concept of increasing financial holdings to bettering long-term security is not an original idea as the principle has been touted by investment brokers, accountants, and financial advisors for centuries. To what degree Terry applied this principle during his reign at Terrytoons and whether the quality of his cartoons suffered as a result will be analyzed later.

### **3. Types of extreme savers**

Saving funds to help ensure a more secure economic future is sound financial practice. The problem arises when money begins to control our behaviour and inhibit our spontaneity in our lives resulting in “extreme saving” behaviour. From a psychoanalytic approach, extreme saving symbolically reflects a deep constrained emotional style. Psychoanalysts have identified three types of extreme savers: (1) the pessimist, one who looks at people’s dealings with money with mistrust and doubt; (2) the worrier, one who lives in a constant state of near-panic, fretting over the financial consequences of their every action where money means psychic integrity; and (3) the miser, one who views money as his basic sense of security and control.<sup>196</sup>

Goldberg and Lewis specify several money types that look upon money as a symbol of security including: (1) the compulsive saver, one who incessantly saves money where no amount of money is sufficient to provide enough security; (2) the self-denier, one who enjoys the self-sacrificial nature of self-imposed poverty of not spending; (3) the compulsive bargain hunter, one who habitually seeks good deals for the satisfaction of securing a bargain; and (4) the fanatical collector, one who collects material possessions as potential sources of affection and security rather than seek the love of humans, where acquiring collections bring a sense of power and superiority.<sup>197</sup> Forman developed a money-sanity scale to measure money neuroses and from his findings describes five classic neurotic money types including the miser who hoards money and has a terrible fear of losing funds, and the tycoon who enjoys amassing wealth to gain power and status over others.<sup>198</sup>

There are a number of names that are equated with individuals that are extreme savers: cheapskate, churl, hoarder, moneygrubber, penny-pincher, pinchfist, pinchpenny, Scrooge, skinflint, and stiff. Many of these words are now used interchangeably but by tracing their etymologies one can understand the original usage of the term. The author proposes six specific types of extreme savers.

#### (1) The Shrewd Saver

Shrewd is defined as: “marked by clever discerning awareness and hard-headed acumen.”<sup>199</sup> The etymology is from the old English “Shrewed” meaning wicked, mischievous or a rascal. A shrewd individual is one that that shows marked wisdom or judiciousness, shrewd in the management of financial affairs, and highlighted by circumspection. The shrewd saver is amassing wealth wisely using cunning, knowledge, foresight and balanced judgment both in financial and non-financial affairs.

#### (2) Thrifty Saver

Thrifty is defined as “thriving by industry and frugality, growing vigorously, and given to or marked by economy and good management.”<sup>200</sup> The etymology of the word “thrift” (when it first appeared in written form in 1305) is derived from thrive (or prosper or succeed).<sup>201</sup> Your thrift was your “income” and what you were able to save where you can prosper more if you have more money coming in than going out. A thrifty saver is budget conscious, uses good money management, shops smartly looking for bargains, will not spend on extravagant purchases, and uses money for more value-laden purchases. The thrifty saver is amassing wealth through sound money management, effective budgeting, and wise purchase decisions.

### (3) The Frugal Saver

Frugal is defined as “characterized by or reflecting economy in the use of resources” with the etymology from the Latin “fruit,” “value” or “virtue”<sup>202</sup> and frugality is defined as “moderate or sparing expenditure or use of provisions, goods, etc.”<sup>203</sup> A frugal individual practices conscientious conservation, seeks optimal technical efficiency, advocates comprehensive recycling, and insists on goods with built-in durability and repairability.<sup>204</sup> Frugal consumers tend to be less impulsive and more disciplined in how they spend money compared to other users.<sup>205</sup>

Frugality is considered a personal virtue and an excellent trait or habit of individual behaviour. Frugality is not practiced as a means to prosperity, is not pure deprivation, is not miserliness or hoarding, but includes saving and investing, and has an overall purpose of just and generous sharing.<sup>206</sup> Frugality can be viewed as a revolt against the society of consumption.<sup>207</sup> Frugality is “characterized by the degree to which consumers are both restrained in acquiring and in resourcefully using economic goods and services to achieve longer-term goals.”<sup>208</sup> A frugal saver is amassing wealth through moderation, temperance, restrained consumption, satisfaction with material sufficiency, a careful use of resources, and thrift.

### (4) Cheapskate

Cheapskate is defined as “a miserly or stingy person; especially one who tries to avoid paying a fair share of costs or expenses.”<sup>209</sup> The origination of the word is American, sometime in the period 1895-1900, and refers to a contemptible person who shirks duties and loafs.<sup>210</sup> A cheapskate is focused on getting as much as he can for as little as possible. A cheapskate is amassing wealth at the expense of others, through avoiding paying for a fair share of costs or expenses.

### (5) Tightwad

Tightwad is defined as a “close or miserly person.”<sup>211</sup> The etymology of the word concerns a person who is uptight and does not want to spend money. The word was defined in 1900 as a “parsimonious person,” using the word “tight” in the sense of “close-fisted” (1805) plus the word “wad.”<sup>212</sup> Parsimony is “unusual or excessive frugality; extreme economy or stinginess.”<sup>213</sup> The derivation is from the Latin parsimonia, from parsus, past participle of parcere, “to spare.”

A stingy person is one who shows a marked lack of generosity. The etymology of the word dates back to about 1659 perhaps from English dialect “stinge,” the noun, sting; akin to Old English “stingan” to sting. A stingy person is one whom exhibits an unwillingness to share.<sup>214</sup> Therefore, like a frugal individual, a tightwad is amassing wealth through a careful use of resources, conservation, and a restrained lifestyle. However, unlike a person practicing frugality, the end goal of wealth acquisition for a tightwad is to seek personal prosperity rather than a just and generous sharing of resources.

(6) Miser

A miser is one “who hoards wealth and spends as little as possible.”<sup>215</sup> The origination of the word is unknown but is dated back to 1542, referring to “miserable person, wretch,” from the Latin miser (adj.) “unhappy, wretched”.<sup>216</sup> The term is used nearly always in the most derisive sense. Miserliness suggests a pathological state of sordid avariciousness involving a morbid pleasure in hoarding devoid of social conscience.<sup>217</sup> A miser is amassing wealth from greedy and avaricious impulses, usually stemming from neurotic behaviour such as depression, acute or chronic anxiety, obsessive-compulsive tendencies, phobias, and even personality disorders.<sup>218</sup>

#### 4. Terry as a Shrewd Money Manager

When describing Terry’s saving behaviour, contemporary critics have labelled Terry a number of terms including: “notorious cheapskate,”<sup>219</sup> “renowned cheapskate,”<sup>220</sup> “notorious tightwad,”<sup>221</sup> and “ever-frugal.”<sup>222</sup> The author posits that Terry’s saving behaviour is “shrewd” practices reflective of great money management skills and a wise businessman practicing prudent and cunning business practices. The author bases his supposition on four key factors in Terry’s life prior to the establishment of his studio in 1929:

- (1) NO FINANCIAL DEBT: While there has been sparse research on the correlates of money management skills, the empirical evidence to date recognizes that money management skills are best measured by analyzing individual debt, and that good money management skills are related to little or no debt,<sup>223</sup> as debtors are generally considered to be more self-indulgent, reckless, and impatient.<sup>224</sup>

For the period from up to the time he started his studio Terry did not incur any financial debt implying he was applying skills of good money management. Terry admitted “I’d never buy anything unless I had the money to buy

it.”<sup>225</sup> Antecedents for Terry’s preference to stay debt-free can be found in parental influences.<sup>226</sup> Terry’s father went through bankruptcy and considerable financial adversity before successfully operating a family auction business. Possibly Terry learned good debt management skills from the lessons his father learned to operate a successful business, or his father’s bankruptcy created a desire within Terry to avoid repeating his father’s bankruptcy experience altogether by never borrowing.

(2) LONG-TERM FINANCIAL PLANNING: Terry’s money management decisions were focused on long-term gains at the expense of short-term losses, an incredible restraint of the “greed reflex.” For example, when exhibitors used only a portion of the 26 Terrytoons cartoons produced annually as they did not have room for all of them in their regular showings rather than force the theatre owners to pay for the entire contract, Terry chose to cancel the contract so that the exhibitors could be induced to sign a new contract for the following year.<sup>227</sup> Becker labelled this behaviour as “shrewd.”<sup>228</sup>

(3) SOUND INVESTMENT AND STRATEGIC WEALTH ACQUISITION: While it is difficult to examine the financial situation of Terry without access to personal financial documents, evidence indicates that Terry’s asset base in 1929 was not acquired through miserly gain but rather through wise investments and sound financial growth such as his part ownership of the film lab in New Jersey and his small share in Fables Pictures, and strategic wealth acquisition such as signing lucrative production contracts.

Terry’s “investments” were also of the intangible form. For example, for employee bonuses Terry would sometimes provide new chairs and animation equipment for his staff. Although the property would still remain a company asset, Terry created goodwill by providing tools and equipment that improved working conditions at the studio while helping to ensure that his staff could function more efficiently.<sup>229</sup>

(4) BALANCED LIFESTYLE: Misers, cheapskates, tightwads and those who live a frugal lifestyle all have one thing in common: a lifestyle centred around living simply and inexpensively as possible. However, evidence supports the conclusion that by 1929 Terry was living a balanced middle-class life supporting a wife and one child, in a comfortable but not luxurious home in Larchmont,

New York.<sup>230</sup> There is no evidence that Terry was hoarding money, living meagrely, or avoiding paying full value for goods or services.

In summation, Terry was conducting both his personal and private affairs in the manner characteristic of a shrewd businessman applying great money management skills.

## **5. Alternate Views on Saving Behaviour**

Economic theory and models on saving behaviour, such as Keynes's views on the motives for saving, has been challenged by a number of other scientists. Sociologists argue that propensity to save is related to social factors such as the relative position of the person in the income distribution of his or her social group,<sup>231</sup> and consumption expenditures are strongly influenced by comparison to other persons' consumption and people act in a social frame of reference yielded by the groups and social networks they are a part of.<sup>232</sup> Psychoanalysts, based on the work of Freud, offer that how a child passes through the four phases of psycho-sexual development up to an advanced age determines how the individual handles their money and finances.<sup>233</sup>

If the child is subjected to excessively intense suppression during the anal phase, particularly as a result of toilet training, characteristics of an anal character can appear where "thrift derives from the pleasure of retaining the contents of the intestine"<sup>234</sup> leading to miserliness.<sup>235</sup> Psychoanalytic theories have been generally criticized by numerous scientists, researchers and scholars,<sup>236</sup> Freud's contribution to understanding the behaviour of extreme savers and others forms of sometimes irrational human behaviour lies in his revolutionary concept of psychoanalysis that acknowledges that the underpinnings of an individual's behaviour are found in developmental periods earlier in life.<sup>237</sup>

Religious perspectives on extreme saving generally ignore the root causes and focus on providing principles to properly handle one's money and finances. Buddhism, Islam, Hinduism, Christianity, and Judaism all condemn concentrating one's energies on building excessive material wealth<sup>238</sup> while frugality and its concept of self-denial has typically been upheld as virtuous, especially in traditional ecclesiastical thought.<sup>239</sup> These religious issues are important to discuss because Terry was reared in a family that followed the Protestant Christian traditions and attended Episcopalian, Presbyterian and Baptist services.<sup>240</sup> Although it could be hypothesized that these sermons allowed Terry to become acquainted with Christian doctrines on money management, the effect Christian teachings had on his money management behaviour is unknown.

Finally, there is the issue whether genetic factors play a role in extreme saving behaviour. Karl Marx accused man of being a worshipper of commodities by anthropomorphizing lifeless objects bringing them special powers to bring happiness.<sup>241</sup> He believed that greed or egoism was innate to a certain degree and then exacerbated by exchange and a division of labour in the capitalist economies.<sup>242</sup> At present, there is no consensus as to the effect of genes on behaviour (and, in particular, the effect on saving behaviour) and the issue is a very controversial one.<sup>243</sup> The issue is important and most directly of concern to the study of behavioural development, behaviour genetics, and evolutionary psychology, and is recommended for future study and deeper exploration.

## **6. Causes of and Factors Underlying Extreme Saving Behaviour**

Following the studies of Warneryd and others, financial saving is treated as behaviour under the influence of a complex array of potential influences.<sup>244</sup> Explanations for personal saving must be grounded in an interdisciplinary approach drawn from a wide perspective of academic disciplines. The writer has applied this research to the saving behaviour of Terry in order to arrive at a psychodynamic model of Terry's economic decision making.

### **a) Psychological: Anxiety, Economic Insecurity and Locus of Control**

Empirical research has found that the relationship between emotional security and financial security is linear, the more money one possesses, the greater the emotional security one feels.<sup>245</sup> Money becomes an emotional life-jacket, a security blanket to prevent the onset of anxiety.<sup>246</sup> Terry's earlier comments about accumulating money to drive away fear reinforce these findings. One large study of 20,000 persons found money contentment not related to income level, but rather to a sense of financial security and self-worth.<sup>247</sup>

Other studies have found savings related to consumption needs associated with anxiety and uncertainty over the life cycle,<sup>248</sup> and how optimistic or pessimistic the person felt about the economy.<sup>249</sup> Money pathology, anxiety and neuroticism have shown to be correlated with the idea that wealth acquisition is chance determined, a feeling that money is an important social comparator, economic pessimism, negative emotions around money, and depression.<sup>250</sup>

The roots of money pathology can be traced through the concept of financial anxiety caused by a feeling of lack of control over one's finances. Psychoanalysts believe that those who suddenly become wealthy are unable to handle their new found riches because the individual feels a loss of control and is dependent upon external controls to provide a sense of security.<sup>251</sup> If fear of losing money by external events is related to neurotic miserly behaviour as Bergler suggests,<sup>252</sup> then an individual with an external control orientation would be especially susceptible to developing neuroses because of a belief in chance or fate determining their financial future.

Research support for the supposition that externals are more susceptible to money pathology comes from a study that found that those who reported high feelings of control reported less general anxiety and tended to be extroverted,<sup>253</sup> a study that found that those individuals who gave external forces more prominence in the form of "bad luck" saved more on a regular basis,<sup>254</sup> and a study that found a strong relationship between external locus of control and low trust in the business world.<sup>255</sup> Therefore, individuals with an external locus of control orientation can be seen as more anxious about the economy and their financial well-being.

An argument has been made that the relationship between saving behaviour and locus of control should be towards internality and not externality. The reasoning behind this supposition is that internals should save more than others since saving can be regarded as an internal mechanism of control over one's personal economic state of affairs. A few studies that analyze the relationship of locus of control to saving behaviour have mixed results. However, the diverse findings are possibly due to the researchers' failures to analyze the motives behind the saving behaviour before drawing their conclusions.<sup>256</sup>

For example, Sakalaki, Richardson and Bastounis found that the internality scale had a statistically significant relationship with saving.<sup>257</sup> However, the researchers also found that internals and externals save for different reasons. Internals initiate saving behaviour from the motive that they are the master of their financial fortune. Inherent is an element of risk taking, financial confidence, aggressiveness, and the saving behaviour arising from a financial strategy to increase one's wealth or financial circumstances. Applying Keynes's purposes for saving behaviour this would include the motives foresight, calculation, improvement, independence, and enterprise. Conversely, externals who emphasize the role of powerful others attach greater importance to those saving motives that allow for uncertainty (illness, unemployment, unforeseen contingencies).<sup>258</sup> The researchers found that their measurement

tool failed to account for a factor that measures what Keynes classified as “precautionary saving”, primarily saving behaviours that are represented by externals.

Taken as a whole, the research on the inter-relationships between anxiety, economic insecurity, locus of control and extreme saving behaviour are important because they provide an explanation for Paul Terry’s financial behaviour and support the author’s supposition that Paul Terry operated under an external locus of control orientation, that this orientation involved a feeling of loss of control over his personal finances and mistrust in the business world creating financial anxiety, and that he coped with these feelings of insecurity through extreme saving behaviour to ensure that he had adequate funds to meet unexpected financial loss.

#### **b) Economic and Life Events: Economic Change, Unemployment and Financial Hardship**

Feelings of financial insecurity and a loss of control over one’s finances which lead to money pathology or extreme saving behaviour can be traced to how economic events have shaped our belief systems about money. Gellerman was one of the first to explicitly state that a person’s treatment of money is really a summary of his or her previous life experiences.<sup>259</sup> Gasparski had empirically demonstrated that saving is the result of decisions which are influenced by individual perceptions, cognitions and values and that these values can be used to predict savings.<sup>260</sup>

Researchers have found that events occurring at an early age that affect one’s emotional and financial security can lead to extreme saving behaviour. Using case studies, Rowe provides analysis on how life events and major errors in judgement, especially those experienced at an early age, can create underlying financial insecurity and money fears.<sup>261</sup> Paul Terry suffered a loss of a parent at a very early age. Empirical studies have found that the death or loss of a parent (as reflected by divorce or marital separation) ranked the highest on the amount of social-psychological readjustment a child has gone through.<sup>262</sup> Cox and Cooper have found that there is a greater chance incidence of rich people’s experiencing early parental death, divorce or other major deprivation,<sup>263</sup> which wealth acquisition has been interpreted as a quest for emotional rather than physical security and a need to prove to themselves and to others their lack of need for dependence on the parents.<sup>264</sup>

Studies on the effect of success and failure on children’s money behaviours have confirmed that children in the success condition contributed more than those who

experienced failure and more than those in the control conditions.<sup>265</sup> These results confirm similar studies on adults that success leads to increased generosity.<sup>266</sup> During the last thirty years a number of researchers interested in the influence of mood on social behaviour have found that the results have been inconsistent as to whether negative mood states influence prosocial behaviour.<sup>267</sup> Researchers have generally found that other factors need to be addressed including who needs help, the age of the participants involved in the research,<sup>268</sup> the emotional state of the victim, the age of the helper,<sup>269</sup> and motivation and attention.<sup>270</sup>

Some of the factors that lead to financial insecurity and money pathology which have been identified by researchers are economic change, financial hardship, and unemployment. Economic change causing financial hardships can have a serious impact on the human psyche and has been linked as a causal factor in the development of behavioural disorders, even in primitive societies.<sup>271</sup> Undesirable economic change (e.g., increased unemployment, financial deprivation) has been linked to undesirable behavioural change (e.g., admissions to mental hospitals,<sup>272</sup> suicide rate,<sup>273</sup> depression), financial anxiety,<sup>274</sup> and psychiatric disability,<sup>275</sup> or psychological trauma (worry, fear, stress, helplessness, demoralization, uncertainty about the future, loss of sense of purpose, anger, bitterness, suspicion, resentment, feelings of being unwanted, shame, self-blame, loss of status, and loss of self-respect)<sup>276</sup> to offer a model that synthesizes the economic change and behavioural disorder.<sup>277</sup> On the individual level, Cohn discovered that becoming unemployed does lead to greater dissatisfaction with self and can be accentuated by lack of an external locus of cause.<sup>278</sup> Therefore, an individual operating under an external orientation (i.e., Terry) is less likely to be discouraged with performance of self because the cause for the unemployment would not be with the individual but with external events outside his or her control.

The effect of financial hardships on spending and saving has been largely studied in the research on consumer behaviour. Studies have shown that life status changes and financially negative events such as unemployment, and cuts in wages and salaries in present job have caused financial insecurity and consumers to decrease spending (e.g., by consuming less and changing brand preferences), and increase savings both short-term and long-term.<sup>279</sup>

The early years of Paul Terry were financially difficult times for the Terry family. Terry was raised in a single-parent home, his father's business went bankrupt, the family struggled to meet their financial obligations, and Terry was forced to go out and work as a small child to earn his own pocket money. After leaving home, Terry continued to struggle economically holding a number of jobs during his teens and early twenties, enduring a significant economic disruption as a result of the 1906 earthquake forcing him to leave the city to find work elsewhere, and working in the new medium of animated film where work

was scarce, tenure was unpredictable, and earnings were meagre until entering a relatively secure contractual arrangement in 1920. Consequently, based on the early economic experiences of Terry, the studies support that he was highly susceptible to developing money pathology and extreme saving behaviour.

### **c) Family Influences, Moral and Cognitive Development and Modelling**

Attitudes towards saving, money management and related economic activities have been assumed to be deeply rooted with parental factors, upbringing, and lifestyle,<sup>280</sup> studies of which drew inspiration from the work of Freud. Empirical evidence has been gathered finding money pathology is learned from both family disorders and messages about money that are inconsistent, confusing and paradoxical.<sup>281</sup> Further, if girls are raised in a home where pocket money and allowances are negotiated with the father by boys, then they may come to shun money matters for fear that they may look less feminine.<sup>282</sup>

Conversely, good money management skills, higher asset accumulation, and increased savings in adulthood have been linked to financial decision-making courses in high school,<sup>283</sup> parental modelling for delayed-gratification behaviour,<sup>284</sup> and parental behaviour such as discussing financial matters with children and parental orientations such as financial conscientiousness and future orientation.<sup>285</sup> Studies have found that the amount a child saves is associated with the amount that parents themselves saved, father's conscientiousness, household income, and economic socialization.<sup>286</sup> Further, studies on the effect of model generosity on the sharing behaviour of children have demonstrated that generous and stingy behaviour can be learned.<sup>287</sup>

The significance of these studies to Terry's behaviour is that his family's early struggles to maintain a home and meet financial burdens as well as his father's involvement with the management of a number of family-owned businesses likely involved forms of extreme saving and prudent money management (e.g., budget reduction, expense control, thrifty consumer decisions, frugal use of resources) that may have generated extreme saving behaviour in Terry through direct instruction and education from his family in the development of money management skills, or indirectly by modelling influences.

### **d) Other Factors: Social and Demographic Predictors**

The research to date has found that while social and demographic variables influence money pathology, the results have been mixed and are generally considered to be poor

predictors of saving behaviour and money pathology.<sup>288</sup> For example, Lindqvist's study found that the variables for socioeconomic data, income characteristics, and attitudes and expectations failed to explain bank savings, only a few variables could weakly explain a measure of long-term savings, and the most important predictor of total savings was family income.<sup>289</sup> McClure's study showed that attitudes measured in the questionnaire were unrelated to demographic differences of gender, education, occupation or religion.<sup>290</sup> Furnham's 1987 study on the determinants of adolescents' beliefs about the economy found political and social beliefs rather than demographic factors influencing economic values.<sup>291</sup>

Furnham and Okamura examined money pathology factors using demographic variables and found that the only significant predictor was negative emotions associated with money suggesting that nearly all money pathologies were associated with people having negative feelings (anxiety, anger, depression) with money.<sup>292</sup> Wernimont and Fitzpatrick studies revealed that those who are unemployed seemed to take a tense, worrisome, and anxious view of money.<sup>293</sup> Similarly, Furnham's 1984 study found that anxiety, obsessionality, and power were most related to the various demographic and social belief variables.<sup>294</sup> Yamauchi and Templer showed that money attitudes were largely independent of a person's income.<sup>295</sup> This result would explain why extreme savers who have a strong income base continue to persist in hoarding money despite the apparent need not to be concerned about their financial well-being.

Empirical research has highlighted the importance of parental influences on money behaviour. Parental factors such as income and education, social and political conservative beliefs and PWE values determine certain childrearing practices of independence, saving, and achievement motivation concluding that the importance of demographic and belief determinants of money beliefs and attitudes lies in the aetiology of these beliefs.<sup>296</sup> Furnham and Thomas studied children's pocket-money and allowances suggesting that factors such as class and age have important effects on children's spending and saving habits, even before they reach the age of ten.<sup>297</sup> Similarly, Bailey and Lown conducted a cross-cultural study of attitudes towards money in Great Britain and the United States of America concluding that "the origin or aetiology of these differences in attitudes towards money can be part attributed to cultural differences that begin in the context of the family and are reinforced by society as a whole."<sup>298</sup>

Empirical work undertaken by Tang and colleagues found some demographic variables related to money ethics.<sup>299</sup> Tang and Gilbert's findings revealed that those who claimed to budget their money carefully tended to be older, of lower income, higher self-

esteem and low organizational stress.<sup>300</sup> Tang's 1995 study found that those who showed a highly positive attitude to money expressed strong economic and political values but not religious values, tended to be older and with lower pay satisfaction.<sup>301</sup> Some studies have shown significant relationships between gender and money behaviour with women noted as being more anxious about money and conservative with purchasing decisions than men.<sup>302</sup>

While social and demographic variables are weak predictors of money behaviour, a few conclusions can be drawn from these studies for Terry. First, based on gender we would expect him to be less conservative in money management affairs. Second, the importance of parental influences on Terry's money management skills has been reinforced. Third, based on his religious upbringing (PWE) Terry should be susceptible to developing money pathology. Fourth, Terry's financial hardships and unemployment would have made him susceptible to money pathology and extreme saving behaviour.

## **7. Behavioural Responses and Coping Mechanisms Associated With Extreme Saving Behaviour**

### **a) Consumer Research and Self-Control**

Saving behaviour usually involves a deliberate intention by the saver to avoid purchasing goods or services entirely, or purchasing similar products at a reduced price or cost. Purchase avoidance has been linked to the ability to delay gratification and the exercise of self-control.<sup>303</sup> Individuals differ in their ability to delay gratification, and these differences have been suggested as one explanation for the observed heterogeneity in household saving behaviour.<sup>304</sup> When consumers fail to try and consume, researchers have found two main categories: (1) "just not trying," where the consumer sees other consumption possibilities but fails to follow up on them,<sup>305</sup> and (2) "trying not to try," where the consumer exerts an effort to try and not consume.<sup>306</sup>

Research by Hoch and Lowenstein found that consumers use self-control to control their spending either by reducing their desire,<sup>307</sup> or increasing their will power to overcome their impatience.<sup>308</sup> Empirical research has also determined that households that had saving rules were much more likely to spend less than income than those that did not have saving rules.<sup>309</sup> Research analyzing self-control and impulsiveness involving delays in reward found that delaying reward increases subsequent generalized self-control involving delay.<sup>310</sup> Rewarded effort has been found to increase children's generalized self-control involving effort.<sup>311</sup> Studies of pre-adolescent children has confirmed that adaptation to delay reduces its

aversiveness, and the degree of effort involved in rewarded tasks becomes learned and is generalized across behaviours providing the ability to postpone gratification in pursuit of long-term goals.<sup>312</sup>

The early life and business career of Paul Terry is characterized by a series of financial disappointments and monetary setbacks including a bankruptcy of a furniture store operated by his father, financial crises in the latter part of the 1890s, difficulties with generating a steady income while working a number of jobs, and the 1906 earthquake that left Terry virtually penniless forcing him to leave San Francisco to seek employment in Montana. Only by the early 1920s, with Terry in his mid-30's, and the success of the Fables Studios cartoons and return on some wise investments, had Terry begin to generate an income that enabled him to enjoy a modest living. Accordingly, the author posits that Terry's early financial adversity and delays in financial rewards developed within Terry the self-control and financial hardiness necessary to engage in extreme saving behaviour.

#### **b) Conservation of Resources**

Contemporary psychology has given significant attention to the study of stress and how individuals deal with emotional trauma in their lives.<sup>313</sup> Stress, a term borrowed from physics, was first defined in terms of stress to humans by Walter Cannon,<sup>314</sup> whose work was carried on by Hans Selye referring to the physiological response to stress as General Adaptation Syndrome.<sup>315</sup> Coping behaviours refer to both the overt and covert behaviours that are taken to reduce or eliminate psychological distress or stressful conditions. Research has examined coping strategies humans use to deal with financial stress including budgeting, making positive financial comparisons, selective ignoring, devaluation of money, optimistic faith, and rumination.<sup>316</sup>

Hobfoll has formulated a new model of stress called the "model of conservation of resources" which he believes more closely reflects current understanding of the stress phenomena and bridges the gap between environmental and cognitive perspectives. This resource-oriented model is based on the supposition that individuals endeavour to build, retain and protect resources and that what is threatening to them is the potential or actual loss of these valued resources.<sup>317</sup> "Resources are defined as those objects (e.g., home), personal characteristics (e.g., those that generally aid stress resistance), conditions (e.g., marriage, tenure, seniority), or energies (e.g., time, money, knowledge) that are valued by the individual or that serve as a means for attainment of these objects."<sup>318</sup>

According to Hobfoll's conservation model, when there is an actual or perceived loss to resources, the individual may employ other resources to offset the loss including replacement (direct or symbolic), attempt loss-control strategies, reinterpret the threat as a challenge, and re-evaluate the value of the resources.<sup>319</sup> Hobfoll's model provides further insight into both the causes for extreme saving behaviour and Terry's budget-conscious managerial practices. Extreme saving behaviour can be seen as a response to financial stressors through the process of conserving resources by applying budget-conscious studio practices. Rather than viewing Terry as a penny-pinching tightwad bent on amassing a fortune, Hobfoll's model places Terry in a different light as a person protecting or conserving his resource base (e.g., studio assets, company finances) based on perceived external threats or losses due to an external locus of control orientation, and/or as an individual responding to feelings of financial insecurity (real or perceived) that may or may not have been caused by previous economic hardships and deprivation.

### **c) Learned Resourcefulness**

Rosenbaum has posited that individuals may differ in the extent that they have acquired a set of self-control behaviours during their learning history. Rosenbaum, following Meichenbaum,<sup>320</sup> has applied the term learned resourcefulness to describe an acquired set of skills and behaviours by which a person self-regulates internal responses (e.g., emotions, cognitions) that interfere with the execution of a desired behaviour.<sup>321</sup> Rosenbaum's Self-Control Schedule has been empirically validated as a useful instrument in measuring and assessing learned resourcefulness.<sup>322</sup> High scores on the SCS have been related to coping with seasickness,<sup>323</sup> success in weight reduction<sup>324</sup> and self-control of nail biting.<sup>325</sup>

Learned resourcefulness is framed in terms of coping skills an individual possesses and exercises that prevent the development of debilitating responses such as depression. An external locus of control and learned resourcefulness can co-exist because the former is concerned with behavioural control over external events while the latter concept is concerned with the cognitive control over internal events such as emotions and cognitions. Learned resourcefulness has been associated with greater tolerance of adverse conditions and more task-relevant coping skills, and is offered as an explanation for extreme saving behaviour under adverse financial conditions.<sup>326</sup>

As posited, financial hardship and economic deprivation can lead to financial anxiety and stress. Stress in turn can result in situation-specific coping in the area of finances and money management, specifically problematic with individuals with an external locus of

control whom place control of their finances on external factors. The author posits that although Paul Terry possessed an external control orientation, he was an individual with high learned resourcefulness and strong internal coping skills. Further, the author posits that Terry applied these coping skills to engage in shrewd money management to control his studio budgets and produce his animated cartoon product at a profit.

Research into why some individuals possess high resourcefulness under stress while others do not has found that self-initiated coping behaviours (e.g., problem-solving, coping self-statements) have been associated with reduced anxiety and depression.<sup>327</sup> Learned or acquired factors have been identified in the development of high resourcefulness in subjects.<sup>328</sup> The author posits that Terry's learned resourcefulness was acquired in much the same way that he developed his self-control in matters of managing his finances and coping behaviours with respect to conservation of resources through financial adversity, economic hardship, and delays in receiving financial rewards for his efforts.

#### **D. Risk-Taking Behaviour**

##### **1. Definition**

Risk-taking is “a hypothesized personality dimension, reflecting the degree to which an individual willingly undertakes actions that jeopardize something of personal value.”<sup>329</sup> For the purposes of this paper, risk-taking will be in the context of economic matters, the degree to which one is willing to undertake actions that jeopardize one's financial assets. When analyzing financial risk-taking behaviour of decision makers, a large number of different outcome variables have been employed including wealth, income, return on investment, rate of return, net income, consumption, payoff, and profit.

Risk aversion is the “tendency of investors to avoid risky investments.”<sup>330</sup> Risk aversion as defined in economic analyses is: “Investor attitude according to which the value (utility) of a sure chance (certain prospect) with a lower yield is considered higher than the utility of an unsure chance (uncertain prospect) with a higher yield.”<sup>331</sup> Therefore, a person with a risk-averse attitude would accept a certain payoff (of a probability of 1.0) of less than \$50 (e.g., \$45) rather than take the gamble at 50-50 odds and possibly receiving nothing. A risk neutral person would be indifferent between the bet and the certain \$50 payment, and a risk-seeking individual would be inclined to take the option to gamble if the certain payment was not more than \$50 (e.g., \$55).

## **2. Risk-Aversion and Individual Characteristics**

### **a) Risk aversion and gender**

Only recently have researchers begun to explore the issue of differences in risk aversion by gender in relation to non-financial risk-taking<sup>332</sup> and financial decision making. The evidence to date from a number of studies, even when controlling for age, education, and wealth, indicates that women are more financially risk averse than men.<sup>333</sup> While conceptual models have been developed for understanding why it is that women invest differently than men considering factors such as differences in wealth and income, labour market experience, gender discrimination, human capital, biological differences, and the effects of socialization,<sup>334</sup> there has yet been any adequate explanations given answering why such gender differences exist.

### **b) Risk aversion and age**

Pursuant to the lifecycle risk aversion hypothesis, risk aversion will increase over an individual's lifecycle or as the person becomes older. The hypothesis is based on the belief that as a person gets closer to retirement the less risk he or she will be willing to accept in their investments because expected future income decreases as one moves closer to retirement so the individual will be receiving less paycheques to offset any adverse investment outcomes. Using both cross-sectional data<sup>335</sup> and longitudinal (i.e., time series) data,<sup>336</sup> researchers found evidence to support the hypothesis that older people are more risk averse and financially conservative than younger people.<sup>337</sup>

A study by Riley and Chow<sup>338</sup> found that risk aversion decreases with age up to 65 years, but thereafter increases significantly. While some studies that account for cohort effects (e.g., young people a decade ago may be more risk averse than young people today) have found slightly inconsistent results (e.g., middle age investors were less risk averse than young investors and that older investors were more risk averse than middle age investors),<sup>339</sup> most studies that consider cohort effects support the lifecycle risk aversion hypothesis.<sup>340</sup>

### **c) Risk aversion and race/ethnicity**

While there have been few research studies completed on the effects of race/ethnicity on risk aversion, the research to date indicates that race is not a factor in risk taking. For example, while one study found whites make safer consumer choices than blacks, the racial

gap narrows significantly after education and wealth are included as control variables.<sup>341</sup> Jianakoplos and Bernasek's two 1998 studies comparing financial risk taking on marital status, race, and gender found contradictory results.<sup>342</sup> With respect to ethnicity, while few studies exist to draw strong conclusions, one study found Spanish students to be less risk averse than United States students.<sup>343</sup>

#### **d) Risk aversion and education**

The relationship between risk aversion and formal education has been well studied, and the results are inconclusive. Some studies find that financial risk aversion decreases with increased educational credentials,<sup>344</sup> while others find aversion increases with more education.<sup>345</sup> One of the problems in interpreting the results is that education, income and wealth have a propensity to be highly correlated with each other. The results are more consistent when analyzing the relationship between financial risk-taking and financial knowledge. Studies have shown that as financial education increases, savings activity is shown to be significantly higher.<sup>346</sup>

#### **e) Risk aversion and locus of control**

The relationship between risk-taking behaviour and locus of control (or a subject's temporal orientation toward an event upon which he or she wagers (prior to the formulation of Rotter's I-E scale in 1966))<sup>347</sup> has been thoroughly explored by scientists and the results have been fairly consistent.<sup>348</sup> subjects with an external locus of control are more risk averse than subjects with an internal locus of control.<sup>349</sup> For example, studies have shown that internals chose more risky portfolios than externals.<sup>350</sup> The reasoning behind externals being more conservative and internals more aggressive in their risk-taking lies in the perception of control over one's fate.<sup>351</sup>

Studies have shown that as perception of control increases so does one's confidence in controlling the outcome of a risky event.<sup>352</sup> Internally controlled individuals are seen as more ego-involved in risk-taking enterprises than externally controlled subjects.<sup>353</sup> An internal sees himself as a master of his fate and takes more chances while a person who sees outcomes as determined by factors outside his own control is inclined to take the most cautious path in the hope that fate is not too unkind.<sup>354</sup>

### **3. Risk-Taking Behaviour, Financial Saving and Consumer Decisions**

Research on the relationship between risk-taking and financial saving is sparse but the empirical findings to date support the conclusion that saving behaviour is correlated with risk-averse behaviour. Cautious subjects are shown to have a lighter burden of debt, have more money in bank accounts, and choose to invest their money in relatively risk-free assets.<sup>355</sup> Conversely, researchers have found that the relationship between risk-taking and savings in various scenarios to be very weak or absent.<sup>356</sup>

Empirical studies have revealed that “precautionary savings,” or savings related to income uncertainty, comprise a significant percentage of total wealth accumulation,<sup>357</sup> and that the factor of risk aversion comprises a significant share of total precautionary savings.<sup>358</sup> The reason why risk-averse investors choose risk-free investments and are more prone to precautionary saving may be due to pessimistic viewpoints on the economy and their finances. For example, studies have found that consumers who have more optimistic views of future economy and personal financial situations were more likely, than their less optimistic counterparts, to be owners of riskier investments such as stocks.<sup>359</sup>

### **4. The Risk-Taking Behaviour of Paul Terry**

The author has posited that prior to 1929 Terry developed an external locus of control and applied shrewd money management skills. The writer also adds that based on the empirical research on risk-taking supported by Terry’s investment decisions that he was engaging in financially risk-averse behaviour during the same period of time. For example, research has revealed the relationship between financially risk-averse behaviour and low debt burden.<sup>360</sup> Since Terry admitted he never put himself in a position where he was in debt,<sup>361</sup> Terry would be considered to be possibly engaging in risk-averse financial practices.

When asked whether he had any money problems during his career Terry admitted to risk-averse behaviour.<sup>362</sup> In reviewing the early financial decisions and career moves of Terry, there is little or no evidence that Terry engaged in any risk taking behaviour. Studies have shown that risk-averse individuals are less likely to move and to change jobs than the risk-neutral or the less risk averse.<sup>363</sup> Yet the 1906 earthquake left him with few choices: either he could remain at home with family until the city began rebuilding when he could return to work with the Chronicle or he could leave the city and seek work elsewhere. Although Terry moved from the Bay City, he remained in his previous career path, the newspaper field, as would be expected of risk-averse individuals.<sup>364</sup>

At the time of the earthquake Terry had very little financial assets to risk which likely made the decision to leave to Portland, Oregon that much easier. After a short stop in Portland, he decided to seek the comfort and security of family in Anaconda, Montana where he would get the opportunity to work as a cartoonist alongside his brother at the *Standard*. Terry didn't spend much time in the state, just long enough to acquire some cartooning skills, and return to Portland to work for the *Oregonian*. Terry then returned to San Francisco to work for some more newspaper concerns before heading to New York City in 1911.<sup>365</sup>

While Terry first obtained work for advertising magnate Baron Collier, it was not long before he was working for the *New York Press*, a position he likely garnered with help from his newspaper cartoonist friends whom had known Terry in San Francisco.<sup>366</sup> The financial risk Terry took in moving to New York City is unknown because archival records do not disclose whether he had a job waiting for him in Manhattan. However, Terry did manage to limit his expenses by arranging to share accommodations with Robert Ripley who also moved to New York arriving in the winter of 1912 to work for the *Evening Globe*.

During his time with the *Press*, Terry undertook his first clearly documented financial risk: to independently animate and produce his first cartoon short *Little Herman* (1915) at his home and studio on 42<sup>nd</sup> street.<sup>367</sup> At one drawing per frame, the work would entail animating about 4,800 individual drawings for the 300-foot film.<sup>368</sup> However, sources have the amount of drawings produced to be no more than 2,000 and this may be due to the fact that Terry filmed sequences where the same drawing was used in two or more frames.<sup>369</sup> Sources also differ with respect to the number of drawings produced (1,000 to 2,000) and time involved in producing the film (2-6 months).

There is little evidence to indicate that Terry left his position with the newspaper to complete the animation work<sup>370</sup> and this could explain the differences in production times cited by the sources (i.e., 4-6 months of calendar time; 1-2 months of actual production hours). While there was considerable risk in terms of labour expenditure, there was at worst only low financial risk based on the production materials and equipment that would be involved in producing the film (i.e., Prestwich camera, 300 feet of 35-millimetre film, animation paper, cels, paint, and materials to build a homemade camera stand). The author estimates that production costs were no more than four hundred dollars in 1915 dollars.<sup>371</sup>

After *Little Herman* was sold to Thanhouser, Terry was asked to produce another cartoon short for the company. After completing the second cartoon, he was hired by John R.

Bray to produce and animate for him. For the period 1915 to 1920, Terry was employed by a number of the animation studios. During this time Terry unlikely undertook any major financial risks acting strictly in an animator-producer capacity. With his induction into the United States Army Terry had finally achieved financial security with a steady government paycheque. His time in the military likely also offered Terry the opportunity to bank some of his earnings. After his release from the armed forces, Terry struggled to find work, and survived on his savings and income generated from sporadic animation work.

One of Terry's greatest business achievements would be negotiating a contract with Estabrook on the Fables series that eventually resulted in signing a long-term agreement with Keith-Albee. While with Fables Pictures, Terry had financial security through the contracts he negotiated to produce the shorts. During his brief time with Estabrook, 1920-1921, Terry was at first earning \$300 a week, later reduced four months later to \$200 a week (plus 5% of the net profits) which for the first 12 month period of Terry's employment equates to \$144,923.13 in 2009 dollars.<sup>372</sup> Therefore, with the success of the Fables Pictures cartoons, Terry likely earned an annual salary in current dollars well into the six-figure range. His 1924 contract (effective 1925) stipulating \$400 a week would have earned him in current 2009 dollars \$254,038.51 as an annual salary plus his take on net profits.<sup>373</sup> In fact, based on his contractual arrangements between the period of August 1920 and his termination in May 1929, Terry earned a total of \$2,091,278.59 in 2007 dollars.<sup>374</sup>

While with Fables in 1922 Paul Terry made a small financial loan of \$3,000 to an old friend, Charles Herliman, to develop a film processing lab, the Hirlagraph Motion Picture Company, operated in Fort Lee, New Jersey. The loan should not be seen as a financial risk on the part of Terry but rather as a brilliant and shrewd business decision. First, Terry had signed a fairly lucrative long-term contract with Fables Pictures, Inc. in June 1921, and the loan of \$3,000 in 1922 represented a very small portion of his growing net worth. Second, Terry had sound business judgment in financing an individual with the business acumen to successfully develop the laboratory. Terry also had high regard for his character and had no reason to suspect that the business would fail or that his loan would not be returned.<sup>375</sup>

Third, by helping to finance a film laboratory nearby he likely saved Fables Pictures a good deal of money in film processing costs (thereby increasing the net profits of Fables and the amount of his 5% share). Fourth, by having Fables Studio use the laboratory to process the film Terry helped to ensure the business was successful and that his loan would be returned. When Herliman could not immediately provide Terry with repayment, Terry wisely opted to use the amount to invest in the growing laboratory eventually resulting in a

25% stake in the company. The only other notable financial decision that Terry made prior to 1929 was to purchase a moderately sized home in Larchmont, New York. However, the purchase of residential real estate in upscale Westchester County can hardly be seen as a financial “risk.” If Terry is correct in that he never went into debt he would have purchased the home outright using accumulated financial savings thereby avoiding negotiating a mortgage. This is quite conceivable considering the amount of earnings Terry was generating from his production contracts.

Paul Terry did not confine his extreme saving behaviour to business practices. When called upon to attend a black tie affair and having only one pair of moth eaten wool trousers, rather than buy a new pair Terry opted to take some black India ink and paint his leg black so the hole would not be visible. He would often wear his shoes down to where there were holes in the soles.<sup>376</sup>

In summation, prior to Terry’s decision to establish his cartoon studio in the summer of 1929, Terry was able to amass a sizable fortune well in excess of \$1,500,000 in current dollars. This revenue was largely generated based on his earnings as producer under contract with Fables Pictures that guaranteed him a weekly salary and a small percentage of returns from company net profits, as well as his return on his investment in the film lab. Fortunately enough for Terry there does not appear to be any record of him investing in the stock market which crashed in October 1929. By that time to Terry’s own admission he had already established Terrytoons.<sup>377</sup> Terry was able through shrewd money management to develop his small fortune without having to go into debt and without the necessity to engage in financial risk-taking that would have jeopardized his future.

## **E. Economic Practices Operating as Received Norms for Managers**

### **1. Major Psychodynamic Components Underlying Economic Practices**

The author posits that in order to understand the economic practices operating as received norms for managers requires examining the economic behaviour of these managers in relation to their psychodynamics of economic decision making. The psychological processes of behaviour that incorporate the economic conduct of these managers are developed from the past economic events and experiences of these executives. From an analysis of studies in economic psychology on the psychodynamic factors that influence economic behaviour, the author has pinpointed four key components that shape the financial

behaviour of individuals and help determine economic practices that operate as received norms for managers:

- (1) **FINANCIAL LOCUS OF CONTROL:** an individual's perception about the underlying main causes of events in his/her life that determines their financial well-being.
- (2) **FINANCIAL SAVING BEHAVIOUR:** the practice or conduct of setting aside financial assets through time rather than consuming them, expending them or using them up.
- (3) **MONEY MANAGEMENT ABILITY:** the knowledge, skills and talent to manage money, including investments, budgeting, banking, and taxes.
- (4) **FINANCIAL RISK TAKING BEHAVIOUR:** the voluntary participation in behaviours that contain, or are perceived to contain, a significant degree of risk in the matters of finance.

## **2. Financial Transactions: Elements**

The author posits that the four psychodynamic factors are actively engaged in each and every economic decision made by a manager. When referring to an economic decision, the writer is referring to any event or condition that involves an exchange of an item of economic value (e.g., assets) or economic activity (e.g., service) for payment that changes the status of the finances of two or more businesses or individuals. The author also posits that each economic decision possesses a number of components which interact with the four psychodynamic factors which will then determine the economic decision of an individual. These components are:

- (a) **Size of Investment:** the total monetary value of assets involved in the transaction.
- (b) **Risk to Current Net Worth:** the size of the transaction in relation to an individual's accumulated net worth, stated as a percentage. The larger the percentage, the more risk involved in the transaction.
- (c) **Expected Rate of Return (or Return on Investment) (ROI):** the ratio of money gained or lost on a transaction relative to the amount of money invested (stated as a percentage). For example, a \$100 transaction that earns \$5 in interest obviously generates more cash than a \$10 transaction that earns \$2 in interest, but the \$10 transaction earns a higher return on the investment (20% as opposed to 5%).
- (d) **Perception of Risk:** the perceived degree of risk of the transaction by the individual. This factor is agent specific and is difficult to quantify due to the subjective component. The

emphasis is on the “perceived” risk and not on the actual risk even if the perception is irrational and unfounded.

- (e) **Financial Security Brought by the Transaction:** The future financial security brought by the transaction (stated as a monetary figure). For example, an individual signing a 5-year employment contract at \$50,000 a year would have financial security of \$250,000 assuming he or she satisfies the terms of the contract. When referring to the financial security brought by the transaction, the author is referring largely to the emotional security brought by the transaction. There is no secret that money can eliminate negative circumstances from our lives by providing better health care, finer education and safer shelter thereby providing various degrees of emotional security. Therefore, there is a direct relationship between financial and emotional security.

#### **F. Economic Practices Operating as Received Norms for Paul Terry**

The author posits that the four factors can be applied to predict and explain the economic behaviour of individuals involved in any financial transaction. When examining the economic behaviour of Paul Terry for period of 1887-1929, his four psychodynamic components are as follows:

- (1) **EXTERNAL LOCUS OF CONTROL:** Paul Terry possessed an external locus of control. Therefore, he viewed chance, fate or luck as determining the economic fortunes of an individual.
- (2) **EXTREME SAVING BEHAVIOUR THROUGH PRECAUTION:** Paul Terry was an extreme saver but did not acquire wealth for avaricious purposes. Terry engaged in extreme saving behaviour to protect himself against a malevolent and unpredictable world. Therefore Terry’s saving behaviour was precautionary measures against unexpected expenses that may arise due to events he believed were outside his control.
- (3) **SHREWD MONEY MANAGEMENT:** Paul Terry was a shrewd manager of money. He was able through foresight, wisdom and knowledge to make prudent financial decisions that in the long-term increased his financial assets and net worth.
- (4) **RISK-AVERSE FINANCIAL BEHAVIOUR:** Paul Terry was very conservative with regards to money management and never engaged in risk-taking behaviour that

jeopardized his financial future. Paul Terry was cautious with his money because he was financially insecure and viewed the world as unpredictable and uncontrollable.

Following the outlined framework for Terry, the psychodynamic components of his economic profile interact with the five elements of a financial transaction as follows:

- (1) Size of the investment: Since Terry was risk-averse his transaction (or investment) threshold was lower than the average investor. The model predicts that Terry would keep his investment in each cartoon produced by his studio at a minimum through small production budgets.
- (2) Risk to current net worth: The writer posits through the model that the larger the percentage risk to net worth, the less Terry would be inclined to engage in the financial activity. The model predicts that Terry would never take a substantial risk, such as producing an animated motion picture, which might potentially put his film studio in financial jeopardy if the film's box office earnings did not recoup production costs.
- (3) Expected rate of return: The model posits that the larger the rate of return the more likely Terry would be to engage in the financial activity. Further, the model predicts that as compared to a risk neutral individual the rate of return would need to be higher for Terry at the same level of risk to net worth for Terry to engage in the financial transaction.
- (4) Perception of risk: Since Terry possessed an external locus of control and was risk-averse, he would be inclined to perceive a financial transaction to be riskier than an individual with an internal locus of control or one who is risk neutral. The model predicts that Terry would risk less and keep his assets in savings, bonds, term deposits and other risk free forms of savings and investments.
- (5) Financial security brought by the transaction: The writer posits that because Terry was financially insecure, he was continually seeking the comfort of long term financial security. This motive explains his decision to forego immediate financial satisfaction and not hold the theatre owners who did not play all of his animated cartoons to the strict terms of the contract in order to ensure the owners signed another contract. The writer posits that because Terry perceived the financial future as uncertain and uncontrollable he would engage in financial

transactions that would provide emotional security. This motive would explain Terry's decision on June 28, 1928 to renegotiate a contract with Van Beuren to produce Fables cartoons at a 20% cut from his standard weekly rate.

Despite the fact that in 1928 the Aesop's Fables cartoons were immensely popular with critics and the public, Terry chose to settle for less and take the short-term emotional security the contract offered rather than leave the studio. Possibly Van Beuren sensed Terry's insecurity and believed Terry would accept less. The signing of the contract gives the impression of weakness which in itself could have jeopardized his bargaining position in future negotiations. The unfavourable contract terms may have also created a desire within Terry to seek better financial security elsewhere. Within a year after signing the contract, Terry discovered that he was not receiving his fair share of the profits and decided to address the issue with Van Beuren that ultimately resulted in his dismissal. However, by this time his asset base was large enough that he was financially able to go out on his own and found his own studio.

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<sup>1</sup> Rotter, "Generalised Expectancies."

<sup>2</sup> Throop and MacDonald, Jr., "Internal-External Locus of Control." Phares, *Changes in Expectancy*.

<sup>3</sup> James, *Internal vs. External Control*.

<sup>4</sup> Lefcourt, "Internal versus External Control."

<sup>5</sup> Zimbardo, *Psychology and Life*.

<sup>6</sup> Joe, "Review of the Internal-External Control Construct." Hersche and Scheibe, "Reliability and Validity." Harrow and Ferrante, "Locus of Control in Psychiatric Patients."

<sup>7</sup> Joe, 619.

<sup>8</sup> Sundali and Croson, "Biases in Casino Betting."

<sup>9</sup> Sundali and Croson, 9-10.

<sup>10</sup> See Langer, "Illusion of Control."

<sup>11</sup> Stotz and von Nitzsch, "Perception of Control."

<sup>12</sup> Chui, "Disposition Effect."

<sup>13</sup> Terry, interview, 20 December 1969, 7.

<sup>14</sup> For further biographical information on newspaper artist and animator John Terry (born 25 May 1880, San Francisco, CA; died 27/28 February 1934, Coral Gables, Florida) see "Obituaries," (John C. Terry), *Variety*; "John C. Terry Dies," *New York Times*; "Terry, John Coleman," *Who Was Who in American Art*; "Terry, John Coleman," *Artists of the American West*.

<sup>15</sup> Terry, interview, 20 December 1969, 2.

<sup>16</sup> *Ibid.*, 2, 4.

<sup>17</sup> Lewis, Public relations letter, 5.

<sup>18</sup> Terry, interview, 20 December 1969, 5.

<sup>19</sup> Terry, "Twigs Are Bent," 1. Terry, interview, 13 June 1970, 104.

<sup>20</sup> "Lunch with Paul Terry," 19.

<sup>21</sup> Terry, interview, 20 December 1969, 3-4. Lewis, Public relations letter, 5.

<sup>22</sup> Terry, interview, 20 December 1969, 3.

<sup>23</sup> *Ibid.*, 4-5.

<sup>24</sup> Terry, "Twigs Are Bent," 2.

<sup>25</sup> Adler, *Understanding Human Nature*.

<sup>26</sup> See generally Ansbacher and Ansbacher, *Individual Psychology*.

- <sup>27</sup> Terry, interview, 20 December 1969, 2.
- <sup>28</sup> Fraser and Nystul, "Effects of Birth Order," 64. Crandall, Katvosky, and Crandall, "Children's Beliefs." MacDonald, Jr., "Birth Order and Personality." Kumlemark and Berg, "Locus of control, syskonplacering och kön."
- <sup>29</sup> Roodin, Broughton, and Vaught, "Effects of Birth Order."
- <sup>30</sup> MacDonald, Jr., "Internal-External Locus of Control," 146.
- <sup>31</sup> Tolor and Jalowiec, "Body Boundary." Ferguson and Kennelly, "Perception of Authority Figures."
- <sup>32</sup> Chance, "Internal Control of Reinforcements". Davis and Phares, "Parental Antecedents of Internal-External Control." Kavotsky, Crandall, and Good, "Parental Antecedents of Children's Beliefs."
- <sup>33</sup> Terry, "Twigs Are Bent," 3.
- <sup>34</sup> Terry, interview, 20 December 1969, 11.
- <sup>35</sup> Ibid., 9.
- <sup>36</sup> Duke and Lancaster, Jr., "Note on Locus of Control," 335.
- <sup>37</sup> Gilmor, "Locus of Control as a Mediator," 19. Sroufe, "Coherence of Individual Development." Lefcourt, *Locus of Control: Current Trends*, 137.
- <sup>38</sup> Terry, interview, 20 December 1969, 9.
- <sup>39</sup> Ibid., 21.
- <sup>40</sup> Ibid., 9-10.
- <sup>41</sup> Case on Appeal from Judgment, 513-514.
- <sup>42</sup> Terry, interview, 20 December 1969, 5, 8. Terry also mentions that the family's summer place in the early 1900s was in San Mateo. Ibid., 7.
- <sup>43</sup> Terry, interview, 13 June 1970, 91-92.
- <sup>44</sup> Terry later described himself as being a reporter-photographer-cartoonist for the newspaper. He earned \$5-a-week in his position. Taylor, "Making a Monkey Out of Aesop."
- <sup>45</sup> Terry, interview, 20 December 1969, 12.
- <sup>46</sup> Ibid., 9-10.
- <sup>47</sup> Other values have been proposed from 7.7 to as high as 8.3 (United States Geological Survey, *What was the magnitude?*).
- <sup>48</sup> Maloney, *Great Disasters*, 96.
- <sup>49</sup> Terry, interview, 13 June 1970, 94.
- <sup>50</sup> Ibid., 95.
- <sup>51</sup> Ibid., 96.
- <sup>52</sup> "Newspapers' Unique Issue." Terry, interview, 13 June 1970, 96. This account is correct except that the newspaper in question was the *Oakland Tribune* in Alameda. See Older, *San Francisco: Magic City*.
- <sup>53</sup> Factors related to the individual include: age and developmental phase, health, disability, pre-existing stresses, previous traumatic life events, strength of social support system, coping skills, expectations of self and others, status of family members, ethnic and cultural milieu, perception and interpretation of the event. Factors related to the event include: lack of warning, abrupt contrast of scene, type of disaster, nature of the destructive event, degree of uncertainty and duration of threat, time of occurrence, scope of the event, personal loss or injury, traumatic stimuli, human error, lack of opportunity for effective action, properties of the post-disaster environment. Hartsough and Myers, *Disaster Work and Mental Health*. Cohen and Ahearn, *Handbook for Mental Health Care*. Hoff, *People in Crisis*. Myers, "Mental Health and Disaster."
- <sup>54</sup> Crisis events that are unpredictable and uncontrollable such as an earthquake and similar natural disasters as opposed to disasters or tragedies that are man-made or controllable have been suggested to produce more stress and deleterious behavioural consequences. Reim, Glass, and Singer, "Behavioral Consequences." Cohen, "After effects of Stress."
- <sup>55</sup> Terry, interview, 20 December 1969, 15.
- <sup>56</sup> Terry, interview, 13 June 1970, 94.
- <sup>57</sup> Ibid., 94-95. By Terry failing immediately to escape the fire rapidly engulfing the Bay City, Terry may have been demonstrating learned helplessness. External locus of control is a similar concept to the learned helplessness model in that while the former concept refers to an attribution style, the latter concept refers to a psychological state in which after a series of experiences of uncontrollability the individual has learned to expect that future events are uncontrollable. Seligman and Maier, "Failure to Escape Traumatic Shock." Seligman, *Helplessness*.
- <sup>58</sup> Ibid., 94.
- <sup>59</sup> Stern, *Buffalo Creek Disaster*. Church, "Buffalo Creek Disaster." Newman, "Children of Disaster." J.L. Titchener & Kapp, "Family and Character Change."

- <sup>60</sup> High levels of subjective distress and early dissociative and posttraumatic stress symptoms were found even within a group of individuals who were not all maximally affected and whose personal involvement varied. Daphne Simeon et. al., "Peritraumatic Reactions," 1702.
- <sup>61</sup> Tyhurst, "Individual Reactions." Scignor, *Post Traumatic Stress Disorder*. Gleser, Green and Winget listed studies on 15 disasters (4 floods, 2 fires, 3 tornados, 3 cyclones, 1 marine collision, 1 shipwreck, and 1 mine cave-in) and noted widespread psychopathology. The marine collision in Delaware (1957) found 76% receiving help for psychiatric complaints four years later. The mine cave-in in Germany (1963) found 60% experiencing phobias and 90% with a change in personality ten years after the event. The tornado and storm in San Angelo, Texas (1953-1954) caused over 50% of the survivors to have documented emotional problems in their family one year later. The famous fire at Cocoanut Grove in Boston (1942) causing 491 deaths documented anxiety and nervousness in 28% of the patients nine months after the disaster. Gleser, Green and Winget, *Prolonged Psychosocial Effects*, 144-145.
- <sup>62</sup> Moos and Schaefer, "Life Transitions and Crises," 11.
- <sup>63</sup> The 1906 earthquake and fire destroyed 25 square miles of the city, 25,000 homes were in ruins, and 225,000 were left homeless. Prideaux, "City That Died of Shock," 95-98.
- <sup>64</sup> Burger and Palmer, "Generalizations of Unrealistic Optimism," 43. Farragher, "Quake Priorities."
- <sup>65</sup> Cohen, *Aftershock*, 225.
- <sup>66</sup> Burnes, Brown, and Keating, "Dimensions of Control." Powell and Vega, "Correlates of Adult Locus of Control." Hill and Bale's primary hypothesis that internals are more active, alert or directive in attempting to control their environments than are externals was confirmed. See Hill and Bale, "Development of the Mental Health Locus of Control."
- <sup>67</sup> Bar-Tal, Kfir, Bar Zohar, and Chen, "Locus of Control and Academic Achievement." Tolor and Resnikoff, "Relation Between Insight." Klingman, Goldstein, and Lerner, "Adolescents' Response to Nuclear Threat." Thurber, "Natural Disaster."
- <sup>68</sup> It was estimated that over one hundred thousand people left the peninsula on which San Francisco stood. The refugees were carried away by trains to anywhere they wanted to go. Gelman and Jackson, *Disaster Illustrated*, 18.
- <sup>69</sup> Hansen, "Chronology of the Great Earthquake."
- <sup>70</sup> Smith, "Changes in Locus of Control," 330-331.
- <sup>71</sup> Bakke, *Unemployed Man*. Although Bakke's comments were made before the concept of locus of control was formally stated, his writings are clear in their description of how unemployed workers became externally controlled as a result of experience in social structures that determined their tasks, the way in which they performed and the types of rewards obtained. O'Brien, *Psychology of Work and Unemployment*, 243.
- <sup>72</sup> Parnes and King, "Middle-aged Job Losers." Parnes, *Work and Retirement*. O'Brien and Kabanoff, "Comparison of Unemployed and Employed." Searls, Braucht, and Miskimins, "Work Values of the Chronically Unemployed."
- <sup>73</sup> Patton and Noller, "Unemployment and Youth."
- <sup>74</sup> Nowicki, "Reported Stressful Events."
- <sup>75</sup> Terry, interview, 13 June 1970, 96-98.
- <sup>76</sup> *Ibid.*, 98.
- <sup>77</sup> *Ibid.*
- <sup>78</sup> *Ibid.*
- <sup>79</sup> Terry, interview, 20 December 1969, 13.
- <sup>80</sup> Terry, interview, 14 July 1970, 133.
- <sup>81</sup> Terry, interview, 20 December 1969, 13.
- <sup>82</sup> Terry was living with Ripley at the time and it was Ripley who told him about the dinner. Terry, interview, 14 July 1970, 133.
- <sup>83</sup> For a book length biography on Winsor McCay [Full name: Zenas Winsor McKay] (born 1867, East or West Zorra, Ontario, Canada (he later claimed to be born in 1869/1871, Spring Lake, Michigan); died 26 July 1934, Brooklyn, New York), see Canemaker, *Winsor McCay: His Life and Art*.
- <sup>84</sup> Terry, interview, 20 December 1969, 17. Becker, 99.
- <sup>85</sup> Case on Appeal from Judgment, 513-514.
- <sup>86</sup> Terry, interview, 20 December 1969, 19. Taylor, "Making a Monkey Out of Aesop," 5. Little Herman is no longer extant but has generally been estimated at 5 minutes in length. However, at 90 feet per minute the file would only be about 3 minutes and 20 seconds in length. Brown, "Film Comic Drawn Here."
- <sup>87</sup> Terry, interview, 20 December 1969, 86.
- <sup>88</sup> *Ibid.*

- <sup>89</sup> However, it is likely that Terry was wrong about Selznick kidding as the motion picture head was very candid and forthright with his statements. Frankness was one of Mr. Selznick's characteristics. "L.J. Selznick Dies," *The New York Times*.
- <sup>90</sup> Gorman, "Altered Locus of Control."
- <sup>91</sup> Slide, "The Thanhouser Company," 69-78.
- <sup>92</sup> Terry, interview, 20 December 1969, 21-23.
- <sup>93</sup> For a complete listing of Terry's silent cartoon products please refer to: Gifford, *American Animated Films*.
- <sup>94</sup> Terry, interview, 13 June 1970, 113. Fisher had Raoul Barré in mind to complete the work. Kanfer, 41. For biographical information on cartoonist and animated cartoon producer Bud Fisher (born 3 April 1884, Chicago, Illinois; died 7 September 1954, New York, NY) see "Fisher, Bud (Harry Conway)," *National Encyclopedia of American Biography*; "Harry C. (Bud) Fisher, Creator of 'Mutt and Jeff,' is dead at 69," *New York Times*.
- <sup>95</sup> Terry, interview, 13 June 1970, 115.
- <sup>96</sup> Crafton, 148. According to Kanfer, Terry had submitted his résumé to Hearst. Kanfer, 41.
- <sup>97</sup> For biographical information on John Randolph Bray (born 25 August 1879, Addison, Michigan; died 10 October 1978, Bridgeport, Connecticut), a newspaper cartoonist and early independent producer of animated cartoons, see "Bray, John Randolph," *Who's Who in America*; Eder, "Grandfather of the Film Honored at 96"; "Bray, John R.," *International Motion Picture Almanac*.
- <sup>98</sup> Crafton, 149.
- <sup>99</sup> Terry, interview, 20 December 1969, 19. Terry, interview, 14 July 1970, 131. Terry's statements that he first invented the traditional animation celluloid process contradict evidence (e.g., patent documentation, oral histories) that supports the claim that Earl Hurd as being the creator of the celluloid system.
- <sup>100</sup> Thomas Ewing (Commissioner of Patents, United States Patent Office, Department of the Interior), Correspondence to the law firm of Penne, Davis and Marvin, Washington, D.C., 7 November 1916; William H. Davis, Correspondence to Paul H. Terry, New York, N.Y., 5 February 1917.
- <sup>101</sup> Thomas Ewing (Commissioner of Patents, United States Patent Office, Department of the Interior), Correspondence to the law firm of Penne, Davis and Marvin, Washington, D.C., 4 January 1917.
- <sup>102</sup> Terry, interview, 14 July 1970, 121-122.
- <sup>103</sup> *Ibid.*, 135.
- <sup>104</sup> *Farmer Al Falfa and His Wayward Pup* (July 21).
- <sup>105</sup> *The Bone of Contention* (March 14).
- <sup>106</sup> Terry, interview, 14 July 1970, 134.
- <sup>107</sup> *20,000 Feats Under the Sea* (April 23); *Golden Spoon Mary* (April 30); *Some Barrier* (July); *His Trial* (July).
- <sup>108</sup> Terry, interview, 20 December 1969, 23.
- <sup>109</sup> For a history of phrenology see Davies, *Phrenology: Fad and Science*.
- <sup>110</sup> Terry, interview, 20 December 1969, 23.
- <sup>111</sup> Davies, 6.
- <sup>112</sup> While the phrenologist viewed personality being largely determined at birth, the phrenologist also saw the human mind as being directly affected by physical exercise and diet and these areas became legitimate subjects of study and analysis offering hope for improvement in character and the development of virtues and the inhibition and atrophying of vices. Davies, 5.
- <sup>113</sup> Registration Card (Paul Houlton Terry), 31-9-154-A.
- <sup>114</sup> Terry, interview, 20 December 1969, 29.
- <sup>115</sup> *Ibid.*, 30.
- <sup>116</sup> *Ibid.*, 28.
- <sup>117</sup> Kayser, "Bricks Without Straw."
- <sup>118</sup> Terry, interview, 20 December 1969, 37. Terry, interview, 14 July 1970, 136.
- <sup>119</sup> Terry, interview, 20 December 1969, 28. Terry, interview, 14 July 1970, 136.
- <sup>120</sup> Honourable Discharge from the Army of the United States signed by Thomas L.W. Evans, Major Sanitary Corps, Washington, D.C., 17 September 1918; Army of the United States of America certificate of discharge to Paul Houlton Terry signed by Colonel, Medical Corps, U.S. Army for the Surgeon General, 17 January 1919, Paul Terry Papers.
- <sup>121</sup> Roos, "Study says non-drug measures helped."
- <sup>122</sup> Patterson and Pyle, "Geography and Mortality." Taubenberger and Morens, "1918 Influenza." Collier, *Plague of the Spanish Lady*. Potter, "History of Influenza."
- <sup>123</sup> Melder, *City of Magnificent Intentions*, 343.
- <sup>124</sup> Bureau of Census, "Deaths from Influenza and Pneumonia," 28-29.

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<sup>125</sup> Terry, interview, 13 June 1970, 100.

<sup>126</sup> *Ibid.*

<sup>127</sup> Hsiao, "Great Influenza Epidemic," 79.

<sup>128</sup> The Health Locus of Control (HLC) measure was first developed by Wallston, Wallston, Kaplan and Maides in 1976 and assesses the degree to which individuals believe that their health is controlled by internal or external factors. Internal beliefs center on one's health condition as being the direct result of one's own actions. External beliefs are premised on the idea that one's health outcome is under the control of significant others (i.e. medical professionals) or is determined by fate, God, luck, or chance. Wallston, Wallston and DeVellis, "Development of Multidimensional." Lau, "Origins of Health Locus." The HLC has been tested to have good discriminant validity. Wallston, Wallston, Kaplan and Maides, "Development and Validation."

<sup>129</sup> Tolor, "Antecedents and Personality Correlates."

<sup>130</sup> Wallston and Wallston found that common, fairly minor ailments and illnesses do not affect HLC beliefs. Wallston and Wallston, "Health Locus of Control Scales." However, the 1918 Spanish influenza was far from minor and had a devastating effect on the health of the human populace that Terry recollected over 50 years later with grim terms.

<sup>131</sup> Dabbs and Kirscht, "'Internal control'."

<sup>132</sup> Terry, interview, 14 July 1970, 128, 136. Terry earlier stated that the studio was on Seventh Avenue (Case on Appeal from Judgment, 515). Apparently this studio was a one person operation. There is no indication Terry made any financial investments to start the studio. Likely he set up the studio employing the camera equipment he used to produce the two shorts for Thanouser.

<sup>133</sup> For biographical information on inventor and animator Earl Hurd (born 14 February 1880, Atchison City, Kansas; died 28 September 1940, Burbank, California) see Horn, "Hurd, Earl"; "Earl Hurd," *Variety*.

<sup>134</sup> Terry, interview, 20 December 1969, 52.

<sup>135</sup> Terry, interview, 14 July 1970, 128.

<sup>136</sup> *Ibid.*, 144.

<sup>137</sup> Terry, interview, 20 December 1969, 40.

<sup>138</sup> "Memorandum of Agreement between Paul H. Terry and Howard Estabrook," 9 August 1920, notarized by King County Clerk's No. 62, 27 August, 1920, Paul Terry Papers.

<sup>139</sup> "Memorandum of Agreement," 9 August 1920, 2.

<sup>140</sup> *Ibid.*, 4.

<sup>141</sup> "Amendment to Contract of 9 August 1920 between Paul H. Terry and Howard Estabrook," unsigned, December 1920, Paul Terry Papers.

<sup>142</sup> The contractual amendments are all on file in the Paul Terry Papers collection.

<sup>143</sup> Terry, interview, 20 December 1969, 40.

<sup>144</sup> For further biographical information on producer Amedee Van Beuren (born 10 July 1880, New York City; died 12 November 1938, New York City) see Klein, "Cartooning Down Broadway"; "A.J. Van Beuren, 58, Film Official, Dies," *New York Times*.

<sup>145</sup> "Memorandum of Agreement between Fables Pictures, Inc. and Paul H. Terry," 23 June 1921, Paul Terry Papers.

<sup>146</sup> For the complete list of approximately 460 shorts produced and/or directed by Paul Terry refer to: Gifford, *American Animated Films*.

<sup>147</sup> "Aesop's Fables (Pathé)," 9 July 1921. Tinée, "Potpourri of Fable." "The Lioness and the Bugs" and "Cats at Law", 23 July 1921. "'Aesop's Fables" – Fables Pictures, Pathe," 26 June 1921.

<sup>148</sup> Barrier, *Hollywood Cartoons*, 35.

<sup>149</sup> Terry, interview, 20 December 1969, 48-49.

<sup>150</sup> For biographical information on Vladimir Tytla (born 25 October 1904, Yonkers, New York; died 29 December 1968, East Lyme, Connecticut) described as the "Michelangelo of animators" by Chuck Jones and "the greatest animator of all time", see "Vladimir Tytla, Cartoonist, Dies," *New York Times*; Canemaker, "Vladimir Tytla: Master Animator."

<sup>151</sup> For biographical information on sculptor and animator Jesse Anderson (born on May 1, 1873 [1875], Bear Lake, Manistee County, Michigan; died [January 14] 1966, San Jose [Palo Alto], Santa Clara, California) see Falk, *Who Was Who in American Art*; Hughes, *Artists in California*.

<sup>152</sup> For biographical information on cartoonist, illustrator, ceramic designer, and writer Ferdinand Horvath (born 28 August 1891, Budapest, Hungary; died 11 November 1973, Riverside County, California), see Dawdy, "Horvath, Ferdinand Huszti"; Miller and Whitney, "Horvath, Ferdinand Huszti"; Mahony, Latimer, and Folmsbee, "Horvath, Ferdinand Huszti"; Gilbert, "Horvath, Ferdinand Huszti."

<sup>153</sup> Disney, "Growing Pains."

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- <sup>154</sup> Terry, interview, 20 December 1969, 52.
- <sup>155c</sup> “Memorandum of Agreement between Paul H. Terry and Fables Pictures, Inc.,” 11 July 1924, Paul Terry Papers.
- <sup>156</sup> Terry, interview, 20 December 1969, 40.
- <sup>157</sup> “Memorandum of Agreement between Paul H. Terry and Fables Pictures, Inc.,” 28 June 1928, Paul Terry Papers.
- <sup>158</sup> Davis, interview, 9e. Davis was likely referring to the contractual clause where Terry was guaranteed a percentage of the net profit of the earnings. It appears RKO had made some adjustments to their accounting methods to deny Terry financial gain he had been receiving earlier.
- <sup>159</sup> Amedee J. Van Beuren (Fables Pictures, Inc.), Correspondence to Paul Terry, 25 May 1929. Terry was given one week’s salary in lieu of notice after nine years with Fables.
- <sup>160</sup> Paul H. Terry, Release of Fables Pictures, Inc. and The Van Beuren Corporation for all legal claims (General Release – 158), 13 June 1929, Paul Terry Papers.
- <sup>161</sup> John B. Nash, Correspondence from the law firm of Breed, Abbott & Morgan to Mr. Paul Terry, 13 September 1929, Paul Terry Papers.
- <sup>162</sup> Terry, interview, 20 December 1969, 1.
- <sup>163</sup> Terry, interview, 13 June 1970, 99.
- <sup>164</sup> See also “Hirliman, George A.,” *The International Motion Picture Almanac, 1944-45*, 187.
- <sup>165</sup> Terry, interview, 13 June 1970, 101.
- <sup>166</sup> See Hirligraph Motion Picture Corporation, “Hirligraph Motion Picture Corporation: First Mortgage 7% Gold Bonus,” New York, New York, Paul Terry Papers.
- <sup>167</sup> Terry, interview, 13 June 1970, 102.
- <sup>168</sup> Charles Hirliman and George A. Hirliman, Promissory Note to Paul Terry, Fort Lee, New Jersey, 15 April 1922, Paul Terry Papers.
- <sup>169</sup> Share Transfer Agreement, Signatories: Charles Hirliman, Paul H. Terry, George A. Hirliman, Charles de Moos, January 1923, Paul Terry Papers.
- <sup>170</sup> Hirligraph Motion Picture Corporation, “Hirligraph Motion Picture Corporation: First Mortgage 7% Gold Bonus,” 1.
- <sup>171</sup> Terry, interview, 13 June 1970, 102. See generally Slide, “Consolidated Film Industries,” 78.
- <sup>172</sup> Terry, interview, 20 December 1969, 23-24.
- <sup>173</sup> Terry, interview, 14 July 1970, 123.
- <sup>174</sup> Terry, interview, 14 July 1970, 123.
- <sup>175</sup> *Ibid.*, 124-125.
- <sup>176</sup> Denig, “Cartoonist Bray with Paramount,” *Moving Picture World*, 11 December 1915. Cited in: Crafton, 156.
- <sup>177</sup> Terry, interview, 14 July 1970, 132. “Agreement,” Signatories: John R. Bray (for the Bray-Hurd Process Company, Inc.) and Paul H. Terry, 29 July, 1926, 2, Paul Terry Papers.
- <sup>178</sup> van Raaij, “Economic Psychology,” 2.
- <sup>179</sup> *Ibid.*
- <sup>180</sup> The Life-Cycle Hypothesis posits that individuals want a constant standard of living in which lifetime utility from consumption is maximized. The model implies two phases in the pattern of saving: (1) the pre-retirement phase where the individual accumulates wealth (saves) and (2) the post-retirement phase where one dissaves until one has no financial resources at time of death. Thaler, “Saving, Fungibility and Mental Accounts.”
- <sup>181</sup> Shefrin and Thaler, “Behavioural Life Cycle Hypothesis.”
- <sup>182</sup> The Permanent Income Hypothesis, developed by economist Milton Friedman, states that consumer choices regarding their consumption patterns are not determined by current income but rather by a consumer’s longer-term income expectations. Friedman, *Theory of the Consumption Function*.
- <sup>183</sup> See generally Douglas and Isherwood, *World of Goods*. Reinsdorf, “Alternative Measures of Personal Saving,” 7.
- <sup>184</sup> Reinsdorf, 12.
- <sup>185</sup> Katona, *Psychological Economics*, 230-231.
- <sup>186</sup> See generally Katona, *Psychological Economics*.
- <sup>187</sup> Barlow, Brazer, and Morgan. *Economic Behavior of the Affluent*. Thaler, “Toward a Positive Theory.”
- <sup>188</sup> Katona, *Psychological Economics*, 233-234.
- <sup>189</sup> Furnham and Argyle, *Psychology of Money*, 107. Keynes, *General Theory of Employment*.
- <sup>190</sup> Potter, “Empirical Study of Motivations.”
- <sup>191</sup> Boyle, “Terry Makes 40 Million Laugh.” This source was retrieved from the New Rochelle Public Library’s clipping files on Terry. No exact date or page number was provided.

- <sup>192</sup> Lewis, Public relations letter, 3.
- <sup>193</sup> Terry, interview, 13 June 1970, 104-105.
- <sup>194</sup> *Ibid.*, 116.
- <sup>195</sup> Terry, interview, 14 July 1970, 148.
- <sup>196</sup> Klebanow and Lowenkopf, *Money and Mind*, 24-25.
- <sup>197</sup> Goldberg and Lewis, *Money Madness*. See also Furnham and Argyle, 138.
- <sup>198</sup> Forman, *Mind Over Money*.
- <sup>199</sup> Merriam-Webster Online, *Merriam-Webster's Online Dictionary*, s.v. "shrewd," <http://www.m-w.com/dictionary/shrewd> (Accessed: 10 December 2007).
- <sup>200</sup> Merriam-Webster Online, *Merriam-Webster's Online Dictionary*, s.v. "thrifty," <http://www.m-w.com/dictionary/thrifty> (Accessed: 10 December 2007).
- <sup>201</sup> Podpress, "thrifty - podictionary 628," *Podictionary, the podcast for word lovers*, 25 October 2007, <http://podictionary.com/?p=652> (Accessed: 10 December 2007).
- <sup>202</sup> Merriam-Webster Online, *Merriam-Webster's Online Dictionary*, s.v. "frugal," <http://www.m-w.com/dictionary/frugal> (Accessed: 10 December 2007).
- <sup>203</sup> *The Oxford English Dictionary*, 2<sup>nd</sup> ed., vol. VI, prepared by J.A. Simpson and E.S.C. Weiner, s.v. "frugality" (Oxford: Clarendon Press, 1989), 228.
- <sup>204</sup> Nash, "On the Subversive Virtue," 421.
- <sup>205</sup> Shoham and Brencic, "Value, Price Consciousness, and Consumption Frugality."
- <sup>206</sup> Nash, 424-425.
- <sup>207</sup> *Ibid.*, 420-421.
- <sup>208</sup> Lastovicka et. al., "Lifestyle of the Tight," 88.
- <sup>209</sup> Merriam-Webster Online, *Merriam-Webster's Online Dictionary*, s.v. "cheapskate," <http://www.m-w.com/dictionary/cheapskate> (Accessed: 10 December 2007).
- <sup>210</sup> Michael Quinion, "Cheapskate," *Michael Quinion Writes on International English from a British Viewpoint*, 13 October 2007, <http://www.worldwidewords.org/weirdwords/ww-che2.htm>, (Accessed: 10 December 2007).
- <sup>211</sup> Merriam-Webster Online, *Merriam-Webster's Online Dictionary*, s.v. "tightwad," <http://www.m-w.com/dictionary/tightwad> (Accessed: 10 December 2007).
- <sup>212</sup> Douglas Harper, "Tightwad," *Online Etymology Dictionary*, November 2001, <http://www.etymonline.com/index.php?search=tightwad> (Accessed: 11 December 2007).
- <sup>213</sup> Houghton Mifflin Company, "Parsimony," *The American Heritage® Dictionary of the English Language*, Fourth Edition, 2000, <http://education.yahoo.com/reference/dictionary/entry/parsimony> (Accessed: 11 December 2007). Merriam-Webster Online, *Merriam-Webster's Online Dictionary*, s.v. "parsimonious," <http://www.m-w.com/dictionary/parsimonious> (Accessed: 31 December 2007).
- <sup>214</sup> Merriam-Webster Online, *Merriam-Webster's Online Dictionary*, s.v. "stingy," <http://www.m-w.com/dictionary/stingy> (Accessed: 31 December 2007).
- <sup>215</sup> Oxford University Press, *Compact Oxford English Dictionary of Current English Usage*, "Miser," [http://www.askoxford.com/concise\\_oed/miser?view=uk](http://www.askoxford.com/concise_oed/miser?view=uk) (Accessed: 8 December 2007).
- <sup>216</sup> Douglas Harper, "Miser," *Online Etymology Dictionary*, November 2001, <http://www.etymonline.com/index.php?search=miser> (Accessed: 11 December 2007).
- <sup>217</sup> Merriam-Webster Online, *Merriam-Webster's Online Dictionary*, s.v. "stingy," <http://www.m-w.com/dictionary/stingy> (Accessed: 31 December 2007).
- <sup>218</sup> Bergler lists eight neurotic signs. Bergler, *Money and Emotional Conflicts*, 131.
- <sup>219</sup> ASIFA-Hollywood, *Animation News from 2nd June 2002*.
- <sup>220</sup> "Trivia for String Bean Jack (1938)," *Internet Movie Database*.
- <sup>221</sup> Kellogg, "Animated Discussion."
- <sup>222</sup> Markstein, "Tom and Jerry."
- <sup>223</sup> Lea, Webley, and Walker, "Psychological Factors in Consumer Debt," 696.
- <sup>224</sup> Livingstone and Lunt, "Predicting Personal Debt." Lunt and Livingstone, "Everyday Explanations."
- <sup>225</sup> Terry, interview, 14 July 1970, 148.
- <sup>226</sup> Tokunaga, "Use and Abuse of Consumer Credit."
- <sup>227</sup> Terry, interview, 20 December 1969, 84.
- <sup>228</sup> Becker, 100.
- <sup>229</sup> Bushell, interview, 3.
- <sup>230</sup> Marchionni, "Paul Terry, At 82," 25. Terry did employ a chauffeur and gardener later in his life. Terry and Lazar, interview, 11 August 1999, 9.
- <sup>231</sup> Duesenberry, *Income, Saving and the Theory of Consumer Behaviour*.
- <sup>232</sup> Hyman, "Psychology of Status."
- <sup>233</sup> Bornemann, *Psychoanalysis of Money*, 4.

- <sup>234</sup> Ibid., 3.
- <sup>235</sup> Ibid., 5.
- <sup>236</sup> For a background on the criticisms of Freud as well as a strong critique on one of Freud's most celebrated cases, the "Case of Little Hans," the first published account of a child analysis, see Wolpe and Rachman, "Psychoanalytic 'Evidence.'"
- <sup>237</sup> Some research support for the psychoanalytic perspective on money management has surfaced. Correlation between orderliness and sparse tipping: Davidson, "Measurement of Anal Character." Correlation between authoritarianism and frugality: Ray, "Shortened Balanced F Scale."
- <sup>238</sup> Dhammapitaka, *Economics According to Buddhism*, 63. The Bhagavad-Gita is quoted in: Belk, "Worldly Possessions," 514. Castillejos, "Wealth and Christianity." 1 Timothy 6:10, *New Revised Standard Version*.
- <sup>239</sup> Nash, "On the Subversive Virtue," 417.
- <sup>240</sup> Terry, interview, 13 June 1970, 89.
- <sup>241</sup> See generally Marx, *Capital: A Critique of Political Economy, Vol. I*.
- <sup>242</sup> See generally Marx, *Capital: A Critique of Political Economy, Vol. III*.
- <sup>243</sup> For a general overview of research on the effects of genes on behaviour refer to: Johnson and Edwards, "Genes, Interactions."; Bateson, "Genes, Environment."
- <sup>244</sup> Warneryd, "On the Psychology of Saving." Lunt and Livingstone, "Psychological, Social and Economic Determinants." Yamauchi and Templar, "Development of a Money Attitude Scale."
- <sup>245</sup> Furnham and Argyle, 137. Bergler, 129-139.
- <sup>246</sup> Furnham and Okamura, "Your Money or Your Life."
- <sup>247</sup> Rubinstein, "Money and Self-Esteem," 43.
- <sup>248</sup> Katona, *Powerful Consumer*. Lindqvist, "Note on Determinants."
- <sup>249</sup> Katona, *Psychological Economics*. Vanden Abeele, "Economic Agents' Expectations."
- <sup>250</sup> Furnham and Okamura, 1174. McClure, "Relationship Between Money Attitudes," 6.
- <sup>251</sup> Goldberg and Lewis, 75.
- <sup>252</sup> Bergler, 131.
- <sup>253</sup> McClure, 5.
- <sup>254</sup> Lunt and Livingstone, "Psychological, Social and Economic Determinants."
- <sup>255</sup> Bastounis, Leiser, and Roland-Levy, "Psychosocial Variables," 273.
- <sup>256</sup> Levenson, "Differentiating Among Internality."
- <sup>257</sup> Sakalaki, Richardson, and Bastounis, "Association of Economic Internality," 438.
- <sup>258</sup> Ibid., 439-440.
- <sup>259</sup> Gellerman, *Motivation and Personality*.
- <sup>260</sup> Gasparski, "Psychological Determinants of Financial Decisions."
- <sup>261</sup> Rowe, *Real Meaning of Money*.
- <sup>262</sup> Coddington, "Significance of Life Events."
- <sup>263</sup> See generally Cox and Cooper, *High Flyers*.
- <sup>264</sup> Furnham and Argyle, 137.
- <sup>265</sup> Isen, Horn, and Rosenhan, "Effects of Success and Failure," 241-242.
- <sup>266</sup> Isen, "Success, Failure, Attention, and Reaction." However, failure did not increase stingy behaviour. Rather, failure children also contributed more than controls. Researchers determined that this generosity was the result of image reparation. Isen, Horn, and Rosenhan, 246-247.
- <sup>267</sup> Bierhoff, "Affect, Cognition and Prosocial Behavior," Carlson, and Miller, "Negative Mood and Helping."
- <sup>268</sup> Emler and Rushton, "Cognitive-Developmental Factors in Children's Generosity."
- <sup>269</sup> Isen, "Positive Affect, Cognitive Processes."
- <sup>270</sup> Terwogt, "Emotional States in Self and Others."
- <sup>271</sup> McCord, *Psychopath and Milieu Therapy*, 49-52.
- <sup>272</sup> Brenner, *Mental Illness and the Economy*. Marshall and Funch, "Mental Illness and the Economy." Catalano and D. Dooley, "Does Economic Change Provoke?"
- <sup>273</sup> Theorell, Lind, and Floderus, "Relationship of Disturbing Life-Changes."
- <sup>274</sup> Lim and Teo, "Sex, Money and Financial Hardship," 383.
- <sup>275</sup> Theorell, Lind, and Floderus, *ibid.* Banks and Jackson, "Unemployment and Risk."
- <sup>276</sup> Swinburne, "Psychological Impact of Unemployment," 49. Jacobson, "Personological Study," 148-150.
- <sup>277</sup> Dooley and Catalano, "Economic Change as a Cause."
- <sup>278</sup> Cohn, "Effect of Employment Status," 90.
- <sup>279</sup> Andreason, "Life Status Changes," 789-791. Walker, "Insecurity and Housing Consumption," 211-226.

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- <sup>280</sup> Julander, *Sparande och effecter*. Olander and Seipel, *Psychological Approaches*.
- <sup>281</sup> Matthews, *Think About Money*.
- <sup>282</sup> Furnham and Argyle, 142.
- <sup>283</sup> Bernheim, Garrett and Maki "Education and Saving."
- <sup>284</sup> Bandura and Mischel, "Modification of Self-Imposed Delay."
- <sup>285</sup> Julander, *Sparande och effecter*. Lea, Webley, and Walker, "Psychological Factors in Consumer Debt." Webley and Nyhus, "Life-Cycle and Dispositional Routes."
- <sup>286</sup> Webley and Nyhus, "Parents' Influence on Children's Future," 158-159.
- <sup>287</sup> Hartup and Coates, "Imitation of a Peer." Harris, "Reciprocity and Generosity." Presbie and Coiteux, "Learning To Be Generous."
- <sup>288</sup> Furnham, "Attitudinal Correlates and Demographic Predictors," 386. See also: Furnham and Argyle, *Psychology of Money*. Furnham, "Why Do People Save?"
- <sup>289</sup> Lindqvist, "Note on Determinants."
- <sup>290</sup> McClure, 4-6.
- <sup>291</sup> Furnham, "Determinants and Structure."
- <sup>292</sup> Furnham and Okamura, 1173-1175.
- <sup>293</sup> Wernimont and Fitzpatrick, "Development of the Money Attitude Scale."
- <sup>294</sup> Furnham, "Many Sides of the Coin."
- <sup>295</sup> Yamauchi and Templer, "Development of a Money Attitude Scale."
- <sup>296</sup> Ibid.
- <sup>297</sup> Furnham and Thomas, "Pocket Money."
- <sup>298</sup> Bailey and Lown, "Cross-Cultural Examination," 398.
- <sup>299</sup> Tang, "Meaning of Money." Tang, "Meaning of Money Revisited." Tang, Furnham, and Davis, "Cross-Cultural Comparison of the Money Ethic."
- <sup>300</sup> Tang and Gilbert, "Attitudes Towards Money."
- <sup>301</sup> Tang, "Development of a Short Money."
- <sup>302</sup> Rubinstein, "Money and Self-Esteem," 38-39. See generally Gresham and Fontenot, "Different Attitudes."; Wernimont and Fitzpatrick, "Development of the Money Attitude Scale."
- <sup>303</sup> G. Ainslie, "Specious Reward." Strotz, "Myopia and Inconsistency." Wärneryd, *Psychology of Saving*. Wood, "Socio-economic Status."
- <sup>304</sup> Angeletos, Laibson, Repetto, Tobacman, and Weinberg, "Hyperbolic Buffer Stock Model."
- <sup>305</sup> The researchers list five ways of "just not trying" to consume: (1) remaining satisfied with current solutions; (2) engaging in habitual behaviour; (3) inertia or procrastination; (4) impediments; (5) being self-reliant. Gould, Houston, and Mundt, "Failing to Try to Consume," 211-213.
- <sup>306</sup> The researchers list four ways of "trying not to try" and consume: (1) asceticism and self-sacrifice; (2) deferred gratification; (3) self-expression; and (4) altruism. Ibid., 213-214.
- <sup>307</sup> The researchers list three ways to reduce consumer desire: (1) avoidance; (2) postponement and distraction; and (3) substitution. Hoch and Loewenstein, "Time-inconsistent Preferences," 499-500.
- <sup>308</sup> The researchers list six ways consumers overcome their impatience: (1) pre-commitment; (2) economic cost assessment; (3) time binding; (4) bundling of costs; (5) higher authority; and (6) regret and guilt. Ibid., 500-503.
- <sup>309</sup> Rha, Montalto, and Hanna, "Effect of Self-Control Mechanisms."
- <sup>310</sup> Eisenberger and Masterson, "Effects of Prior Learning." Eisenberger, Masterson, and Lowman, "Effects of Previous Delay." Logue, Rodriguez, Pena-Correal, and Mauro, "Choice in a Self-Control Paradigm." Mazur and Logue, "Choice in a Self-Control Paradigm."
- <sup>311</sup> Eisenberger, Mitchell, and Masterson, "Effort Training." Eisenberger, Carlson, Guile, and Shapiro, "Transfer of Effort Across Behaviors." Eisenberger, Heerdt, Hamdi, Zimet, and Bruckmeir, "Transfer of Persistence Across Behaviors." Eisenberger and Masterson, "Required High Effort." Mischel and Grusec, "Waiting for Rewards and Punishments."
- <sup>312</sup> Eisenberger and Adornetto, "Generalized Self-Control."
- <sup>313</sup> See Kaplan, "Psychological Distress in Sociological Context." Lazarus and Folkman, *Stress, Appraisal, and Coping*. Pearlin and Schooler, "The Structure of Coping."
- <sup>314</sup> Cannon, *Wisdom of the Body*.
- <sup>315</sup> Selye, *Physiology and Pathology of Exposure to Stress*. Selye, *Annual Report of Stress*.
- <sup>316</sup> Fleishman, "Personality Characteristics and Coping Patterns."
- <sup>317</sup> Hobfoll, "Conservation of Resources," 513.
- <sup>318</sup> Ibid., 516-517.
- <sup>319</sup> Ibid., 518-520.
- <sup>320</sup> Meichenbaum, *Cognitive-behavior Modification*.
- <sup>321</sup> Rosenbaum, "Learned Resourcefulness as a Behavioral Repertoire."

- <sup>322</sup> Rosenbaum, "A Schedule For Assessing."
- <sup>323</sup> Rosenbaum and Rolnick, "Self-Control Behaviors."
- <sup>324</sup> Smith, *Cognitive Correlatives*.
- <sup>325</sup> Frankel and Merbaum, "Effects of Therapist Contact."
- <sup>326</sup> Rosenbaum and Ben-Ari. "Learned Helplessness and Learned Resourcefulness." Gintner, West, and Zarski, "Learned Resourcefulness."
- <sup>327</sup> Kanfer, "Self-management Methods." Meichenbaum, *Cognitive-behavior Modification*.
- <sup>328</sup> Bandura, *Social Learning Theory*. Lazarus and Folkman, *Stress, Appraisal and Coping*. Suls and Fletcher, "Relative Efficacy of Avoidant." Vaillant, *Adaptation to Life*.
- <sup>329</sup> Scott, "My Final Rope-Swing Qual," 6.
- <sup>330</sup> See Scott, *Wall Street Words*.
- <sup>331</sup> "Risk Aversion," *BusinessDictionary.Com. Over 20,000 Definitions. Clear. Concise. Comprehensive.* <http://www.businessdictionary.com/definition/risk-aversion.html> (Accessed: 5 January 2008).
- <sup>332</sup> Most of these studies find evidence that women have a greater risk aversion than men. For example, Hersch provides empirical evidence that women make safer choices than men in a number of risky consumer decisions such as smoking, seat belt usage, preventative dental care and having regular blood pressure examinations. Hersch, "Risky Consumer Decisions."
- <sup>333</sup> Jianakoplos and Bernasek, "Are Women More Risk Averse?" Palsson, "Relative Risk Aversion." Riley and Chow, "Asset Allocation."
- <sup>334</sup> Bernasek and Bajtelsmit, "Gender and Perception of Risk."
- <sup>335</sup> Morin and Suarez, "Risk Aversion Revisited." Palsson, "Relative Risk Aversion," 771-787.
- <sup>336</sup> Bakshi and Chen, "Baby Boom, Population Aging."
- <sup>337</sup> Baker and Haslem, "Investor Socioeconomic Characteristics." Lease, Lewellen, and Schlarbaum, "Market Segmentation." Lewellen, Lease, and Schlarbaum, "Patterns of Investment Strategy."
- <sup>338</sup> Riley and Chow, "Asset Allocation," 32-37.
- <sup>339</sup> Brown, "Age Clienteles."
- <sup>340</sup> Jianakoplos and Bernasek, "Are Women More Risk Averse?"
- <sup>341</sup> Hersch, "Compensating Differentials."
- <sup>342</sup> Compare: (1) Jianakoplos and Bernasek, "Are Women More Risk Averse?" to (2) Jianakoplos and Bernasek, "Female Risk Aversion."
- <sup>343</sup> Zinkhan and Karande, "Cultural and Gender Differences."
- <sup>344</sup> Riley and Chow, "Asset Allocation," 32-37.
- <sup>345</sup> Riley and Chow, 32-37. Hersch, "Compensating Differentials."
- <sup>346</sup> Bayer, Bernheim, and Scholz, "Effects of Financial Education."
- <sup>347</sup> Kogan and Wallach, *Risk Taking*. Slovic, "Assessment of Risk-Taking Behavior," Crowne and Liverant, "Conformity Under Varying Conditions."
- <sup>348</sup> For the few inconsistent results see: (1) Liverant and Scodel, "Internal and external control as determinants." (Internally controlled subjects were more conservative than externally controlled subjects but methodological issues present); (2) Lefcourt and Steffy, "Level of Aspiration." Minton and Miller, "Group Risk Taking." (Failed to confirm a relationship between risk-taking and I-E scale); and (3) Krauss and Blanchard, "Locus of Control in Ethical Risk-Taking." (Internals showing greater risk-taking than externals not confirmed).
- <sup>349</sup> Baron, "Authoritarianism."
- <sup>350</sup> McInish, "A Game Simulation." Maital, Filer, and Simon, "What Do People Bring." However, it should be noted that there has not been complete uniformity in results. For example, in a 1982 study McInish found that externals chose more risky portfolios. See McInish, "Individual Investors and Risk-Taking."
- <sup>351</sup> Investors that possess a strong "perception of control" (i.e., internal controls) are shown to exhibit more overconfidence (hence risky behaviour). See Stotz and Nitzsch, 126.
- <sup>352</sup> Cohen, *Chance, Skill, and Luck*.
- <sup>353</sup> See Slovic, *ibid*.
- <sup>354</sup> Strickland, Lewicki and Katz, "Temporal Orientations and Perceived Control."
- <sup>355</sup> Dahlbäck, "Saving and Risk-Taking." Guiso and Paiella, "Risk Aversion, Wealth and Background Risk."
- <sup>356</sup> Morgan, Sirageldin, and Baerwaldt, *Productive Americans*.
- <sup>357</sup> Skinner, "Risky Income." Merrigan and Normandin, "Precautionary Saving Motives." Carroll, "How does Future Income." Leland, "Saving and Uncertainty." Eeckhoudt, "Changes in Risk."
- <sup>358</sup> Ventura, "Relevance of Prudence."
- <sup>359</sup> Kreinin, "Stock Ownership." Zhong and Xiao, "Determinants of Family Bond," 1.

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<sup>360</sup> Dahlbäck, “Saving and Risk-Taking.”

<sup>361</sup> Terry, interview, 14 July 1970, 148.

<sup>362</sup> Ibid.

<sup>363</sup> Guiso and Paiella, 25-26.

<sup>364</sup> Terry, interview, 20 December 1969, 9.

<sup>365</sup> Ibid., 13.

<sup>366</sup> Cartoonist Bud Fisher had moved to New York in 1909 to work for Hearst at the *New York American* while cartoonist Tad Dorgan was transferred by Hearst as early as 1902 to work for the *New York Evening Journal*.

<sup>367</sup> Fischer, “Every Day’s a Miracle.”

<sup>368</sup> At 90 feet per minute and at the rate of 24 frames per second equates to 4,800 drawings.

<sup>369</sup> Differing production data include: (1) 1,000 separate drawings and two months to produce: Boyle, “Terry Makes 40 Million Laugh”; (2) 1,000 drawings and Terry spending four months completing the short. Paul Terry: “They All Laughed,” 1952, publication source and exact date not listed; (3) 2,000 drawings produced: Leamy, “Popeye, Little Lulu,” 13; and (4) Six-months to produce the short: Bernhardt, “Paul Terry Marks 30<sup>th</sup> Year.” “Terrytoons Have Made Many Laugh.” A-27.

<sup>370</sup> Boyle states that Terry quit two jobs as a comic strip and newspaper artist to make the film. Boyle is the only source that the author could locate that mentions Terry leaving his job to produce his first short. Boyle, “Terry Makes 40 Million Laugh”.

<sup>371</sup> Terry complained that Selznick’s offer of \$1.00 a foot for the film was less than what he paid for the film, although Terry claimed a profit at \$1.35 a foot. Therefore, outside of the camera costs, this equates to \$405 or \$8,668.48 in 2009 dollars. Calculated using an inflation calculator: [http://www.bls.gov/data/inflation\\_calculator.htm](http://www.bls.gov/data/inflation_calculator.htm)

<sup>372</sup> The calculation for the first 52 weeks of Terry’s term is as follows: (16 weeks x \$300/week) + (36 weeks x \$200/week) = \$12,000. Calculating the inflation from 1921 (the end of the first 12 month period) to 2009, this total equates to: \$144,923.13 in 2009 dollars.

<sup>373</sup> The calculation for the first 52 week period of the 1924 contract (effective beginning 1925) is \$400/week x 52 weeks = \$20,800 (1926 dollars) or \$254,038.51 (2009 dollars).

<sup>374</sup> The calculation is as follows (rounding to nearest week): (16 weeks (9 August 1920 – 1 December 1920) x \$300/week = \$4,800 or \$51,882.48 with inflation calculated from 1920) + (245 weeks (1 December 1920 – 9 August 1925) x \$200/week = \$49,000 or \$605,295.60 with inflation calculated from 1925) + (151 weeks (9 August 1925 – 1 July 1928) x \$400/week = \$60,400 or \$763,572.56 with inflation calculated from 1928) + (47 weeks (1 July 1928 – 29 May 1929) x \$320/week = \$15,040 or \$190,134.62 with inflation calculated from 1929). If you include the \$5,000 he received from the general release and the \$33,000 for the sale of the 10% stake in Fables (\$38,000 or \$480,393.33 with inflation calculated from 1929), Terry had generated \$2,091,278.59 in 2009 dollars. Please note: this total is just a rough approximation and would be larger as the inflation calculations were undertaken on the total sum of dollars earned at the end of the four contractual periods rather than adjusted for each of the 459 weeks during the contractual periods.

<sup>375</sup> Terry, interview, 13 June 1970, 101.

<sup>376</sup> Terry and Lazar, interview, 1.

<sup>377</sup> Terry, interview, 20 December 1969, 49.

### **III. PSYCHODYNAMIC ANALYSES OF PAUL TERRY'S ECONOMIC PRACTICES AND MANAGERIAL RESPONSES TO THE MAJOR ECONOMIC, TECHNOLOGICAL, AND INSTITUTIONAL FORCES THAT SHAPED ANIMATED CARTOONING DURING THE GOLDEN AGE OF AMERICAN ANIMATION, 1929-1955**

#### **A. Introduction**

During the period that Paul Terry operated his Terrytoons studio, 1929-1955, several major economic, technological, and institutional events or conditions had arisen which required animation studio production heads to make economic choices in response to these developments. Guiding their economic decision making were their personal psychodynamics which determined not just production values and film aesthetics, but whether their studio was able to survive during these times of change. In Chapter Two, the author found that there were four psychodynamic components that play a key role in determining the economic practices that operate as received norms for individuals.

In this chapter, the author will analyze the economic practices of Terry by focusing on Terry's historical responses to twelve major forces of change during the period 1929-1955. The author will determine whether the economic practices that operated as received norms for Terry during the period of 1929-1955 were consistent with his economic behaviour during the period 1887-1929. Consistent results between the two time periods will provide evidence that conclusions reached in Chapter Two with respect to Terry's economic decision making and managerial behaviour were accurate and reliable.

#### **B. Economic Forces of Change**

##### **1. The Great Depression, Hollywood Economics and the Slump in the Motion Picture Industry, 1929-1935**

By the time Terry was released by Amedee Van Beuren in May 1929, he had the financial capital to establish a small animation studio and manage operations as sole owner, producer and studio head. However, Terry chose to form a partnership with animator Frank Moser whom he first met in 1914 at the Winsor McCay cartoonists' dinner<sup>1</sup> and had worked alongside at the Fables Pictures studio until 1929.<sup>2</sup> The decision to form a partnership rather than run a new cartoon studio as sole owner is compatible with the psychodynamics of

Terry's economic practices because Terry was simply reducing his risk to his current net worth by sharing start-up costs.

Terry reduced his financial risk even further by having Moser convince Audio-Cinema<sup>3</sup> in financing the partnership and furnishing the Long Island studio and equipment necessary for the production of the animated shorts. According to the contract between the partnership and Audio-Cinema, Terry and Moser would invest in the company through their time and labour and forego compensation until Audio Cinema's advanced money had been returned.<sup>4</sup> The decision to form the partnership was a shrewd business decision by Terry because having an experienced production head and veteran animator working together was a recipe for success in the nascent field of animated cartoon-making. Moser was also a very prolific animator and his efficiency allowed the partnership to enjoy considerable savings in production costs through reduction in payroll expenses.<sup>5</sup> Further, Moser was very budget conscious and frugal with his money, a fact acknowledged by former co-workers and family.<sup>6</sup> Therefore, Terry could trust Moser to ensure that his production personnel were working at peak efficiency to keep overhead low.

Meanwhile Terry approached his old friend Earl W. Hammons, President of Educational Films Corporation of America and negotiated a contract with Hammons to have Educational Films act as distributor for the cartoon product through their exchanges.<sup>7</sup> Production began on the first animated short "Spanish Onions" in October 1929 followed by "Pretzels" in November 1929.<sup>8</sup> Less than a month into their new operations, on October 29<sup>th</sup> ("Black Tuesday"), the stock market crashed setting off the Great Depression and eventually sending the United States unemployment rate as high as 26.7 percent by 1934.<sup>9</sup>

Terry would later claim that the 1929 Crash found him in the middle of a party he had been throwing. According to Terry he said nothing to his guests who continued dancing, walked along the Hudson River line in the Bronx and threw his last dime away in order "to start from scratch."<sup>10</sup> While the party Terry was attending may have occurred, quite possibly to celebrate the founding of his new studio, any financial problems suffered by Terry as a result of the Crash is most assuredly apocryphal. First, Terry unlikely invested in the stock market. There are no records of Terry having invested in the stock market during this period in any of the archival materials the writer referenced. At the time of the crash Terry would more likely have had his savings locked away in secure investments in a banking institution.

Second, if Terry had invested in the market then based on the four psychodynamic components underlying his managerial practices he would have had a diversified investment

base including bank savings and, as previously mentioned, his personal residence. Third, Terry never would have known the extent of his loss until the opening of next business day as some stocks suffered more than others. Fourth, even in the unlikely scenario that he had all his life savings invested in stocks, Terry would have recovered some of his investments the following business day and not been left completely penniless as he contends.

Based on the research as detailed in Chapter 2, the economic uncertainty that occurred in the fall of 1929 could have moved Terry's locus of control towards greater externality, thereby causing the producer to become even more financially insecure. The Crash and economic panic would have provided further confirmation to Terry how larger external forces control our lives and economic fortunes. The conclusions reached in Chapter 2 with respect to Terry's economic psychodynamics would find that the financial hardships created by the Great Depression would have increased Terry's financial insecurity and extreme saving behaviour because he would have sought to protect himself by increasing financial savings while staving off perceived personal and/or company bankruptcy through strict financial control.

After about ten months of production in Long Island City, Terry and Moser relocated their studio to the Bronx. On October 1930, the Moser-Terry partnership was formally entered into through a written contract.<sup>11</sup> The partnership agreement terms included a small \$250 investment by each partner, and the option to draw \$300 a week on the account of the accruing share of the net profits for the current year.<sup>12</sup> That same month, Terry and Moser attempted to seek financial compensation from Audio-Cinema for their services, but their request for a guarantee of \$25,000 per year was rejected by the company.<sup>13</sup> In November 1930, a one-year distribution contract between Educational Films and the partnership was renegotiated whereby the partnership agreed to produce a series of 26 animated cartoons during the period.<sup>14</sup>

In November 1930, Terry and Moser agreed to have Joseph W. Coffman, President of Audio-Cinema, enter the partnership to produce the cartoons.<sup>15</sup> While the addition of Coffman as a co-partner reduced both Terry and Moser's stake in the new company, based on the assumptions underlying the psychodynamics of Terry's economic practices the benefits of bringing Coffman into the partnership was likely seen by Terry as improving his financial security. First, Coffman would be motivated to strengthening the relationship between the parties as he had a financial interest in both sides, even possibly securing better financial terms from Audio-Cinema in subsequent renegotiations. Second, Coffman's expertise in film sound and work as a consultant on processing motion picture film could help the partnership

in improving the sound quality of their films while ensuring that the processing costs were kept at a minimum. Third, Coffman's extensive contacts in the motion picture industry could prove helpful if Audio-Cinema began to experience financial difficulties or Moser-Terry required outside assistance to meet production deadlines.

With the advent of sound cartoons in 1930, exhibitor demand for cartoon shorts had increased to a point where every company in the industry excepting Warner Bros., Fox and United Artists were planning on including cartoon shorts on their programs.<sup>16</sup> However, as the Depression worsened many motion picture theatres began billing double features while eliminating short cartoons from the program.<sup>17</sup> In 1931, the motion picture industry struggled through the effects of the Depression<sup>18</sup> as admission prices were lowered, attendance dropped 40% by year end,<sup>19</sup> and many theatres were forced to close.<sup>20</sup> Audio-Cinema also experienced financial problems. After moving from producing industrial-type shorts and medical films into major sound productions, both their 1931 feature-length live-action films *Pagliacci* and *The Struggle* failed at the box office.<sup>21</sup> Another financial obstacle was that Audio-Cinema was under license from Western Electric to use their sound and had reached a maximum license fee which they were unable to renegotiate.<sup>22</sup> Apparently, Audio-Cinema was losing money on the cartoon production because they were paying Western Electric both for sound recording and for clearing the use of the music through their subsidiary, Electrical Research Products Inc., in the range of \$3,000 per cartoon.<sup>23</sup>

With increasing financial pressure on Audio-Cinema, both Moser and Terry agreed to enter a studio rental arrangement with the production company as a means to distance themselves from the studio's financial problems and continue operations.<sup>24</sup> With financial problems for Audio-Cinema continuing to mount, the company was meeting production deadlines by borrowing money from Consolidated Film Industries<sup>25</sup> through the assistance of Coffman who personally guaranteed payment of all loans on behalf of Audio-Cinema.<sup>26</sup> Coffman remained a partner for about a year but with the studio troubles continuing, terminated his relationship with Moser-Terry in late 1931.<sup>27</sup>

In July 1931, Terry and Moser had renegotiated a distribution contract with Educational Films Corporation whereby Educational was to receive a 50% commission on gross rentals.<sup>28</sup> This arrangement was amended in December 1931 whereby Educational Films received 40% for distribution commission instead of 50%, and 35% of the net profits.<sup>29</sup> The new agreement is wholly compatible with the psychodynamics of Terry's economic practices which would see the producer seeking financial security at the expense of short-term profit because net profits were calculated after commissions were deducted. In times of

financial adversity where revenues were weak with marginal or non-existent net profits, Terry-Moser would receive 60% and not 50% of the revenues after commissions were deducted but before net profits were deducted. However, in times of high revenue generation where net profits were guaranteed, Educational would benefit with a 35% stake in the net profits.

In early 1932, with Audio-Cinema nearing bankruptcy and creditors demanding payment, Terry and Moser terminated their business relationship with the company,<sup>30</sup> and moved to studio rental space in Harlem to produce the animated shorts,<sup>31</sup> a move likely arranged through Terry's relationship with Coffman.<sup>32</sup> The separation of their business ties with Audio-Cinema is compatible with conclusions reached in Chapter 2 with respect to Terry's economic behaviour. The Terry-Moser relationship with Audio-Cinema was apparently quite lucrative for the partnership. While a risk-taker may have gambled a little too long by profiting from the relationship until creditors seized company assets, Terry likely sought the financial and emotional security of having no business relationships with a failing company by vacating the studio premises. Another benefit of relocation was that the partnership could eliminate the fees paid to Western Electric by not using copyright music and writing original music thereby generating more profit.<sup>33</sup> Educational Films would continue to distribute the shorts.<sup>34</sup>

After the move to Harlem, complaints began to surface from their distributor Educational regarding the quality of the pictures. Both Terry and Moser disagreed on how to address the complaints. Moser and Terry formed an incorporated company, designated Moser & Terry, Inc., in January 1932.<sup>35</sup> However, the corporation was dissolved and an agreement was signed between Moser and Terry to form a partnership in May 1932<sup>36</sup> with the partnership agreement of October 16, 1930 being reaffirmed.<sup>37</sup> Apparently the corporation was dissolved because Moser refused to yield a controlling interest in the incorporated company to Terry.<sup>38</sup> Terry's attempt to assert an authoritarian managerial style is compatible with Terry's conservative economics. Studies have shown a relationship between authoritarianism and both conservative behaviour in economic issues and frugality.<sup>39</sup>

Financial problems in the film industry continued in 1932 as theatres and motion picture studios continued to either languish or go bankrupt as a result of problems borne out of the Depression and those endemic to the film industry. Some of the solutions proposed to shave down operating costs were reorganization of theatres and exchange systems, and holding down flexible film costs such as studio costs, film production costs, and salaries.<sup>40</sup> The year 1933 was also a dark year for film business as bankruptcies of film interests rose

sharply, both RKO and Paramount-Publix sank into receivership,<sup>41</sup> many theatre chains reduced the salaries of their employees by 50%,<sup>42</sup> film production costs were reduced to meet the grossing possibilities of the theatres,<sup>43</sup> banks refused to back film productions, prices were cut at the theatres affecting about 8,000 film showings, and Warner Bros. closed some theatres rather than reduce admissions.<sup>44</sup> Despite the poor economic outlook, the partnership of Moser & Terry renegotiated another distribution contract with Educational Films Corporation of America for 1932-1933.<sup>45</sup>

By 1933, the effects of the Depression had caught up with Educational Films as the company had begun to experience financial problems and, as a result, negotiated a distribution arrangement with Fox Films. In January 1933, Educational Films closed its 36 exchanges throughout United States and Canada and, by sub-contract, appointed Fox Films as its sales agent to distribute the cartoons now known as Terry-Toons in these two countries.<sup>46</sup> The relationship between the partnership, Moser & Terry, and Educational Films was critical to the ongoing success of the animation studio because the film production company ensured that the Terry cartoon product was distributed to theatre chains across North America, a fact Terry later publicly acknowledged.<sup>47</sup>

In March 1933, the 1932 distribution contract between Moser-Terry and Educational Film Corporation of America was continued for a period of one year, with the permission being given to appoint Fox Films Corporation as its agent in the distribution of the animated shorts of the partnership.<sup>48</sup> In late 1934, the studio moved from Harlem to New Rochelle occupying the seventh and thirteenth floors of an office building.<sup>49</sup> In May 1934, a second corporation was formed under the laws of the State of New York and was designated as "Moser & Terry, Inc."<sup>50</sup> Terry once again insisted on corporate control but he was unsuccessful in his bid. Terry was behind the move to have the company incorporated both in 1932 and 1934 which is compatible with the psychodynamic components formulated in Chapter 2 of Terry as a shrewd businessman seeking financial security.<sup>51</sup> An incorporated company provides personal asset protection by allowing owners to have limited liability for business debts and obligations. The financially insecure Terry was likely seeking the financial protection incorporation offered.

By 1935, the film industry had experienced the worst of the economic effects of the Depression and was in a process of restoration as most of the bankruptcies and receiverships were discharged. Paramount, Pathé, and Fox-Metropolitan successfully reorganized,<sup>52</sup> RKO received new investors, and attendance at movie theatres increased with the major problem facing the industry being the overhead required to meet the demand.<sup>53</sup> Film budgets were

raised, more money was spent on marketing films, and extensive campaigns to push the bigger pictures were common indicating renewed confidence in the industry.<sup>54</sup>

## 2. Rising Costs of Animated Film Production

To produce an animated short has always been an expensive procedure because a significant proportion of the work is completed through time consuming manual labour involving a variety of highly skilled artists and production personnel. Animation has been described as the most labour-intensive form of Hollywood film production.<sup>55</sup> In the infancy of animation, animated shorts were too expensive to produce to become an economic force in the film industry. Due to their inability either to produce animated films in large quantities or to control costs of producing such films, early practitioners like Emile Cohl and Winsor McCay were eliminated from animation by 1921.<sup>56</sup> In 1936 while passing his last years in Paris, Cohl was forced to live off \$7 a month given to him by public charity.<sup>57</sup>

One of the first methods to streamline the process was the creation of identical printed background scenes using a zinc etching process, a practice devised by John R. Bray. Bray then added the moving components of the animated cartoon to the blank centre, thereby significantly reducing the number of skilled artists needed to complete an animated cartoon short. Later Bray applied Taylorist principles and compartmentalized the animated filmmaking process through an assembly-line type method of skilled artists specializing in various tasks thereby further reducing time and labour costs.<sup>58</sup> With the creation of departments each animator had more time to pursue creative work<sup>59</sup> while the most repetitive and rudimentary tasks could be minimized and completed by semi-skilled labour, most of who were paid far less than skilled cartoonists.

With the invention of celluloid by both Bray and Hurd, the number of drawings was gradually reduced because celluloid allowed the animator to only draw that part of the body which moved. However, by the 1930s, with the development of sound, speech and lip movements, the number of drawings required was increased once again driving up production costs.<sup>60</sup> During the 1930s, the assembly-line animation process began to fully develop with the establishment of separate departments not limited to animation (e.g., story, background, inking, camera, music, sound), and this organizational system<sup>61</sup> was employed by all Golden Age studios and would remain virtually the same until the introduction of computer technology.<sup>62</sup>

Based on the number of studio bankruptcies, receiverships and closings from the birth of animation to 1930, producing animated shorts for a profit during the early years of animation was a difficult endeavour requiring strong money management practices and strict financial control. When Disney built his studio in Burbank in 1939 which covers several acres, he designed the structures so that in the event the animation business didn't work out the studio could be converted into a hospital.<sup>63</sup> Hearst financed and operated an animation studio at a loss simply for the publicity value he could give his syndicated comic strips.<sup>64</sup> By the time litigation ended in the Bray-Hurd cartoon suit in 1930, half of the dozen defendants had gone out of business in the five-year interim.<sup>65</sup>

During the silent period some studio heads went to extreme lengths to reduce production overhead by equipping their studios with used office furniture and kitchen tables purchased at flea markets and garage sales, refusing to heat the premises during the winter, and failing to provide simple furnishings such as curtains and rugs.<sup>66</sup> Many studios, like MGM, began to closely watch the time spent by their staff with the installation of time clocks.<sup>67</sup> The Van Beuren Studio fought production costs by asking the staff for "voluntary" unpaid overtime, "which was in fact something less than voluntary."<sup>68</sup> Schlesinger, MGM, and Disney all adopted a footage quota tracking every artist's production output. If the artist failed to meet the quota, management would use that against them if they went to ask him for a raise.<sup>69</sup> In an attempt to reduce errors, some studios used large charts that featured every animator's name. If an artist made a production error, a mark was placed next to his name and artists that had too many errors were disciplined.<sup>70</sup>

In 1931, despite production costs on a Walt Disney short having risen from \$5,400 a cartoon to \$13,500, Disney was still willing to expend more money to improve his product and refused Carl Laemmle's offer of \$15,000 per short.<sup>71</sup> The costs of producing a cartoon had risen largely due to the conversion to synchronized sound and colour, "a 'Fordist' organization of animated film production with a large team of artists and assistants,"<sup>72</sup> and costs associated with technological innovation (e.g., multiplane camera).

Another reason for the rise in production costs and studio budgets in the 1930s was the shortage of animators, a problem existing since the birth of animation, which had become critically acute with an increase in the demand for production.<sup>73</sup> As a result, studio executives were forced to pay their animators a sizable salary to keep them from moving to another studio while at the same time instituted procedures to harvest a new crop of animators.<sup>74</sup> Studios aggressively sought animators, in a time when the national unemployment rate was over 21 percent, by placing sensational advertisements,<sup>75</sup> expanding efforts across country to

look for skilled artists (e.g., Disney sent representatives to New York City to tap into the home grown artistic talent of Terrytoons and Fleischer Studios), and poaching talent directly from other studios.<sup>76</sup>

By the middle of the 1930s, Disney decided to move into feature films. His decision can be viewed as partly due to efforts to reach out to a new audience, but mostly due to decreasing profits on his shorts. Like many of the other studios, Disney received his return on production costs by an agreement with the distributor where he was paid a simple percentage of the gross rental receipts which is paid on a sliding scale depending on theatrical locale and the age of the film.<sup>77</sup> However, the distributor, United Artists, took a heavy cut, a 40 percent share, when they distributed Disney films.<sup>78</sup>

Further, even Disney's most successful short, *The Three Little Pigs* (1933), was renting at black and white rates (rates 1/3<sup>rd</sup> those charged for colour films) even though the prints were produced in Technicolor. Disney also had to pay for more prints to satisfy the demand, prints that would not be useful once the cartoon had been viewed by the majority of the movie going public. Aggravating the demand for shorts was the rise in double billing leaving no room for newsreels and animated cartoons on the theatre programs. Attracting Disney to feature production was the fact that features rented at much higher rates. While a first-run theatre may pay \$3,000 for a feature film, it would only pay \$150 or less for its Silly Symphony on the same program even though the billboard outside the theatre featured the short almost as prominently as the feature.<sup>79</sup>

Disney's solution to the rising costs of animated cartoon production was "to make his shorts so good that the public would demand them forcing exhibitors to pay higher rentals."<sup>80</sup> However, this method was largely unsuccessful because distributors were unwilling to pay Disney more for a short despite the critical response and were only interested in keeping costs at a minimum.<sup>81</sup> As a result, beginning in the mid-1930's, Disney began to reduce production costs by exercising more personal control over production, particularly through control of the narrative using the script and the storyboard as a choke point.<sup>82</sup>

When Metro-Goldwyn-Mayer started production in 1937 with the hiring of Fred Quimby to set up the department,<sup>83</sup> the shortage of animators was still prevalent.<sup>84</sup> By 1939, despite efforts to keep production costs under control, Disney was spending \$50,000 to \$55,000 per short subject with some shorts (e.g., *The Old Mill* (1937)) reaching as high as \$72,000. However, animated cartoons were not the only shorts experiencing increased production costs. Due to rising costs and the widespread adoption of television with news

programming, the highly successful *March of Time* short series created in 1935 stopped production in 1951.<sup>85</sup> High production costs likely played a part in Universal dropping its cartoon total from 26 to 13 for the period of 1939-1940 as compared to that for the same period of 1938-1939.<sup>86</sup> In 1944, Walter Lantz presented a demand for higher rentals for its product based on increased production costs as a result of wartime restrictions. Lantz noted that costs had risen by 40 percent since 1942 while rental rates remained the same.<sup>87</sup>

By the time the Second World War ended, Disney was spending \$100,000 to \$300,000 a cartoon short and was not able to justify the expenditure.<sup>88</sup> In November 1946, Disney threatened to discontinue producing the shorts within six months unless his distributor, RKO, pushed up rentals on the shorts.<sup>89</sup> While Disney continued producing shorts, that year he announced suspension of production on all studio projects except for *Song of the South*, *Fun and Fancy Free*, *So Dear to My Heart*, and *Melody Time*<sup>90</sup> and later dismissed 450 employees.<sup>91</sup> In December 1946, Disney made a statement that while shorts production has been drastically cut due to rising production costs he still planned to produce a limited number of short subjects and two full-length features.<sup>92</sup>

In early 1947, George Pal, producer of Paramount's Puppertoons, stopped shorts production due to rising production costs with *Tubby the Tuba* being the last short produced.<sup>93</sup> In June 1947 labour costs and prices for colourisation forced Paramount to drop the "Little Lulu" series while Columbia discontinued Screen Gems to make a "Bouncing Ball" song series for audience participation for a fraction of the cost of the other series.<sup>94</sup> At 1947 rental rates many producers were forced to wait at least three years to make a profit. As a result some producers began turning to commercial and industrial films to work on a cost-plus basis (i.e., cost of the work plus a fee). For example, Pal moved into features with United Artists and completed some commercial work. John Sutherland, one of the first to drop out of producing animated shorts for entertainment purposes, asked for release from his deal with United Artists and entered the commercial and educational market to produce animated works.<sup>95</sup>

Walter Lantz, unable to produce for Universal-International at a cost of \$25,000 for single subjects under the contract, negotiated with United Artists for a better distribution deal and augmented his cartoon activities with extensive operations in the commercial market.<sup>96</sup> Lantz was forced to reduce output by 45% during the 1947- 48 season due to high labour costs and difficulty in obtaining Technicolor commitments sending 60% of Hollywood cartoonists out of work.<sup>97</sup> As a result of increasing production costs, the Animated Cartoon Producers Association held a meeting in October 1947 to devise methods to shave costs.<sup>98</sup>

Later that year, Lantz curtailed production over a 90-day period giving creative staff a three-month layoff to reduce inventory of shorts in production while still meeting production commitments to United Artists.<sup>99</sup> In mid-1953, Warner Bros. Hollywood cartoon studio was shut down for a number of months that affected between seventy and eighty cartoonists due to the high production costs, technical changes in filming methods, and the fact that the company had a large reserve of cartoons (about 40) either ready for release or in the colour-processing stage.<sup>100</sup>

While at Disney control of production was centred in the story department, as noted in Chapter One, at the Fleischer studio Max Fleischer's role was very remote with regards to management of production issues and he became more pre-occupied with managing the business while Dave was a very loose supervisor suggesting gags or improvements to animators, devising vague storylines, and acting in a secondary role at story sessions with animators and story writers.<sup>101</sup> Since many of Fleischer's talent were actively poached to work in sunny California at the West Coast studios, Fleischer had to keep salaries high to keep the skilled talent at the studio, a situation aggravated by the 1937 strike.<sup>102</sup>

The subsequent move to Miami and the need to incorporate a vast new labour pool was one factor leading to the introduction of the *Standard Production Reference*, a procedural and technical manual outlining the rules of studio animation practice.<sup>103</sup> The manual regularized production and emphasized the interrelationships and coordination of the many production departments and functions in an animation studio, codified and clarified studio procedures through the institution of standardized practices, introduced detailed bookkeeping of every stage of the production process, and reinforced a rigid hierarchy of responsibility.<sup>104</sup> The work was written in 1940 after completion of *Gulliver's Travels* (1939) in order to prevent the production problems that occurred during creation of their next feature length film *Mr. Bug Goes to Town* (1941). Langer argues that the political infighting over the *Gulliver's* story had created production delays resulting in the incurring of unnecessary costs, and the manual would help Sparber and Kneitel reassert their control over production.<sup>105</sup>

While production costs continued to climb, eventually exhibitors refused to pay any more money for the product, a fact Terry acknowledged led to the demise of the theatrical animated short.<sup>106</sup> The psychodynamic profile of Terry's economic behaviour developed by the author is a producer intent on taking little financial risks, keeping his production costs at a minimum, and ensuring his distributor is satisfied with the product. As will be delineated later, Terry's response to the increasing costs in production is faithful to the framework for the economic practices of Terry formulated by the author: he avoided experimentation,

pushed his animators and staff to produce efficiently, controlled his labour costs through modest wages, refrained from adding colour until his distributor gave him little choice, took few financial risks in trying to improve the product, and produced a cartoon product that the general public found entertaining and aesthetically pleasing which satisfied his distributor and ensured contracts were renegotiated.

The business philosophies and money management practices of Disney and Terry are markedly different. Scholars and family members characterize Walt Disney as an optimist with respect to his financial affairs,<sup>107</sup> a financial risk-taker,<sup>108</sup> one who pushed his animators to continually improve the quality of their work,<sup>109</sup> a producer that sought capital so he can improve the quality of his cartoons,<sup>110</sup> an individual concerned with creating rather than earning,<sup>111</sup> spending money very quickly,<sup>112</sup> and not focused on amassing money for personal gain.<sup>113</sup> The author posits that Terry was a financial pessimist, financially risk-averse, one who pushed his staff to meet acceptable standards of artistry, developed production standards centred on economy, was preoccupied with earning, and had difficulty spending money. While Disney believed that the key to profitability was quality in production,<sup>114</sup> Terry opted to take the route of speed working on the theory of volume and price.<sup>115</sup> Animation producer, writer, film historian, and former Terrytoons employee, Howard Beckerman, argues that Terry was only interested in keeping the business going producing on budget through a “customized factory product.”<sup>116</sup>

Besides exerting control over production to minimize costs, studios began to generate revenue through marketing of their cartoon characters. For Disney, he found a goldmine to offset his production costs in the form of Walt Disney Enterprises, administered by Kay Kamen, Ltd., which successfully advertised, marketed, and licensed Disney merchandise, most notably millions of Mickey Mouse watches (the Ingersoll Watch Company) and cereal bowls as box-top premiums (General Foods). Pat Sullivan turned a profit on his most popular character Felix the Cat only by marketing Felix the Cat dolls and handkerchiefs in Great Britain.<sup>117</sup>

Unlike Disney, Terry admitted that except for his comic books he was not successful at licensing of his cartoon products.<sup>118</sup> An examination of financial documentation of Terrytoons (1942-1950) found comic book licensing revenue accounting for only five percent of corporate income<sup>119</sup> while royalties' income from product licensing averaging just 3.5 percent of what the company was receiving from film rentals,<sup>120</sup> providing documentary support for Terry's statement. Financial records and corporate documentation also indicate that Terry failed to engage a professional like Kamen to undertake the highly specialized

work of character merchandising.<sup>121</sup> Possibly Terry's risk-averse behaviour may have prevented him from investing in a professional to license his characters.

Terry's lack of success in licensing his product could be the result of Terry's belief in variety and the use of different types of storylines and one-shot miscellaneous cartoon characters in his cartoons thereby failing to fully exploit star value established characters such as Mighty Mouse.<sup>122</sup> By considering the four key components derived for the economic practices of managers, a satisfying explanation can be considered why Terry preferred producing an assortment of cartoon characters over concentrating his efforts on one or two of his most successful creations. According to the author's economic framework for Terry, Terry sought financial security engaging in low-risk financial transactions. Possibly concentrating on a few characters seemed too risky for Terry. Like the proverbial warning not to put all your eggs into one basket, rather than rely on a few of his most popular cartoon assets to generate income, Terry decided to spread his risk by offering to the public a number of potentially engaging cartoon characters along with his stable of popular creations.

### 3. Animated Shorts Do Not Generate Box Office Money for Film Studios

Theatrical animated cartoons, as well as newsreels and short subjects, never generated box office revenue, and their production costs were recouped from the profits of feature films.<sup>123</sup> After the Second World War theatre owners and distributors discovered that they could attract audiences even without cartoons –for which rentals were a mere \$5 or \$10 a week.<sup>124</sup> Paul Terry was well aware of the revenue generation shortcomings of the animated cartoon.<sup>125</sup> At a studio meeting in the early 1950's, Terry is remembered for his comment comparing the animated cartoon before a movie to free bread before a restaurant meal. According to Terry, the diner goes to a restaurant for the main course much like a movie patron goes to the theatre for the feature film. The diner does not attend for the complimentary bread and butter or the theatre goer for the animated cartoon.<sup>126</sup> Terry believed that animated shorts, no matter how well made, would ever be attractive enough for producers to demand increased rental rates.

In October 1934, an attempt was made to move animated cartoons away from their association with feature films when Robert Schirmer, the grandson of the founder of the music company, opened America's first all-cartoon cinema at the Bijou theatre on Broadway.<sup>127</sup> The enterprise could be viewed as an experiment to determine whether animated shorts could attract an audience without the drawing power of a feature film. While the venture proved initially successful<sup>128</sup> within a year the novelty had apparently worn off as

the theatre had returned to running live-action films.<sup>129</sup> Similar experiments in the early 1930s in Paris, France and Stockholm, Sweden only met with limited success.<sup>130</sup>

The insecurity and extreme saving behaviour that characterizes the psychodynamic profile of Terry's economic decision making would only be exacerbated with the knowledge that animated shorts have no box office revenue generation capabilities. Terry would fear that possibly one day exhibitors would simply refuse to purchase the shorts and run features only. The economic reality of the motion picture business was that there was very little profit incentive for a distributor to continue purchasing shorts to accompany their features, a fact acknowledged by Terry and his nephew.<sup>131</sup> Terry had very little leverage to renegotiate with a distributor and except for a bold gamble such as the one made by the Lantz staff in 1940 to begin production with hopes of attracting a distributor,<sup>132</sup> there was likely very little Terry could have done to change the financial dynamics of the marketplace.

Consequently, unlike Disney who acted like an individual operating with an internal locus of control by attempting to produce better cartoons to attract higher rentals, the psychodynamic framework developed for Terry's managerial practices predicts that Terry would act from a position of insecurity and attempt to please the powerful others who controlled his destiny, namely the distributors and exhibitors. The historical record supports the psychodynamic framework. The writer was unable to uncover any evidence that Terry had placed his relationship in jeopardy through overbearing, high-handed or autocratic business practices. Rather, Terry's actions were at many times extremely conciliatory as evidenced by Terry not holding exhibitors to their contracts when they failed to exhibit all 26 shorts a year in order to renegotiate another contract.

#### 4. The Rise of the Full-Length Animated Feature Film

With the realization that the costs of making each new animated short was increasing and the revenues derived from them diminishing, as early as 1934 Walt Disney had developed an alternative game plan: to produce a feature film, *Snow White and the Seven Dwarfs* (1937).<sup>133</sup> While the budget for the film (labelled as "Disney's folly") was \$500,000 and the feature's final cost was nearly one and a half million, the film was a tremendous hit and grossed \$4,192,000 in the U.S. and about the same internationally on its first release.<sup>134</sup>

With the success of *Snow White*, Twentieth Century-Fox, Terry's distributor, approached Terry with the idea of producing a feature film. Terry and his accountant, Bill Weiss went down and got a line of credit from a bank.<sup>135</sup> Meanwhile, Disney followed the

success of their first film with their next release *Pinocchio* (1940) which eventually cost Disney \$2,300,000 to produce.<sup>136</sup> Terry and Weiss screened *Pinocchio*. According to Weiss, the reason why Terry never chose to produce a full-length animated picture was because Terry's opinion was that Disney's second feature wasn't going to match the success of his first film.<sup>137</sup> However, according to Terry, he went to see a family friend, Lawrence M. Giannini, the president of the Bank of America, for advice on whether to make an animated film.<sup>138</sup> Giannini told Terry to "never make a cartoon feature" because it was too hazardous.<sup>139</sup>

Another problem Terry had with making a feature was his belief that animated cartoons were meant to be brief, produced for children, and could not sustain the attention of an adult longer than ten or fifteen minutes.<sup>140</sup> While Terry refused to make a feature, Disney chose to continue making features but after *Bambi* (cost: \$1,700,000) and *Fantasia* (cost: \$2,300,000), the Disney family had incurred \$3,500,000 in debt<sup>141</sup> forcing the company to go public in 1940 when Disney lost his foreign market as a result of the Second World War.<sup>142</sup> Only after the release of *Cinderella* (1950) which grossed \$4 million domestically did Walt Disney Productions become solvent again.<sup>143</sup>

Attempting to match Disney's success with *Snow White* were the Fleischer brothers with *Gulliver's Travels* (1939), an adaptation of Jonathan Swift's classic tale, produced over an 18-month period at an approximate cost of \$1,500,000.<sup>144</sup> The film received an enormous amount of advanced billing and did good business at the box office.<sup>145</sup> However, the Fleischers were dissatisfied because Paramount forced the brothers to hurry production resulting in a number of problems with the film including lack of stylistic unity in the animation and poor character development.<sup>146</sup> The film was generally given bad reviews by the media largely as a result of the inevitable comparisons to *Snow White*.<sup>147</sup>

The Fleischer Brothers would follow up their success with *Hoppity Goes to Town* (1941) (alternate title: *Mr. Bug Goes to Town*), a film seen today by most critics as superior to the first film.<sup>148</sup> However, the film was given unjust treatment by the critics with bad reviews,<sup>149</sup> released by Paramount in December 1941 with very little promotion, and flopped at the box office.<sup>150</sup> Although the company had been dealt a financial blow with the lengthy 1937 strike, and endured an expensive move to a new animation facility in Miami, Florida during 1938 to produce in a non-union labour environment,<sup>151</sup> the economic problems stemming from the poor box office return of *Hoppity* has been pinpointed as the primary cause for Paramount taking over studio operations from the Fleischers in 1942.<sup>152</sup> Although Walter Lantz toyed with the idea of producing a feature film to be called *Aladdin and His*

*Wonderful Lamp* around 1940,<sup>153</sup> other than a puppet animated feature released in 1954 by RKO,<sup>154</sup> the only two studios that dared to gamble on producing a full-length hand-drawn animated feature film in the United States during the period which Terry was in charge of his studio were Walt Disney Productions and Fleischer Studios.<sup>155</sup>

The psychodynamics underlying Terry's economic behaviour that were developed by the author can explain Terry's decision not to produce a full-length animated feature. Since most studio heads considered the decision to produce a full-length animated film to be too risky, and Terry's investment threshold was lower than the average investor, the psychodynamic framework for Terry's economic practices predicts that Terry would not invest in a full-length animated feature. As the cost to produce a full-length animated feature of approximately 75 minutes in length in 1940 was around \$2 million dollars based on production budgets of similar features and Terrytoons was a small studio with limited capital,<sup>156</sup> the framework predicts the risk to current net worth would be too great for Terry to invest.

According to the statements of Weiss, Terry was of the opinion that after the success of *Snow White* every animated full-length feature produced thereafter would not be as successful. While the reasoning for this belief was not made clear, Terry later made comments in 1969 that the success of *Snow White* was due to the novelty of the production being the first of its kind.<sup>157</sup> Therefore, the psychodynamic framework for Terry's economic practices expects that Terry would not be inclined to produce a feature because the expected rate of return would be diminished. Further, with the poor box office returns from such 1940 features as *Hoppity Goes to Town* and *Fantasia*, the perception of risk would be too great for Terry to invest.<sup>158</sup> Maltin is correct in stating: "Terry knew that making a feature-length cartoon was a gamble, and he never gambled on anything."<sup>159</sup>

Former Terrytoons employee Jack Zander who worked under Terry in 1936-1937 noted that since Terry was enjoying the comfort of long term financial security by way of a distribution contract with Twentieth Century-Fox, a huge box office windfall would have made little difference to Terry's financial security, and therefore there was little need for Terry to change his current economic situation by investing in a feature film.<sup>160</sup> Finally, there was little emotional security brought by investing in a feature film because a future filled with tremendous risk and uncertainty would have negatively impacted his emotional security. Accordingly, when considering the economic practices operating as received norms for Terry, the decision by the producer not to invest in a feature film can be better understood.

## C. Technological Forces of Change

### 1. Movement Towards Colourised Shorts

In 1938 Paul Terry produced his first colourised short *String Bean Jack*, six years after Disney had released his first colour short, *Flowers and Trees* (1932), and four years after most of the other studios had completed work on their first colourised animated cartoon. In 1934, Fleischer studios (*Poor Cinderella*) and Walter Lantz (*Jolly Little Elves*) produced their first colour cartoon. That same year Van Beuren started producing the colourised Rainbow Parade shorts, Columbia began releasing their Color Rhapsody series, while Schlesinger completed his first colour Merrie Melodies shorts, *Honeymoon Hotel*.<sup>161</sup> The general consensus among Terry's employees why he was so late going into colour is that Terry believed that the colourisation process was too expensive and he was trying to keep his production costs at a minimum.<sup>162</sup>

According to Moser, about 1934 Terry wanted to incorporate and have controlling interest in the company. Terry allegedly told Moser that he had devised a "new and cheap process for use of color so cheap that it would cost no more than black and white cartoon pictures which we produced"<sup>163</sup> and he would place this invention at the benefit of the corporation if given control of the newly formed company. After the incorporation of the company, Terry failed to produce the invention because there was no final product.<sup>164</sup> Rather Terry's invention was in the form of an idea that he planned to develop.<sup>165</sup> Terry's actions reveal that in 1934 he understood Moser placed great emphasis on colourising their animated cartoons, and he (Terry) was only prepared to move into the colourisation process if undertaken with little expense.

Opinion evidence from former Terrytoons employees such as Bill Weiss suggests that Moser wanted to move into colour before Terry did.<sup>166</sup> When Moser suggested that the company produce one or two cartoons in colour "to see what success we would have with them" Terry said "to forget about it."<sup>167</sup> Even though most studios had moved to producing in colour by September 1935,<sup>168</sup> Terry was apparently only trying to keep pace with his New York neighbour, Fleischer Studios, who were producing all of their shorts of their most popular cartoon character, Popeye, in colour.<sup>169</sup> Terry admitted that he always against colour<sup>170</sup> because the receipts from the shorts did not justify going into colour production.<sup>171</sup>

Company financial statements for the period 1932-1935 provide strong support for the conclusion that the studio would have had a difficult time trying to support producing

shorts in colour without having to operate in the red.<sup>172</sup> For example, for the year ending December 31, 1935, if production costs increased by more than approximately 15 percent due to the added expense of colour, the company would have been operating in the red.<sup>173</sup> Technicolor process was very expensive because there was no laboratory on the east coast to process the film requiring the studio to ship the celluloid out to California to be colour processed.<sup>174</sup> By 1936, while still holding out to produce in black and white, Terry was now wondering whether not going into colour was mistake.<sup>175</sup>

Around 1936, problems began to surface for the partnership when the distributor began receiving complaints about the lack of colour in their cartoons that if not corrected could potentially jeopardize a renewal of the distribution contract.<sup>176</sup> Terry's response was that "there was not enough money in the pictures to do color with."<sup>177</sup> Harvey Day, general manager in charge of sales and distribution for Terrytoons, also wanted to keep away from colour because of the expense involved making it "practically prohibitive for us to go into color."<sup>178</sup> John Clark, vice-president of distribution for Twentieth Century- Fox, also believed Terrytoons could not afford to produce in colour.<sup>179</sup>

Earle Hammons, manager of Educational Pictures, and Jack H. Skirball, general sales manager for Educational Films Corporation, found the entertainment quality of the cartoons more of an issue than the fact they were not colourised.<sup>180</sup> Terry, trying to avoid the use of colour, suggested to Hammons that if the partnership created more humorous and entertaining cartoons, then the lack of colourisation could be offset,<sup>181</sup> a suggestion supported by Day<sup>182</sup> and William Sussman, eastern sales manager for Fox.<sup>183</sup> Eventually Terry was able to renew his contract with the distributor by making certain promises directed towards improving the entertainment value of the cartoons while avoiding colourising his cartoons.

Producing colourised cartoons in the early 1930s was a very expensive and risky enterprise considering the failure of other technologies (i.e., two-colour Kinemacolor, two-colour Prizmacolor, three-colour Chronochrome, two-colour Technicolor), the high print cost for colour, the dwindling receipts and declining production budgets that came with the Depression,<sup>184</sup> and the fact that musicals, the genre with which two-strip Technicolor had become closely associated, were suddenly considered box-office poison."<sup>185</sup> With very few Hollywood live-action films produced in colour by the mid-1930s (*La Cucaracha* (1934), *Becky Sharp* (1935)), colour was seen as a novelty effect making colour conversion less of a priority. Both Hollywood and the Technicolor company had tried to dismiss that colour was an element of the unusual in promoting their products.<sup>186</sup>

Walt Disney was open to technological innovation and believed animated cartoons were a good match for the new process because they were an exaggeration of the real.<sup>187</sup> Terrytoons animator Mannie Davis was also of the opinion that colour added much to the appeal of animated cartoons and considered a black and white cartoon “flat” as compared to a colour cartoon.<sup>188</sup> Walt’s brother Roy was against the conversion to colour because of the expense<sup>189</sup> and the fact that the production schedule could be delayed due to complications stemming from colourising and photographing the cels.<sup>190</sup> Walt used Roy’s misgivings to gain a concession from Technicolor and win Roy’s approval at the same time by negotiating an exclusive two-year contract with Technicolor<sup>191</sup> thereby gaining a competitive advantage over their nearest competitor Fleischer through product differentiation.<sup>192</sup>

The psychodynamic framework for Terry’s economic practices predicts that Terry would keep his production costs as low as possible and not make the risky and expensive move to colour until he was forced to do so. The historical facts provide support for the framework’s prediction. Rather than move to colour, Terry used other concessions that helped secure his contract with Educational Films. While renegotiating the 1936 contract, Terry promised to develop established characters (e.g., Kiko the Kangaroo),<sup>193</sup> create a story department to develop more entertaining storylines,<sup>194</sup> and increase the staff to complete the work.<sup>195</sup> The first two changes likely involved little cost to Terry. However, the eventual staff enlargement from 35 to 56 men drove up production costs significantly.

The framework explains why Terry would increase his staff by 60 percent rather than walk away from the contract. One of the four psychodynamic components for Terry’s economic practices posits that Terry was an extreme saver operating from a position of financial insecurity. Therefore, a financially insecure Terry may have believed that he would not find another distributor for his cartoons if Educational decided not to renew their contract. Even with the staff increase, the Terrytoons production crew was still smaller than most of his competitors while Terry continued to produce an impressive 26 shorts a year on schedule. Further, true to the psychodynamic framework for Terry, he used the opportunity to increase his financial security as much as possible. Terry requested from Hammons a two-year contract rather than the customary one-year contract. Hammons was so impressed by Terry’s commitment to improve the product that Educational agreed to a two-year renewal.<sup>196</sup>

Finally, there were other reasons Terry would have wanted to increase his staff outside of the contract renewal. First, Terry wanted to delegate more of his time to management and “didn’t intend to work so hard anymore.”<sup>197</sup> Second, Terry was operating his studio with a staff that was working long hours (8:30 to 5:30) six days a week<sup>198</sup> and the

staff increase likely improved working conditions at the studio thereby helping to retain some of his more skilled artists who may be tempted to move west to work in sunny California under better working conditions. Third, the increase in staff would be a step forward in producing more entertaining animated cartoons. As will be detailed later Terry had a genuine desire to keep his product entertaining. Fourth, with Moser no longer affiliated with the company at the time of renegotiation with the distributor, Terry had a 100 percent stake in the company and according to the psychodynamic framework Terry would have received more financial and emotional security from the buy-out. As he now possessed more personal net worth there was less risk to current net worth through the investment in staff. Therefore, Terry was in a better position to take a risk. Fifth, considering the strides being made by Terry's competitors, an improvement in cartoon quality was necessary if Terry wanted to make his product attractive to other distributors in the event that Educational Pictures either decided not to renew or were no longer able to renew after the two-year distribution contract had expired.

Despite avoiding the conversion to colour in 1936, with the other studios moving to producing all of their shorts in colour Terry "tried to postpone the inevitable by releasing other cartoons in sepia tone, sprinkling his output with a handful of color entries each season until 1943, when black-and-white finally bit the dust."<sup>199</sup> Had Terry not moved into colour, the opinion of his co-workers was that he would have been out of business.<sup>200</sup> By 1943 studio financial records reveal that the company was in a better position to support complete conversion to colour. Further, the conversion allowed the company to better showcase a new line-up of cartoon characters, most notably Mighty Mouse (aka Supermouse) who first appeared in late 1942 in the short *The Mouse of Tomorrow*.<sup>201</sup>

## 2. Innovation and Experimentation: Stereoptical Process and the Multiplane Camera

According to Janet Staiger, film companies differentiated their products in an attempt to gain a competitive edge over other studios in a bid for a consumer's disposable income (e.g., Disney's introduction of Technicolor cartoons in 1932).<sup>202</sup> During the period 1926 – 1935, sound, colour, three-dimensional and widescreen technologies were all introduced into the film industry. Technological innovation was part of the process to differentiate products and despite the higher production costs was considered by most animation studios as necessary for the financial well-being of an institution.<sup>203</sup> By 1934 both Walt Disney Productions and Fleischer Studios were the only animation studios heavily investing in research and development on a sustained basis, and were non-cooperative and highly competitive.<sup>204</sup>

Langer describes the struggles between Fleischer and Disney during the period 1924 to 1941 as each studio attempted to differentiate their products through technological innovation in an attempt to gain a competitive advantage over the other. For example, the Fleischer brothers released their animated “Song Car-Tunes” using the DeForest Phonofilm process. Disney answered the Fleischer challenge by utilizing the Powers Cinephone process to synchronize the sound in their first Mickey Mouse cartoon, *Steamboat Willie* (1928). When Disney moved into colour in *Flowers and Trees* (1932) with the Technicolor process, Fleischer Studios responded by using the bichromatic Cinecolor and two-colour Technicolor process.<sup>205</sup>

Appreciating the Technicolor process was superior to the two-colour processes, Max Fleischer introduced the Stereoptical Process for *Poor Cinderella* (1934), the studio’s first Color Classic short. Walt Disney countered with the development of the Multiplane Camera beginning in 1935 culminating with the use of the technology in *The Old Mill* (1937).<sup>206</sup> Unfortunately, each of the three-dimensional technologies was extremely expensive and not particularly efficient. The Fleischer Studio decided to combine all of their technologies into their two feature length films (*Gulliver’s Travels* (1939), *Hoppity Goes to Town* (1941)) ultimately becoming insolvent. Walt Disney responded by applying all of his expensive technologies into *Pinocchio* (1940), *Fantasia* (1940), and *Bambi* (1942) nearly going bankrupt.<sup>207</sup> The end result is that rather than boosting company fortunes expensive technological innovation eroded corporate profits for both companies.

Technological innovation is a risky and expensive enterprise where profits can become quickly eroded without results being achieved. The psychodynamic framework for Terry would expect him to avoid risk, seek to control costs, and keep production overhead low. Therefore, the framework casts Terry as an individual with little or no spirit to engage in technological experimentation. The contemporary view of Terry, such as the one expressed by Maltin, is a producer that shunned innovation and relied heavily on repetition in his cartoon product.<sup>208</sup> However, the writer has gathered evidence that suggests that Terry was a producer who enjoyed developing new technologies and making improvements to animated cartoon production methods. Maltin states that early in his animation career Terry devised a matte system to photograph the background separately before placing the characters and action together to make a print,<sup>209</sup> and created various labour-saving methods of animating Farmer Al Falfa.<sup>210</sup>

Around 1940, Terry was developing an aerial animation camera device that made possible photographing animated cels with movie-film backgrounds.<sup>211</sup> Terry's mechanical creation, which could also be used horizontally,<sup>212</sup> was based on similar back projection systems used in Hollywood live-action films that Terry adapted for the animated cartoon genre.<sup>213</sup> While Terry filed a patent on the device, when Disney developed a similar device, Terry did not bring a patent infringement action against the producer.<sup>214</sup> According to Weiss, the patent was to protect Terry against potential lawsuits.<sup>215</sup> Therefore, looking at Terry's behaviour through the lens of the psychodynamics of his economic practices, Terry filed a patent to avoid costly litigation thereby seeking to improve his long-term financial security. Only one cartoon was produced using the invention<sup>216</sup> and Terry abandoned further innovation on the camera due to continuing technical problems with the device.<sup>217</sup>

One of Terry's many avocations was metalworking. He was instructed in the craft and use of machine shop equipment (lathe, drill press) by a mechanic and cameraman named Dan Ward. Terry employed Ward at Terrytoons as the studio mechanic and both worked together on the projection photographic device described above.<sup>218</sup> Terry also used other studio cameramen including long-time Terrytoons veteran George MacAvoy to experiment and build animation equipment. When these employees were not shooting film or building animation equipment, they were working in a machine shop developing new tools, machinery and various apparatuses, most notably camera stands.<sup>219</sup>

Around 1954 Terry developed what he referred to as the "Terryscope," a small portable booth containing a projection screen.<sup>220</sup> For the price of a nickel, one sound, colour Terrytoons cartoon would be exhibited on a small television screen inside these tiny structures that could sit one child comfortably.<sup>221</sup> These small little one seat theatres were then placed in supermarkets where children could watch a cartoon while their mothers were shopping. Apparently Terry leased them out to supermarkets, malls and other locations where families shop. Although Terry stated he invested \$500,000 into the invention, animator Mannie Davis provided a more detailed and accurate remembrance that Terry invested \$50,000 to \$60,000 in the venture.<sup>222</sup>

The psychodynamic framework for Terry's economic practices can explain Terry's experimentations in developing animation technology without an apparently strong possibility of recouping his investments. First, Terry had a keen recreational interest in creating mechanical gadgetry and equipment.<sup>223</sup> For example, Terry experimented with synchronized sound to produce *Dinner Time* (1928) that preceded Disney's first sound short *Steamboat Willie* (1928).<sup>224</sup> His aerial camera device could be viewed as the product of a

relatively inexpensive recreational diversion undertaken in his machine shop. Second, the revolutionary aerial camera may have been seen by Terry as an inexpensive means to differentiate his product from the competition without having to go into colour in the late 1930s. In the early 1940s, when avoiding colour was no longer an option for Terry, he may have abandoned further work on the camera and began producing all his shorts in colour.

Third, Terry required mechanics and machinists to build, repair, and maintain studio equipment such as animation cameras, camera stands, studio desks, film editing equipment, and related machinery. Having a small in-house staff would have been much more cost-effective than out-sourcing his work. Terry likely made sure his staff was kept busy and productive by having them work on some experimental projects when not engaged in regular studio mechanical work. There is no evidence to suggest that Terry hired staff to completely devote their energies to technological innovation.

Finally, Terry's financial decision to invest in the "Terryscope" project must be viewed within the psychodynamic parameters of the "risk to net worth" element of the financial transaction. By 1954, when the projection booth was developed, Terry had already established a very large financial security blanket and the investment would have been a very small fraction of his accumulated net worth at the time. One can reasonably foresee Terry investing in the technology if he had strong grounds to believe that he could recoup his investment. Further, the financial arrangements surrounding the technological development are unknown. Terry may have secured independent backing from a financial investor to manufacture the projection devices, or he may have negotiated mall lease agreements or other contracts to ensure his investment would be returned.

### 3. Introduction of Television

In early 1946, Alex Anderson, the nephew of Paul Terry, was working in the story department at the studio and proposed to his uncle the novel idea of producing an animated series for television.<sup>225</sup> Terry was not interested in the idea because he viewed television as the enemy to the theatrical cartoon market. Terry was concerned that if he tried to produce cartoons for television that his distributor, Twentieth Century-Fox, might not renew his contract.<sup>226</sup> Anderson then proposed the series idea to friend Jay Ward, both joined to form Television Arts Productions (T.A.P.) based in Berkeley, California, and created a pilot. In late 1948, Anderson and Ward signed a deal with NBC to produce 130 episodes of the cartoon series, *Crusader Rabbit*, the first cartoon series produced specifically for television release.<sup>227</sup>

Terry's response to Anderson's invitation is wholly compatible with his psychodynamics of economic decision making. Terry was completely dependent upon his distributor to distribute his studio product. While Walter Lantz recovered from the temporary loss of their distributor, Universal, in 1940, Van Beuren closed in 1936 when RKO switched to distribute for Disney and Ub Iwerks was unable to recover the same year when MGM decided to start their own operations.<sup>228</sup> In the late 1940s, television was viewed as a primary competitor to the entertainment dollar of the public and many in the film industry were experiencing difficulties in finding solutions to cope with the problem.<sup>229</sup> Television provided audiences with entertainment that was both inexpensive and readily available. In 1949-1950, the average weekly motion picture attendance decreased by one third from 90 million to 60 million. This was the largest decline to date in the history of movie-going which did not plunge again until the mid-1960s.<sup>230</sup> Both Hollywood's attitude to the small screen and Terry's fear that he would upset his distributor and lose the contract, exacerbated by his financial insecurity as posited by the author, likely influenced his decision to refrain from entering the television market.

By 1951 television networking in the United States was linked coast to coast and the new medium was growing as more households purchased television sets<sup>231</sup> while most Hollywood studios began adapting to the challenge television posed by producing entertainment that could not be offered by the tube.<sup>232</sup> By the early 1950s Terry understood that in order for his studio to meet the challenges posed by the new media required adaptation or in due course perish.<sup>233</sup> By the late 1940s, television animation was being produced by independent animation studios<sup>234</sup> and live-action studios also began to sell portions of their theatrical film libraries to other companies to sell to television.<sup>235</sup> Terry sensed an opportunity for his studio to take advantage of the medium by making his film library available for television.<sup>236</sup>

In 1953, Terry was able to convince Twentieth Century-Fox to make his cartoon library available for the television market under certain conditions. Fox stipulated that only the much older black-and-white shorts from the 1930s could be televised (i.e., Kiko the Kangaroo, Farmer Al Falfa) and not the newer theatrical cartoons (e.g., Mighty Mouse, Heckle and Jeckle). Further, the production credits were to be camouflaged by re-filming the opening credits.<sup>237</sup> Terry was able to interest General Foods in purchasing the television rights to a large package of shorts from the early film library. The cartoons became part of *Barker Bill's Cartoon Show*, which premiered on CBS November 18, 1953 and ran to November 25, 1956,<sup>238</sup> and was the first major animation studio to sign up for television.<sup>239</sup> In

1956, *Barker Bill's Cartoon Show* ended and was replaced by a syndicated program, *Terry Toons Club* (later re-titled *Terry Toons Circus*), hosted by Claude Kirchner on WWOR-TV New York. The success of *Barker Bill's Cartoon Show* led to CBS purchasing the entire Terrytoons library of shorts as well as the production facilities in New Rochelle, New York in 1955.<sup>240</sup>

Terry's approach to the opportunities and problems posed by the rise of television in the late 1940s and early 1950s displays the classic response found in the psychodynamic components for Terry's economic practices. Concerned with his financial security he ignored corporate profits and a place in animated film history by turning down his nephew's invitation in order to maintain strong relations with his distributor. Then, in the early 1950s, when television was beginning to change the way America spent their entertainment dollar, the shrewd Terry cautiously approached Fox with his plan to sell rights to his film library, and then agreed to their terms in order to enter the television market.

#### **D. Institutional Forces of Change**

##### **1. Exhibition and Distribution Problems With Short Subjects**

During the Golden Age of American Animation, all studio production heads were cognizant of the fact that without a distributor that can arrange for the animated product to be exhibited alongside full-length feature films, there is very little that can be done except shut down operations until another contract had been negotiated. In 1927, despite a commercial arrangement profitable for both parties, John Randolph Bray's distributor, Goldwyn, suddenly decided not to renew its distribution contract. Bray had little choice but to close his studio.<sup>241</sup> In 1936, both Amedee Van Beuren and Ub Iwerks lost their distributors and were forced to cease operations. Walter Lantz lost his distributor, Universal Studios, in 1940 but was able to continue production for a short while until he was fortunate enough to renegotiate a contract with the film studio.<sup>242</sup>

There were a number of problems for an animation studio head in attracting and negotiating a distribution contract. First, there were just a dozen or so major Hollywood feature film production companies that were potential suitors to distribute animated cartoon shorts during the Golden Age while the number of producers of shorts (newsreels, animated cartoons, and 20-minute short subjects) was large and competitive.<sup>243</sup> Second, the animated short that preceded each feature film would sometimes be passed over either for a double-billed feature or for other non-animated short subjects.<sup>244</sup> Third, opinion evidence confirms

that during the 1940s empirical studies were undertaken indicating that theatrical attendance did not decline when cartoon shorts were not being exhibited with the feature.<sup>245</sup> The end result was that many producers of animated shorts had weakened bargaining positions and entered contracts under less than favourable terms to keep their studios in production.

Terry appreciated the commercial demands of the business and that keeping his distributor happy was the key to survival in the competitive business of animated film production. Distributors demanded inexpensively produced shorts and, other than Disney who ran consistently over budget,<sup>246</sup> most studio budgets were tight and keeping costs at a minimum was a necessity. In order to satisfy his distributors, Terry produced cartoons on a tight budget, avoided innovation, and kept his product routine and predictable.<sup>247</sup> Exhibitors were seeking conventional formulaic cartoons because predictable cartoons obviated “the need for screening the product carefully or even thinking much about it.”<sup>248</sup>

Terry’s decision to keep to the conventional was borne out of his economic psychodynamics to go with what works and not take risks. Terry also understood the realities of the marketplace that theatre chains preferred to buy their short subjects in blocks and therefore had little interest in one or two expensively produced innovative and masterfully crafted shorts among the batch. By producing on a tight budget he had little choice but to operate a factory-like production system featuring cartoons having repetitious storylines and familiar plot devices, but fortunately for Terry this is exactly what his distributor and exhibitors demanded.

## 2. Shorts Given Little Attention by Film Critics

Film scholars have long recognized that animated cartoons, with few exceptions, are rarely the concern of critics.<sup>249</sup> One reason may be that critics attend private screenings at which time cartoons are not part of the viewing menu.<sup>250</sup> Another reason may be related to the prevailing opinion of distributors who find shorts as a necessary evil because exhibitors demand shorts to pad their two-hour programs while full-length pictures bring from twenty to fifty times as much rental in the theatres.<sup>251</sup> Terry’s explanation for the indifference by critics towards his animated cartoons was that reviews of cartoon shorts had no effect on the economic behaviour of the movie-going public.<sup>252</sup> The public attended the theatre for the feature film and the quality of a short or even whether a cartoon was exhibited or not did not influence purchasing decisions.

In the early 1940s, critics began to drop cartoons from review pages of trade magazines and by the close of the decade critical reviews of animated cartoons had disappeared almost entirely from media publications. Terry held no illusions on the importance of animated cartoons to box office revenue generation. His opinion on the purpose of short subjects to theatre owners and exhibitors was that “they were just fillers.”<sup>253</sup> The fact that critics ignored or overlooked the need to review short subjects posed problems to producers like Disney and Fleischer who desired to create innovative cartoons that advanced the art form. Critical reviews would help differentiate their product from the mediocre fare produced by the other studios. These reviews could be used to attempt to extract higher rental rates from exhibitors and negotiate more favourable contracts from distributors.

The disappearance of critical reviews from the trade literature was both good news and bad news for Terry. Without media attention, there was less likelihood that his distributor would become aware of any disparities between the entertainment value of the Terry product and the higher budgeted shorts. Accordingly, there would be less pressure on Terry to remedy any deficiencies which would have certainly driven up production costs. Any increase in production costs would have reduced Terry’s net worth and negatively impacted his financial security as postulated in the psychodynamic components constructed to explain Terry’s economic behaviour.

Alternately, the disappearance of critical discussions of animated cartoons in the media could be interpreted by his distributor as a further marginalization of cartoons as legitimate entertainment for the movie-going public. The possible end result could have been Fox determining that cartoons added very little to the theatrical fare and deciding to remove animated shorts from the menu altogether. If Terry had perceived the absence of critical reviews as threatening renegotiations with his distributor, his financial insecurity would have been increased thereby affecting his economic decision making and saving behaviour.

### 3. Poor Entertainment Quality of Animated Cartoon Shorts

During the silent period of animation, most animated cartoon producers experienced great difficulty in producing shorts that movie-goers found entertaining, quality deficiencies that historians have attributed to tiny production budgets,<sup>254</sup> management indifference to production quality,<sup>255</sup> rudimentary production practices of the early studios,<sup>256</sup> lack of humour<sup>257</sup> and absence of intelligent ideas in the storylines.<sup>258</sup> Paul Terry acknowledged that his early cartoons were “not very creditable as far as quality was concerned.”<sup>259</sup> With the

arrival of sound, colour, and technological advancements (e.g., multi-plane camera), along with the development of specialized animation departments (e.g., story, animation, backgrounds), the quality of animated shorts could only improve.

However, despite the progress in the medium and cartoons featuring engaging storylines, high-energy action, and appealing characters, by the early 1950s the poor quality of the shorts produced by the major studios was still a concern. Pratley wryly pointed out in 1951 that because audiences cannot walk out of shorts shown in theatres if they want to view the main feature, cartoon studios have very little impetus to improve the quality of their animated products.<sup>260</sup> Pratley's solutions were to expand production budgets, devote more time to production, and employ talented writers.<sup>261</sup>

The lack of entertainment value in animated shorts was a serious issue for the animation industry because the problem could have created an unwelcome chain of events with the public complaining to theatre owners about the cartoons, the exhibitors refusing to exhibit the shorts based on public feedback, and the distributors unable to sell the animated cartoons as part of their shorts programs prior to the main feature. The end result could be the closure of studios that were unable to find distributors, the advancement of the argument that animated cartoons are incapable of consistently entertaining mainstream public audiences, and the relegation of animated films to backroom movie parlours and travelling sideshows as curiosities of a bygone era.

The author posits that based on the psychodynamic framework for Terry, the issue of the state of the quality of animated cartoons produced by his studio would only become a concern to him if and when the problem threatened his financial security. The psychodynamic framework which sees Terry as a risk-averse manager of money with extreme saving behaviour does not predict that Terry would invest large sums of money to improve the entertainment value of his cartoon product for the sake of advancing the art form or silencing the voices of film critics. Rather, the framework sees Terry as a producer spending just enough money on his cartoons to ensure that the entertainment value of his product would satisfy the minimal demands of his distributor.

The conclusions drawn on the psychodynamics underlying Terry's economic practices are supported by the events leading up to Moser's 1936 lawsuit against Terry for fraudulent misrepresentation. During 1935 and early 1936, Earle Hammons, theatre operators, and the distributor Fox Film Corporation had been receiving numerous complaints as to the quality of the animated shorts produced by Moser & Terry, Inc.<sup>262</sup> Hammons

informed Harvey Day, the sales manager of Moser & Terry, Inc., of these complaints and advised that the entertainment value of the shorts must be improved. The sales manager then informed both Terry and Moser of Hammons' concerns.<sup>263</sup> Terry did not act upon the requests of his sales manager to improve the product as he was more concerned with the opinions of his distributor Fox.<sup>264</sup> The complaints should have come as no surprise to Terry. Before receiving the complaints from his sales manager, Terry was already aware that there were problems with the entertainment value of some of the cartoons having screened some shorts at local theatres where audience responses were negative.<sup>265</sup>

Hammons informed Moser and Terry in early 1936 that he did not intend to renew the distribution contract because the pictures lacked entertainment value.<sup>266</sup> On fear of losing the distribution contract with Hammons and finding no other company to distribute the shorts, Moser sold his stock in Moser & Terry, Inc. and his interest in the partnership of Moser & Terry to Terry allowing Terry to have complete control of the studio.<sup>267</sup> Terry then informed Hammons that if the contract was renewed that he "would increase the personnel of his business, increase salaries, take larger quarters and improve the quality of the pictures to be produced."<sup>268</sup> Terry also requested from Hammons an additional one year to the term of the one-year contract in consideration of his investment of additional funds into the business and to cash in on the increased overhead. Upon Terry's promises, Hammons agreed to renew the contract for an additional two years.<sup>269</sup>

The fact that Terry continued to refrain from spending money on improving the product thereby keeping overhead low is compatible with the psychodynamic component viewing Terry as an extreme saver. Possibly he was wishful that the complaints would stop, the entertainment value of the cartoons would improve without financial intervention, or his distributor would not raise the issue again. While Terry's financial security was threatened, he was confident that the distribution contract would be renewed despite the complaints and he was determined to continue to keep production costs low until faced with an ultimatum.

Possibly his confidence in a renewal was due to the fact that Terry had known Hammons for about twenty years,<sup>270</sup> was likely familiar with the way Hammons conducted his business affairs, and believed the situation had not reached a critical point. When Hammons finally made a direct threat not to renew the contract unless the product improved, Terry had no other choice but to invest in his cartoon product or lose the distribution contract. Being risk-averse as the psychodynamic framework posits, Terry was not willing to take the chance of finding another distributor who would be willing to distribute his budget cartoon product if the contract was not renewed.

The author's conclusions drawn with respect to the economic practices operating as received norms for Terry supports the assertion that at the time Terry purchased Moser's shares, he had reassurances that the distribution contract would be renewed as there would be too much risk for Terry to accept if he had no guarantees from a distributor. Terry's statement under oath that if he couldn't negotiate a contract with Educational, he would be able to find another distributor<sup>271</sup> contradicts his earlier comments that if he lost his contract with Fox no one else would want to deal with his studio.<sup>272</sup> If Terry truly believed that no other distributor would want to deal with him after Fox had turned his studio down, then he could not feel confident in his situation that he could find another distributor. The contradiction gives the impression Terry was not altogether truthful about his true intentions.

Terry's response to Moser when faced with having to invest in his studio or lose the contract was "that he was going to have to cut down on all his expenses, and that he intended to cancel his charge accounts in the stores" also is suspect.<sup>273</sup> Since evidence strongly suggests Terry never purchased on debt, it is unlikely he had charge cards. The statement may have been made to magnify the severity of the situation to induce a worried Moser to sell his shares.

There is also a distinct possibility that Terry had reassurances from Hammons that a contract would be renewed. Hammons had suspicions of disagreements between Moser and Terry over the way the company should be operated. Testimony at the trial reveals that both Hammons and Terry were confident that by eliminating Moser Terry could make good pictures.<sup>274</sup> The relationship between Moser and Terry had deteriorated to the point in early 1936 where Moser was unwilling to invest anymore in the studio.<sup>275</sup> Therefore, it was in Hammons' best interests to have Terry purchase Moser's shares giving motive for collaboration between Terry and Hammons against Moser.

By convincing the nervous Moser that Hammons may not renew the distribution contract and then purchase his shares, Terry improved his chances of negotiating another distribution contract with Hammons. However, to charge that Terry had full assurances from Hammons that the contract would be renewed if he had bought Moser out would be to accuse Terry and Hammons of conspiring and engaging in fraudulent activities. Therefore, the writer suggests another possibility: that Terry had already engaged the interest of another distributor and negotiations were possibly underway that would be finalized if Fox dropped out.

Terry's decision to invest in his company after receiving the ultimatum was an abrupt shift in his economic practices. Terry not only had been against colourising his shorts but also opposed the purchase of studio equipment such as a movieola<sup>276</sup> because the machine would decrease employee productivity<sup>277</sup> and was against Moser's idea for the creation of a story department.<sup>278</sup> The psychodynamic framework can also explain Terry's sudden change in spending behaviour.

While Terry's promises to increase salaries and add certain people to the organization<sup>279</sup> helped convince Hammons he was serious about improving the quality of his cartoons, the promise also served to improve working conditions for an overworked staff evident by Moser's comment on the studio's rigorous production schedule.<sup>280</sup> Since skilled animators were in short supply during the 1930s, following the psychodynamic framework for Terry as a shrewd and financially insecure producer he may have felt these improvements were necessary or risked losing some of his prized talent to other studios that paid better or provided superior working conditions.

Further, while Terry's promise to create a story department to improve the entertainment quality of the shorts helped to secure another contract from Hammons, there were likely other motives. A story department would also provide better working conditions for his staff helping to secure their loyalty.<sup>281</sup> In addition, Terry was writing most of the stories and wanted to devote most of his energies to managing the studio now that he was solely responsible for its operation. There is evidence that Terry began to believe that Moser's idea of a story department was a good idea.<sup>282</sup> In fact, in February 1936 prior to negotiations with Hammons Terry was already in the process of enlarging the story department by renting an adjoining room to the story department.<sup>283</sup>

Finally, based on the psychodynamics formulated on Terry's economic practices, one could conclude that a significant force behind Terry securing the distribution contract was to increase his financial security as Terry would feel much more financially secure with a longer deal. Therefore, as noted earlier, it is not surprising to find that Terry argued for an additional year on the contract because he was making a substantial investment. After receiving the longer-term contract, Terry kept his promise to Hammons and increased his staff to about 54 or 55 men while providing some of his staff raises.<sup>284</sup>

#### 4. The Rise of the Unions and the Labour Movement

John R. Bray's assembly-line animation production methods instituted during the silent era to keep production costs under control while providing animators more time for creative work resulted in studios being jammed with adolescents and untrained women, most of whom were working for low salaries doing repetitive depersonalized work.<sup>285</sup> As a result of the less than optimal working conditions, many studios experienced high employee turnover rates.<sup>286</sup> By 1933, the rise of the labour movement had reached the film industry with the founding of the Screen Actors Guild attempting to eliminate exploitation of Hollywood actors forced into oppressive multi-year contracts by major movie studios.<sup>287</sup>

In early 1937, employee unrest at the Fleischer Studio reached a boiling point when demands were made by the Commercial Artists and Designers Union for better pay and shorter working hours.<sup>288</sup> While wages were on par with the other animation studios, the work load was heavy, there was no margin for error (e.g., the Fleischers did not shoot pencil tests) that existed at the Iwerks and Disney studios, and the staff was forced to use antiquated equipment.<sup>289</sup> When Max Fleischer refused to negotiate with the employees and fired fifteen artists for complaining, on May 7, 1937, the CADU walked out of the studio, a strike instigated by the inkers, painters and in-betweeners over a "living wage" including pay and benefits.<sup>290</sup>

The Fleischer strike lasted five months and resulted in Paramount forcing the Fleischers to sign with CADU for better pay and benefits. The Fleischers then moved the studio to Miami, Florida, a strong anti-union state, to avoid further labour unrest.<sup>291</sup> However, with months lost in production, costs associated with the move to Miami, increased payroll, and poor box office returns on *Hoppity Goes to Town* (1941), the Fleischer brothers were forced out of the company that was renamed Famous Studios by Paramount Pictures.<sup>292</sup>

In 1938, the Painters, Decorators and Paperhangers Union chartered the Screen Cartoon (later Screen Cartoonists) Guild, Local 852. The Guild allied with the Conference of Studio Unions (CSU), a group that competed with the International Alliance of Theatrical Stage Employees (IATSE) under the leadership of Herbert Sorrell for control of film workers in Hollywood.<sup>293</sup> In 1941, the union began a concerted drive to unionize all of the animation studios and quickly obtained contracts with Walter Lantz Productions, Screen Gems, George Pal and MGM. After a six-day lockout, Leon Schlesinger's studio that produced the Looney Tunes shorts also signed a union contract.<sup>294</sup>

In 1941, the Walt Disney studio staff was both the best compensated unit in the animation industry and enjoyed the finest working conditions. Nevertheless, Disney's employees were not satisfied because they were required to give copious amounts of free overtime,<sup>295</sup> bonuses promised by Disney were not given, employees were dismissed as the work slowed, and the studio salary structure was flawed with illogical wage disparities.<sup>296</sup> Disney's lawyer, Gunther Lessing, aggravated the situation by only showing contempt for the activities of the Federation.<sup>297</sup>

After Disney employees chose the Federation of Screen Cartoonists to represent their interests with Disney animator Art Babbitt acting as the president of the Federation, Disney refused to bargain with the union.<sup>298</sup> Walt tried to avert a strike by sitting down with his staff but rather than addressing their concerns he focused on how patient he had been with his employees and how hard he had worked in developing his studio.<sup>299</sup> Babbitt left the Federation in February 1941 to join the Cartoonists Guild and become Disney's unit chairman.

On May 28, 1941, after Disney laid off about two dozen employees, refused to meet with the guild's committee, and then fired Babbitt accusing him of being a troublemaker,<sup>300</sup> a strike, instigated by Herb Sorrell, began.<sup>301</sup> The strike damaged the public image of a studio that liked to portray itself as just one big happy family,<sup>302</sup> and resulted in a much shorter version of *Dumbo* (1941) because fewer animators could be employed to complete the film and Disney could not afford the constant production revisions.

When Disney left to tour Latin America as a goodwill ambassador, a federal mediator found in favour of the Cartoonist Guild on all issues.<sup>303</sup> Boycotts across the United States, his Bank of America financiers, the fear of the loss of government contracts, and advice from his brother Roy all contributed to his decision to accept the union terms. On September 21, 1941, the staff returned to work after the nine week strike. At the studio, salaries increased two-fold overnight for a 40-hour employment week and screen credits were established. The Screen Cartoonist Guild now represented 90% of Hollywood animation workers.<sup>304</sup>

The strike had a devastating effect on the studio. The event so upset Disney that he wept.<sup>305</sup> Disney lost some of his best and brightest talent who moved on to other studios,<sup>306</sup> the paternalistic relation that existed between Disney and his animation staff had disappeared, and the strike damaged the studio's reputation in the industry by cementing the studio's derogatory nickname of "the mouse factory". In addition, Disney became vindictive, lost the

trust of even his most loyal artists, and developed a streak of paranoia that would haunt him the rest of his life.<sup>307</sup>

The psychodynamic framework would cast Terry as a producer opposed to the unionization of his studio because the increased wages to his lower paid production staff and better benefits for all his employees would decrease corporate net profit and consequently his long-term financial security. Former Terrytoons employees such as Tom Morrison would later state that Terry was completely against a union shop at the studio.<sup>308</sup> Examining the historical record of the events leading up to the 1947 strike at the Terrytoons studio should help determine whether the hypothesis drawn from the framework is correct.

While the unions had by 1941 successfully negotiated contracts with most studios, Terrytoons still had non-unionized staff, a testament to Terry's shrewd managerial abilities. Terry was successful in avoiding a strike partly due to his practice of hiring family members thereby making it difficult for relatives to move against one another on the many divisive issues that characterize strike action. Further, Terry located his studio in New Rochelle, New York, thousands of miles from the hotbed of Hollywood labour action thereby distancing the studio from many of the issues, personalities, and problems that gave birth to strike action.

The unionization trouble for Terry began after two Terrytoons employees, business agents for the Screen Cartoonists Local 1461, were successful in having the union recognized as a bargaining agent for the studio employees. The N.L.R.B. subsequently found the employees to constitute a unit appropriate for the purposes of collective bargaining within the meaning of Section 9(b) of the Act.<sup>309</sup> Terry's first response to the growing labour unrest was to avoid the issue altogether by failing to respond to employee suggestions that management and staff meet to discuss unionization.

By using delaying tactics Terry was able to postpone for about a year coming to some agreement with his employees. Eventually Terry agreed to a one year contract with his employees in June 1944 but not before firing the President and Vice President for union activities, both of whom were reinstated by the N.L.R.B. after the company was convicted of unfair labour practices.<sup>310</sup> While the one year contract was acceptable to the employees, the union voted the contract down. Eventually an agreement was reached where the staff was able to work with a contract without union approval as long as Terry abided by all the terms of the contract.<sup>311</sup>

With Terry abiding by all contract terms and the one-year term set to expire, a new contract was forwarded to Terrytoons in May 1945 along with a request for a negotiation meeting. However, Terry rejected all of the union demands, followed by the union later rejecting the company counter proposal. Terry continued to delay meeting with union representatives, and the one-year contract expired on June 30, 1945. By the end of 1945, a new contract was not entered into because of two main setbacks, Terry was only agreeable to non-standard wage rates (i.e., Terry paid “whatever he could get out of” his employees)<sup>312</sup> and he was opposed to the union shop clause.<sup>313</sup> Terry would admit that he had no problems with paying his more talented staff wages comparable to the other studios but had difficulty with paying his lesser talented staff (e.g., inkers, colourists, opaquers) higher wages as these employees could be easily replaced.<sup>314</sup> The loss of the lesser talented staff were no threat to Terry’s financial security as they could be easily trained and replaced, a conclusion that is compatible with the psychodynamic components developed for Terry’s economic practices.

The psychodynamics of Terry’s economic practices would find that the prospect of a strike would have created a certain degree of financial insecurity in Terry because a lockout could threaten Terry’s ability to meet his production commitments to his distributor. Therefore, based on the psychodynamics underlying the economic practices operating as received norms for Terry, it would be expected that he would take measures to ensure that he could still meet his contractual obligations with his distributor during a work stoppage. By delaying a strike, Terry was able by early 1946 to produce a backlog of animated shorts that could keep the company meeting its contractual commitments for over a year.<sup>315</sup> By accumulating unreleased shorts, Terry was also trying to dissuade his employees from walking out and was successful in convincing Thomas Morrison in resigning his position as shop steward as he knew that there was no company urgency in coming to terms with the staff if a walkout occurred.<sup>316</sup>

During 1946, with the security of a library of unreleased shorts, the company continued to hold firm to a non-union shop and below the standard rates. Terry refused to sign a new contract in the fall after the company had agreed earlier in the summer to a tentative union agreement, an apparent management delay tactic. The union, unsuccessful in eliciting support from the Industrial Relations department of Twentieth Century-Fox, believed it was necessary to continue to fight for a contract with industry standard rates and a union shop clause, especially since a similar contract was signed at Famous Pictures, Terrytoons closest rival in the area, in January 1947.<sup>317</sup> Terrytoons was left as the only studio in the country not paying standard rates and which did not have a union shop.<sup>318</sup>

Terry fully understood that a labour walkout would only benefit his company because he could simply have his backlog of films released and save huge production costs for each day of the lockout.<sup>319</sup> The company accepted a new union contract but not surprisingly Terry later refused to sign.<sup>320</sup> After requesting some time to recover from illness, Terry decided he wanted a two-year contract complicating matters for the union.<sup>321</sup> The issue of whether Terry was stalling on bargaining and negotiating in good faith was raised later that month involving an incident where Terry fired five employees for union related activities resulting in an eventual two-week lockout at the studio, a matter settled by an N.L.R.B. decision.<sup>322</sup>

While the staff was hesitant to strike based on Terry's accumulated backlog of films,<sup>323</sup> when Pepe Ruiz,<sup>324</sup> business agent for the Cartoonists Guild, arrived from California and argued that an organized labour action would achieve the same success as had been achieved at the other studios, the employees eventually bought into Ruiz's reasoning.<sup>325</sup> On May 16, 1947, with no progress in sight, the strike officially began.<sup>326</sup> Terry did not want to repeat the errors of Disney by losing some of his more talented staff during the strike so he offered these artists assurances that despite the strike action that their jobs were secure, and requested their continued employment services, and all would become loyal scab workers.<sup>327</sup>

For the next nine months, the majority of the Terrytoons employees walked the picket lines, spent time with their families, or tried to find alternative sources of income<sup>328</sup> while Ruiz negotiated with the company. The shrewd Terry, satisfied with the status quo, continued to avoid any reasonable attempts to seriously bargain with his employees and made unreasonable demands that aggravated the strikers while providing managerial support for his current loyal staff of scabs.<sup>329</sup> In October 1947 the frustrated strikers filed a petition with the N.L.R.B. requesting decertification of the Screen Cartoonists Local 1461, AFL, as the bargaining unit for Terrytoons workers.<sup>330</sup> Finally, with many of the strikers experiencing financial difficulties and many families divided by the strike action,<sup>331</sup> after 32 weeks of employee strike action, the labour dispute ended on December 19, 1947.<sup>332</sup>

There were a number of reasons for the failure of the strike. First, Terry had well over a year of animated shorts ready to release once the strikers began their walkout, a time period far longer than any Terrytoons employee was able to economically endure.<sup>333</sup> Second, the Screen Cartoonists Local was not affiliated with the International Alliance of Theatrical Stage Employees (I.A.T.S.E.), but rather was in direct competition. Therefore the strikers could not get their support such as the picketing of theatres where Terrytoons cartoons were exhibited.<sup>334</sup> Third, the picketers received very little support from the other unions and the picket lines were not respected.<sup>335</sup> Fourth, Terry had a loyal bunch of dedicated scab workers,

many of whom had been with him since the company first began producing animated shorts, and because the studio was non-union anyone coming off the street looking for jobs could find work for Terry.

Terry's response to the rise of labour unrest at the studio and subsequent strike strongly supports the psychodynamic framework for Terry because he strongly opposed unionization to avoid higher production costs, shrewdly delayed the strike as long as possible, wisely convinced his most talented staff to remain at work, and methodically produced a backlog of shorts to provide a sense of financial security in the event of a walkout. The surplus of shorts was also used as a means to convince his employees not to strike while providing the distributor with little worries the company would not be able to meet production commitments.

#### 5. The Sherman Anti-Trust Act and the End of Block Booking

On June 20, 1938, three of the smaller film studios (United Artists, Columbia, and Universal), the "Little Three", initiated a lawsuit (*U.S. v. Paramount Pictures, et al*) against the Big Five studios (MGM, RKO, Paramount, Twentieth Century-Fox, Warner Bros.) seeking to end the block booking system.<sup>336</sup> Under block booking, independent (i.e., unaffiliated) theatre owners were forced to take large numbers of a studio's motion pictures without recourse allowing these studios to distribute B- films (i.e., second-class product) with their A-class features and star vehicles making production and distribution more economical. Coinciding with the practice was blind bidding where theatre owners were never given the opportunity to view the product before purchase.<sup>337</sup> The Little Three argued the block booking system violated the *Sherman Anti-Trust Act*,<sup>338</sup> legislation that seeks to prevent the artificial raising of prices by restriction of trade or supply through illegal monopolies.<sup>339</sup>

The lawsuit ended with a settlement between the studios known as the Consent Decree of 1940 where the Big Five were allowed to keep their theatres if they met the requirements of the decree within a three-year period or the lawsuit would be reinstated. The consenting studios were allowed to continue to sell films in blocks of up to five features, but full-line forcing, or the block booking of short subjects, was prohibited in the arrangement. The Big Five also agreed to prohibit the use of blind bidding. All of these practices were watched over by an administration department to ensure enforcement.<sup>340</sup> The Little Three were unhappy with the ruling and argued they were exempt from the agreement allowing the government to reopen the Paramount case by June 1, 1942 and the Big Five to resume their earlier activities.<sup>341</sup>

The Justice Department began the second phase of *U.S. v. Paramount, et al*, commonly known as "The New York Equity Suit." On October 8, 1945 the Big Eight (Big Five and Little Three) studios and the Justice Department were in Federal Court. The Little Three were identified as defendants because of alleged collusion with the theatre-owning Big Five. While the studios continued to complain about the instability of the foreign markets and vertical integration making block booking necessary, the trial ended in January 1946 with the court finding all studios guilty of conspiracy in restraint of trade.<sup>342</sup>

The practice of theatre pooling, which involved two competing theatre chains working together for mutual advantage, was also prohibited. The court permitted the Big Five studios to keep their large circuits and retain their own theatre chains, and instituted competitive bidding where studios were forced to accept the price of the highest bidder and distributors had to sell each film without the appearance of block booking.<sup>343</sup> Both the government and the major studios submitted appeals that would send the Paramount case to the United States Supreme Court.<sup>344</sup> Joining the Department of Justice in their goal of restoring free competition to the industry was the Society of Independent Motion Picture Producers (SIMMP), a union formed by the independent film producers unhappy with the original Consent Decree of 1940.<sup>345</sup>

The landmark Supreme Court decision handed down on May 4, 1948 affirmed the Statutory ruling that declared the studios guilty of violating antitrust laws thereby abolishing block booking and requiring all films henceforth to be sold on an individual basis. The Supreme Court also reversed the lower court mandate for competitive bidding, considered studio disintegration to be the ultimate solution to the problems faced by the independents, and remanded the decision back to the lower courts with the recommendation that competitive bidding be nullified and that divorcement be reconsidered.<sup>346</sup>

The Big Five tried to negotiate another consent degree before final ruling by the Federal District Court, but were thwarted in their efforts by protest from SIMMP. Accordingly, with little options available, RKO became the first to remove its theatre operations from its studio operations and a consent decree was signed on November 8, 1948. Paramount, feeling the burden on impending legislation looming over the company fortunes, decided to voluntarily divest their theatre chain rather than submit to a court-directed liquidation. Paramount entered into a divorcement decree with the Justice Department on February 25, 1949.<sup>347</sup> While the other three Hollywood theatre-owners fiercely resisted the Justice Department demands, the government was not interested in negotiating. The decisive

blow came with the Federal Statutory Court decision on July 25, 1949 - eleven years and one week after the Paramount case was filed. By the end of 1949, all major film studios had given up ownership of their theatres.<sup>348</sup>

The block booking system provided a stability of film supply and demand for the cartoon producer because each animated cartoon produced had a certain guaranteed audience and dollar return. When the government prohibited block booking, the guarantee of shorts being distributed along with the feature film ended. As a result, some historians argue that with the loss of a guaranteed market, production declined resulting in the eventual death of the theatrical cartoon by the end of the 1950s.<sup>349</sup> However, the end of block booking in 1949 can only be a partial answer for the death of the theatrical cartoon because the practice of full-line forcing of shorts was declared illegal with the 1940 Consent Decree, yet there was little effect on short production during the 1940s.

After the Consent Decree, larger studios that owned their theatres like Twentieth Century-Fox adapted by releasing their shorts through their exhibition houses, while other studios such as Universal which did not own their own theatre chains were not as fortunate. The primary effect on studios following the Supreme Court decision was that they were forced to tighten their belts. Live-action shorts were soon phased out despite their value as test vehicles for new personalities on the verge of stardom and their worth as a means to provide directors and other promising studio talent the opportunity to work in Hollywood. While animated shorts were not phased out, most studios imposed budget cut-backs that eliminated quality and allowed the entertainment value of cartoons to diminish.<sup>350</sup>

While the Consent Decree outlawed full-line forcing in 1940, there was very little threat to Terry's contractual relationship with his distributor because Twentieth Century-Fox owned their own theatre chain guaranteeing that the cartoon product would be distributed. Despite his distributor's built-in market, Terry understood that animated cartoons do not sell tickets.<sup>351</sup> Further, Terry likely appreciated that if expenses were to be trimmed by his distributor in response to the Supreme Court's ruling, then non-revenue generating fare such as short programs would be in jeopardy of being removed from the theatre bill. With the rise of the double feature already pushing some shorts off the theatre bill, based on the psychodynamics of Terry's economic practices his insecurity would only be increased.<sup>352</sup>

Accordingly, with the end of the block booking system, the psychodynamic framework would predict that Terry would become more insecure and worried about his financial future. What is unknown is whether Terry attempted to convince Fox of the value of

animated cartoons to their product line, possibly by developing greater public awareness and interest in Terrytoons cartoons through marketing and character merchandising efforts. What is known is that Terry continued to produce cartoons on a budget and avoided any actions that would upset his relationship with his distributor such as entering the field of cartoon production for television.

However, the most likely result of the death of the block booking system was resignation by Terry that the end of the theatrical cartoon was near and that the best road ahead lay with embracing television, a feat he accomplished in 1953. Furthermore, the end of the theatrical cartoon may have played a factor in his decision to sell his cartoon library to CBS in 1955 for Terry was never one to pass up a lucrative financial offer (\$3.5 million) at a time when the future of the animated theatrical cartoon was never so uncertain.

## **E. Conclusions**

The author found that Terry's responses to twelve major forces of change during the period 1929-1955 could be explained by considering the four psychodynamic components which comprise his managerial practices operating as received norms, a framework consisting of an external locus of control, extreme saving behaviour, shrewd money management, and risk-averse financial behaviour due to financial insecurity. Terry's managerial practices operating as received norms during the period 1929-1955 were remarkably consistent with his economic practices for the period 1887-1929 thereby providing support both for the framework of four psychodynamic components formulated in Chapter 2 as well as the importance of considering the economic practices of managers when addressing issues underlying film interpretation and analysis. By including the economic practices of managers within the current unified mode of film production, film scholars will be better able to analyze and address the interrelationships of film style, technology and mode of production through historical change.

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<sup>1</sup> Case on Appeal from Judgment, 107.

<sup>2</sup> Ibid., 108.

<sup>3</sup> Audio-Cinema was a company of sound engineers and consultants from a number of major companies (Eastman Kodak, Consolidated Film, Bell Telephone Labs) that generated revenues from engineering work and engaged in film production. Weiss, interview, 15 June 1970, 2c.

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<sup>4</sup> Case on Appeal from Judgment, 515-516.

<sup>5</sup> Weiss, interview, 15 June 1970, 2c.

<sup>6</sup> Davis, interview, 15e. Morrison, interview, 5d. Moser, interview, 15b. Further study is recommended to determine whether, like Terry, Moser's frugal money behaviour can be attributed partly to an external locus of control.

<sup>7</sup> Case on Appeal from Judgment, 110.

<sup>8</sup> These production dates are found in the Paul Terry Collection, a 2 box collection at the Film Study Center, Museum of Modern Art, New York City. The collection features 47 sketchbooks with each book featuring scene drawings for each of the first 47 cartoons produced by the partnership. Accompanying the sketchbooks is "Schedule A" listing the sketchbook number, and title, production dates and contents (characters, synopsis) for each sketchbook.

<sup>9</sup> Rothbard, *Great Depression*, xv.

<sup>10</sup> Marchionni, 25.

<sup>11</sup> This contract forms part of the Paul Terry Papers collection, Fayetteville, North Carolina.

<sup>12</sup> Clauses 2 and 3 of Memorandum of Agreement between Paul H. Terry and Frank H. Moser dated 16 October 1930, New York, New York, Paul Terry Papers.

<sup>13</sup> Letter from F. Lyle Goldman, Secretary of Audio-Cinema, to Paul Terry and Frank Moser, 17 October 1930, Paul Terry Papers.

<sup>14</sup> Letter from Paul Terry, Frank Moser and Joe Coffman to J.C. Barnstyn, 8 December 1930, Paul Terry Papers, Fayetteville, North Carolina. Case on Appeal from Judgment, 9.

<sup>15</sup> The business relationship between Coffman and the Moser-Terry partnership in the form of contracts and correspondence is detailed in the Paul Terry Papers. At the time of his 1970 interview Terry had much respect for Coffman as a businessman and sound expert. Terry, interview, 20 December 1969, 86.

<sup>16</sup> "Wholesale Demand for Cartoon Shorts," 13:1.

<sup>17</sup> Forgacs, "Disney Animation," 367.

<sup>18</sup> Chartier, "Hard Year for Films," 12.

<sup>19</sup> Waller, "Year in Pictures," 4.

<sup>20</sup> Chartier, "Hard Year for Films," 12.

<sup>21</sup> Weiss, interview, 15 June 1970, 2c. "Cinema: The New Pictures," March 2, 1931. Hershenson, "When Griffith Filmed in Mamaroneck."

<sup>22</sup> Weiss, interview, 15 June 1970, 4c.

<sup>23</sup> *Ibid.*, 5c-6c. However, financial statements for March 1, 1930 to September 30, 1931 indicate that Audio-Cinema was generating a profit from the animated cartoon production and that music license fees were much smaller than \$3,000 per cartoon as Weiss had indicated. Audio-Cinema, Incorporated, Terrytoons – Series I – 26 Reels – Released at the rate of one (1) every two (2) weeks starting March 1, 1930 (Financial Statement prepared 11 November 1931); Audio-Cinema, Incorporated, Terrytoons – Series II – 17 Reels – Released at the rate of one (1) every two (2) weeks starting February 22<sup>nd</sup>, 1931 (Financial Statement prepared 11 November 1931), prepared by Patterson and Ridgway, Paul Terry Papers.

<sup>24</sup> *Ibid.*, 5c.

<sup>25</sup> Statement of Loans Account for Consolidated Film, Audio-Cinema, Inc., 24 September 1931. "Pressing Accounts," Audio-Cinema, Incorporated, 24 September 1931 (68 accounts listed), Paul Terry Papers.

<sup>26</sup> "Memorandum of Agreement between Consolidated Film Industries, Inc. ("Consolidated") and Audio-Cinema, Inc. ("Producer") and Joe W. Coffman and F. Lyle Goldman ("Individuals")," 18 September 1931, Paul Terry Papers.

<sup>27</sup> Terry, interview, 14 July 1970, 127-128.

<sup>28</sup> Memorandum of Agreement between Frank H. Moser and Paul H. Terry doing business as a partnership known as Moser and Terry ("Producer") and Educational Films Corporation of America ("Distributor"), 8 July 1931, Paul Terry Papers.

<sup>29</sup> Letter from E.W. Hammons (Educational Film Exchanges, Inc.) to Moser & Terry, 30 December 1931, Paul Terry Papers, Fayetteville, North Carolina. Letter from E.W. Hammons (Educational Film Exchanges, Inc.) to Moser & Terry, 18 January 1932, Paul Terry Papers.

<sup>30</sup> Terry, interview, 14 July 1970, 87.

<sup>31</sup> Studio records from the Paul Terry Papers collection indicate that in December 1931 the studio was located in the Bronx, but by May 1932, the new studio address was 203 West 146th Street, New York City.

<sup>32</sup> Weiss, interview, 15 June 1970, 5c.

<sup>33</sup> *Ibid.*, 7c.

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- <sup>34</sup> The Paul Terry Papers collection has a number of distribution agreements entered between Moser-Terry and Educational Films Corporation of America.
- <sup>35</sup> A corporate chronology of the early years of Moser and Terry can be found in Moser's Complaint. Case on Appeal from Judgment, 6-31. Care must be taken in the interpretation of the documentary evidence as the matter was obviously highly contentious.
- <sup>36</sup> Memorandum of Agreement between Moser & Terry, Inc. ("Corporation") and Frank H. Moser and Paul H. Terry ("Individuals"), 18 May 1932, Paul Terry Papers.
- <sup>37</sup> Letter from D. Theodore Kelly (Kelly, Hewitt & Harte, Attorneys and Counsellors at Law) to Frank Moser, 20 April 1934; Letter from the law firm of Breed, Abbott & Morgan to Paul H. Terry, 1 May 1934. Case on Appeal from Judgment, 7.
- <sup>38</sup> Case on Appeal from Judgment, 7, 111.
- <sup>39</sup> Ray, "Short Balanced F Scale," 309-310.
- <sup>40</sup> Shain, "Problems of the Film Industry," 12. For a detailed analysis of the effects of the Great Depression on Hollywood: Balio, "Surviving the Great Depression."
- <sup>41</sup> See generally Zukor, *The Public Is Never Wrong*; Eames, *The Paramount Story*; Server, *Robert Mitchum*.
- <sup>42</sup> Chartier, "The Year in Pictures," 3.
- <sup>43</sup> Ibid.
- <sup>44</sup> Ibid.
- <sup>45</sup> Memorandum of Agreement between Frank H. Moser and Paul H. Terry ("Partners") and Educational Films Corporation of America, 14 June 1932, Paul Terry Papers.
- <sup>46</sup> Case on Appeal from Judgment, 330. Directions as to distribution arrangements can be found in Letter from Educational Films Corporation of America to Moser and Terry, 21 March 1933, Paul Terry Papers.
- <sup>47</sup> Terry, interview, 20 December 1969, 82.
- <sup>48</sup> Case on Appeal from Judgment, 9.
- <sup>49</sup> Silverman, interview, 36. Sommer, interview, 16.
- <sup>50</sup> Case on Appeal from Judgment, 7-8.
- <sup>51</sup> Ibid., 114-119.
- <sup>52</sup> Chartier, "Year in Pictures," 6.
- <sup>53</sup> Morgan, "Picture Prospects and Profits," 522-523.
- <sup>54</sup> Chartier, "Year in Pictures," 6.
- <sup>55</sup> Smoodin, *Animating Culture*, 119.
- <sup>56</sup> Langer, "Institutional Power and the Fleischer Studios," 5.
- <sup>57</sup> "Inventor of Animated Cartoons Now on Dole."
- <sup>58</sup> See generally Canemaker, "Profile of a Living Animation Legend."
- <sup>59</sup> Deneroff, 2.
- <sup>60</sup> "How Funny "Looney Tunes" Are Made."
- <sup>61</sup> For a good overview of the animation process: Culhane, *Animation from Script to Screen*, 11-21.
- <sup>62</sup> Deneroff, 2.
- <sup>63</sup> Polt, "Death of Mickey Mouse," 36. The story developed as a result of Disney telling his dad how he could get his money back out of the studio in the event the animation company failed. See: Greene and Greene, "The Burbank Studio."
- <sup>64</sup> Adamson, 20.
- <sup>65</sup> "Bray-Hurd Win Cartoon Suit."
- <sup>66</sup> Sito, "'So What Was It Like?'," 40.
- <sup>67</sup> Ibid., 38.
- <sup>68</sup> Ibid., 39.
- <sup>69</sup> Ibid.
- <sup>70</sup> Ibid.
- <sup>71</sup> "Mickey Mouse and the Bankers."
- <sup>72</sup> Forgacs, 367.
- <sup>73</sup> Sito, "'So What Was It Like?'," 38.
- <sup>74</sup> "Animated Cartoon Prod. Is Now The Big Coin for Sketch Artists."
- <sup>75</sup> "Wanted - 5,000 Cartoonists."
- <sup>76</sup> "'Mickey Mouse' is Eight Years Old."
- <sup>77</sup> "Mickey Mouse and the Bankers," 94.
- <sup>78</sup> Forgacs, 367.
- <sup>79</sup> Forgacs, 367; Schickel, 161-162.
- <sup>80</sup> "Mickey Mouse and the Bankers," 94.

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- <sup>81</sup> Schickel, 102.
- <sup>82</sup> Langer, "Institutional Power and the Fleischer Studios," 7.
- <sup>83</sup> See generally Barrier, *Hollywood Cartoons*.
- <sup>84</sup> Churchill, "Hollywood Turns Back the Clock," 141.
- <sup>85</sup> "Time's Parallel to Disney." See generally Fielding, *March of Time*.
- <sup>86</sup> "Longer Pix Cut Shorts."
- <sup>87</sup> "Cartoon Prods. Setting Demand for Rent Hike."
- <sup>88</sup> Polt, 34.
- <sup>89</sup> "Heavier Costs May Force Disney to Drop Shorts."
- <sup>90</sup> Eliot, *Walt Disney: Hollywood's Dark Prince*, 187.
- <sup>91</sup> *Ibid.*, 188.
- <sup>92</sup> "Walt Disney Back With Leprechaun Pic Ideas." Disney would later release his plans to move into live-action features with a mixture of live action and cartoons in the same feature further distancing him from animated filmmaking. "Disney Goes More To Live-Cartoon Feature Prods."
- <sup>93</sup> "Animated Shorts Too Costly."
- <sup>94</sup> "Cartoon-Making Kicked Around."
- <sup>95</sup> *Ibid.*
- <sup>96</sup> *Ibid.*
- <sup>97</sup> "Cut Cartoon Output 45%."
- <sup>98</sup> "Cartoonists Shaving Costs."
- <sup>99</sup> "Lantz's 90-Day Layoff."
- <sup>100</sup> Pryor, "Warners Order Halt In Cartoons."
- <sup>101</sup> Langer, "Institutional Power and the Fleischer Studios," 7-8.
- <sup>102</sup> *Ibid.*, 8.
- <sup>103</sup> *Ibid.*, 10.
- <sup>104</sup> *Ibid.*
- <sup>105</sup> *Ibid.*, 11-12.
- <sup>106</sup> Terry, interview, 20 December 1969, 82.
- <sup>107</sup> Green and Green, *Remembering Walt*, vii, x.
- <sup>108</sup> *Ibid.*, 3.
- <sup>109</sup> See Solomon, *Enchanted Drawings*, 44.
- <sup>110</sup> Theme park executive William "Joe" Potter noted: "Once, when I tried to explain to Walt that something was going to cost a million dollars, he said, "'When are you going to learn not to bother me with inconsequential details?'" Green and Green, 101.
- <sup>111</sup> *Ibid.*, 100.
- <sup>112</sup> *Ibid.*
- <sup>113</sup> Thomas, *Walt Disney: An American Original*, 228; Marc Eliot paints a different portrait of Disney in his book *Walt Disney: Hollywood's Dark Prince*. He describes Disney as a harsh task master (p. 35); treated his employees in the same fashion as the heads of other studios, as employees and not artists (p. 67-68); relied on cheap sources of talent through recruitment pitches in dozens of newspaper advertisements (p. 69); paid his apprentice animators cheap wages considering their experience as art lessons and enough payment by themselves (p. 69); did not provide his employees with paid vacations (p. 89); had little sense of humour and a short temper (p. 90); when under financial pressures lost patient with his staff at the slightest provocation (p. 94); and when necessary intimidated his animators by threatening to abandon animation altogether (p. 139).
- <sup>114</sup> Grant, 188.
- <sup>115</sup> Morrison, interview, 14d.
- <sup>116</sup> Beckerman, interview, 2-3.
- <sup>117</sup> Adamson, 20.
- <sup>118</sup> Terry, interview, 14 July 1970, 143.
- <sup>119</sup> Terrytoons Inc., *Balance Sheet*, December 31, 1942 (Financial Statements), Paul Terry Papers; Terrytoons Inc., *Profit and Loss Statement*, Twelve Months Ending December 31, 1942 (Financial Statements), Paul Terry Papers; Terrytoons Inc., *Balance Sheet*, December 31, 1943 (Financial Statements), Paul Terry Papers; Terrytoons Inc., *Profit and Loss Statement*, Twelve Months Ending December 31, 1943 (Financial Statements), Paul Terry Papers; Terrytoons Inc., *Balance Sheet*, June 30, 1944 (Financial Statements), Paul Terry Papers; Terrytoons, Inc., *Profit and Loss Statement*, Six (6) Months Ending June 30, 1944, Paul Terry Papers; Terrytoons Inc., *Balance Sheet*, September 30, 1944 (Financial Statements), Paul Terry Papers; Terrytoons, Inc., *Profit and Loss Statement*, Nine (9) Months Ending September 30, 1944, Paul Terry Papers.

- <sup>120</sup> Terrytoons, Inc., *Analysis of Income Accounts, Years Ended December 31, 1943 – 1950*, Paul Terry Papers.
- <sup>121</sup> For a description of the elements of character merchandising, see World Intellectual Property Organization, *Character Merchandising*.
- <sup>122</sup> Terry, interview, 14 July 1970, 142. Tommy Morrison noted: “If you look back at the old pictures, he didn’t believe in having a popular or famous character or personality character. He believed in more variety. That was his theory.” Morrison, interview, 15 June 1970, 11d.
- <sup>123</sup> Pratley, “The Cartoon’s Decay,” 35.
- <sup>124</sup> Polt, 34.
- <sup>125</sup> Terry, interview, 20 December 1969, 84.
- <sup>126</sup> Terry and Lazar, interview, 26-27.
- <sup>127</sup> “America’s 1<sup>st</sup> Cartoon Cinema.”
- <sup>128</sup> “Cartoon Spot’s \$725 Weekend.” Nugent, “Semi-Annual Report.”
- <sup>129</sup> Krefft, “Bijou Theatre.”
- <sup>130</sup> “Mickey Mouse and the Bankers,” 94.
- <sup>131</sup> Anderson, interview, 17.
- <sup>132</sup> Grant, 144.
- <sup>133</sup> *Ibid.*, 69.
- <sup>134</sup> McDonald, “Now the Bankers Come to Disney,” 218, 223.
- <sup>135</sup> Weiss, interview, 15 June 1970, 26c.
- <sup>136</sup> Maltin, “Pinocchio.”
- <sup>137</sup> Weiss, interview, 15 June 1970, 26c.
- <sup>138</sup> Terry mentions that “Dr. Giannini” was the brother of the founder of the bank. In fact, he was Lawrence Mario Giannini, the son of the founder of the bank.
- <sup>139</sup> Terry, interview, 14 July 1970, 149-150.
- <sup>140</sup> Terry, interview, 20 December 1969, 25.
- <sup>141</sup> McDonald, “Now the Bankers Come to Disney,” 218.
- <sup>142</sup> *Ibid.*, 223.
- <sup>143</sup> *Ibid.*, 214.
- <sup>144</sup> See: “Cinema (Gulliver’s Travels),”; “Entertainment (Gulliver in Technicolor).”
- <sup>145</sup> Grant, 87.
- <sup>146</sup> Langer, “Max and Dave Fleischer,” 55.
- <sup>147</sup> “Cinema (Gulliver’s Travels).” “Entertainment (Gulliver in Technicolor).” Grant, 87.
- <sup>148</sup> Grant, 87. Cabarga, 186.
- <sup>149</sup> Cabarga, 188, 190.
- <sup>150</sup> *Ibid.*, 190.
- <sup>151</sup> Langer, “The Disney-Fleischer Dilemma,” 355.
- <sup>152</sup> Cabarga, 192; Grant, 89.
- <sup>153</sup> Grant, 144.
- <sup>154</sup> *Hansel and Gretel* (1954) (directed by Michael Myerberg and John Paul) released by RKO.
- <sup>155</sup> For a complete list of Disney Films, see: Maltin, *The Disney Films*. The international productions include: (1) *The Magic Horse* (1949) (Artkino (Russian)); (2) *The Emperor’s Nightingale* (1951) (New Trends Associates (Czech)); (3) *Johnny the Giant Killer* (1953) (Lippert Pictures (French)); and (4) *Animal Farm* (1955) (DCA (British) (directed by John Halas & Joy Batchelor)).
- <sup>156</sup> Terrytoons Inc., *Profit and Loss Statement, Twelve (12) Months Ending December 31, 1942* (Financial Statements), Paul Terry Papers.
- <sup>157</sup> Terry, interview, 20 December 1969, 26-27.
- <sup>158</sup> Terry would later acknowledge: “Fleischer was doing well and he made that *Gulliver’s Travels* and it broke him, practically.” Terry, interview, 14 July, 1970, 149.
- <sup>159</sup> Maltin, *Of Mice and Magic*, 135.
- <sup>160</sup> Zander, interview by the author, 15.
- <sup>161</sup> Production information, release dates, running times for approximately 7,000 animated cartoons can be found in: Webb, *Animated Film Encyclopedia*.
- <sup>162</sup> Anderson, interview, 17. Davis, interview, 17e. Case on Appeal from Judgment, 130.
- <sup>163</sup> Case on Appeal from Judgment, 116.
- <sup>164</sup> *Ibid.*, 116-117.
- <sup>165</sup> *Ibid.*, 620.
- <sup>166</sup> Weiss, interview, 15 June 1970, 13c.
- <sup>167</sup> Case on Appeal from Judgment, 620.
- <sup>168</sup> *Ibid.*, 132.

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- <sup>169</sup> *Ibid.*, 605.
- <sup>170</sup> *Ibid.*, 558-559.
- <sup>171</sup> *Ibid.*, 578.
- <sup>172</sup> For example, for the twelve month period ending December 31, 1935, the studio's most profitable year during the Moser-Terry reign, the net company profit was \$23,943.04 while the total costs to produce the 26 shorts was \$159,275.09. See "Balance Sheet," "Profit and Loss Statement," and "Terry-Toons Completed and Released" and related financial documents as found in Case on Appeal from Judgment, 760-860.
- <sup>173</sup> Please note that there were two sets of balance sheets, one set has a profit for the 12 months ending December 31, 1935 as \$45,728.30 which provides for about double the available capital to invest in colour production.
- <sup>174</sup> Case on Appeal from Judgment, 608.
- <sup>175</sup> *Ibid.*, 140.
- <sup>176</sup> *Ibid.*, 211-212.
- <sup>177</sup> *Ibid.*, 141.
- <sup>178</sup> *Ibid.*, 591.
- <sup>179</sup> Case on Appeal from Judgment, 604.
- <sup>180</sup> Case on Appeal from Judgment, 328-329, 385, 658-659.
- <sup>181</sup> *Ibid.*, 521.
- <sup>182</sup> *Ibid.*, 591.
- <sup>183</sup> *Ibid.*, 604.
- <sup>184</sup> Telotte, "Minor Hazards," 273-274.
- <sup>185</sup> Kindem, "Hollywood's Conversion to Color," 150.
- <sup>186</sup> Telotte, 274.
- <sup>187</sup> *Ibid.*, 276.
- <sup>188</sup> Davis, interview, 19e.
- <sup>189</sup> Thomas, *Walt Disney: An American Original*, 114.
- <sup>190</sup> Telotte, 276.
- <sup>191</sup> *Ibid.*
- <sup>192</sup> *Ibid.*
- <sup>193</sup> Case on Appeal from Judgment, 336.
- <sup>194</sup> *Ibid.*, 395.
- <sup>195</sup> *Ibid.*, 585.
- <sup>196</sup> *Ibid.*, 336.
- <sup>197</sup> *Ibid.*, 136.
- <sup>198</sup> *Ibid.*, 197.
- <sup>199</sup> Maltin, *Of Mice and Magic*, 134. Morrison, interview, 10d.
- <sup>200</sup> Davis, interview, 17e-18e.
- <sup>201</sup> "This Week's New Shorts."
- <sup>202</sup> Staiger, "Hollywood Mode of Production," 97.
- <sup>203</sup> Langer, "The Disney-Fleischer Dilemma," 355.
- <sup>204</sup> *Ibid.*, 349.
- <sup>205</sup> *Ibid.*, 353.
- <sup>206</sup> *Ibid.*
- <sup>207</sup> *Ibid.*, 354. By 1936, both sound and colour technologies were standardized and the film industry experienced little technological innovation until after World War II.
- <sup>208</sup> Maltin, *Of Mice and Magic*, 122.
- <sup>209</sup> *Ibid.*, 123-124.
- <sup>210</sup> *Ibid.*, 124.
- <sup>211</sup> "New Cartoon Camera Combines Drawings and Photographs."
- <sup>212</sup> Weiss, interview, 15 June 1970, 24c.
- <sup>213</sup> Davis, interview, 20e.
- <sup>214</sup> Weiss, interview, 15 June 1970, 24c.
- <sup>215</sup> *Ibid.*
- <sup>216</sup> Terry, interview, 20 December 1969, 26.
- <sup>217</sup> Gordon, interview, 9.
- <sup>218</sup> Terry, interview, 20 December 1969, 60-62.
- <sup>219</sup> Davis, interview, 20e; Weiss, interview, 15 June 1970, 23c; Terry, interview, 20 December 1969, 60-62.
- <sup>220</sup> "Broadway."

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- <sup>221</sup> Davis, interview, 19e.
- <sup>222</sup> Ibid.
- <sup>223</sup> Weiss, interview, 15 June 1970, 23c.
- <sup>224</sup> Grant, 188.
- <sup>225</sup> Anderson, interview, 4.
- <sup>226</sup> Ibid., 6.
- <sup>227</sup> See generally Erickson, *Television Cartoon Shows*.
- <sup>228</sup> Maltin, *Of Mice and Magic*, 203.
- <sup>229</sup> McDonald, "Now the Bankers Come to Disney," 226. Some film studios had longstanding relationships with broadcasters and corporate ownership of television stations by film studios allowed adaptation to the new demands of the device easier to manage. See generally Balio, *Hollywood in the Age of Television*, Hilmes, *Hollywood and Broadcasting*.
- <sup>230</sup> While television played a significant role from 1950 to 1956 in the motion picture industry's redefinition of itself, it cannot be primarily blamed for the demise of motion picture attendance during this period. During 1949-1950 there were only a handful of television stations and relatively few owned television sets. In 1948, the Federal Communications Commission had placed a freeze on the issuance of licenses for new television stations that lasted until 1952. The expansion of television in the 1950s was due to the termination of the freeze on new stations and to the completion in 1951 of a network of coaxial cable and microwave links that expanded the broadcast range of television transmission. Statistical evidence strongly supports the conclusion that the decline in theatre attendance was due to an "economic and socio-cultural transformation of the blue-and-white collar Americans during the post-war period into the "leisured masses"" where the post-war public, having more disposable personal income and vacation time, moved away from passive entertainment to active entertainment. Belton, *American Cinema*, 323.
- <sup>231</sup> "Number of TV Households in America."
- <sup>232</sup> Schickel, 26-27.
- <sup>233</sup> Grant, 189.
- <sup>234</sup> Cohen, "Development of Animated Television Commercials." For a good overview of television advertising in the late 1940s and 1950s, refer to: Samuel, *Brought to You by*.
- <sup>235</sup> See generally Balio, *Hollywood in the Age of Television*.
- <sup>236</sup> Terry, interview, 20 December 1969, 87-88.
- <sup>237</sup> Erickson, 14.
- <sup>238</sup> Woolery, *Children's Television*, 34-35.
- <sup>239</sup> Grant, 189. Note should be made of the "Commonwealth Cartoon Package" a short-lived 30-minute television program that premiered in 1951 and featured cartoon classics such as Ub Iwerks' "Flip The Frog" and "Willie Whopper," Paul Terry's "Aesop's Fables," and even some Walt Disney vintage shorts along with other cartoon favourites offered for local programming (See generally Woolery, *Children's Television*).
- <sup>240</sup> Erickson, 14-15.
- <sup>241</sup> Grant, 50.
- <sup>242</sup> Ibid., 144.
- <sup>243</sup> For a list of film studios, distributors, and animation production companies during 1944-1945, see Ramsaye, *International Motion Picture Almanac*, 581. For 1948: Kearns, *Motion Picture Production Encyclopedia*, 799-801.
- <sup>244</sup> Seiler, "Tall talent in short films."
- <sup>245</sup> Beginning in the 1930s, prior to the release of a short to the public, Disney adopted the practice of assessing the quality of a short by first screening the cartoon at an obscure theatre for audience responses. If the short was found to lack entertainment value, the required changes were made to the cartoon back at the studio. *Big Bad Wolf*, 146, 148. Most animation studios did not have the budget to make further changes to a short after the cartoon had been produced and a print had been made. The modus operandi of these film executives was to release the short to the public and then rely upon critical reviews in the media to gauge the success of a cartoon in entertaining audiences. A general assumption in the film industry at the time was that if a short received good media coverage, then theatre attendance would be enhanced by having the short accompany the main feature. While the author was unable to locate any empirical studies that directly examined the relationship between animated shorts and theatre attendance during the Golden Age of Animation, verbal discussions with a few Terry personnel understood that film studios were beginning to take a more scientific approach to determining the economic value of an animated short to their bottom line. Further there was internal documentation to indicate that there was little value of adding one animated short to the theatre billing. Paul Terry Papers. For a more thorough analysis of this subject, see Kanfer, *Serious Business*.

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- <sup>246</sup> McDonald, "Now the Bankers Come to Disney," 139, 224, 226.
- <sup>247</sup> Maltin, *Of Mice and Magic*, 135.
- <sup>248</sup> Schickel, 102.
- <sup>249</sup> Pratley, 34.
- <sup>250</sup> Ibid.
- <sup>251</sup> "Mickey Mouse and the Bankers," 94.
- <sup>252</sup> Terry, interview, 20 December 1969, 85.
- <sup>253</sup> Ibid.
- <sup>254</sup> Adamson, 18. Pratley, 36.
- <sup>255</sup> Grant, 50.
- <sup>256</sup> Adamson, 18.
- <sup>257</sup> Ibid.
- <sup>258</sup> Pratley, 36.
- <sup>259</sup> Terry, interview, 20 December 1969, 1.
- <sup>260</sup> Pratley, 36.
- <sup>261</sup> Ibid.
- <sup>262</sup> Case on Appeal from Judgment, 98-99.
- <sup>263</sup> Ibid., 99.
- <sup>264</sup> Ibid., 560.
- <sup>265</sup> Under direct examination at trial, Terry admitted that based on tests of crowd reactions to the shorts, the "pictures seemed to have fallen off some." Ibid., 520, 588-589.
- <sup>266</sup> Ibid., 99-100.
- <sup>267</sup> Ibid.
- <sup>268</sup> Ibid., 101.
- <sup>269</sup> Ibid.
- <sup>270</sup> Ibid., 337.
- <sup>271</sup> Ibid., 581-582.
- <sup>272</sup> Ibid., 143.
- <sup>273</sup> Ibid.
- <sup>274</sup> Ibid., 333, 534.
- <sup>275</sup> Ibid., 429, 619.
- <sup>276</sup> A movieola is a projection machine that helps the animators match drawings to sound thereby improving the timing of an animated short.
- <sup>277</sup> Case on Appeal from Judgment, 131.
- <sup>278</sup> Ibid., 132.
- <sup>279</sup> Ibid., 336.
- <sup>280</sup> Ibid., 197.
- <sup>281</sup> Ibid., 395.
- <sup>282</sup> Ibid., 136.
- <sup>283</sup> Ibid., 540.
- <sup>284</sup> Ibid., 585.
- <sup>285</sup> Deneroff, 2.
- <sup>286</sup> Crafton, *Before Mickey*, 163-165.
- <sup>287</sup> See generally Prindle, *Politics of Glamour*.
- <sup>288</sup> Sito, "'So What Was It Like?'" 38.
- <sup>289</sup> Langer, "Max and Dave Fleischer," 53.
- <sup>290</sup> Langer, "Working at the Fleischer Studio," 11. Deneroff, 1.
- <sup>291</sup> Sito, "Cartoonists Unions."
- <sup>292</sup> Deneroff, 1.
- <sup>293</sup> Animation Guild Local 839 IATSE, "Screen Cartoonists Guild."
- <sup>294</sup> Sito, "Disney Strike of 1941."
- <sup>295</sup> Sito, "'So What Was It Like?'" 38.
- <sup>296</sup> Sito, "Disney Strike of 1941."
- <sup>297</sup> Barrier, *Hollywood Cartoons*, 283.
- <sup>298</sup> Ibid., 284-285.
- <sup>299</sup> Ibid.
- <sup>300</sup> Ibid., 285.
- <sup>301</sup> Ibid., 283-284.
- <sup>302</sup> Grant, 71.
- <sup>303</sup> Ibid.

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- <sup>304</sup> Sito, “Disney Strike of 1941.”
- <sup>305</sup> McDonald, “Now the Bankers Come to Disney,” 223.
- <sup>306</sup> Sito, “Disney Strike of 1941.”
- <sup>307</sup> Grant, 71.
- <sup>308</sup> Morrison, interview, 15d.
- <sup>309</sup> “In the Matter of Terrytoons, Inc.,” 401-404.
- <sup>310</sup> The matter can be referenced in N.L.R.B. case No. 2-C-5108.
- <sup>311</sup> Morrison, interview, 17d - 18d.
- <sup>312</sup> Silverman, interview, 41.
- <sup>313</sup> See Motion Picture Screen Cartoonists Guild. “Summary of Strike, 1944-1948,” 1.
- <sup>314</sup> Terry, interview, 14 July 1970, 126.
- <sup>315</sup> Morrison, interview, 19d.
- <sup>316</sup> Ibid.
- <sup>317</sup> See “Summary of Strike, 1944-1948,” 2.
- <sup>318</sup> Ibid.
- <sup>319</sup> Terry, interview, 14 July 1970, 127.
- <sup>320</sup> See “Summary of Strike, 1944-1948,” 2.
- <sup>321</sup> See Motion Picture Screen Cartoonists Guild. “Chronology of Strike, 1944-1948,” 4.
- <sup>322</sup> National Labor Relations Board, “Agreement and Notice to all Employees.”
- <sup>323</sup> Silverman, interview, 40.
- <sup>324</sup> For further information on artist and labour organizer Pepe Ruiz (born 19 March 1906, Cuba; died 10 December 1993, Palisades Park, NJ) see Studge, “August 1, 1944.”
- <sup>325</sup> According to Larry Silverman, the staff was “talked into it” and went out on strike. Larry Silverman, interview, 41.
- <sup>326</sup> See “Chronology of Strike, 1944-1948,” 4.
- <sup>327</sup> Screen Cartoonists Local 1461, “Know Your Scabs,” 3.
- <sup>328</sup> Silverman, interview, 41.
- <sup>329</sup> “Fantastic Company Demand Rejected by Cartoonists.”
- <sup>330</sup> “Move to ‘Decertify’ Cartoon Union Filed.”
- <sup>331</sup> Screen Cartoonists Local 1461, “The Terry-Toon Strike.”
- <sup>332</sup> “Strike Is Ended at Terrytoons.”
- <sup>333</sup> Silverman, interview, 42.
- <sup>334</sup> Morrison, interview, 20d.
- <sup>335</sup> Silverman, interview, 42.
- <sup>336</sup> Aberdeen, “Classic Hollywood and the Independent Filmmakers Who Changed Hollywood Forever, The Independent Producers and the Paramount Case, 1938-1949, Part 1: The Hollywood Slump of 1938,” [http://www.cobbles.com/simpp\\_archive/paramountcase\\_1slump1938.htm](http://www.cobbles.com/simpp_archive/paramountcase_1slump1938.htm).
- <sup>337</sup> Schatz, *Genius of the System*, 39, 74-75.
- <sup>338</sup> *Sherman Act*, July 2, 1890, ch. 647, 26 Stat. 209, 15 U.S.C. § 1-7.
- <sup>339</sup> U.S. Department of Justice, *Antitrust Enforcement*, 2-3.
- <sup>340</sup> Aberdeen, “Classic Hollywood and the Independent Filmmakers Who Changed Hollywood Forever, The Independent Producers and the Paramount Case, 1938-1949, Part 3: The Consent Decree of 1940,” [http://www.cobbles.com/simpp\\_archive/paramountcase\\_3consent1940.htm](http://www.cobbles.com/simpp_archive/paramountcase_3consent1940.htm).
- <sup>341</sup> Ibid.
- <sup>342</sup> Aberdeen, “Classic Hollywood and the Independent Filmmakers Who Changed Hollywood Forever, The Independent Producers and the Paramount Case, 1938-1949, Part 4: The Studios in Federal Court, 1945,” [http://www.cobbles.com/simpp\\_archive/paramountcase\\_4equity1945.htm](http://www.cobbles.com/simpp_archive/paramountcase_4equity1945.htm).
- <sup>343</sup> Ibid.
- <sup>344</sup> Ibid.
- <sup>345</sup> Aberdeen, “Classic Hollywood and the Independent Filmmakers Who Changed Hollywood Forever, The Independent Producers and the Paramount Case, 1938-1949, Part 5: Friend of the Court—SIMPP Files For Amicus Curiae, 1947, 1945,” [http://www.cobbles.com/simpp\\_archive/paramountcase\\_5amicus1947.htm](http://www.cobbles.com/simpp_archive/paramountcase_5amicus1947.htm).
- <sup>346</sup> Aberdeen, “Classic Hollywood and the Independent Filmmakers Who Changed Hollywood Forever, The Independent Producers and the Paramount Case, 1938-1949, Part 6: The Supreme Court Verdict That Brought an End to the Hollywood Studio System, 1948,” [http://www.cobbles.com/simpp\\_archive/paramountcase\\_6supreme1948.htm](http://www.cobbles.com/simpp_archive/paramountcase_6supreme1948.htm).
- <sup>347</sup> Ibid.
- <sup>348</sup> Ibid.
- <sup>349</sup> Polt, 34.

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<sup>350</sup> Aberdeen, “Classic Hollywood and the Independent Filmmakers Who Changed Hollywood Forever, Block Booking: The Aftermath of Block Booking,” [http://www.cobbles.com/simpp\\_archive/blockbook\\_aftermath.htm](http://www.cobbles.com/simpp_archive/blockbook_aftermath.htm).

<sup>351</sup> Terry, interview, 20 December 1969, 82-84.

<sup>352</sup> Aberdeen, “The Aftermath of Block Booking.”

#### **IV. EXPLORING THE ARTISTIC AMBITIONS, CREATIVE MOTIVATIONS, AND ANIMATED FILM LEGACY OF PAUL HOULTON TERRY**

##### **A. Introduction: Maltin's Contention**

In his sourcebook on American cartoon studios, Maltin asserts that Paul Terry's oft-repeated motto comparing himself to Woolworth's revealed that he had no love or artistic motivation in the cartoons he produced.<sup>1</sup> However, the author posits that Maltin misinterprets the quote because the issue of artistic drive and creative ambition is not applicable to Woolworth, a retailer of manufactured goods. Rather, the writer posits that Terry was likely referring to similarities between the business practices of the two company heads. Both Terry and Woolworth applied budget-conscious methods in operating their companies, sold a product designed to be attractive to the common man and not for refined tastes, and operated their companies with a strategic plan to make a profit by selling in quantity.

According to Maltin, Terry operated his studio with little desire to produce quality animation involving apathy for the product he produced, an attitude developed from three early disappointing experiences in the film business.<sup>2</sup> Maltin establishes this perspective on Terry's approach to animated cartoon-making to justify his assertions later on in the text relating to Terry's business philosophies, production values, and studio practices. Conversely, the writer argues that Terry retained a creative drive to produce animation that would amuse children, satisfy his distributor, and rank with the animated shorts of the other studios in terms of aesthetic qualities and entertainment value.

In this chapter, the writer will analyze Maltin's assertions within the framework of the four psychodynamic components of the economic practices which operated as received norms for Terry in order to determine whether the framework supports or speaks against the film critic's contentions. Relationships between various antecedents in the development of creative or artistic motivations of individuals will be identified and explored to assess whether any of the three career setbacks that Maltin mentioned Terry suffered early in his career would have affected Terry's creative drive to produce imaginative and entertaining animated cartoons. The author will also survey Terry's artistic and creative contributions to the field of animated cartooning in an attempt to clarify his artistic legacy to the industry.

Finally, the writer will briefly survey the artistic talent of Terry's key studio personnel in order to arrive at an answer whether Terry operated his studio simply to manufacture a product that met a minimal level of production quality or whether Terry

managed his studio based on a desire to create cartoons that were well produced and aesthetically pleasing to the movie-going public. When undertaking this analysis, the author will be following two suppositions. The first supposition is that Terry understood that to create quality animation requires a commitment to employ a talented group of artists able to produce entertaining and aesthetically pleasing cartoons. The second supposition is that Terry was committed to producing a quality of animation commensurate with the talent level of his staff. Therefore, if Terry is found to have retained a talented group of artists, the writer will then conclude that he was committed to producing engaging and attractive animation. The author will also provide a historical overview of Terry's struggles with Disney for the artistic services of Bill Tytla, one of animation's greatest talents, which directly relates to the issue whether Terry was committed to producing animation with high quality cel aesthetics.

In Chapter 5, the author will apply the principles of Neal-Lunsford's cel aesthetics on a random sample of animated cartoons produced by the major Golden Age animation studios in order to compare and rank the cel aesthetics qualities of the shorts produced by Terrytoons to the other studios. The quality of the cel aesthetics of Terry's animated cartoons and the relative ranking to the creative output of the other studios will help in determining whether Terry was committed to producing cartoons with high quality aesthetics. When undertaking this analysis, the author will be following the supposition that the quality of the cel aesthetics of the Terrytoons cartoons is directly related to the motivation and commitment by Terry to produce animated cartoons that are entertaining and aesthetically pleasing.

## **B. Application of the Psychodynamic Framework for Terry's Management Practices**

The psychodynamic model views Terry as financially insecure, risk-averse, an extreme saver, possessing an external locus of control towards his economic fortunes, and a shrewd manager of money. Conversely, Maltin views Terry's business practices through the lens of a lack of artistic motivation and apathy towards the cartoons his studio created, the result of suffering three blows to his "artistic ambition."<sup>3</sup> The psychodynamic framework's compatibility with Maltin's contentions is analyzed.

### **1. Terry producing cartoons with no love or artistic motivation involved**

The heart of the framework is Terry's drive for economic security underlying his financial decisions and not on the artistic and creative motivations which affect cartoon aesthetics. Nevertheless, underlying the framework's concept of financial

security are increased company profits. Terry sought profitability through cost control, tight budgets, and economical production methods. The amount of money invested in a cartoon short by a producer will directly affect cartoon aesthetics and the entertainment value of a short.

While Terry was concerned with expense reduction to increase corporate net profit, Disney believed his financial security and corporate growth lay in producing a product that was superior to his competitors which entailed investing considerable financial resources into each cartoon his company produced. While the framework states that Terry always put his financial security first in making his decisions, there is no reason to suspect that Terry was not concerned with producing the best product he could under the production budgets he established for his studio. Terry may well have had strong motivations to produce quality cartoons and grieved his decision to produce animated shorts on a tight budget believing he had no other choice but to produce economically in the competitive marketplace.

## 2. Terry as being cold-blooded about animation

The psychodynamic framework does not address the issue whether Terry was cynical, disenchanted and cold-blooded about the state of the animation business because of artistic disillusionment. However, the framework would find agreement with Maltin that producing a profit was the primary objective for Terry in operating his studio. Maltin would state this profit motive was because of blows to artistic ambition while the framework posits that Terry sought to increase his financial holdings to help decrease his financial insecurity.

## 3. Terry feeling that the quality of the shorts did not matter

According to Maltin, Terry felt that since exhibitors did not consider quality in determining which shorts to exhibit or made no efforts to exhibit all shorts produced, then there was no reason to continue to spend more money improving the entertainment value of the cartoons. However this contention presupposes that Terry's only interest in producing quality cartoons was to please exhibitors. Terry may have been motivated to produce quality animation for other reasons such as to make advances in production design or to ensure his legacy was not equated with cheaply manufactured animated cartoons.

The psychodynamic framework approaches the issue of the quality of shorts in terms of whether improving the entertainment value of the cartoon product would strengthen the financial stability of the cartoon studio and thereby Terry's emotional security. The framework would posit that if a lack of quality in the shorts began to threaten his financial security than Terry would correct any deficiencies in production methods. The events surrounding Terry's renegotiations with his distributor in 1936 provide support for this assertion.

Faced with the possibility of not being able to re-negotiate a contract with his distributor, the producer responded by promising to make changes in the studio operations to help ensure the cartoons were more entertaining. Therefore, according to the framework, unlike Maltin's assertion, the quality of shorts was important to Terry but only to the point where his product was meeting a minimal level of production quality that ensured his distributor was satisfied. Whether Terry desired to produce shorts of a superior quality but was unable to achieve this result because of budget restrictions caused by his financial insecurity and other psychodynamics will be discussed later.

4. Terry as having a career which was not characterized by artistic growth and achievement

Issues of artistic growth in the animated film genre are related to the psychodynamic framework. Producing animated cartoons on a budget due to financial insecurity and achieving artistic accomplishments in the animated film genre are not mutually exclusive states. For example, in an attempt to reduce production costs, Terry may have undertaken technological innovation culminating in advancements in the way cartoons are produced. For example, Bray's assembly-line system both helped to reduce production costs and allowed animators and skilled artists to devote more time to their work arguably raising the artistic quality of the cartoons produced.

5. Terry as spending as little money on his animated shorts as possible.

Maltin remarks that Terry spent as little money as possible by keeping his shorts as simple as possible, frowning on innovative ideas, relying on formulas and repetition, and reusing animation from earlier films.<sup>4</sup> The framework of four psychodynamic components views these production practices through the lens of Terry endeavouring to increase corporate profits by reducing production costs in order to provide the

emotional and financial security he requires. However, the framework never puts forward the contention that in reducing costs to achieve financial security Terry would spend as little money as possible on his shorts.

If during his corporate reign Terry became more financially secure, the possibility that his saving behaviour would become less extreme and production budgets for his shorts increase would not be incompatible with the psychodynamic framework. Further, as the framework posits that Terry is a shrewd money manager, always producing animated cartoons at the lowest possible cost would not be a wise business philosophy. If timely small investments in his shorts would provide more short-term opportunities or benefits without unduly raising the production budgets, then these investment decisions would find support within the framework.

6. Terry operating a studio where conditions were such that outstanding creative talent soon left for studios with better working conditions.

If Maltin is correct in writing that working conditions at Terrytoons were in such a state that talented artists would leave for greener pastures,<sup>5</sup> then artists such as Conrad Rasinski, Carlo Vinciguerra, Eddie Donnelly, and Anderson Craig, all whom remained at the studio for most of their careers, were not “talented” artists.<sup>6</sup> Therefore, the author will later analyze Maltin’s contention by reviewing the artistic biographies of the key Terry staff members who remained with Terry for most of their careers in order to analyze their artistic talent and contributions to the animated film genre.

According to Maltin, Terry’s factory-like production methods restricted artistic expression<sup>7</sup> as he was stubborn, not receptive to new ideas, and didn’t want to experiment.<sup>8</sup> As a result, animators and directors became frustrated and left as soon as other job opportunities such as the mass exodus of artists to the new MGM studio in California in 1937.<sup>9</sup> The degree to which the staff was comfortable with the working conditions at Terrytoons is directly related to Terry’s economic decision making and the psychodynamic framework for his managerial practices. Those studios that had higher production budgets such as Disney generally had better working conditions and many of animation’s brightest talent during the Golden Age aspired to work for Disney.

The psychodynamic framework accommodates Terry operating a studio on a tight budget while ensuring that studio working conditions were comfortable for his more talented workers. Since one of the psychodynamic components of the framework posits Terry as a shrewd manager, he would be ensuring that his animators and directors were working in studio conditions that were on par with the rest of the industry since these artists were difficult to replace during the Golden Age. To provide talented artists with comparable wages to keep them from leaving is shrewd money management, one of the pillars of the psychodynamic framework.

In summation, by offering a more flexible approach guided by reasoned insight into Terry's behaviour, the four components of the psychodynamic framework provide more logical explanations for Terry's business practices, studio working conditions, and managerial decisions than Maltin's interpretations.

## **C. Research on Creativity and Artistic Motivations**

### **1. Introduction**

In this section, the author will explore the effects of various social, psychological, political, financial and cultural factors on creativity in order to determine which antecedents may have shaped Terry's artistic motivations and creative aspirations in the animation business. Further, the writer will apply creativity research to assess whether any of the three career setbacks that Maltin mentioned Terry suffered early in his career would have affected Terry's creative drive to produce imaginative and entertaining animated cartoons. Although empirical research in a retrospective case study can never provide absolute proof that certain factors did or did not affect Terry's artistic motivation and creative drive, the author aims to identify which antecedents "may have had an effect" on his ambitions which should help to better understand and appreciate Terry's contributions to the field of animated cartoon making.

### **2. Definitions**

Fundamental to the concept of creativity is the notion of originality and the motivation to "bring something new and valuable to birth."<sup>10</sup> When a product is created that is indistinguishable from another product, like manufactured goods along an assembly line, creativity researchers characterize these mass produced products as not being creative in design because they lack originality.<sup>11</sup> Creative products elicit a unique and quantifiable set of

aesthetic responses from observers: surprise, satisfaction, stimulation and savouring.<sup>12</sup> Therefore, when Maltin refers to Terry manufacturing a product<sup>13</sup> and relying on formulas and repetition in his cartoons often reusing animation from his earlier animated shorts, the film critic is referring to a loss of creativity because the cartoons are produced without relying on novel, new or fresh ideas.<sup>14</sup> Maltin reinforces these thoughts when he states that “repetition was the byword, and that is why even the most avid cartoon buffs find it difficult to distinguish one Terrytoons cartoon from another in their minds.”<sup>15</sup>

While some of the earliest definitions of creativity have focused on the creative process,<sup>16</sup> most explicit definitions have used the creative product as the distinctive feature of creativity. In attempting to assess or measure creativity, some researchers have relied on subjective judgments of products or persons, others have undertaken an objective analysis of products, while the majority have used creativity tests (e.g., personality inventories, biographical inventories, behavioural assessments).<sup>17</sup> Some studies have attempted to distinguish creative abilities in the arts from those creative abilities in science and management.<sup>18</sup> Other studies have been undertaken to determine different types of creativity within the visual arts and the relationships existing among the types,<sup>19</sup> including creativity in the practice of film making and cinematography.<sup>20</sup>

Amabile provides a theoretical framework for the conceptual definition that comprises two necessary factors: “A product or response will be judged as creative to the extent that (a) it is both a novel and appropriate, useful, correct or valuable response to the task at hand, and (b) the task is heuristic rather than algorithmic.”<sup>21</sup> According to Amabile’s conceptualization of creativity, there are three components essential for creativity: domain-relevant skills, creativity-relevant skills, and task motivation and as the level of these components increase so does the final level of creativity in a given product.<sup>22</sup>

### **3. Factors Related to the Concepts of Creativity and the Creative Personality**

#### **a) Intrinsic and Extrinsic Motivation**

The empirical evidence to date confirms that people are motivated to create.<sup>23</sup> While early behavioural research found that external motivators whether defined in terms of their ability to reduce an individual’s drive<sup>24</sup> or as discrete events that change the rate of response<sup>25</sup> were necessary for learning and achievement, by the 1950s, the concept of intrinsic motivation arose which challenged the notion that external rewards or reinforcers were the sole motivators of learning and achievement.<sup>26</sup> Intrinsic motivation related to creativity refers

to motivation to do some creative activity by his or her interest in and enjoyment of that activity.<sup>27</sup> Extrinsic motivation related to creativity refers to motivation to do some creative activity by some goal imposed on them by others such as a promise of reward or the expectation of evaluation.<sup>28</sup>

Intrinsically motivated actions have been shown to be innate while extrinsically motivated behaviour is characterized by pressure and tension resulting in anxiety and low self-esteem.<sup>29</sup> Research has found that intrinsic motivation becomes differentiated in childhood so that a child's interest is directed towards certain activities and that environmental factors affect or influence the activities towards which an individual's interest is directed by affecting their experience of competence and self-determination.<sup>30</sup> Research studies on the subject of motivation with regards to creativity have shown similar findings to form one general principle: Intrinsic motivation is conducive to creativity, but extrinsic motivation is detrimental.<sup>31</sup> However, there is evidence to support the argument that with certain individuals, intrinsic and extrinsic motivation from rewards and competitions can combine in an additive fashion to further creativity.<sup>32</sup>

When Maltin refers to Terry's artistic motivation to produce animated shorts based on a love of the art form he is referring to Terry's intrinsic motivation to be creative, to be motivated to engage in cartoon production from the pleasures derived from undertaking the task. Conversely, when Maltin is referring to Terry's motivation to produce animated cartoons to make a profit, these motivations would be extrinsic in nature because they are imposed upon Terry by requirements to meet contractual obligations to his distributor. Therefore, Maltin is arguing that Terry's intrinsic motivation to creatively produce animated cartoons was negatively affected by his previous disappointments. Maltin may also be arguing that Terry's extrinsic motivation to produce animated shorts was increased if his creative failures caused him to become cold-blooded and more profit focused. Further, research has shown that Terry could have both an intrinsic task motivation towards creating an animated cartoon and an extrinsic orientation towards a similar task in the same domain such as fulfilling his contract with his distributor.

#### b) External Evaluation

All of the three disappointments that Maltin alleges caused blows to Terry's creative drive have one central theme: the concept of external evaluation or evaluative criticisms of Terry's product. Selznick was not happy with the first cartoon Terry produced and so he offered him more money for the raw film stock. An exhibitor informed Terry that his product

was being used as a cathartic agent to drive people from the theatre. Some theatre owners were so unimpressed with Terry's cartoons that they had no desire or made little or no effort to exhibit all 26 cartoons.

Studies in the early 1970s following self-perception theory proposed that intrinsic motivation can be undermined by the imposition of salient extrinsic constraints on performance.<sup>33</sup> The "overjustification hypothesis" (i.e., the proposition that a person's intrinsic interest in an activity may be decreased by inducing him to engage in that activity as an explicit means to some extrinsic goal) has been tested using a variety of potential external constraints including external evaluation. Studies on the effects of external evaluation on creative performance have been divided into two research streams: (1) impact of expectations of evaluation on creativity, and (2) impact of actual evaluation on creativity.

#### (1) Expectation of Evaluation and Risk-Taking

Studies undertaken to determine the effect of evaluation expectation on creativity have consistently found that an adult's creativity is negatively affected when the subject expects his creative work to be judged or evaluated by others,<sup>34</sup> both with respect to artistic creativity<sup>35</sup> and verbal creativity.<sup>36</sup> An expectation of an external evaluation appears to undermine creativity because it acts as an extrinsic constraint. Research has shown that decrements in creativity will accompany the imposition of extrinsic constraints.<sup>37</sup>

Since Terry's creative work in animation had been critically reviewed by trade journals as early as 1920, the writer can conclude that Terry was expecting his cartoon product to be evaluated by those affiliated with the motion picture business. Therefore, based on creativity research, Terry's artistic motivations and creative drive would be adversely affected by his expectations of evaluation. However, after 1937 when Terry created a story department and moved away from creating storylines for his cartoons to focus on managing the studio operations, Terry may not have considered himself to be the "creator" of the animated cartoon shorts his studio produced and consequently there may have been no evaluation expectations of his creative work.

Further, since the motion picture business has always been an industry whose products were expected to be evaluated by others, the expectations of evaluation may have become so ingrained or second nature to Terry to not have influenced his creativity. In addition, Terry always had the option not to read the reviews of his cartoons in the trade literature and this control over whether to receive the evaluations or ignore them may have

reduced any negative effects on his creativity. Finally, Terry may have felt no pressure to produce his shorts under the creative demands of others because he had the opportunity to correct any creative deficiencies thereby removing the negative impacts of any external constraint on creativity. For example, in 1936 Terry was given a choice to enhance his creativity and increase the entertainment value of his product before his distributor made a decision to renew the contract.

While some studies have found artworks by those expecting evaluation to be more creative than the artwork of non-evaluation subjects, these results only hold true when evaluation subjects are given specific instructions on how to make a creative design.<sup>38</sup> Other studies have also revealed increments in creativity under reward conditions<sup>39</sup> and where creative performance is under functional control.<sup>40</sup> These apparently contradictory results can be explained by the nature of the task and the type of instructions given. If a creative performance requires a heuristic solution rather than an algorithmic solution where the level of production depends on some degree of risk taking and set breaking, some level of creativity beyond the obvious where ambiguity exists, then the imposition of salient extrinsic constraints, establishing an extrinsic motivation, will result in lower levels of creativity.<sup>41</sup>

Inherent in the creative process is a degree of risk. Studies on the relationship of risk-taking to creativity have found that many of the descriptions of creative individuals closely resemble similar descriptions of individuals of high risk (i.e., unusual behaviour, non-conforming behaviour, risky behaviour).<sup>42</sup> Creativity involves probing, inquisitiveness, imagination, a suspension of judgment, a movement away from conventional ways of looking at the world, trying out new ideas, exploring different scenarios, and imagining future possibilities that are quite different from the past.<sup>43</sup>

The psychodynamic framework characterizes Terry as risk-averse and therefore prone to be less creative. Experimenting on new animation techniques, constructing original cartoon characters, and devising new storylines involve a considerable amount of creativity and risk taking. Terry may have relied on animated sequences and familiar jokes from previous shorts rather than engage in more dynamic creative work to avoid the risk involved in the creative process. Not only is time and money consumed while creating, but there is the danger that the experiments may provide no lasting benefit to the studio or that audiences may find the new characters, storylines, and humour unappealing.

For example, when story man Dan Gordon devised a humourous gag involving a mouse and presented the idea to Terry, rather than investigate the possibility of developing

humorous potentials from this gag, Terry told Gordon, “If one mouse is funny, two mice will be twice as funny.”<sup>44</sup> By relying on the same gag in the cartoon while using two mice rather than one, Terry likely believed he would be generating twice the laughs while avoiding having his story department generate more gags for the scene thereby reducing production costs. In the early 1950s Terry bought the gag files of comedian Joe Laurie, Jr. a repository of over 100,000 jokes.<sup>45</sup> Terry likely intended to use these gags in his animated cartoons saving his writers the effort in creating new gags for the shorts. Further, the risk-averse Terry may have believed that by relying on the audience-tested material, he would be assured that the humour would resonate with theatre goers that viewed his animated cartoons.

## (2) Actual Evaluation and Self-Determination

Empirical research has demonstrated that actual evaluation, such as feedback on creative performance, is a reward with both a controlling aspect and an informational aspect. If the controlling aspect is more salient, it will initiate a change in perceived locus of causality process. If the informational aspect is more salient, a change in feelings of competence and self-determination will be initiated within the individual.<sup>46</sup>

With respect to feelings of competence, the degree that the external evaluation is positive, intrinsic motivation will be enhanced because the feedback enhances people’s experience of their ability to perform a task.<sup>47</sup> Conversely, when a person fails in his or her attempts to achieve a successful result either because the task is too difficult or when the situation is structured so that desired outcomes do not follow from behaviour, or when the person receives negative feedback, intrinsic motivation is undermined resulting in amotivation and a sense of incompetence,<sup>48</sup> feelings similar to the results found in the failure and learned helplessness studies of Seligman and colleagues.<sup>49</sup>

Researchers have found that positive feedback has to occur within the context of self-determination, when performances outcomes were not constrained and there is freedom from external control, to enhance intrinsic motivation. A person’s interest will gravitate towards those activities in which they experience a sense of self-determination. When people are intrinsically motivated they choose the activities they engage in and they choose how to carry out these activities.

Conversely, factors which control one’s behaviour in relation to the activity, such as the opportunity to make choices,<sup>50</sup> will undermine intrinsic motivation.<sup>51</sup> The extent that there is external control over a person’s work, restricting one’s self-determination, intrinsic

motivation will be undermined.<sup>52</sup> Intrinsic motivation may be undermined by performance-contingent rewards, such as external control through evaluation, even more than task-contingent rewards if they are perceived to be more controlling.<sup>53</sup>

Based on cognitive evaluation theory, external control brings about a change in intrinsic motivation because of the effect on a person's perception of why he is performing the activity.<sup>54</sup> If intrinsically motivated, the perceived locus of causality of that behaviour is within the individual performing the task. Internal satisfaction results from the pleasure the task brings. However, when an individual performs the activity for external rewards such as money, the locus of causality changes and he comes to perceive that he is doing the task based on environmental demands (such as to meet financial commitments) and not because he enjoys the endeavour.

#### **4. Application of the Research on the Effects of Evaluation on Intrinsic Motivation to Maltin's Three Disappointments**

As research has shown, external evaluation of a person's work reduces intrinsic motivation either by restricting one's self-determination and freedom of choice (the "controlling aspect") or by giving the person a sense of incompetence (the "informational aspect") depending on which facet is more salient. Applying the research on the effects of evaluation on intrinsic motivation to the three evaluations made on Terry's product in order to determine whether Terry would have lost his intrinsic motivation to produce creative animated cartoons, the author provides the following analyses:

1. Incident One: Lewis J. Selznick stating he thought the film stock was worth more than Terry's finished product.

The author asserts that Selznick's comment on Terry's first short, *Little Herman*, did not affect Terry's self-determination to create animated cartoons. First, Selznick was not the only potential purchaser of Terry's short. Terry could market his first animated film to other producers, agents, theatre owners, distributors or exhibitors. Second, Terry was not under any contractual, legal or employment arrangement with Selznick and therefore was not under any duty or pressure to change the way he created and produced his animated cartoons based on Selznick's opinion. Third, Terry was not expecting input on how to improve his cartoon product nor did Selznick provide evaluative comments on how to enhance the quality. Therefore, the controlling aspect was non-existent.

Accordingly, the informational aspect of the evaluation was likely more salient. The question then is whether the evaluation by Selznick would have given Terry a sense of incompetence. The author asserts that while the statement made by Selznick taken at face value would be received by most animated cartoon producers as a damaging comment on their artistic competence, Terry later admitted that he was not quite sure if Selznick was serious about his comment and therefore likely did not take the comment too seriously.<sup>55</sup> Therefore, since Terry did not receive the comment as a negative statement on his artistic competence, his intrinsic motivation was unlikely affected.

2. Incident Two: An Exhibitor using Terry's animated cartoons as a cathartic agent to drive people from the movie house to make room for the people outside.

Being told that your animated cartoons are being used as a tool like a laxative to drive the audience from the theatres would come as a great disappointment to any animated film producer. However, Maltin neglects to mention that the exhibitor was not suggesting to Terry that the entertainment quality of his shorts were so poor that audiences were evacuating the movie house at the sight of one of Terry's cartoons. Rather, as Terry later explained, the exhibitor used his cartoons as a means "to say this is the end of the show" and that they had to leave the theatre. "Of course, kids would stay to watch them, but adults wouldn't."<sup>56</sup> The fact that Terry mentioned that children would remain and view the shorts is evidence that Maltin had misquoted Terry.

When making the statement, Terry was raising the point that the public's opinion of animated shorts in general was poor because cartoons were looked upon as "just fillers" and not as forms of entertainment.<sup>57</sup> Terry's intention was to comment that animated shorts did not receive the same level of attention and respect as feature motion pictures. Rather than viewing animated cartoons as vehicles to entertain audiences, exhibitors considered animated shorts as devices to provide the opportunity for audiences to leave the theatre much like "scenics" or end credits to a feature film.<sup>58</sup>

Accordingly, the exhibitor was not evaluating Terry's product but rather was displaying an attitude of indifference towards the entertainment possibilities of an animated cartoon. Since the comment was not directed at Terry's product, Terry's artistic competence was not at issue. Further, as there were no expectations by either party as to future performance with respect to the Terry product, the controlling aspect was non-existent.

3. Incident Three: Theatre owners not playing the full 26 cartoons annually resulting in Terry cancelling the contract to induce the owners to enter another contract.

From a revenue generating perspective, Terry understood that animated cartoons could not compare to feature films<sup>59</sup> because movie-goers attended the theatre for the feature film.<sup>60</sup> Consequently, Terry appreciated that exhibitors would overlook cartoon shorts for double billing features leaving many animated shorts yet to be exhibited by the end of the contractual term.<sup>61</sup> The problem was not that Terry's cartoons lacked entertainment value, but rather that exhibitors were not extrinsically motivated to ensure that all shorts were exhibited as per the contractual terms. Since Terry understood that these exhibitor decisions did not relate to evaluations of his product there was no effect on Terry's self-determination nor would his artistic competence be affected.

In summation, there is no evidence to support Maltin's conclusion that any of the three incidents undermined Terry's intrinsic motivation to create animated cartoons since none would have restricted Terry's self-determination and freedom of choice or have given Terry a sense of incompetence.

## **5. Other Explanations for Decreased Levels of Creativity in the Terrytoons Product**

### a) Locus of Control

As has been demonstrated, empirical research on antecedents to the development of locus of control suggests Terry was susceptible to developing an external orientation. Evidence gathered to date supports the conclusion that external locus of control restricts creativity. For example, studies have found that highly creative individuals cope with frustration more effectively and are more productive in the absence of external reinforcement than lesser or non-creative subjects.<sup>62</sup> These results suggest that since externals look to reinforcement to guide behaviours, there are likely to be less creative. Similarly, other studies have revealed that externality is related to lower levels of creativity when compared to control groups.<sup>63</sup>

Conversely, empirical research has found internals to be more receptive of environmental factors which may provide information pertinent to their future behaviour,<sup>64</sup> tend to place greater emphasis on tasks which are dependent on skill and not chance variables,<sup>65</sup> and excel in tasks involving self-disclosed feedback (while external controls

performed better in tasks reinforced through verbal feedback from the experimenter),<sup>66</sup> all factors important to creativity. Other studies have discovered that internals possess many of the attributes that are related to creativity, such as autonomy, seeking out information that might lead to change, independence of judgment, creative self-image, self-confidence, and a willingness to take reasonable risks.<sup>67</sup>

Further, studies have revealed internals to have significantly higher scores on the flexibility and originality measures found in creativity tests.<sup>68</sup> These scores can be explained by the fact that internals would be less concerned with external evaluation and would be more likely to provide new and unique responses of many forms than externals that tend to conform to traditional modes of responding that have been positively reinforced by powerful others in the past.<sup>69</sup> When investigating the relationship of locus of control and creativity in black and white children by measuring the factors of fluency, creativity, and creative efficiency, researchers discovered that internals gave more creative responses than externals and were more efficient,<sup>70</sup> results explained by positing that internal subjects are more active seekers and users of information than their external counterparts.<sup>71</sup>

Therefore, since Terry was susceptible to developing an external locus of control orientation and empirical research supports the conclusion that externality is linked to lower levels of creativity, then the writer posits that Terry was prone to being less creative due to his external orientation. Terry's decision to reuse animation, reluctance to explore different types of gags, and reliance on what has worked in the past as opposed to creating original material are all indications that he had difficulty in engaging in creative cartoon making.

Individuals with an external locus of control orientation believe their destiny is controlled by external forces referred sometimes as "powerful others." The author posits that rather than creating original material through independent thought, Terry relied on these powerful others to determine the creative direction of his cartoons, namely the movie goers that viewed his cartoon product. Terry likely arrived at his concept of powerful others in the mid-1930s when complaints from theatre patrons led to problems renewing his contract with his distributor.

Terry's solution was to take a risk on only a small portion of new material being introduced into each cartoon. The rest of the material had to be stories that were already deemed to be acceptable by the audiences. According to Terry's daughter, Terry was only willing to introduce 20 percent new material in any animated short.<sup>72</sup> In addition, as previously noted, Terry bought the audience tested gags of comedian Joe Laurie, Jr. which Terry planned to use in his shorts. He likely believed these jokes would ensure that his

cartoons were humorous and entertaining to his audiences. Finally, Terry employed staff to visit theatres and record audience responses to storylines and cartoon gags from his and other studios' cartoons to determine which material was best received by the theatre goers.<sup>73</sup> Terry could then assure himself of audience satisfaction by repeating the more successful plot points and gags in his cartoons.<sup>74</sup> Long after his retirement from animation Terry would admit that the key to success in creating animated shorts was in analyzing the mind of the audience.<sup>75</sup>

#### b) Deadlines

Pursuant to Terry's contractual arrangement with his distributor, Educational Pictures and later Twentieth Century-Fox, he was required to produce 26 animated cartoons annually, one short every two weeks. Failure to meet these contractual obligations may have caused his distributor to seek other producers that could assure delivery of the requisite number of cartoon shorts to meet their exhibition demands. Further, Terry may have been subject to contractual liability claims in a court of law.

In order to meet these deadlines within budgetary requirements, Terry employed a small, hard working crew<sup>76</sup> that was placed under a great deal of pressure to meet production deadlines.<sup>77</sup> Terry believed that the best way to keep production levels high was to put his creative staff under deadlines and pressure to perform.<sup>78</sup> Support for Terry's practice comes from research that has found that deadlines have an energizing effect increasing productivity.<sup>79</sup> However, while productivity was increased, studies have shown that an external imposition of deadlines result in lower levels of desire to perform tasks once considered highly enjoyable. The explanation offered by the researchers was the "overjustification hypothesis" or simply engaging in a task in order to achieve something (i.e., meeting a deadline) will produce a loss of intrinsic interest in the task.<sup>80</sup>

While every major cartoon studio during the Golden Age was bound by contractual obligations to produce animated shorts under time constraints, the Terrytoons studio had the smallest staff and highest production volume of the majors making the studio crew most susceptible to suffering a loss of intrinsic interest in performing their creative duties. The author posits that the decrease in intrinsic motivation likely resulted in lower levels of creativity. Further, the imposition of deadlines likely restricted good idea generation because there was a lack of time necessary for deep insights into formulating entertaining and rich storylines.

### c) Competition

Historical evidence confirms that the Golden Age animation studios were closely watching each other and striving to improve the entertainment value of their shorts in an attempt to gain an edge over the competition. As has been previously detailed, Disney and Fleischer engaged in a bitter struggle to differentiate their product for competitive purposes through technological innovation.<sup>81</sup> Products that were entertaining and competitive in the marketplace were necessary to attract and retain distributors, a critical undertaking as there were far more animated film studios than major feature film production companies that could guarantee exhibition.

While the Terrytoons studio was not competing directly with Disney in terms of technological innovation, Terry was monitoring the cartoons of their New York neighbour, Fleischer Studio in order to determine whether to keep pace and produce an animated cartoon in colour.<sup>82</sup> As noted earlier, as animators were in short supply through much of the Golden Age, poaching of creative talent by studios was a common practice,<sup>83</sup> a practice Terry found difficult to manage.<sup>84</sup> Therefore, striving to seek a competitive edge over rival studios in order to seek or retain distributors was a critical component of the animation industry during the Golden Age.

Empirical research on the effects of competition on creativity has consistently found that competition reduces creativity under the proposition that intrinsic motivation is conducive to creativity while extrinsic motivation is detrimental.<sup>85</sup> Studies have found that competition forces people to shut down their creative thinking capacities due to pressure to produce and feeling controlled resulting in a lower number of novel ideas. Competition increases evaluation expectation causing higher levels of conformity, lower levels of risk taking and a general reduction of expression.<sup>86</sup> Further, most competitive situations involve deadlines.

Research has found that the best creative thought occurs in non-competitive situations when the individual is distant to the problem and is rested and engaged in unrelated activities. Competition reduces creativity by causing individuals to refrain from providing information and therefore reduces the degree of intellectual networking, cross-pollination, and teamwork required to achieve the best ideas. When individuals are placed in a competitive situation, ideas are generated according to the value system indicated at the start thereby decreasing the number of diverse and novel ideas, reducing lateral thinking, and lowering the separation of creativity from critical thinking.<sup>87</sup>

Therefore, the very competitive nature of the animation industry likely reduced Terry's intrinsic motivation to be creative. Since Terry rarely consulted his staff when making executive or creative decisions in a non-collaborative atmosphere, Terry's decisions had a major influence on the final product.<sup>88</sup> Therefore, considering the non-collaborative studio atmosphere, Terry's lack of intrinsic motivation would have significantly influenced the creative direction of the studio. Further, evaluation expectation which reduces risk-taking may have been magnified in Terry by the competitive nature of the industry further diminishing creative expression. Finally, the competition with Fleischer likely caused a pressure to conform which research has shown leads to decreases in the generation of innovative ideas and a movement towards non-creative decision making.

#### d) Rewards

As previously noted, the phenomenon of lower intrinsic motivation following external reward has been well-documented empirically.<sup>89</sup> Explanations for the loss of intrinsic motivation see the external reward or constraint causing the subjects to view the task as work. Pursuant to self-perception theory subjects who perform the task in order to meet some extrinsic contingency "infer" that their task engagement was motivated only by the constraint and not their own interest.<sup>90</sup> Similarly, cognitive evaluation theory proposes that the presence of salient external constraints on performance cause a shift in the individual's perceived locus of causality from internal to external.<sup>91</sup>

Research with respect to determining the effects of reward on creativity has consistently found that extrinsic reward leads to lower intrinsic motivation to engage in a creative task and less creativity following the "overjustification" hypothesis.<sup>92</sup> For example, Amabile found that poems written under an extrinsic orientation (e.g., tangible reward, external evaluation, external direction, writing as a means to extrinsic ends) were significantly less creative than those written in the intrinsic or control group conditions.<sup>93</sup> In another study, children being rewarded for engaging in art activities showed later decrements in intrinsic interest in these pursuits.<sup>94</sup>

Conversely, researchers in the behaviour modification tradition, those involved in creativity-enhancement and "token economy" studies where continuous feedback on competence was given to subjects that received automatic rewards if the performance met certain standards, have found positive effects of reward on creative performance.<sup>95</sup> These contradictory results have been reconciled with the intrinsic motivation hypothesis based on the explanation that rewards that convey competence information may not undermine

intrinsic motivation as much as rewards that convey only controlling information. Therefore, if the informative aspect of reward becomes more important than the controlling aspect, subjects might not experience a decrement in intrinsic motivation.<sup>96</sup>

Other proponents of the intrinsic motivation school argue that the tasks in the intrinsic motivation studies were initially intrinsically interesting to the subjects.<sup>97</sup> Enhancement in performance on instruments administered in a classroom used in the behaviour modification studies is to be expected when intrinsic interest is initially low.<sup>98</sup> Another noted difference is that the tasks in the behaviour modification studies were algorithmic (a clear path to a solution) rather than heuristic (relatively open-ended with no clear path to a solution) calling into question whether the tasks required a demonstration of creativity.<sup>99</sup> This argument is bolstered by examining the pattern of results in the behaviour modification studies where the more strictly algorithmic aspects of assessed creativity were the most strongly influenced by reinforcement.<sup>100</sup>

The author posits that the studio head who was most likely to have his intrinsic motivation to create unaffected by performance-based rewards such as money and public recognition (e.g., awards) was Walt Disney. First, Walt distanced himself from the financial management of his studio, duties he left with his brother Roy Disney.<sup>101</sup> Second, family and friends have noted that Disney was too busy creating and learning to bother trying to gain public recognition or impress people.<sup>102</sup> Third, Disney had a positive outlook on future prosperity and seemed little concerned that the company would meet financial commitments.<sup>103</sup>

Fourth, Disney's business philosophy was if you concentrate on creating quality animated products then the financial concerns will take care of themselves as the public demand for an entertaining product would generate the necessary box office revenue.<sup>104</sup> Therefore, despite the pressures that flowed from performance-based rewards such as box office receipts and recognition from peers in the film industry, Disney's creative energies were unchecked and today most film scholars consider the animated shorts he produced during the Golden Age to be some of the most creative and richly produced cartoons during that period. Proof can be found in Disney's thirty Academy Awards nominations for Best Animated Short from 1932 – 1955 with eleven Oscar wins.

Conversely, the author posits that the Golden Age cartoon studio head whose intrinsic motivation to create would be most influenced by performance-contingent rewards was Paul Terry. First, Terry was the sole owner of the production company and therefore he had the

responsibility to successfully manage and oversee all facets of studio operations. Therefore, Terry would have been subject to the lure of a broad number of performance-based rewards linked to his studio's creative output which could have affected his intrinsic motivation to create.<sup>105</sup> Second, all significant financial decisions for the studio were made by Terry. As a result, Terry was continually placed in a stressful position where he had to make financial decisions impacting his creative work, such as whether to invest in new technology.

Third, Terry's managerial style was that of a micro-manager so he was constantly involved in many creative decisions at the production level thereby potentially influencing or restricting his staff's creative input into the finished product. Fourth, the author posits Terry possessed an external locus of control orientation making him susceptible to the belief that his studio fortunes were tied to significant others rather than being focused inwardly towards creating a better product for personal reasons irrespective of external rewards. Fifth, because the author posits Terry was financially insecure he had a tendency to closely observe or control the work of his subordinates or employees to ensure that he was getting maximum value from his staff. For example, during the 1940s Paul Terry began to undertake surveillance measures on his staff by hiring relative Charles Perrin to sit on a box overlooking the artists and report on footage completed.<sup>106</sup> By undertaking these measures, Terry may have unintentionally reduced the intrinsic motivation of his artists and their desire to engage in creative cartoon making as studies have shown that intrinsic motivation to engage in the task is reduced when individuals are monitored while performing these tasks.<sup>107</sup>

## **D. Analysis of Terry's Creative Contributions to the Field of Animated Cartooning**

### **1. Introduction**

If Terry experienced a complete loss of artistic motivation causing him to produce cartoons strictly for extrinsic purposes (e.g., financial rewards) as Maltin contends,<sup>108</sup> there should be evidence of a decline in Terry's creative aspirations and artistic legacy with respect to animation later in his career. Therefore, the author will briefly examine Terry's creative contributions and artistic motivations in the area of animated cartooning from his early career through to retirement to help provide further insight into Maltin's contentions. As a child, Terry was attracted to an artistic career as he was raised in a family of artists. His mother was a sculptor and his older brother John a successful newspaper artist and cartoonist. After Terry's mother died at an early age, his father devoted his time to raising his children in an atmosphere that fostered creativity<sup>109</sup> and the use of their imaginations.<sup>110</sup> While Terry's only art training was at Polytechnic High in San Francisco<sup>111</sup>, he persevered and became involved

in a professional capacity as a newspaper cartoonist, retoucher and/or photographer for a number of San Francisco newspapers and later for the *New York Press*.<sup>112</sup>

## **2. Early Career in Animation**

While working for the *Press*, after attending the Winsor McCay dinner, Terry decided to enter the business of animated cartoons in 1915<sup>113</sup> with the production of his first short *Little Herman* using a unique production technique he developed called the “double exposure method.” Terry appreciated the tremendous labour involved in making a cartoon, and so he began experimenting in how to produce cartoons more efficiently. Working for Bray, Terry created his first memorable character, a bald-headed, white-bearded, pot-bellied hayseed named Farmer Al Falfa which debuted in *Farmer Alfalfa’s Catastrophe* (1916) for Paramount-Bray. The character was popular enough to become a regular fixture of Terrytoons cartoons until the 1950s. Terry has also been credited with being the first to use mice in an animated cartoon and for inaugurating the art of drawing animal characters in humanized form.<sup>114</sup>

While working on the Fables series, Terry recognized the importance of concluding the animated shorts with a moral (although often the moral was just a made up gag line by Terry or his animators) which were funny particularly because they had no relation to the film.<sup>115</sup> Many of the stories for these Fables shorts were written by Terry and became one of the more popular series during the 1920s. By 1928, at the invitation of Amedee Van Beuren, Terry began experimenting in sound and he can be credited with producing the first synchronized sound cartoon *Dinner Time* (1928), a short that preceded Walt Disney’s much heralded *Steamboat Willie* (1928).

## **3. Terrytoons Years**

After founding the Terrytoons studio with Frank Moser in 1929, Terry played a vital creative role by writing most of the stories for the studio shorts until 1937 when a story department was created.<sup>116</sup> After 1937, Terry continued to offer story suggestions in an attempt to improve the entertainment quality of the animated shorts.<sup>117</sup> Terry also helped originate and develop some of the studio’s cartoon characters. In 1943, one of Terry’s story men, I. Klein, created the concept of a super fly. The concept appealed to Klein because he had heard that a fly, for its size, had super strength.<sup>118</sup> He took the idea to Terry showing Terry a few drawings where Terry suggested that the character be a mouse.<sup>119</sup> Thereafter

Terry worked with the story department to develop the character into Supermouse later helping to evolve the cartoon creation into the now famous Mighty Mouse.<sup>120</sup>

The creative genius behind the creation of two other popular characters, Heckle and Jeckle, was also Paul Terry who thought it would be amusing to have identical twins as the key characters of a series.<sup>121</sup> Maltin gives Terry credit for his inventiveness and originality in the choice of character design.<sup>122</sup> Terry's opinion of the characters was that the two magpies were the best series the studio ever produced,<sup>123</sup> a belief shared by Maltin.<sup>124</sup>

Terry made two other significant contributions to the studio's stable of cartoon characters. First, he created Dinky Duck, Terrytoons' answer to Disney's Donald Duck and Warner Bros.' Daffy Duck,<sup>125</sup> although the character was not well received by the public.<sup>126</sup> Terry also created Gandy Goose, a character with the vocal characteristics of Ed Wynn.<sup>127</sup> Although the character was initially not popular with audiences, rather than scrap the character entirely, Terry had the brilliant idea to pair Gandy with Sourpuss, a character based on the personality of Jimmy Durante. The teaming of the two characters created great chemistry and received accolades from audiences and critics.<sup>128</sup>

As noted in Chapter Three, Terry experimented with an aerial animation camera device that made possible photographing together animated cells with movie-film backgrounds. The invention was so revolutionary that the camera was featured in the December 1940 edition of *Popular Science*.<sup>129</sup> Around 1954 Terry developed what he referred to as the "Terryscope," a small portable booth containing a projection screen. For the price of a nickel, one sound, colour Terrytoons cartoon would be exhibited on a small television screen inside these tiny structures that could sit one child comfortably. These small little one seat theatres were then placed in supermarkets where children could watch a cartoon while their mothers were shopping.<sup>130</sup>

Another pioneering method instituted by Terry in the 1930s was directing his staff to attend viewings of his shorts at local theatres in order to record audience responses to his cartoons. Terry can be credited with being one of the first to employ market research on live audiences in the animated film short genre.<sup>131</sup> Terry's attempt in 1915 to convince Thanhouser to purchase his first cartoon, *Little Herman*, by having children from the neighbourhood screen the film can be seen as a rudimentary form of the use of audience response for marketing purposes.<sup>132</sup>

Terry was keenly interested in supporting the advancement of animation evidenced by his funding of an annual scholarship to the High School of Art and Design. The award consisted of \$25 and a job with the Terrytoons studio. The award was presented by Paul Terry himself.<sup>133</sup> In addition, Terry made creative contributions to other art forms. For example, in 1951 Terry wrote the lyrics and studio musician Philip Scheib provided the music to the song “The Miracle” that was sung by Kenneth Schon of the Metropolitan Opera Association.<sup>134</sup> Terry and Scheib also teamed up in the same capacities to create the song “Never Let Satan’s Foot Get in the Door.”<sup>135</sup>

#### **4. Retirement Years**

After selling his cartoon library to CBS in 1955, Terry devoted many hours to painting, doing sculpture, and tinkering in his workshop.<sup>136</sup> Terry maintained his interest in seeing the growth and development of animation in young artists by serving on the board of trustees of the School of Industrial Art in New York City.<sup>137</sup> He also became involved in the Children’s Studio, a private art school for children located in Rye, New York operated by Florence King Weichsel. Terry supported the institution through financial gifts. He also visited the institution frequently to give encouragement to the children to pursue creative endeavours much like his father had did for him over a half a century earlier.<sup>138</sup>

In 1967, at the age of 80, Terry attended the World Exhibition of Animation Cinema held in Montréal, Quebec, Canada,<sup>139</sup> where some of greatest animators, artists, and producers gathered at this global celebration of animation. While at the world event Terry endeavoured to meet and share stories of his career with many of the animation greats that he never had the opportunity to do so with during his years as studio head.<sup>140</sup> Interviews undertaken of Terry shortly before his death when the former producer was 83 years old reveal an individual still fascinated with the art and industry of animation. Terry’s biggest regret late in life was not having the time and opportunity to explore more fully the wonderful world of animated filmmaking.<sup>141</sup> In summation, there is no evidence in the historical record to suggest Terry lost any artistic motivations in the field of animation. Rather, he was busy trying to create a quality product during his later years in production and helping to advance growth in field of animated cartooning during his retirement years.

#### **E. Terry’s Artistic Motivations as Reflected in the Artistic Talent Retained at the Terrytoons Studio**

##### **1. Introduction**

In order to maintain cost-efficient production methods, Terry employed a small staff, and pushed his employees to produce efficiently on a schedule requiring no room for experimentation. Despite the focus on producing economically, since Terry feared losing his staff to rival studios in a market where animators and skilled cartoonists were in short supply, Terry paid his most talented staff competitive wages and created a warm family environment at the studio through nepotistic hiring practices. Conversely, there is evidence to suggest that Terry paid his lower skilled staff meagre wages because they could be easily trained and replaced, events which gave rise to studio labour unrest in the 1940s.<sup>142</sup>

The author posits that the level of the artistic talent at the Terry studio is directly related to Terry's ambitions to produce entertaining and quality crafted animated shorts, a supposition supported by Terry's admission that the quality of his cartoon product depended on the artistic talent he employed at his studio.<sup>143</sup> If Terry employed a highly talented artistic staff, a conclusion can be drawn that producing a quality cartoon product was important to Terry. Conversely, if Terry's staff was not highly talented, then conclusions could be drawn that producing aesthetically pleasing and entertaining cartoons was not important to Terry.

## **2. Identification of the Artistic Staff Terry Considered Critical to the Success of the Studio**

Since Terry understood that to retain talented artists required providing better financial incentives to these employees, staff wages at the studio should be related to Terry's opinion of their talent. Unfortunately, extant studio financial records do not disclose which staff members were paid at the higher rates. The author posits that an indication of which artists were well compensated is length of tenure at the studio. The assumption is that employee satisfaction with studio working conditions is positively related to length of tenure. Accordingly, the author can identify eleven artists that devoted all or most of their careers to work at Terrytoons and who likely received strong financial benefits for their services: animator-directors Connie Rasinski, Eddie Donnelly, Mannie Davis, and Robert Kuwahara; animators James Tyer, Arthur Bartsch, and Carlo Vinci; story men John Foster and Thomas Morrison; background artists Anderson Craig and Bill Hilliker; and musician Philip Scheib.

Terry believed that his staff sought recognition through screen credits and by doing so he was satisfying their need for an acknowledgment of their artistic contributions to the finished product thereby providing them with a measure of job satisfaction.<sup>144</sup> However, Terry was very sparse with providing screen credits with acknowledgements for each animated short

limited to the director, story man, and musician. Terry may have been deliberating using the credits as a means to highlight the work of the select few he felt were most critical to his studio's success. Therefore, the author posits that those artists that received screen credits Terry considered important to studio fortunes. These individuals included: animator-directors Rasinski, Davis, and Donnelly; story men Foster and Morrison; and musician Scheib.

During the labour negotiations leading up to Terrytoons strike of 1947, Terry had produced a backlog of films and was prepared for a long bitter strike. He understood that as the strike progressed many of his striking employees would suffer financially and would be forced either to go back to work at the studio or look for work elsewhere. He also understood that during the strike his best talent would be prime targets for other studios that were looking to poach potentially disgruntled and unemployed artists.

Since Terry did not want to repeat Disney's mistake in losing his talent base during the strike, he approached those artists he considered his most critical to the success of his studio and offered to keep them on his payroll throughout the duration of the labour action. All of these employees Terry approached in confidence decided to remain on the studio payroll and were subsequently listed as scabs in the union literature. This production crew of scabs included Bartsch, Davis, Donnelly, Foster, Morrison, Rasinski, and Scheib, along with Frank Schudde.<sup>145</sup> The fact that many of the same production staff had long tenures, were given select screen credits, and had the opportunity to continue to receive full remuneration during the strike underscores the importance of these artists to Terry. Accordingly, the author posits that Terry considered all of these artists as integral to the success of his studio.

### **3. Biographical Overviews of Paul Terry's Key Artistic Talent**

#### a) Introduction

As detailed above, the author has identified twelve members of the production crew whom Terry believed were critical to the success of his company. The issue now turns to the level of talent of each of these artists, a critical question in determining whether Terry had artistic motivations to produce quality crafted shorts evidenced by retaining a highly talented staff. Since any assessment or ranking of talent may lead to controversy amongst the scholarly community and be difficult to quantify, the author will only be formulating some general conclusions as to the artistic abilities of the twelve artists based on a retrospective analysis of their careers. The following factors will be taken into consideration when arriving at very broad conclusions on talent levels:

b) Artistic education and training.

Artists that had received formal education and training in drawing, painting, illustration, graphics design, music, and the arts were considered to possess the requisite artistic background necessary to succeed in the animation profession. Formally trained artists were highly valued because they exhibited a commitment to acquiring the skills and abilities to become a successful artist and were expected to display a certain skill level by having been educated. Many of the most respected animators during the Golden Age, such as Vladimir Tytla, had been formally trained at art schools.

c) Years employed as an artist in the animation industry.

The number of years an artist has been employed in the animation industry should have a direct relationship to their level of artistic competency under the assumption that skills develop with more experience. Further, artists that are talented should also be highly sought after by the animation studios due to their mastery of the craft. Therefore, these individuals should be more successful in locating and maintaining a career in animation than lesser skilled artists.

d) Artistic accomplishments or achievements within and outside the field of animated cartoons.

More talented animation artists should have a better record of artistic achievements both within and outside the animation profession than lesser talented artists. Some of these accomplishments could include: senior studio positions held, exhibitions or public showings of artistic works, animation film credits, published works in peer reviewed journals, grants received, presentations given at regional and national meetings, and memberships held in animation, cartooning or related artistic organizations.

e) Reputation amongst his peers and in the scholarly community

During the Golden Age of Animation, movement of artists from studio to studio was commonplace as artists sought better career opportunities. Further, with a limited number of producers and theatrical distributors that remained fairly stable during the Golden Age, animated cartoonists were a small closely knit community. Therefore, an artist's reputation quickly became known to his peers. If an animator exhibited a command of the art form, he

would have developed a strong reputation amongst all his peers. Those artists that were talented were jealously guarded by the studio bosses, offered premium salaries, and were considered to be leaders, teachers and mentors in the animation community.

f) Honours, awards and other special recognitions of achievement

Artists that have shown a consistent level of mastery of their art form would be more likely to have received recognition by individuals, associations, and organizations associated with their artistic professions. Any honour received by an artist whether in the field of animation or other artistic pursuits would tend to indicate that the artist had achieved a level of artistic mastery in his or her discipline. Artists with a strong track record of artistic achievements were highly valued by studio bosses and jealously guarded and usually very well compensated.

#### **4. Summary of the Talent of the Terrytoons Key Production Crew**

In order to research and gather biographical information on the twelve Terrytoons artists, the author completed comprehensive literature searches in libraries, archives, and special collections in the United States and Canada, conducted oral history interviews of animation artists, accessed databases and digital files, and gathered together obituary information and genealogical data. As a result, the writer was successful in compiling a significant amount of information to provide a full career overview for each artist. The author prepared a detailed biographical profile for each of the twelve artists which are listed in Appendix A. Biographical summaries are detailed in Table 1 infra.

After compiling the information, the five factors were analyzed in relation to the twelve above listed artists in order to assess their talent levels. The author found that contrary to Maltin's position that Terry was unable to retain talented artists at his studio, all of whom the film critic maintains "left for greener pastures,"<sup>146</sup> a talent survey of the key staff reveals that Terry had created a strong stable nucleus of highly skilled artists who dedicated a significant portion of their working careers for the New Rochelle studio. Based on their length of tenure at the studio, most of the profiled artists apparently enjoyed their time at the studio spending the majority of their careers at Terrytoons. Only three of the artists profiled left the studio before they retired from animation, two of which departed after Terry had sold the studio. None of these artists appeared to have left because they were dissatisfied with the way Terry operated his studio. Four artists (Hilliker, Morrison, Rasinski, Scheib) spent their entire careers at Terrytoons.

TERRYTOONS TALENT SUMMARY							
NAME		TERRYTOONS POSITIONS	ART EDUCATION and TRAINING	YEARS EMPLOYED IN ANIMATION	ARTISTIC AWARDS/ NOMINATIONS	PROFESSIONAL ASSOCIATIONS	OTHER ARTISTIC ACCOMPLISHMENTS
LAST	FIRST						
<b>Bartsch</b>	Arthur	Director; background designer	Metropolitan Art School; Grand Central Art School; Pratt Institute	35 years (1933-1968)	Academy Award Nomination, 1959 (directed animated short)	National Cartoonists Society	Art director for television; interior designer; book illustrator; comic book artist
<b>Craig</b>	Anderson	Background artist	Kansas City Art Institute and School of Design	18 years (c. 1937- c. 1955)			Portrait painter; founder, Experimental School of Art; managed own animation studio; art director
<b>Davis</b>	Emanuel	Animator	Cooper Union Art School; Art Students League	47 years (1916-1963)	Academy Award Nomination, 1943 (directed animated short)	National Cartoonists Society	Newspaper artist; first to combine live actors with animation
<b>Donnelly</b>	Edwin	Director; animator	Art Students League	39 years (1923-1962)	Academy Award Nomination, 1944 (directed animated short); honourable mention for miniature models		Newspaper cartoonist; woodworking; miniature model making
<b>Foster</b>	John	Director; animator		34 years (1915-1949)			Created cartoon character Gandy Goose; noted writer of gags
<b>Hilliker</b>	Douglas	Background artist		17 years (c. 1942 – 1959)			Painter; commercial artist; magazine cover illustrator; poster designer; furniture designer and craftsman
<b>Kuwahara</b>	Robert	Director; animator, character designer; story man	Otis Art Institute	25 years (1932-1942; 1949-1964)	Honor medal, Freedom Foundation, Columbia University	National Cartoonists Society	Commercial illustrator; Creator of Hashimoto Mouse and Lariat Sam cartoon characters; comic strip creator and artist
<b>Morrison</b>	Thomas	Animator; production manager; story man, voice actor; sound effects artist		41 years (1932-1973)		National Cartoonists Society	Actor; story writer for television commercials; makeup artist; playwright; play director; music lyricist
<b>Rasinski</b>	Conrad	Director; animator	Phoenix Art Institute; Art Students League	36 years (1929-1965)	Academy Award Nomination, 1946 (directed animated short)	National Cartoonists Society	Comic book artist; caricaturist; animation art instructor; redesigned Mighty Mouse
<b>Scheib</b>	Philip	Composer; musical director	University of Berlin; Stern Conservatory of Music	34 years (1931-1965)	Four animated shorts he was involved as musical director were nominated for Academy Awards (1943, 1944, 1946, 1959)	Associated Musicians of Greater New York; American Federation of Musicians, Local 802.	Violinist; pianist; lyricist; conductor; music director for theatre.
<b>Tyer</b>	James	Animator; story writer		46 years (c. 1925 – 1971)			Animation director; animation special effects
<b>Vinciguerra</b>	Carlo	Animator	National Academy of Design	45 years (1933-1978)	Silver medal, Tiffany Family Foundation; various art awards		Muralist; landscape artist; painter; stained glass artist; comic book artist; exhibitions of his art in NYC galleries

**Table 1.** Terrytoons Talent Summary

With respect to devotion to the profession, nine of the twelve artists dedicated 34 or more years to the animation profession. Further, many of these artists were formally educated and trained at some of United States' most important art schools and some began employment at Terrytoons with decades of experience in animated cartoon production at many of the other Golden Age studios. At least two artists (Donnelly, Kuwahara) left their employment at Walt Disney to work at the Terrytoons studio.

Finally, many of these artists achieved notable successes either at the studio or in other artistic endeavours. Craig was a highly accomplished portrait painter. Donnelly was an expert miniature model designer. Hilliker was a brilliant and gifted poster designer for motion pictures. Kuwahara was an award winning comic strip artist. Scheib was a highly talented and proficient composer with formal music training and education in Europe. Vinciguerra was a talented muralist, stain glass designer and painter whose work was exhibited in some of New York City's finest art galleries.

In addition, some of the animated shorts directed by these artists received nominations by the Academy of Motion Picture Arts and Sciences in the "Short Subjects, Cartoons" category while other artists were recipients of significant artistic honours and awards outside of their work in animation. In summation, based on the biographical analyses, the twelve artists the author identified as important to Terry were found to be highly talented and accomplished artists pointing to the conclusion that Terry was committed to producing engaging and attractive animation

#### **F. Terry and Disney: The Struggle for the Services of William Tytla**

When animator Shamus Culhane approached Paul Terry for a job, the producer boasted that his studio made a lot of money while labelling his product as feces in comparison to the work of other studios.<sup>147</sup> Obviously Terry's quote cannot be taken literally as his company was not in the business of producing excrement. Neal-Lunsford understood the quote to mean that Terry's business operational goal was to make money at the expense of an inferior product.<sup>148</sup> However, Terry's efforts and success in retaining a highly talented core group of production personnel challenges Neal-Lunsford's assertion.

Evidence indicates that the talented production crew Terry retained at the studio were being paid very well, likely above the industry average.<sup>149</sup> Therefore, how does one reconcile Terry's economic psychodynamics with his significant financial investment in the studio's more talented group of artists? One answer is that by paying his very gifted artists comparable wages he would have helped his cause in keeping them from leaving the studio. However, there are no facts to suggest that Terry was under any threat of immediate staff turnover through wage disparities. Further, there is no evidence to support the conclusion that he was in danger of losing his contract with his distributor as a result of a drop in production quality.

In addition, as Terry was a shrewd money manager he would have been aware that animated cartoons with high production values provide the same return on investment as budget cartoons. Therefore, the author posits that any attempts to augment talent levels at the studio were made for intrinsic reasons based on creative aspirations and a genuine desire to improve the production quality of his shorts. Efforts by Terry to retain talented artists were not made because he feared his distribution contract would have been terminated or because he believed he would have been able to increase revenue generation from more aesthetically pleasing cartoons.

Therefore, the author posits that evidence points to the conclusions that Terry had not lost his artistic motivation to produce quality cartoons, was concerned about the quality of his product,<sup>150</sup> and did his best under the economic conditions to retain a talented staff of artists. Despite the limited production budget, the Terry product had a sufficiently high enough artistic merit to garner three Academy Award nominations in the 1940s. Consequently, the author argues that Terry's statement to Culhane should be taken as a cynical remark by a frustrated producer unable to spend the money necessary to produce animated shorts at an aesthetic level that met his creative aspirations.

Terry's desire to produce a superior cartoon is exemplified through his struggles to retain the services of Vladimir "Bill" Tytla, proclaimed by his fellow contemporaries as well as many animation historians as one of the greatest animators of all time.<sup>151</sup> In 1923, Tytla began working for Terry at the Fables Studio. Tytla soon impressed Terry with his mastery of animation, asked Terry for a 100% increase in salary, and received the raise without an argument. Later Terry admitted that he would have given Tytla even more money if he had asked for it.<sup>152</sup>

After studying painting and sculpture in Paris, Tytla returned to the United States in 1931 to work for Terry at Terrytoons. When Disney began to inquire into luring Tytla to California, Terry gave Tytla a pay hike. A few weeks later Tytla received another pay hike after animator Babbitt wrote him trying to convince him to move to Disney. When Babbitt wrote Tytla a third time, a third pay hike followed. Tytla eventually decided to fly to California and explore Disney's studio and even though his salary was less than what he was getting at Terrytoons accepted a job at Disney in November 1934.<sup>153</sup>

Tytla completed masterful work on *Snow White and the Seven Dwarfs* (1937) developing and animating the Seven Dwarfs. He also impressed Disney with animation on the giant in the short *The Brave Little Tailor* (1938), the sorcerer Yensid in the short *The*

*Sorcerer's Apprentice*, Monstro the Whale and Stromboli in *Pinocchio* (1940), and Chernabog (devil giant) in the "Night on Bald Mountain" sequence from *Fantasia*. When Babbitt was fired after he complained of wage differentials between himself and his assistant, the event ignited the Disney strike. Tytla backed the union and decided to strike with mixed feelings as he was close friends with both Disney and Babbitt.<sup>154</sup>

After the strike was resolved, Tytla was not comfortable with the new studio working conditions. On hearing of his discontentment, Terry flew from New York to California to enlist the aid of the attractive screen actress Claire Trevor, a cousin of Tom Morrison, and shower Tytla with offers.<sup>155</sup> Terry's efforts were successful. Tytla resigned from Disney almost two years after the strike was settled, and left for Terrytoons where he was hired as director of animation.

While Terry compensated Tytla well for his services, Tytla grew unhappy with the studio's focus on efficiency that Terry had instituted to keep costs under budgetary control. Tytla departed Terrytoons after just over a year at the studio to work for Paramount (Famous Studios) where he was equally unhappy.<sup>156</sup> Tytla returned to Terrytoons to complete some piecework directing a few Terry shorts in the early 1960s, and finished his career working on hundreds of animated commercials for Tempo, Academy Pictures, and his own studio, William Tytla Productions, between 1958 and 1968.

While Tytla's reputation as a gifted artist was well-known within the animation industry, his name was unfamiliar to movie goers. Unlike feature live action films where a star's name attached to a film was almost instant box office success, animators were never given marquee billing and Terry understood that a Tytla directed cartoon was not going to generate any more box office revenue than a Mannie Davis or Eddie Donnelly cartoon. Therefore, one can reasonably conclude that Terry's only reason for engaging Tytla's services was based on intrinsic interests to increase the production values of his animated product.

Animation historian Mike Barrier found that friendship and a need to keep Terry's cartoons at a more acceptable standard as likely reasons for the hiring of Tytla.<sup>157</sup> However, there is no precedent from Terry's previous hiring practices that friendship was a motive to expend considerable financial resources and fly across the continent to recruit artists. Further, by 1943 Terry had already made a number of successful changes in studio production methods to satisfy his distributor and there was no apparent urgency to make any further improvements. For example, Terry had recently developed the cartoon character Mighty

Mouse which was becoming very popular among audiences. Terry's distributor was very pleased with the product and studio fortunes had never looked brighter.

Maltin explains that Terry was motivated to bring Tytla back to the studio because he was impressed with Tytla's animation.<sup>158</sup> Terry would later corroborate his high regard of Tytla's work in interviews conducted in 1969-1970. Maltin writes that Terry took advantage of discord between Disney and the animator to offer Tytla an employment position at the studio. Maltin's interpretation of the events is likely accurate considering Terry had known Tytla for over 20 years, had a high regard for his work, and was looking for an opportunity to settle an old score with Disney for his earlier poaching of his talent.

While the psychodynamic framework for Terry's managerial practices characterizes Terry as a budget conscious producer, there is no reason to believe that Terry was not frustrated with not being able to produce a product that was Disney-like. The institutional dynamics, technological advancements, and economic realities of the marketplace provided Terry with little option but to minimize production costs. Terry's economic insecurity and external locus of control only added to the financial conservatism that was necessary for a studio to survive during the Golden Age. Based on the number of significant financial problems experienced by some of the major studios during the Golden Age, Terry's belief that he had no other choice but to produce economically or face severe financial repercussions was well founded.

The fact that Terry was adding Tytla's hefty salary to the studio payroll does not signify that Terry had become any less conservative in his economic dealings. The additional salary would only increase total production costs by a tiny fraction and therefore the financial risk was very minimal.<sup>159</sup> The recruitment of Tytla was a major coup for Terry because the level of aesthetic quality of his animated cartoons would noticeably improve. Further, having Tytla on staff would only increase studio morale, raise the quality of animation of other studio artists through mentorship and discipleship, and eliminate any doubts that Terry was not serious about producing fine animation.

Finally, based on studio financial records, Terry could have hired more highly talented staff in an attempt to increase the entertainment value even further, but this assertion is made with the benefit of hindsight. Considering Terry was prone to financial conservatism, the fact that his closest competitor, Fleischer Studios, had been a recent victim of financial problems may have increased his financial insecurity. Further, his overseas markets had disappeared during the Second World War reducing the number of exhibitors for the product.

Therefore, Terry's decision to add Tytla to the talent roster in 1943 is all that more noteworthy and considerable proof of Terry's creative drive and artistic motivation to produce quality crafted animated shorts.

**G. Achieving a More Cogent Analytical Approach to Understanding Terry's Motivations to Produce Quality Crafted Animated Shorts by Applying Neal-Lunsford's Framework of Cel Aesthetics**

In this chapter, the author found that the four components of the psychodynamic framework developed in Chapter Two provided more logical explanations for Terry's business practices, studio working conditions, and managerial decisions than Maltin's interpretations. The author also concluded that after an historical analysis of Terry's contributions to the animation field, that he possessed a genuine interest and passion for animated filmmaking that continued throughout his life. In addition, a biographical survey of the talent of Terry's key artists along with Terry's pursuit of Vladimir Tytla provided clear and convincing evidence that Terry had an intrinsic motivation to produce quality crafted animation.

As noted in Chapter One, Bordwell, Staiger and Thompson argue for a coherent system whereby aesthetics and the mode of film production reinforce one another. The three authors assert that understanding film production requires articulating a theoretical approach and that this involves outlining the fundamental principles of historical stability and change using a unified approach. The Unified Mode of Film Practice developed by Bordwell, Staiger and Thompson states that Hollywood cinema was affected by three progressions: (1) changes in the mode of film production, (2) changes in film style, and (3) technological developments.<sup>160</sup>

The author's analytical approach in studying Terry's business and economic practices has focused primarily upon modes of film production and technological developments, two of the three progressions which form part of the Unified Mode of Film Production, and not on film stylistics. For example, the talent survey undertaken in this chapter concerns labour force issues that form part of changes in modes of film production. Terry's responses to the introduction of television as noted in Chapter Three reflect his responses to technological issues. The Sherman Anti-Trust Act and the end of block booking as well as the problems related to the distribution of animation shorts also addressed in Chapter Three are more related to economic and institutional issues.

Changes in film stylistics as noted by Bordwell, Staiger, and Thompson concern progressions which are “visible and audible” in the film product.<sup>161</sup> In regards to animated film, these changes would be reflected in the cel aesthetics (e.g., animation, background art, sound) of the animated cartoons produced by the studios. Therefore, the author argues that to better understand Terry’s artistic motivations by taking a more unified approach to understanding mode of film practice requires analyzing the cel aesthetics of the animated cartoons. By examining the particular film stylistics for each studio, scholars can better understand the artistic motivations of the studio heads. Bordwell, Staiger, and Thompson support this reasoning when they refer to causative agents, such as an artist or inventor, as key elements to changes in film style.

The author also finds support in his assertion that cel aesthetics are directly related to the artistic motivations of studio heads from the conclusions drawn by Neal-Lunsford. Neal-Lunsford’s research found that the aesthetic qualities of cel animation are related to three factors: (1) animation production process, (2) economic factors, and (3) artistic objectives of particular animation studios.<sup>162</sup> Therefore, in Chapter Five, the author will apply the framework of analysis outlined in Neal-Lunsford’s cel aesthetics to analyze the stylistics of the Terrytoons cartoons as well as the animated shorts from the other Golden Age studios in order to determine whether Terry was artistically motivated to produce cartoons with high quality aesthetics. Through the analysis, the author will also determine in terms of cel aesthetics where Terry’s animated product ranks in comparison to the other studios, and what were some of the cel aesthetics strengths and weaknesses found in the Terry cartoon shorts.

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<sup>1</sup> Maltin, *Of Mice and Magic*, 121.

<sup>2</sup> *Ibid.*, 121-122.

<sup>3</sup> Maltin, 121-122.

<sup>4</sup> *Ibid.*

<sup>5</sup> *Ibid.*, 122.

<sup>6</sup> The deductive reasoning is as follows:

*Talented artists could not survive at the studio and left for greener pastures* (major premise).

*Conrad Rasinski, Carlo Vincierra, Eddie Donnelly, and Anderson Craig are artists who survived at the studio and did not leave for greener pastures* (minor premise).

*Therefore, Conrad Rasinski, Carlo Vincierra, Eddie Donnelly, and Anderson Craig are not talented artists* (conclusion).

<sup>7</sup> *Ibid.*, 131.

<sup>8</sup> *Ibid.*, 132.

<sup>9</sup> *Ibid.*

<sup>10</sup> Helson, “Creative Personality,” 295.

<sup>11</sup> Sobel and Rothenberg, “Artistic Creation.”

<sup>12</sup> Jackson and Messick, “Conceptual Problems in the Assessment of Creativity.”

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- <sup>13</sup> Maltin, *Of Mice and Magic*, 121.
- <sup>14</sup> Ibid., 122.
- <sup>15</sup> Ibid., 135.
- <sup>16</sup> Watson, *Behaviorism*, 198.
- <sup>17</sup> For an in-depth analysis of these studies refer to: Amabile, *Social Psychology of Creativity*, 17-35.
- <sup>18</sup> Guilford, "Creative Abilities in the Arts," 113-117.
- <sup>19</sup> See Eisner, "Children's Creativity in Art."
- <sup>20</sup> Domino, "Assessment of Cinematographic Creativity," 151-152.
- <sup>21</sup> Amabile, *Social Psychology of Creativity*, 33.
- <sup>22</sup> Ibid., 394.
- <sup>23</sup> See Feldhusen, "Conception of Giftedness."
- <sup>24</sup> See Hull, *Principles of Behavior*.
- <sup>25</sup> See Skinner, *Behavior of Organisms*.
- <sup>26</sup> Berlyne, "Novelty and Curiosity." Harlow, "Motivation as a Factor." Koch, "Behavior as Intrinsically Regulated." White, "Motivation Reconsidered."
- <sup>27</sup> Deci, "Effects of Contingent," 217.
- <sup>28</sup> Amabile, *Social Psychology of Creativity*, 14-15.
- <sup>29</sup> See Deci and Ryan, *Intrinsic Motivation*.
- <sup>30</sup> Deci and Ryan, "Initiation and Regulation," 10-11.
- <sup>31</sup> Amabile, "Motivation and Creativity," 397-399. While the results have consistently shown that extrinsic motivation reduces creativity, the findings have not always been unanimous. For example, Krop found that higher intelligence, high levels of intrinsic motivation, and high extrinsic motivation were all associated with higher levels of creativity. The explanation for the differences may be found in errors in the research design or in how the study defined or measured both external and internal motivation. Krop, "Effects of Extrinsic Motivation."
- <sup>32</sup> See Hennesy and Amabile, "Conditions of Creativity."
- <sup>33</sup> See Bem, "Self-Perception Theory."
- <sup>34</sup> Amabile, "Effects of External Evaluation," 227-228.
- <sup>35</sup> Study 2, Amabile, Goldfarb, and Brackfield, "Effects of Social Facilitation."
- <sup>36</sup> Study 1, Ibid.
- <sup>37</sup> Kruglanski, Friedman, and Zeevi, "Effects of Extrinsic Incentives."
- <sup>38</sup> Amabile, "Effects of External Evaluation," 228.
- <sup>39</sup> See Glover and Gary, "Procedures to Increase."
- <sup>40</sup> See Halpin and Halpin, "Effect of Motivation."; Johnson, "Differential Effects."; Raina, "Study Into the Effect."
- <sup>41</sup> Amabile, "Effects of Evaluation on Artistic Creativity," 230.
- <sup>42</sup> See Glover and Gary, *Behavior Modification*. Glover and Sautter, "Relation of Four Components," 229.
- <sup>43</sup> Sternberg, "Implicit Theories of Intelligence."
- <sup>44</sup> Maltin, *Of Mice and Magic*, 130-131.
- <sup>45</sup> Maltin, *Of Mice and Magic*, 126.
- <sup>46</sup> Deci, *Intrinsic Motivation*, 142.
- <sup>47</sup> Karniol and Ross, "Effects of Performance." Deci, "Effects of Externally Mediated." Harackiewicz, "Effects of Reward Contingency." Vallerand and Reid, "Causal Effects of Perceived Competence." Blanck, Reis, and Jackson, "Effects of Verbal Reinforcements." Russell, Studstill, and Grant, "Effect of Expectancies." Anderson, Manoogian, and Reznick, "Undermining and Enhancing."
- <sup>48</sup> Deci, Cascio, and Krusell, "Sex Differences."
- <sup>49</sup> Garber and Seligman, *Human Helplessness*.
- <sup>50</sup> Zuckerman, Porac, Lathin, Smith, and Deci, "Importance of Self-Determination." Swann and Pittman, "Initiating Play Activity."
- <sup>51</sup> Fisher, "Effects of Personal Control." Sansone, "Task Feedback."
- <sup>52</sup> Amabile, *Social Psychology of Creativity*, 113-114.
- <sup>53</sup> See generally Deci, *Intrinsic Motivation*, 142. See Deci, "Effects of Contingent," 217-229.
- <sup>54</sup> See Heider's theory of perceived locus of causality (Heider, *Psychology of Interpersonal Relations*).
- <sup>55</sup> Terry, interview, 20 December 1969, 86.
- <sup>56</sup> Ibid., 85.
- <sup>57</sup> Ibid.
- <sup>58</sup> Ibid.
- <sup>59</sup> Terry, interview, 20 December 1969, 84.
- <sup>60</sup> Ibid.

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- <sup>61</sup> Ibid.
- <sup>62</sup> Torrance, *Encouraging Creativity*.
- <sup>63</sup> Kneipp and Gadzella, "Comparison of Locus of Control."
- <sup>64</sup> Rotter, *Social Learning and Clinical Psychology*. Rotter, "Generalized Expectancies."
- <sup>65</sup> Baron, "SRS Model." Baron and Ganz, "Effects of Locus of Control."
- <sup>66</sup> Baron, Cowan, Ganz, and McDonald, "Interaction of Locus of Control."
- <sup>67</sup> Barrington and Harrington, "Creativity, Intelligence, and Personality." Cattell, *Abilities*. Cattell, Eber, and Tatsnoka, *Handbook*. Mumford and Gustafson, "Creativity Syndrome." Rank, *Art and Artist*. Rank, *Will Therapy*. Sternberg, "Implicit Theories of Intelligence."
- <sup>68</sup> Glover and Sautter, "Investigation of the Relationship," 259.
- <sup>69</sup> Ibid., 260.
- <sup>70</sup> DuCette, Wolk, and Friedman, "Locus of Control and Creativity," 298.
- <sup>71</sup> Ibid.
- <sup>72</sup> Leahy, interview, Transcript (Part II), 1.
- <sup>73</sup> Reviews prepared by employee Ralph Sancier for about two dozen animated cartoon shorts can be found in the Paul Terry Collection. An obituary on Ralph Sancier (born 22 October 1911, Edgewater, New Jersey; died 17 December 1984, New Rochelle, New York), animation artist and licensed high school art teacher, was published in the local New Rochelle newspaper. See "Ralph Sancier," (Obituaries), *The Standard-Star*.
- <sup>74</sup> With respect to using gags and plot devices from other cartoons, while Terry had a humorous quote that he "never stole more than he could carry" (Terry and Lazar, interview, 14), the producer always believed that he was only undertaking research activities and never engaging in theft of intellectual property.
- <sup>75</sup> Terry, interview, 20 December 1969, 78.
- <sup>76</sup> Morrison, interview, 14d.
- <sup>77</sup> Moser's description of studio conditions in the early 1930s required the staff to toil from eight-thirty in the morning to five-thirty at night including working on Saturdays. Moser stated the routine left him exhausted every night. Case on Appeal from Judgment, 197.
- <sup>78</sup> Terry, interview, 20 December 1969, 71.
- <sup>79</sup> Arvedson, *Deadlines and Organizational Behavior*. Webb, *Papers*.
- <sup>80</sup> Amabile, DeJong, and Lepper, "Effects of Externally Imposed Deadlines," 97.
- <sup>81</sup> Langer, "The Disney-Fleischer dilemma."
- <sup>82</sup> Case on Appeal from Judgment, 605.
- <sup>83</sup> Zander, interview, 4.
- <sup>84</sup> Marchionni, 25.
- <sup>85</sup> Amabile, "Children's Artistic Creativity," 575-577.
- <sup>86</sup> See Bishop, "Creativity, Innovation."
- <sup>87</sup> Ibid.
- <sup>88</sup> Lah and Gordon, interview, 21, 26.
- <sup>89</sup> Amabile, DeJong, & Lepper, "Effects of Externally Imposed Deadlines. Lepper & Greene, "Turning Play Into Work." Deci, "Effects of Contingent." Deci, "Intrinsic Motivation, Extrinsic Reinforcement."
- <sup>90</sup> Bem, "Self-Perception Theory." Kelley, "Processes of Causal Attribution."
- <sup>91</sup> This line of reasoning is followed in the work of Deci and Ryan.
- <sup>92</sup> Kruglanski, Friedman, & Zeevi, "Effects of Extrinsic Incentives." Lepper and Greene, "Undermining Children's Intrinsic Interest," 134-135. Greene and Lepper, "Effects of Extrinsic Rewards."
- <sup>93</sup> Amabile, "Motivation and Creativity," 397-399.
- <sup>94</sup> Lepper, Sagotsky, Dafoe, and Greene, "Consequences of Superfluous."
- <sup>95</sup> Glover and Gary, "Procedures to Increase." Halpin and Halpin, "The Effect of Motivation." Raina, "A Study Into the Effect." Ward, Kogan, and Pankove, "Incentive Effects." Milgram and Feingold, "Concrete and Verbal Reinforcement." Johnson, "Differential Effects." Campbell and Willis, "Modifying Components." Maloney and Hopkins, "Modification of Sentence Structure." Locurto and Walsh, "Reinforcement and Self-Reinforcement."
- <sup>96</sup> Deci, Intrinsic Motivation, 142. Deci and Ryan, "Empirical Exploration."
- <sup>97</sup> Lepper and Greene, "Overjustification Research." Deci and Ryan, "Empirical Exploration."
- <sup>98</sup> McGraw, "Detrimental Effects of Reward."
- <sup>99</sup> Amabile, "Effects of External Evaluation," 221-233.
- <sup>100</sup> McGraw and McCullers, "Evidence of a Detrimental Effect." Glucksberg, "Influence of Strength." Glucksberg, "Problem-Solving."

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- <sup>101</sup> Green and Green, 90, 101. "Walt Disney: Great Teacher," 156. See generally Culhane, *Walt Disney's Fantasia*.
- <sup>102</sup> Green and Green, 3.
- <sup>103</sup> *Ibid.*, 3, 101.
- <sup>104</sup> *Ibid.*, 100.
- <sup>105</sup> Other production companies run by a solitary studio head in charge of both production and finance would include Walter Lantz and Van Beuren studios.
- <sup>106</sup> Sommer, interview, 1.
- <sup>107</sup> Lepper & Greene, "Turning Play Into Work," 483-484.
- <sup>108</sup> Maltin, *Of Mice and Magic*, 121.
- <sup>109</sup> Terry, interview, 20 December 1969, 4.
- <sup>110</sup> Paul Terry, "Twigs Are Bent," 1.
- <sup>111</sup> "Lunch with Paul Terry," 18.
- <sup>112</sup> *Ibid.*, 19.
- <sup>113</sup> Terry's words were "all at once it consolidated right there" referring to his realization that his interest and experience in photography and newspaper cartooning could be combined into the new field of animated cartoon making. Terry, interview, 20 December 1969, 15-16.
- <sup>114</sup> Fischer, "Every Day's a Miracle."
- <sup>115</sup> Terry, interview, 20 December 1969, 48.
- <sup>116</sup> Morrison, interview, 15 June 1970, 6d-7d, 10d.
- <sup>117</sup> *Ibid.*, 28d.
- <sup>118</sup> Klein, "Mighty Mouse."
- <sup>119</sup> Brasch, *Cartoon Monikers*, 108.
- <sup>120</sup> Morrison, interview, 12d.
- <sup>121</sup> *Ibid.*, 13d. Cawley and Korkis, *Cartoon Superstars*, 103.
- <sup>122</sup> Maltin, *Of Mice and Magic*, 140.
- <sup>123</sup> Terry, interview, 20 December 1969, 56.
- <sup>124</sup> Maltin, *Of Mice and Magic*, 141.
- <sup>125</sup> Brasch, *Cartoon Monikers*, 32.
- <sup>126</sup> Markstein, "Dinky Duck."
- <sup>127</sup> Davis, interview, 30e.
- <sup>128</sup> For an overview of these characters: Erickson, *Television Cartoon Shows*; Lenburg, *Encyclopedia of Animated Cartoons*.
- <sup>129</sup> "New Cartoon Camera Combines Drawings and Photographs."
- <sup>130</sup> "Broadway."
- <sup>131</sup> Bakker, "Building Knowledge about the Consumer." "Terrytoons Founder Joins."
- <sup>132</sup> Terry, interview, 20 December 1969, 21-23.
- <sup>133</sup> Correspondence from Bill Kresse to Wynn Hamonic, Jackson Heights, New York, 1 April 1996, Paul Terry Papers, 1.
- <sup>134</sup> Philip A. Scheib and Paul Terry, "The Miracle," score, 1951, Paul Terry Papers.
- <sup>135</sup> Philip A. Scheib and Paul Terry, "Never Let Satan's Foot Get in the Door," score, 1952, Paul Terry Papers.
- <sup>136</sup> "Lunch with Paul Terry," 20. Null, "Cartoon Pioneer Retired...Not Bored."
- <sup>137</sup> Marchionni, 25. The School of Industrial Art referred to in the article probably refers to the High School of Art and Design. The High School was founded under the name of the School of Industrial Art in 1936.
- <sup>138</sup> Correspondence from Paul Terry to Children's Studio, Westchester Country Club, Rye, N.Y., undated, Paul Terry Papers.
- <sup>139</sup> See: Smith, "World Exhibition of Animation."
- <sup>140</sup> Terry, interview, 20 December 1969, 51. Terry, interview, 14 July 1970, 134.
- <sup>141</sup> Terry, interview, 20 December 1969, 60.
- <sup>142</sup> These comments are reflected in Terry's opinion that when the unions were instituted at his studio, the better paid talent did not benefit from the new salary structures. Terry, interview, 14 July 1970, 126.
- <sup>143</sup> Terry, interview, 13 June 1970, 107.
- <sup>144</sup> *Ibid.*, 106-107.
- <sup>145</sup> Screen Cartoonists Local 1461, "Know Your Scabs".
- <sup>146</sup> Maltin, *Of Mice and Magic*, 122.
- <sup>147</sup> Culhane, *Talking Animals and Other People*, 391.
- <sup>148</sup> Neal-Lunsford, 31-32.

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<sup>149</sup> Discussions with family members of some of the twelve production crew found that they were being well compensated for their services. This information can be found in various interviews in the Paul Terry Papers.

<sup>150</sup> Terry had a well-known quote amongst his family members: "Anything but perfection is rank failure." Terry and Lazar, interview, 25.

<sup>151</sup> Grant, 190. Terry, interview, 13 June 1970, 117-118.

<sup>152</sup> Klein, "Golden Age Animator," 7. "Vladimir Tytla, Cartoonist, Dies."

<sup>153</sup> Grant, 191.

<sup>154</sup> *Ibid.*, 191-192.

<sup>155</sup> According to sources from Terry's family, Terry asked screen actress Claire Trevor, the cousin of Terrytoons employee Tom Morrison, to meet with him, Irma, and Tytla for dinner where he asked her to help convince the animator to move to New York and work for Terry (Paul Terry Papers).

<sup>156</sup> Grant, 192.

<sup>157</sup> Barrier, *Hollywood Cartoons*, 384.

<sup>158</sup> Maltin, *Of Mice and Magic*, 136-137.

<sup>159</sup> The average production cost per short including the costs for the release prints for release dates from August 21, 1943 to June 17, 1944 was approximately \$16,700 per short for the 20 shorts listed or about \$434,000 per year for the 26 cartoons produced annually ("Terrytoons Inc., "Completed & Released Series 11," (Financial Statements), Production Numbers 347-366, 30 June 1944, Paul Terry Papers). About 1946-1947, according to studio records relating to the 1947 strike, the average salary at Terrytoons was \$113.00 per week for an "Animator, Class I." Assuming Tytla was receiving \$150.00 per week for his services, his total annual salary would be \$1,800 or about .004 (or 4/10<sup>th</sup> of 1%) of the total annual production costs.

<sup>160</sup> Bordwell, Staiger, and Thompson, *The Classical Hollywood Cinema*, preface, xiv.

<sup>161</sup> *Ibid.*, 247.

<sup>162</sup> Neal-Lunsford, "Cel aesthetics," v.

## **V. PAUL TERRY'S MOTIVATION TO PRODUCE QUALITY CRAFTED ANIMATED CARTOONS AS REVEALED THROUGH A COMPARISON OF THE STRUCTURAL QUALITIES OF A SAMPLE OF GOLDEN AGE ANIMATED CARTOON SHORTS BY APPLYING NEAL-LUNSFORD'S CEL AESTHETICS**

### **A. Introduction**

Bordwell, Staiger, and Thompson have argued that Hollywood filmmaking from 1917-1960 must be viewed as a unified mode of film practice, and argue for a coherent system whereby aesthetics and the mode of film production reinforce one another. They claim that cinema was affected by three progressions: (1) changes in the mode of film production, (2) changes in film style, and (3) technological developments.<sup>1</sup> In Chapters 2, 3, and 4, the author approached the analyses of the business practices, financial behaviour, and artistic motivations of Paul Terry by addressing institutional, technological, and production issues through the psychodynamic framework of Terry's economic practices. In this chapter, the author will analyze film stylistics by applying a framework of analysis and principles of Neal-Lunsford's cel aesthetics on a random sample of animated cartoons produced by the major Golden Age animation studios in order to compare the cel aesthetics qualities of the shorts produced by Terry to the other studios for the purposes of helping to determine whether Terry was artistically motivated to produce cartoons with high quality aesthetics.

### **B. Analyses of Cel Aesthetics: A More Penetrating Methodological Approach**

In Chapter 4 the author identified twelve artists Terry believed were integral to the success of his studio. Biographical analyses of these artists found them to be group of highly talented and artistically accomplished individuals. Therefore, the author concluded that Terry was committed to producing engaging and visually attractive animation. However, this conclusion is based on the suppositions that Terry was committed to producing a quality of animation commensurate with the talent level of his staff and that he believed that the gifted group of artists he had on staff was necessary to produce an entertaining and aesthetically pleasing product.

An argument can be made that Terry employed a staff of talented artists for reasons other than to produce quality crafted animation. According to the psychodynamic framework, an insecure Terry concerned with losing his distributor would want his animated cartoon product to meet a minimal level of production quality that ensured his distributor Educational Pictures, and later Twentieth Century-Fox, were satisfied. Possibly Terry believed that it was

necessary to employ the group of artists he had on staff to ensure his cartoons met this minimal standard of production quality. Terry's decision in 1936 to enlarge his staff and establish a story department in order to meet the minimal standard of production quality required by his distributor to renew his contract, as noted in Chapter Three, provides support for this assertion.

Another possibility is that the writer is incorrect in his assessments of the talent levels of Terry's artists and that the production staff was unable to produce engaging and aesthetically attractive animation. Maybe despite the talent level, the staff lacked certain artistic skills necessary to produce top notch animation. Even if the writer is correct in his assessments of the talent levels, possibly the talent base of Terry's gifted artists was not large enough to produce 26 quality crafted animated cartoons each year as stipulated in the contract with his distributor. Perhaps Terry understood that he had a shallow talent base but was unwilling to expand his staff of talented artists to produce quality animation. Conversely, if the talent base was large enough to produce quality animation, then perhaps due to indifference or lack of artistic motivation from Terry he was unwilling to make investments in the technology required to produce aesthetically pleasing cartoons. Terry's hesitancy to embrace colour animated cartoons in the 1930s and his failure to make investments in such production equipment as a movieola, as noted in Chapter Three, support this argument.

Therefore, a more penetrating methodological approach to determining whether Terry was motivated to producing quality crafted animation is to analyze the cel aesthetics of his animated cartoons. By comparing and ranking his cartoon product to the animated shorts produced by the other Golden Age cartoon studios, the author will be able to shed more light on Terry's commitment to producing entertaining and visually attractive animated cartoons. In this analysis, the strength of Terry's motivation to produce quality animation will be directly related to the quality of the cel aesthetics of his animated cartoons. In addition, the ranking of the cel aesthetics of Terry's animated cartoons in relation to the other Golden Age studios will provide evidence as to whether Terry succeeded in producing cartoon shorts that were comparable with the product from the other production facilities.

**C. Evidence and Opinion With Respect to the Quality of the Cel Aesthetics of the Terrytoons Cartoons in Comparison to the Animated Cartoon Product from the Other Golden Age Animation Studios**

## **1. Nominations and Academy Awards in the “Short Subjects, Cartoons” category during the Golden Age of Animation, 1930-1960**

By 1960 when the Golden Age of American Animation<sup>2</sup> was drawing to a close, Walt Disney Productions had garnered eleven Oscars in the category, Metro-Goldwyn-Mayer had won eight Oscars, Warner Bros. was awarded five, United Productions of America won three, and John and Faith Hubley earned one Oscar.<sup>3</sup> The other Golden Age studios Walter Lantz, George Pal, Columbia Pictures, Fleischer Studios, and Terrytoons Studio all failed to win an Academy Award in the "Short Subjects, Cartoons" category.<sup>4</sup> Are the number of Oscars handed down by the Academy of Motion Picture Arts and Sciences in the category “Short Subjects, Cartoons” an accurate reflection of which studios were better able to produce animated shorts of a higher technical and artistic merit? If so, then conclusions can be drawn that studios such as Terrytoons, Walter Lantz, and Columbia Pictures produced animated cartoons that were inferior in terms of technical and artistic merit than studios such as Disney and Warner Bros.

A compelling argument can be made that the lack of success at the Academy Awards® for studios such as Terrytoons and Fleischer could be related to distribution and access problems with the animated cartoons. Long before the arrival of the Internet in an age of radio with no television, members of the Academy of Motion Picture Arts and Sciences would have found great difficulty in viewing even a small number of shorts produced globally. For east coast studios such as Terrytoons and Fleischer, their distance from Hollywood may have played an integral factor in access to these shorts in the nomination process.

There is also the distinct possibility that not all of the members who cast their votes for the best cartoon short viewed all of the nominated shorts. In 1978 the voting precedents for the Academy Awards were changed for the animated and live short subjects where only peer groups were allowed to cast votes for the winners. This was a great improvement over previous years where, although peer groups would nominate nominees, the final voting was thrown open to the entire Academy, many of whom had not even seen the short subjects.<sup>5</sup> Today, members can vote only after attesting they have seen all of the nominated films in the Animated Short Film category.<sup>6</sup> Another possibility is that the motion picture studios that distributed the shorts such as Educational Pictures/Twentieth Century-Fox (Terrytoons), Paramount (Fleischer), and Universal (Walter Lantz) may not have effectively marketed their products to the Academy to ensure that the voters were able to view the animated product.

## 2. Critical Opinions of Film Scholars and Historians on the Terrytoons Cartoons

In Chapter One, the author surveyed the critical opinions held by writers and scholars on the animated cartoon product of the Terrytoons studio. The author found that from the period from 1980 onward, the general consensus of the Terry product was that it was inferior to the other Golden Age studios. For example, in *Of Mice and Magic*, a book by Leonard Maltin published in 1980, the author praises the work of Walt Disney but concludes his chapter on the Terrytoons animation studio with his opinion that the Terry product was “never very good.”<sup>7</sup>

Maltin also remarks that when in the 1960s the demands of network television required the mass production of quickly-manufactured low budget cartoons using limited animation techniques, television animation fell below the production values of the Terry studio of the forties and fifties. When the Terry shorts are judged against the television product, Maltin states that “Terrytoons look good by comparison.”<sup>8</sup> Other critics writing after 1980 also found Terry’s cartoons substandard when comparing the product to the other studios. Crafton labeled Terry’s cartoons “potboilers”,<sup>9</sup> Barrier was also unimpressed with the quality,<sup>10</sup> and Grant argued that the best Terrytoons cartoons were produced after Terry had retired and sold the studio to CBS.<sup>11</sup>

Conversely, for the fifty year period prior to 1980, the reviews of Terry’s cartoon product were nearly all favourable. Falk applauds Terry’s innovative techniques in animation,<sup>12</sup> Les Daniels found the Terry cartoons “energetic” and “entertaining,”<sup>13</sup> and Heraldson’s opinion was that the Terry product was “excellent.”<sup>14</sup> In Chapter One, the author posited reasons for the critical division of opinion between the pre-Maltin and post-Maltin writers including research design error, failing to acknowledge sources of bias, and improper interpretation of results.

Another explanation for the differing critical opinions could be related to the level of access to the Terrytoons shorts after 1980. As noted in Chapter One, a limited number of Terrytoons cartoons were released on video in the 1980's by CBS/FOX Home Video. In the early 1990's, some shorts were re-released by Video Treasures, but unfortunately since then shorts have not been commercially available. Therefore, one can conjecture that very few critics or scholars and even fewer members of the general public have seen a large enough sample of shorts that would fairly represent the quality of the Terrytoons product. Paul Terry can claim that his studio had garnered three Academy Award Nominations during the 1940s yet this fact is never mentioned by contemporary historians.<sup>15</sup> Stephen Worth has stated that:

“...the Terry cartoons have been out of circulation so long, most animation fans have forgotten (or never knew) how great the studio once was.”<sup>16</sup>

### **3. *The 50 Greatest Cartoons: The First Cross-Studio Comparison of Cel Animation from the Golden Age***

The majority of scholarly research or critical commentary into animated cartoons has concentrated on textual matters such as audience effects, violence, sex roles, racial stereotypes, adult themes, war-time propaganda, how animated cartoons are created, and computer-generated animation.<sup>17</sup> Until the 1990s, there was a complete absence of any serious study into evaluating and comparing the quality of the cel animation produced by various animated cartoon studios. In 1994, *The 50 Greatest Cartoons: As Selected by 1,000 Animation Professionals*<sup>18</sup> was published, the first attempt to explore and rate the production output of animated shorts from various animation studios. The book, edited by animated cartoon historian Jerry Beck, showcased the fifty greatest cartoons of all time as judged by a panel of more than 1,000 cartoon historians and animation professionals. By taking votes from people working in the animation industry, Beck attempted to make the list an authoritative compilation of the best cartoon shorts produced.

Of the fifty shorts listed, forty-three were produced during the first thirty-two years of the Golden Age of American Animation, 1928-1960 attesting to the decline in quality of cartoons over the last half century. Categorizing the shorts by studio, seventeen cartoons were produced by the Warner Bros. studio, nine shorts were created by Walt Disney Productions, seven manufactured by Metro-Goldwyn-Mayer, five turned out by Fleischer Studio, three each by United Productions of America and the National Film Board of Canada, and one each by Winsor McCay, Walter Lantz Productions, Pat Sullivan, Marv Newland, Sally Cruickshank, and John Hubley. None of the over 1,000 shorts produced by Paul Terry during his 40 year career in animation made the list.

The editor's only submission requirements were that each cartoon on this list had to be under thirty minutes long and cel animated (with *Gertie the Dinosaur* (1914) being the only exception noted in the book). From an empirical studies perspective, there are serious problems with the Beck research methodology. First, in order to claim that the shorts listed in the publication were the fifty “greatest” cartoons ever produced would require that each of the panel members review every animated cartoon produced since the birth of animation so as not to overlook a short that may have made the list. The study can be criticized for not including animation produced outside of North America. Most likely the majority of Beck's

panel members were based in the United States and most familiar with English language cartoons. Beck acknowledges that many of those polled were members of the San Francisco, Portland, New York and Hollywood chapters of ASIFA (Association Internationale du Film D'Animation).<sup>19</sup> Further, since most of the Terrytoons cartoons have never been seen since their theatrical release, there would be a small probability that all of these shorts (or a fair representation of them) were viewed by the animation professionals.

Second, for the 50 cartoons listed to be accurately judged and measured against the others would require each of the 1,000 animation professionals to have viewed the other cartoons that made the top fifty. There is no indication from the Beck text that this was done. Rather, all those polled were simply asked to rank their favorite cartoons from numbers 1-50.<sup>20</sup> The fact that four heavily televised Warner Bros. cartoons directed by Chuck Jones make up the top five while the relatively obscure National Film Board of Canada's *The Man Who Planted Trees* (1987) and the difficult-to-locate Columbia short *Unicorn in the Garden* (1953) are listed as the 44<sup>th</sup> and 48<sup>th</sup> greatest short respectively indicates that not all fifty shorts may have been viewed by each panel member. A third methodological concern is that there was no empirical system employed by the professionals to measure one cartoon against the others. The ballot was tallied by a simple weighing of the cartoon with its ranking.<sup>21</sup> Therefore, personal biases may have crept into the scoring as some panel members may have intentionally or unintentionally given certain personal favorites a higher rating than other cartoons.

Fourth, there is no sign that all of the professionals applied the same set of measurements in coming to their conclusions. Beck acknowledges that "every voter used his or her own criteria."<sup>22</sup> A failure to use the same evaluative criteria to measure can lead to empirical errors as all panel members need to apply the same testing methodologies in order to make the results consistent across the survey. Fifth, there was no definition given to the term "greatest" and how this should be measured. Rather, Beck asked those he polled one question when making a decision as to whether to include the cartoon in their personal top fifty: "Is this a classic cartoon?"<sup>23</sup> Finally, Beck did not provide a definition for the term "cartoon" which generally refers to a funny short film or motion picture. As a result, some animated shorts produced without a humorous or satirical tone (e.g., Walt Disney animated propaganda and educational shorts) may have been overlooked by the panel members. In summation, based on the lack of an adequate research design to analyze the animated shorts, the list can be better considered to be a compilation of fifty "highly regarded" North American cartoon shorts rather than the fifty best shorts ever produced globally.

## **D. *Cel Aesthetics: A Method for the Analysis of Animated Cartoons: An Empirical Study***

### **1. The Goal of *Cel Aesthetics*: To Create a Framework of Analysis**

The same year that the Beck book was published, Jeffrey Neal-Lunsford submitted to the faculty of the graduate school at Indiana University in partial fulfillment of the requirements for the degree Doctor of Philosophy in the Department of Telecommunications, his doctoral dissertation *Cel Aesthetics: A Method for the Analysis of Animated Cartoons*. The overall goal of the study was to establish a framework that could be “used by critics and scholars to analyze animated cartoons in terms of their cel aesthetics qualities and to show how this framework can be applied to evaluate individual cartoons, particularly in terms of comparison with other cartoons.”<sup>24</sup> The framework allowed for the creation of aesthetic comparisons that could then be used to compare live-action as opposed to animated productions, and evaluate cartoons produced by different animation studios, created at different time periods, and produced for theatrical release as opposed to television production.

At the time of writing, while the aesthetic characteristics of live action film and television production had been thoroughly explored by such scholars as Robert Edmonds, Herbert Zettl and Lincoln Johnson,<sup>25</sup> there had been little written about the aesthetic features of animated cartoons.<sup>26</sup> Some scholars have attempted to make subjective aesthetic judgments of a work of art more objective by developing methodologies to measure aesthetic experiences. For example, American philosopher Monroe Curtis Beardsley developed theories on aesthetic value such as his magnitude-of-value and magnitude-of-experiences scales.<sup>27</sup> Despite the best efforts of scholars, because aesthetic experience is linked to enjoyment and subjective terms such as “good” or “bad,” researchers have found difficulty in developing a systematic means to measure the aesthetic features of a work of art.

Neal-Lunsford’s cel aesthetics moved beyond general discussions of aesthetic issues by utilizing “a concise, generalizable framework of analysis to create a method that can be easily put into practice.”<sup>28</sup> Cel aesthetics departed from the traditional view of aesthetic thought as a means to discovering the truth or beauty in a particular work of art. Rather, Neal-Lunsford’s method focused on aesthetic structures as they relate to the production process, an applied approach which emphasizes the relationships between the production elements used in the animated cartoon making process and how these elements influenced the aesthetic attributes of a work.

## **2. The Five Elements of Cel Aesthetics: Motion, Space, Light, Time, and Sound**

The framework of cel aesthetics analyzes the image elements or building blocks that form the aesthetic properties of animated cartoons, and studies cel animation in terms of five elements and their constituent components. These production elements include motion (i.e., the use of movement in animated cartoons), space (i.e., the way videospace is articulated chiefly through frame characteristics and the way shots are composed), light (i.e., depiction of light, shadow, and colour and their role in defining the aesthetic qualities of an animated work), duality of time and space (i.e., how time is depicted and manipulated in a cartoon), and sound (i.e., the aural images of speech, sound effects, and music).

Neal-Lunsford argued that there are four key components that are involved in the aesthetic qualities of an animated cartoon: (1) economics, (2) technology, (3) narrative, and (4) structure. Economics is crucial to the animated cartoon because “higher budgets usually result in cartoons of better quality.”<sup>29</sup> The creation of animation is also an artistic process that relies on technology. Neal-Lunsford provided examples of the multi-plane camera and the photocopier as technology that shaped how cartoons were produced.<sup>30</sup> According to the Neal-Lunsford, the narrative of a cartoon influences the cel aesthetics of a completed work “because of the importance of creating a visual script through storyboards rather than the method used for live-action productions in which the script is created in the form of text.”<sup>31</sup> Finally, structure is important to cel aesthetics because of time constraints imposed on length, and the structure of the production elements (e.g., camera movements and scene transitions).<sup>32</sup>

## **3. Cel Aesthetics Relation to Three Factors: Production Process, Economics, Studio Artistic Objectives**

Neal-Lunsford examined the five elements of cel aesthetics to a sample of twenty animated shorts, ten produced for television and ten for theatrical release. Comparisons were drawn between animation produced for television and that created for theatrical release in order to detect similarities and differences. Comparisons were also made between the animated works and live-action productions. As a result of his analyses, Neal-Lunsford found that the value of cel aesthetics, as an analytical method, is often related to three specific factors.

The first area was the impact of the animation production process on the aesthetic attributes of animated cartoons. For example, Neal-Lunsford found that theatrical animation production processes differed from those used for television animation. The majority of primary motion in cel animation occurred along the x- and y- axes, and only rarely along the z-axis. This was a result of a limitation of the production process. Motion in animation must be created and z-axis animation is more difficult and time consuming to create because it is more demanding to draw and maintain figures in perspective as they move along the z-axis as opposed to movement along the x-and y-axes where the same perspective can be maintained.<sup>33</sup>

The second area which proved helpful in explaining the differences in individual cartoons concerned the impact of economic factors in the creation of cel animation. Television cartoons were made on smaller budgets and were found to be significantly different than those produced for theatrical release. Television cartoons were found to be markedly different because these shorts tended to make greater use of off-screen narrators to help alleviate the burden of having to accurately match lip movements. Cartoons produced for television also contained much less secondary movement such as pans, trucks and tilts that add to the time and expense of making a cartoon. Further, the characters in limited animation employed in television cartoons spent a large amount of time talking rather than moving because it was cheaper to animate moving lips rather than entire bodies. In addition, television cartoons were found to use more transitions, featured a smaller range of colours, use repetitious canned music, and had shorter running times.<sup>34</sup>

The third area of significant comparison involved the aesthetic qualities or artistic objective of a particular animation studio leading to the adoption of a specific aesthetic style. While Neal-Lunsford found that this factor to be less prevalent than the first two factors, “it is still important for future consideration to note that cel aesthetics is not just a function of the production process and the impact of economics, but is also the result of a deliberate decision-making process based on artistic objectives.” Neal-Lunsford notes that this facet can be seen in the decision of the UPA studio which featured abstract or stylized depictions of characters and backgrounds as opposed to the more traditional life-like representations common to the studios such as Disney, Warner Bros., or MGM.<sup>35</sup>

#### **4. Importance of Cel Aesthetics to Present Study**

Neal-Lunsford has established that cel aesthetics are a direct reflection of the production process and economics of each studio. By examining the cel aesthetics of the

short, judgments can be made as to what type of production processes were involved in creating the short and whether the short was produced on a tight budget or on a more liberal spending plan. Animated shorts featuring elements of a higher aesthetic quality are generally considered to have been produced on a higher budget. Any production features of the five cel aesthetics elements that involve extra artwork and added labour costs will increase production costs. Neal-Lunsford categorized cel aesthetic elements of animated shorts in terms of their effects on production budgets as detailed in Table 2.

<b>CEL AESTHETICS PRODUCTION FEATURES</b>	
<b>Production Features Of An Animated Short Produced on a Small Budget</b>	<b>Production Features of an Animated Short Produced on a Large Budget</b>
<b>1. MOTION</b>	
Movement along the x-and y-axes.	Movement along the z-axis.
Lack of motion and reliance on characters talking.	Characters in a constant state of motion.
Jerky character motion through reduction in drawings.	Character motion that is life-like, natural, fluid and smooth through effective use of in-betweens.
Stationary camera or animation restricted to a fixed point.	Camera movement including zooms, rack focus, pans/tilts, trucking, dollying, and crane movement.
Scene transitions through cuts.	Scene transitions by fades, dissolves, and wipes.
Use of cycled or reused animation drawings.	Original artwork used for all animation.
<b>2. SPACE</b>	
Medium shots.	Medium to extreme close-ups. Wide angle shots. Panoramic wide shots.
Neutral eye-level shots.	Use of angles in camera shots.
Two-dimensional surfaces.	The use of depth cues such as relative size of objects, overlapping planes, the application of linear perspective, and utilization of shadows.
Confusion in depth cues between the animation and backgrounds.	Consistent application of depth cues in both animation and backgrounds.
Abstract backgrounds.	Realistic backgrounds.

Application of tools, equipment, practices, and processes common to the industry.	Use of unusual technological practices (e.g., Stereoptical process) for special effects and enhancement of videospace.
<b>3. LIGHT</b>	
Flat lighting with a tendency for a high-key lighting style that is non-directional and diffused and used simply to illuminate the artwork.	Application of directional lighting.
Absence of or inconsistent use of chiaroscuro and shadows in the character animation.	Consistent application of chiaroscuro and shadows in the character animation.
Absence of or inconsistent use of chiaroscuro and shadows in the background art.	Consistent application of chiaroscuro and shadows in the background art.
Flat looking characters.	Three-dimensional characters.
Limited colour range in character animation. Simple colour schemes.	Use of a broad spectrum of colours in character animation. Complex colourisation of the animated elements may be present.
Limited colour range in the background art. Use of a broad expanse of solid colours. No sense of realism.	Use of a wide spectrum of colours in the background art.
Colour used for the purpose to paint characters and background art.	Special use of colour to establish mood, indicate emotional states, define and articulate space, provide symbolism, describe the visual character of objects, depict weather conditions or time and day, and guide viewer attention to certain screen areas.
Simple basic character animation.	Execution of much detail in the character animation usually found in facial features and clothing.
Basic, usually unrealistic, depiction of objects in both the exterior and interior shots. Objects look cartoon-like or abstract in the background art.	Execution of much detail in the background art with a naturalistic look to the objects.
Inconsistent application of colour from cel to cel.	Consistent application of colour from cel to cel.
<b>4. TIME</b>	
Any effort that reduces the clock (running)	Any effort that increases the clock time of an

time of an animated short.	animated short.
Subjective properties of screen time are not manipulated.	Screen time that reinforces the mood of the production.
Shots held on screen for long periods of time.	Rapid editing/cutting rhythm to the action.
<b>5. SOUND</b>	
Reliance on narration over lip synchronization.	Narration used sparingly. Character dialogue that complements on-screen action.
Poor lip synchronization.	Accurate lip synchronization.
Vocalizations that fail to define action, ideas, or characters.	Vocals that identify personality traits and define characterization.
Use of sound effects in a much more literal sense.	Effective descriptive sound effects to reinforce visual images, aid in the articulation of space, and decorate scenes. Sounds are used in a more creative fashion to describe a character or object.
Use of the same sound effect for different descriptive events.	A large library of sound effects that accurately represent the action on screen.
Reliance on a sound effects library.	Creation of unique sounds rather than relying on a sound effects library.
Minimal or non-existent use of music and sounds to describe action.	Greater use of music and sounds to help describe the action.
Canned music.	Creation of original orchestral scores specifically for each individual short.
Borrowed musical score.	Original creation of a musical arrangement.
Music that fails to enhance mood or atmosphere of the animated short.	Use of music to establish mood.
Music that fails to consider the rhythmic structure of screen events.	Use of music to establish or supplement the rhythmic structure of screen events by parallelism, stabilization, or counterpoint.

**Table 2.** Comparison of the Production Features of Neal-Lunsford’s Five Cel Aesthetics Elements on Animated Cartoon Production Costs

Therefore, by analyzing the production features of cel aesthetics of the animated product, conclusions can be drawn as to what type of production processes a producer employed in creating his cartoon, whether the studio head produced animated shorts under strict budgets, and how studio economic practices impacted the aesthetic elements of his

cartoon product. Neal-Lunsford has established that cel aesthetics are a direct reflection of the specific aesthetic style of each studio. For that reason, inferences can be made as to a producer's motivation to create aesthetically pleasing and quality crafted animation by examining the production processes involved in creating the animated shorts apparent in the cel aesthetics of the cartoons produced by the studio. To create aesthetically pleasing animated cartoons requires employing skilled artists, craftsmen, and technicians, using first-class animation equipment and technology, and instituting and applying efficient and cost-effective systems and methods of operation and organization. If Terry was artistically motivated to produce quality crafted animation, then the cel aesthetics of his cartoons should exhibit a high aesthetic quality and be comparable to the product of the other Golden Age animation studios.

## **E. Present Study**

### **1. Purpose and Goal**

The primary purpose of the study is to apply the framework of analysis and principles of Neal-Lunsford's cel aesthetics on a random sample of animated cartoons produced by the major Golden Age animation studios in order to compare the cel aesthetics qualities of the shorts produced by the various studios. Particular attention will be placed on the animated cartoons of Terrytoons in order to more thoroughly analyze the strengths and weaknesses of the cel aesthetics of these shorts. After ranking the shorts based on Neal-Lunsford's aesthetic criteria, conclusions can be drawn based on the quality of the cel aesthetics features of Terry's product, and inferences can then be made as to his artistic motivation to produce quality crafted animation.

Based on analyzing the production features found in the cel aesthetics of the 26 shorts, the goal of the study is to answer the following questions:

1. When analyzing the cel aesthetics elements of the animated cartoons produced by the studios of the Golden Age of American Animation, which studios were ranked at the top in terms of overall mean scores for each of the five production components, and which studios achieved top scores in the 2-component, 3-component, 4-component, and 5-component analyses?
2. Where do the cel aesthetic elements of the Terrytoons cartoon rank in comparison to the cel aesthetic elements of the cartoon product of the other studios of the Golden Age of American Animation?

3. What are some of the cel aesthetic element strengths and weaknesses of the Terrytoons animated cartoon shorts?
4. Did the application of Neal-Lunsford's cel aesthetics find support from the Oscar voting results in the "Short Subjects, Cartoons" category based on the number of shorts awarded and nominated during 1931 – 1960, or for the results of Beck's poll as found in his book *The 50 Greatest Cartoons: As Selected by 1,000 Animation Professionals*?
5. Is Maltin correct in stating that the Terrytoons animated cartoon product is substandard when compared to the shorts produced at the other major Golden Age studios?
6. What inferences can we draw as to Terry's artistic motivations to produce engaging and visually attractive animation and whether he desired to create a cartoon product that was comparable to the cartoon product of the other studios?

## **2. Method**

### a) Overview

A random sample of cartoons from the Golden Age of American Animation during the period Paul Terry operated his studio, 1929-1955, were analyzed on five production components: animation, backgrounds, soundtrack, camerawork, and time. A score was developed for each of the components and the sample cartoons categorized from highest to lowest in order to compare how each cartoon ranked in relation to the other shorts. Further, a 2-component (animation and backgrounds), 3-component score (animation, backgrounds, soundtrack), 4-component score (animation, backgrounds, soundtrack, camerawork), and 5-component score (animation, backgrounds, soundtrack, camerawork, time) were drafted for further analytical comparisons.

### b) Sample

Stratified random sampling was conducted on a population of 4,142 theatrically released animated cartoon shorts using a table of random numbers. The statistical population represented all theatrically released animated cartoon shorts produced by the eleven major studios (i.e., Walt Disney, Columbia, Warner Bros., Metro-Goldwyn Mayer, Walter Lantz, Fleischer, Famous, Van Beuren, Ub Iwerks (Celebrity Productions), UPA, and Terrytoons<sup>36</sup>) during the period in which Paul Terry operated his cartoon studio, 1929-1955.<sup>37</sup> All cartoons that had a release date from August 1, 1929 through to December 31, 1955 were considered

to be part of the population from which the random sample was taken. Stratified random sampling was undertaken to improve the representativeness of the sample because certain studios produced more cartoon product during this time period. Therefore, each studio was considered a sub-population from which a sample was drawn independently to ensure that more cartoons were sampled from the studios with the higher production outputs and that all studios were represented in the random sample.

The writer acknowledges that it would not be practical or feasible to analyze every animated cartoon created during the production period due to the large amount of time involved in analyzing one animated cartoon short. Therefore, a total sample of twenty-six animated cartoon shorts was chosen from the population, a sample size that would be sufficient for the purposes of this study. The sampling followed the rule that each studio had at least one short represented in the sample. Twenty of the 26 sampled shorts were found in the author's extensive library of animated cartoons while the other six were located in the collections of animation historians and film collectors.

An additional element in the stratification was that due to the small sample size no more than three cartoons were represented in the sample by any one cartoon studio in order to prevent the situation in which too many of the randomly selected cartoons were from the same sub-population or studio. Accordingly, Walt Disney Studios which produced a large number of animated shorts was represented by three cartoons in the sample while UPA, which produced only a very small number of cartoons during the period of operation (1944-1955), were represented by only one cartoon short. Terrytoons had five cartoons sampled because the studio produced a large proportion of the total cartoons produced during this period (nearly 15%), but more importantly it was expected that the larger sample size would help improve the generalizability of the conclusions to the entire sub-population of 604 Terry shorts.

In order to ensure the writer viewed the most accurate representations of a studio's work, all twenty-six animated shorts were viewed in their original theatrical versions based on historical studio release information. For example, the five Terrytoons shorts were archived prints taken from the film library of Viacom (Paramount), while the Walt Disney shorts were viewed from copies from the Walt Disney Studio library. Some copies were from private collections of hard-to-find, public domain 16mm home movie prints. There is no indication that any of the shorts had undergone editing, voice or music replacement, or dubbing for censorship, television or other purposes.

The twenty-six randomly chosen shorts categorized in chronological order by production studio and major series star(s) are detailed in Table 3.

	<b>TITLE</b>	<b>PRODUCTION COMPANY</b>	<b>CARTOON STAR/SERIES</b>
1.	<i>Hells Heels</i> (1930)	Walter Lantz Productions	Oswald the Lucky Rabbit
2.	<i>Jesse and James</i> (1931)	Terry-toon Cartoons	Terry-Toon
3.	<i>The Fatal Note</i> (1933)	Van Beuren Productions	The Little King
4.	<i>Jack Frost</i> (1934)	Ub Iwerks/Celebrity Productions	Comi-Color
5.	<i>A Little Soap and Water</i> (1935)	Fleischer Studios	Betty Boop
6.	<i>The Robber Kitten</i> (1935)	Walt Disney Productions	Silly Symphonies
7.	<i>The Shoemaker and the Elves</i> (1935)	Columbia Pictures Corporation	Color Rhapsody
8.	<i>Molly Moo Cow and Robinson Crusoe</i> (1936)	Van Beuren Productions	Molly Moo Cow
9.	<i>Little ol' Bosko and the Cannibals</i> (1937)	Metro-Goldwyn Mayer	Bosko
10.	<i>Scary Crows</i> (1937)	Columbia Pictures Corporation	Scrappy
11.	<i>The Villain Still Pursued Her</i> (1937)	Terry-toon Cartoons	Terry-Toon (Oil Can Harry and Fanny Zilch)
12.	<i>The Temperamental Lion</i> (1940)	Terrytoons	Terry-Toon
13.	<i>The Beach Nut</i> (1944)	Walter Lantz Productions	Woody Woodpecker
14.	<i>How To Be a Sailor</i> (1944)	Walt Disney Productions	Goofy
15.	<i>Throwing the Bull</i> (1946)	Terrytoons	Mighty Mouse
16.	<i>Mickey's Delayed Date</i> (1947)	Walt Disney Productions	Mickey Mouse
17.	<i>Free Enterprise</i> (1948)	Terrytoons	Heckle and Jeckle
18.	<i>Professor Tom</i> (1948)	Metro-Goldwyn Mayer	Tom and Jerry

19.	<i>There's Good Boos To-Night</i> (1948)	Famous Studios	Casper the Friendly Ghost
20.	<i>Grape Nutty</i> (1949)	Columbia Pictures Corporation	Color Rhapsody (Fox and Crow)
21.	<i>Scrappy Birthday</i> (1949)	Walter Lantz Productions	Andy Panda
22.	<i>Drip-Along Daffy</i> (1951)	Warner Bros.	Merrie Melodies (Daffy Duck)
23.	<i>French Rarebit</i> (1951)	Warner Bros.	Merrie Melodies (Bugs Bunny)
24.	<i>Gerald McBoing Boing's Symphony</i> (1953)	United Productions of America	Gerald McBoing Boing
25.	<i>Floor Flusher</i> (1954)	Famous Studios	Popeye the Sailor
26.	<i>Deputy Droopy</i> (1955)	Metro-Goldwyn Mayer	Droopy

**Table 3.** Listing of 26 Randomly Chosen Shorts by Production Company and Cartoon Star or Series

c) Analyses

In order to analyze the animated cartoons, the production features found in Neal-Lunsford's five elements of cel aesthetics as noted in Table 2 were assigned into five production components: animation, backgrounds, soundtrack, camerawork, and time. For purposes of this study, each component was given equal weight in the analysis. These five components were chosen for three reasons. First, Neal-Lunsford's cel aesthetic elements can be easily classified into one of these five production components. Movement concerns animation, music is related to sound, and motion effects are related to camerawork. Second, an animation studio is traditionally organized into animation, background, camera, and music departments facilitating departmental comparisons between studios. Third, identifying the artistic strengths and weaknesses within the studio can be more easily drawn because artists rarely moved between departments.

Each of the five production components had a total point score. A higher point score indicating superior production values and a more expensively produced (larger budget) cartoon. The cartoons were ranked from highest point total to lowest point total for each of the five production components. The five production components were each comprised of a number of production features such as cycled animation, z-axis movement, and directional

lighting. The total score for each of the five production components was the sum of the scores for each of the production features for that production component. In order to award points for each of the production features required first developing an appropriate scale for each production feature to which the sampled cartoons could be rated.

The scale for each of the production features was established by first viewing an independent test sample of 24 animated shorts from the Golden Age of American Animation. Twenty-four shorts were chosen because the number 24 is easily divisible into halves, quarters, thirds and eighths making for strong scalability. After the data was collected, percentiles were calculated to determine the ranges for the categories. For example, from the 24 test sampled shorts for the cycled animation production feature, 1/3<sup>rd</sup> of the shorts had no cycled animation, 1/3<sup>rd</sup> had 1-5 scenes of cycled animation, and 1/3<sup>rd</sup> had six or more scenes of cycled animation.

#### (1) Animation

A total “animation” score was developed for the cel aesthetics related to the animation process based on scoring ten aesthetic production features: cycled animation, z-axis movement, directional lighting, shadows, colour range, inconsistencies, character animation details, extreme close-ups, jerky motion, and wide shots. The maximum score possible for this production component was 18 points.

#### **Cycled Animation**

Cycled animation reduces the cost of an animation production by reusing artwork. Therefore, an animated short with no cycled animation would be costlier to produce than the same short with recycled artwork. Timing the length of cycled animation was found to be too cumbersome. Rather the number of scenes involving cycled animation was counted.

0 Points = 5 or more scenes of reprocessed art  
1 point = 1 to 5 scenes of reused art  
2 points = No recycled animation<sup>38</sup>

#### **Z-Axis Movement**

Animating a character along the z-axis is more labour intensive than rendering the same figure along the x- and y-axes.

- 0 Points = 0 to 5 z-axis movements
- 1 point = 6 to 10 z-axis movements
- 2 points = 11 or greater scenes of a character moving along the z-axis<sup>39</sup>

### **Directional Lighting**

Any form of directional lighting where an animator has applied the effects of light on characters and objects adds to production costs. Character movement requiring any complex shading to be replicated for every frame, adapting to the movements of the characters is an extremely daunting task.

- 0 points = Directional lighting is absent
- 1 point = Directional lighting is present

### **Shadows**

- 0 points = Complete lack of character shadows
- 1 point = Characters cast shadows during the short (regardless of consistency)

### **Colour Range**

Adding one additional colour to an animated character's appearance can slow down the animation production considerably as a typical seven minute cartoon usually features as many as 5,040 cels.<sup>40</sup> Therefore a colour scale was developed and divided into three categories based on the number of colours used to colourise the animated cartoon characters with a "stronger colour range" denoting more colours used to colourise the animated cartoon characters than an "average colour range." For each animated short, the total number of colours (or shades of grey for black and white cartoons) used to colourise the cartoon characters were totaled and then applied to the scale and given a poor, average, or strong range score.

- 0 points = Poor colour range
- 1 point = Average colour range
- 2 points = Strong colour range

## **Inconsistencies**

An unexplained artistic inconsistency in the character animation is an indication of problems in the animation process. For example, a sudden change in the colour of a character's apparel in successive shots would indicate problems with the colour checkers. Higher budgeted cartoons are expected to feature more consistency with the artwork.

0 points = Many inconsistencies

1 point = Few inconsistencies

2 points = No inconsistencies

## **Character Animation Details**

Character animation details refer to the number of details found in the appearance of a character. A character with facial features such as a tongue, teeth, and eyelashes is more time consuming to animate than a character without these characteristics. Since character features could vary significantly and because the animation could be very time consuming, four point categories were used. Fifteen elements of character animation were addressed and marks awarded based on the responses to these questions which included: (1) number of facial features (e.g., eyes, nose, eyelashes) found in the characters (0-5 points), (2) number of clothing, jewelry, and other adornments that were used to decorate the character (0-5 points), (3) range or number of different characters used in the animated cartoon (0-5 marks), (4) consistency in the physical appearance for each character from scene to scene (0-3 marks), (5) whether the movements for each character were similar from scene to scene or whether it appeared different animation styles were applied to the same character (0-3 marks), (6) whether the animated character moved smoothly or whether there was jerky movement (indicating how many drawings were used for each second of animation) (0-3 marks), (7) whether the animated cartoon featured dancing (0-3 marks), and (8) how many close-ups were used of the character in the animated cartoon (0-5 marks). Using the total mark score from these questions, this tally of marks was then plotted on a character animation range from poor (0-15 marks) to excellent (46-60 marks) and a final point score was awarded from 0-3.

0 points = Poor character animation

1 point = Moderate character animation

2 points = Good character animation

3 points = Excellent character animation

### **Extreme Close-Ups**

Extreme close-ups involve more animation work as they require spending the time to animate more facial details.

- 0 points = No extreme close-ups
- 1 point = Few extreme close-ups
- 2 points = Many extreme close-ups

### **Jerky Motion**

Jerky animation, a prominent characteristic of limited animation, means that fewer in-betweens were used creating variable or uneven character motion.

- 0 points = Choppy animation present
- 1 point = Absence of jerky animation

### **Wide Shots**

Full screen panoramic wide shots involving a number of characters in motion are more expensive to produce than medium shots. Wide shots were categorized by number of scenes into three categories.

- 0 points = No wide shots
- 1 point = Few wide shots
- 2 points = Many wide shots

### **(2) Backgrounds**

A total “backgrounds” score was developed for the cel aesthetics related to the animation backgrounds featured in each short based on scoring five aesthetic production features: background details, colour range, shadows, depth, and inconsistencies. The maximum score possible for this production component was 9 points.

## **Background Details**

Background details refer to level of artistic effort found in the animation backgrounds. Simple backgrounds with poor attention to detail such as an abstract representation of an object or a simple horizon line would be relatively easy to render and inexpensive to create. Conversely, to fill spaces with many realistic or natural looking objects would be very time consuming and costly to depict. Since background features could vary significantly and because rendering realistic backgrounds could be very time consuming, four point categories were used.

- 0 points = Poor background details
- 1 point = Moderate background details
- 2 points = Good background details
- 3 points = Excellent background details

Various visual criteria were developed to help categorize the backgrounds into one of the four categories. Questions were asked such as: Does the tree have leaves? Does the door have a door knob? Does the painting on the wall have visible image within the frame? Each of the four levels had minimal criteria to meet. If interior or exterior background objects were found to have met the minimal criteria of level three (good) but not level four (excellent), the cartoon backgrounds would be scored at level three. An example of an application of the rating scale to analyze the depiction a distant forest shot would be if the scene showed green blobs of paint indicating vegetation on a flat horizon line this background would be scored as poor. On the other end of the scale, realistic looking trees where attention is paid to articulation (to accurately render the point where every limb attaches to the trunk, every branch to limb, and every twig to the branch) would be scored as excellent.

## **Colour Range**

Adding one additional colour to an animation background can slow down the production of backgrounds considerably. Therefore the colour range was divided into three categories based on the number of colours used.

- 0 points = Poor colour range
- 1 point = Average colour range
- 2 points= Strong colour range

For example, in the Popeye cartoon a maximum of seven colours were being used to colourise the three characters, Popeye, Bluto, and Olive Oyl, placing the cartoon into the average category. For black and white cartoons, the various shades of grey were analyzed in determining the variation in colour.

### **Shadows**

Backgrounds that have exterior or interior spaces filled with objects that cast shadows takes more time to render because care and attention must be paid to light sources. If background objects cast shadows during the short, one point was awarded regardless of whether the chiaroscuro was consistent throughout the cartoon. The complete absence of shadows resulted in no points being awarded to the cartoon.

0 points = Complete lack of character shadows

1 point = Characters cast shadows during the short (regardless of consistency)

### **Depth**

Objects placed in the backgrounds that provide accurate depth cues for the animation will drive up production costs.

0 points = Faulty or non-existent depth cues

1 point = Realistic depth cues

### **Inconsistencies**

Inconsistencies creep into the background art by production staff failing to ensure that objects and characters are consistent from scene to scene. Errors by layout artists, background artists, colour checkers, and scene checkers can result in differences in the shape, size, colour, and position of objects in the background when compared to previous artwork. Higher budgeted cartoons are expected to feature more consistency by the artists because there are more resources available to ensure a greater attention to detail in the animated short.

0 points = Many inconsistencies

1 point = Few inconsistencies

2 points = No inconsistencies

### (3) Soundtrack

A total “soundtrack” score was developed for the cel aesthetics related to the speech, music and special effects in the short based on scoring five aesthetic features: source, score, vocal talent, sound effects, and use of sound elements. The maximum score possible for this production component was 10 points.

#### **Source**

With respect to the musical component, any film production, live-action or animated, that requires the services of an orchestra, whether the instrumental ensemble is a full symphony or a small chamber orchestra, will increase production costs substantially as opposed to relying on canned music. One point was awarded for a production featuring original source music while shorts that used canned music received no points.

#### **Score**

To create an original entertaining score for each animated short, as opposed to simply borrowing material that is available in the public domain, involves considerable time and production expense in studio fees and composer wages. One point was awarded for a production featuring original music while shorts that only featured borrowed materials received no points.

#### **Vocal Talent**

Unlike live-action features where body language and human expressions drive the narrative, animated shorts rely on vocal talent to help define the personality of the characters. Since vocal talent is so important to the aesthetics of an animated short, this grouping was divided into four categories. Twelve elements of vocal talent were addressed and marks awarded based on the responses to these questions which included: (1) range or number of different voices used in the animated cartoon (0-5 marks), (2) consistency in the voices used for each character (0-3 marks), (3) whether the voices matched the character’s lip movements (0-3 marks), (4) whether the animated short featured the use of accents (0-3 marks), (5) whether the animated cartoon featured singing (0-3 marks), and (6) whether the voice matched the description of the character (e.g., a woman’s voice for a small child would fail to match) (0-3 marks). Using the total mark score from these questions, this tally of marks was then plotted

on a vocal talent range from poor (0-10 marks) to excellent (31-40 marks) and a final point score was awarded from 0-3.

- 0 points = Poor vocal talent
- 1 point = Average vocal talent
- 2 points = Good vocal talent
- 3 points = Excellent vocal talent

### **Sound Effects**

The application of effective sound effects drives up production costs because a studio must develop a large sound library to effectively represent the on-screen action or duplicate (or approximate) the sounds normally associated with things, actions, or places. Sound effects must also be used creatively by writers so that the sounds reinforce visual images. A sound effects score depended on the range of sound effects used in the animated short with a larger variation of sound effects receiving a higher score. In addition, each sound effect was analyzed to determine whether the sound effect effectively represented the on-screen action with higher scores awarded for animated cartoons that were able to duplicate the sounds normally associated with the things, actions, or places.

- 0 points = Poor sound effects
- 1 point = Average sound effects
- 2 points = Superior sound effects

### **Use of Sound Elements**

Use of Sound Elements involves the complete sound dynamics of the soundtrack covering speech, sound effects and music. Neal-Lunsford found that theatrical cartoons make greater use of music and other sounds to describe the action aided by large orchestras emphasizing the importance of sound to the complete aesthetic experience of animated cartoons. Use of Sound Elements addresses issues such as how well the soundtrack communicates information, establishes mood, reinforces visual images, creates or supplements the rhythmic structure of the events occurring on the screen, and decorates a scene.

- 0 points = Poor use of sound elements
- 1 point = Average use of sound elements
- 2 points = Good use of sound elements

3 points =        Excellent use of sound elements

#### (4) Camerawork

A total “camerawork” score was developed for the cel aesthetics related to the camerawork in the short based on scoring two aesthetic features: motion effects and transitions. Shorts were compared to the average score and ranked based on the standard deviation away from the mean.

#### **Motion Effects**

Any movement of the camera that is independent of the primary motion occurring in front of the camera (what Neal-Lunsford refers to as “secondary movement”) is expensive to produce. Motion effects have been found to be more prevalent in theatrical cartoons than television cartoons.<sup>41</sup> Secondary motion would cover such movement as zooms, pans, trucks, and tilts. The total number of motion effects was determined and the cartoons rated ranked from top to bottom based on the sum total of movements.

#### **Transitions**

All sequence motion created through a change of shots is a transition (what Neal-Lunsford refers to as “tertiary movement”). Cuts, or the instantaneous change from one shot to another, are the simplest, most frequently used, and least expensive transition method. Conversely, fades, dissolves and wipes are more expensive to produce and occur less frequently in television animation when compared to theatrical animation.<sup>42</sup> For each animated short, the total number of transitions was counted and the ratio of expensive transitions to total transitions was calculated. The higher the ratio, the more expensive the transition work in the animated short.

#### (5) Time

Each cartoon was timed and ranked from longest to shortest based on clock time in length in seconds. Production costs increase with the length of an animated cartoon. Neal-Lunsford’s study found that theatrical cartoons, more lavishly produced, have a longer average clock time than television cartoons. Time was given equal weight with the other four production components because of the great savings involved in producing a shorter cartoon.

A cartoon that is six minutes long would be expected to cost about 15% less than a seven minute short based on production costs per second.

### 3. Results

#### a) Individual Analyses of the Shorts

Each of the twenty-six animated cartoons was analyzed from a cel aesthetics perspective. The analyses of the shorts, listed chronologically by their release date, are as follows:

*Hells Heels* (1930), Produced by Walter Lantz Productions, Distributed by Universal Pictures

Satirizing the Universal feature *Hell's Heroes* (1929), in a small town in the Old West, Oswald the Lucky Rabbit is forced by two outlaws, Pegleg Pete and his dog pal, to rob the bank, and then must elude the law while trying to return to the sheriff his lost son. The Lantz studio produced over 140 Oswald cartoons, including a prodigious twenty-four shorts in 1930. The frenetic pace likely impacted the quality of the production. The short suffers from flat sloppily drawn characters, jerky character motion, and plenty of cycled animation.

The backgrounds have very little detail with sometimes the only depth cue being a lightning bolt in the sky or a cactus on the horizon. One scene transition has a character varying in size in relation to the skeleton of a cow. Periodically the voices are not correctly synchronized with the characters lip movements. There are very few expensive motion effects, and most scene transitions are cuts rather than costlier fades, dissolves, or wipes. The cartoon benefits from a number of inventive, zany and unpredictable gags from the mind of animator Bill Nolan reminiscent of New York style animation.

*Jesse and James* (1931), A Paul Terry Toon Cartoon, Distributed by Educational Pictures

With the help of his horse, a cowboy mouse rescues a kidnapped Indian girl mouse from two mean outlaws, Jesse and James. An animated short that features very crudely drawn animation (e.g., horses that gallop with the front legs and back legs moving in pairs rather than the classic four beat gait).<sup>43</sup> Although the z-axis shots are well rendered, there are so many lengthy stretches of poorly cycled animation that the viewer may get the impression that the characters are moving in circles.

Backgrounds of outdoor scenes are many times very sparse with only a tree or a small house used for depth cues. Interior scenes similarly feature little detail (e.g., the outlaws' cabin has no furniture or decorations). The sound effects are primitive (e.g., rather than noise of rustling bovine, stampeding cattle elicit sheep sounds (i.e., "Baa") that are distinctively from human origin), and the musical score has a narrow range of instrumentation (e.g., the large dance hall orchestra featured in one scene sounds like a three piece ensemble). *Jesse and James* is a short that fails on every level of production.

*The Fatal Note* (1933), Van Beuren Studios, distributed by RKO Radio Pictures

An animated short based on Otto Soglow's comic strip "The Little King." With help from his dog, the tubby monarch successfully defends himself against an evil villain intent on murdering him. The production features lushly decorated backgrounds and a large number of z-axis movements that would have posed significant challenges to accurately render. However, the fact that the short was animated by one artist likely resulted in a heavy reliance on cycled animation (e.g., both the opening and closing shots of the loyal subjects cheering the ruler are recycled artwork).

Jerky pan movements, a lack of accuracy of depth and linear perspective between characters and backgrounds, and very few expensive motion effects also mar the production. While the soundtrack features plenty of creativity in the form of dialogue sung in rhyme, the sound effects library is inadequate (e.g., when a bomb explodes the sound resembles a large drum being beaten), and there is insufficient vocal accompaniments on some musical arrangements (e.g., when a roomful of servants sing, the soundtrack records only two voices). Another glaring problem is that there are inconsistencies in the background artwork during some scene transitions (e.g., the villain marks an "X" on the piano keyboard to denote the key that will detonate the bomb placed inside the piano, but in the next scene the mark changes on the keyboard in relation to the other keys).

*Jack Frost* (1934), Ub Iwerks, distributed by Celebrity Productions

Jack Frost arrives to warn the forest animals to prepare for winter but a curious young bear wants to see what the world looks like when everyone else is hibernating. When Old Man Winter arrives leaving the bear in the cold, Jack Frost helps the bear find his way home. The cartoon opens with an impressively detailed wide shot of forest animals playing amongst the trees and foliage. Although the animation is finely rendered by Al Eugster and crew with the characters casting both realistic shadows and body movements, some of the character

close-ups offer a minimalist expression of facial features (e.g., Jack Frost has no eyelashes and his teeth are rarely shown).

The carefully selected choice of realistic special effects, expressive vocal talent, rhyming dialogue, and lively dance numbers add measurably to this relatively long Comi-Color short. However, the cartoon features very little z-axis movement and just a few expensive scene transitions. The short is also characterized by the use of a narrow range of colours applied to both the characters and backgrounds (mostly dull fall colours with oranges and browns). One example is the large six striped rainbow at the end of the short that features only three colours.

*A Little Soap and Water* (1935), Fleischer Studios, distributed by Paramount Studios

After Betty Boop chases her pup around the house and is successful in giving her reluctant dog a bath, the canine becomes covered in soot from the fireplace. The cartoon is by far the shortest of the twenty-five cartoons analyzed with the next shortest cartoon nearly a half-minute longer indicating that this Fleischer cartoon was produced on a tight budget. The animation by Myron Waldman and Edward Nolan feature good character detail and effective use of chiaroscuro (e.g., even the dog's wagging tail casts shadows). Both accurate depth cues and linear perspective are present.

The backgrounds are well presented with the furniture casting shadows using realistic directional lighting. While there is plenty of set decoration with a careful attention to fine detail (e.g., the pictures on the wall in the distant background feature images within), there is inconsistency between successive scenes (e.g., the bath salts shaker present on the table mysteriously disappears in the next shot). The short also exhibits scenes of cycled animation, little z-axis movement, and mostly inexpensive scene transitions (i.e., cuts). Further, the absence of certain sound effects (e.g., no splash sounds when the dog lands in the wash basin after flying through the air), and a narrow range of orchestral instrumentation detract from the production.

*The Robber Kitten* (1935), Walt Disney Productions, distributed by United Artists

Ambrose the kitten runs away from home with plans to become a robber, renames himself Butch, and meets a real robber: Dirty Bill, a bulldog. When Dirty Bill asks Ambrose/Butch if he's pulled off any big jobs, he lies and tells him of a stagecoach robbery while also showing him his loot. Bill won't accept that the loot is just a bag of cookies, chases

after Ambrose, and scares the kitten into the bath he had earlier avoided. The film is a very well drawn cartoon with accurate z-axis animation and strong character development.

A large colour palette with rich vibrant hues, meticulously drawn backgrounds, no cycled animation, strong depth cues, and characters that cast shadows with accurate directional lighting all add significantly to the composition. The similarity in design, colour and form between the toy stagecoach Ambrose robs in his bedroom and the life size coach he later describes to the outlaw dog provide support for scene consistency and superior production values. The short also features the great vocal talents of Billy Bletcher (i.e, Dirty Bill), a rich sound effects library, and an orchestral score that compliments the action. The lack of the use of more expensive camerawork for scene transitions and motion effects keep this short from being a superior production.

*The Shoemaker and the Elves* (1935), Columbia Pictures Corporation, distributed by Columbia Pictures Corporation

An old shoemaker takes in a young boy from the cold and adopts him as his son. While they are sleeping a group of elves get into his shop, cut leather, sew, and dance with the new shoes they have created. The shoemaker wakes up the next morning to find his shelves filled with the footwear. While the producers crafted a lengthy cartoon short (i.e., the short was the second longest of the 26 shorts viewed) featuring dozens of elves dancing, singing, and working to music, nearly all of the movement occurs along the x-axis. A few of the scenes involving z-axis animation fail to accurately depict the movement.

Cycled animation is used primarily in the dance numbers. One scene of an elf being hit by a hammer is unabashedly repeated two more times later in the same musical number. The backgrounds have little colour variation. Some of the interior scenes have modest set decoration, and the outdoor shots vary in artistic style from naturalistic to more abstract in design creating inconsistencies in aesthetics. A few scenes have elves varying in size relative to background objects. A caricature of Charlie Chaplin as an elf is inserted in one shot for no other purpose than to capitalize on his popularity. While shadows are cast by the animated characters, they are not consistently applied throughout the cartoon.

The strength of the short is in the sound. The orchestral instrumentation is lush and the score well timed. Original music, a wide range of musical instrumentation, strong vocal talent (including a male chorus to open the cartoon), lively dance numbers (e.g., All God's

Chillun Got Shoes), and strong representational sound effects make this an entertaining production.

*Molly Moo Cow and Robinson Crusoe* (1936), Van Beuren Studios, distributed by RKO Radio Pictures

Molly Moo Cow lands on an island inhabited by Robinson Crusoe and although she is chased back into the sea by the castaway she returns to rescue him from a bunch of cannibals. Slight but perceptible shifts in the camera during character movement, absence of wide shots and extreme close-ups, inconsistency in animation (e.g., Molly leaves footprints in the sand in the opening scene but not in the closing scenes), a limited colour palette used on the animated characters, few expensive scene transitions, and variability in the use of chiaroscuro with the characters (not as frequent towards the end of the cartoon) leave the impression that the production was produced on a budget and rushed in the latter stages.

The island backgrounds use good shadow effects, provide accurate depth cues, and exhibit variability in colour composition but sometimes there is little definition in the jungle flora. While at periods of time the sound effects fail to represent the action, the original score effectively captures the native rhythm and jungle beat as well as the menace of the cannibals.

*Little ol' Bosko and the Cannibals* (1937), Hugh Harman and Rudolf Ising, distributed by Metro-Goldwyn Mayer

On the way to grandmother's house with a bag of cookies, Bosko's imagination takes him to a jungle of cannibal cookie-eating frogs out to get his cookies. Energetic animated dance numbers involving a large number of camera motion effects, stellar vocal talent (including impersonations of famous Afro-American jazz musicians Fats Waller, Cab Calloway, and tap dancer Bill "Bojangles" Robinson), a dynamic orchestral arrangement, and realistic sound effects highlight this short. While there is very little z-axis movement despite a number of dance sequences and only a few expensive scene transitions, the characters cast realistic shadows (e.g., the shadows in the folds of Momma's apron) and reflections (e.g., Bosko's reflection on the shiny piano) and offer true-to-life body movement.

At 583 seconds in length, the cartoon is by far the longest short viewed (the second longest is nearly a minute shorter) indicating that this cartoon was an expensive endeavor. While cycled animation is present, the movement is limited to few scenes. The exterior

background sets appear to be prepared on a budget as they primarily consist of huts and jungle foliage that offer little detail and a narrow colour palette of greens and yellows.

*Scary Crows* (1937), Columbia Pictures Corporation, distributed by Columbia Pictures Corporation

Scrappy and his dog work all day on the farm only to have annoying crows uproot the fields and eat the crops but are able to scare away the birds before the sun sets. The short features expressive but crude animation with recycled artwork and characters that at times appear one-dimensional, fail to cast shadows, and exhibit poor and inconsistent colour selections (e.g., Scrappy's hair varies from blonde to red). The backgrounds seem hastily prepared with poor depth relative to the characters and a failure to consider lighting sources.

To avoid the necessity for detail, the outdoor scenes are predominantly distant trees, farmhouses and fences set on a blue horizon. Unexplainable time inconsistencies appear in the short (e.g., Scrappy awakes at 7:00 a.m. but the next two scenes the clock reads 6:25 a.m.). Periodic cycled animation and poor sound effects (e.g., the crowing rooster is from human origin and crows in the cartoon chirp rather than caw) also detract significantly from the production.

*The Villain Still Pursued Her* (1937), A Paul Terry Toon, distributed by Educational Pictures

Nasty villain Oil Can Harry kidnaps the banker's daughter, Fanny Zilch, and takes her down a mine shaft. The hero rescues Fanny from Harry before the explosives in the mine are detonated. No extreme close-ups, wide shots, or expensive transitions, and few motion effects mark this entry as a budget short. The animation is capably rendered with characters casting appropriate shadows, directional lighting (as noted by reflections cast on Harry's hat), accurate depth cues, well-executed z-axis movement in a large number of scenes, and detailed facial definition (e.g., Fanny has eyelashes).

The backgrounds are lush in detail in both the exterior and interior scenes. For example, the staircases feature art decoration and light glistens off the railings while tiny objects fill the spaces of rooms and corridors. There is one background inconsistency noted (i.e., the clock face on the mine shaft wall). Cole Porter's score of the same title is used and is highly effective in carrying this operatic melodrama. The cartoon vocals are sung masterfully in rhyme in tenor. The sound effects, although few, are also representational of the action and the musical instrumentation is competently recorded.

*The Temperamental Lion* (1940), Terrytoons Studio, distributed by Twentieth-Century Fox

A caged lion from Major Doolittle's African Expedition escapes from the zoo and gets even with the explorer by sending him over the roof of the Explorer's Club in order to relax in his deck chair. Expressive animation (e.g., the laughing hyena sequence), careful attention to character detail, a large colour palette for character costumes, nicely rendered facial composition on extreme close-ups, extremely well rendered character animation on a number of z-axis movements, accurate use of chiaroscuro, and just a few scenes of cycled animation highlight this Terry entry.

The backgrounds sport handsome production values with lush landscapes, rooms filled with objects and decorations, strong backdrop scenic consistencies, a wide range of colours (e.g., the brickwork has multi-hues), and the effective use of shadows. The orchestral arrangement is original and capably conducted while the sound effects are effectively recorded and the vocal talents and character mannerisms outstanding (e.g., a great impression of Bert Lahr's voice as the lion). Only the lack of a strong array of camera effects and a shorter running time than the average (mean) time of the cartoons viewed keep this cartoon from being at the top of the list.

*How To Be a Sailor* (1944), Walt Disney Productions, distributed by RKO Radio Pictures

The story of how man had come to rule the sea tracing the development from caveman to the modern day United States Navy sailor. The animation is workmanlike but not impressive. For example, the clipper ship on the open waves has only the top flag flapping in the breeze and not the main sails. The characters inconsistently cast shadows. There is an excellent variety in colours for the characters. No cycled animation is present. In comparison to the other shorts viewed there are a moderate number of motion effects and expensive scene transitions.

Backgrounds are of variable quality with some impressive sets (e.g., the pirate ship laden with gold pieces; interior of the battleship) and others very basic (e.g., simple boat silhouette against a flat night backdrop). Depth problems also surface (e.g., Columbus' ship on the ocean that looks flat with no shading, light reflections, or water ripples; an Egyptian boat looks one-dimensional set against the Pyramids). A vast sound effects library and musical pieces that reflect the period of sailing history reveal care and attention to the

soundtrack. The short also closes with an impressive wide shot of Goofy as a torpedo sinking the entire Japanese fleet.

*The Beach Nut* (1944), Walter Lantz Productions, distributed by Universal Pictures

Woody Woodpecker pesters Wally Walrus just out for a relaxing day at the beach eventually causing the seaside amusement dock to come crashing down into the water. Sloppy, lazy, and inconsistent artwork tarnishes this production. Movement along the z-axis is avoided or inaccurately rendered. The scene of Woody surfing towards the shore (shot from behind Woody) does not have the shore moving towards the viewer. Many beach scenes consist solely of a flat blue (ocean) and orange (horizon) providing poor depth cues. Three background scenes involving an arrangement of food on the beach, the shape of a broken window of a nearby building, and the position of beach umbrellas in the sand all mysteriously change in form or location in successive shots.

In one scene Wally wears green swimwear but the colour changes to yellow in mid-stride. The opening shot of the crowd gathered around Wally clutching Woody features faceless spectators and buildings without doors or windows. The scene of Woody flying on a carpet while talking on a telephone is set against a simple black background. A narrow range of colours are applied (e.g., in the crowd scene only black or blue is used to colour the spectators garments), an abundance of cycled animation is present, and characters are drawn that cast no shadows all reveal a production made on a tight budget. Only the vocal talent, effective sound effects, and significant number of motion effects keep this production from being at the bottom of the list.

*Throwing the Bull* (1946), Terrytoons Studio, distributed by Twentieth-Century Fox

A rich Spaniard offers his daughter's hand in marriage to any matador that can defeat the bull in the ring. The bull defeats all who challenge him causing Mighty Mouse to enter the ring and pummel the bovine sending the animal to the butcher shop thereby winning the daughter's hand. Numerous scenes of accurately rendered z-axis animation, expressive character animation, detailed costume designs that offer a wide range of colours and hues (e.g., toreadors), consistent casting of shadows by characters with appropriate directional lighting, and many close-ups of character faces with life-like emotions provide outstanding examples of high quality animation. Cycled artwork is limited to few distant crowd scenes and is almost imperceptible.

Excellent depth cues are provided such as when the bull brags that he can beat Mighty Mouse, the clouds in the background move. The use of chiaroscuro for symbolic purposes occurs when the matadors, unable to exit the room, are waiting nervously for their next turn to fight the bull. The shadows of prison cell bars are cast on the floor and wall of the corner of the room where they sit symbolizing their trapped and claustrophobic predicament.

The backgrounds are meticulously painted evident by the many objects that fill the interior spaces. No scenic inconsistencies were present. More impressively, the high overhead wide shot of the bullring features intricate design work. Despite the distance, tiny houses, flags, roads, people and trees, most of which cast shadows, are all clearly discernible. Most of the cartoon is sung in opera borrowing from Donzetti's sextet (*chi mi frena tal memento*) from Lucia di Lammermoor using powerful tenor voices. The cartoon also uses a Spanish speaking bull, witty language and a few puns (evident by the title) to carry the dialogue. Despite the poor range of sound effects and shorter than average cartoon length, the cartoon can claim to be one of the best animated productions of the twenty-six shorts viewed.

*Mickey's Delayed Date* (1947), Walt Disney Productions, distributed by RKO Radio Pictures, Inc

Mickey is late for his costume party date with Minnie, but thanks to help from Pluto he is able to arrive on time with tickets in hand. The animation is competently rendered but fails to achieve a consistent level of artistry. While cycled animation is absent from the short, there are a few transitional problems with successive shots. For example, in one scene Pluto is standing on a small rug looking for Mickey's top hat while in the next shot the rug has disappeared beneath Pluto's feet. In another scene Mickey is looking for his hat in a trash can that sports a handle but in the following scenes, involving Pluto colliding with the can sending Mickey rolling down the street and crashing into a taxi stop pole, the can has no handle.

The short has a large number of expensive motion effects but very few costly scene transitions. The extreme close-ups of facial expressions are detailed and life-like. A wide range of hues are used to colourise the characters but the Disney animators rarely applied chiaroscuro to movement. The backgrounds provide strong representations of interior spaces and street life with the correct application of shadows and effective lighting patterns. The soundtrack features a subdued but original score with a strong set of sound effects.

*Free Enterprise* (1948), Terrytoons Studio, distributed by Twentieth-Century Fox

Heckle and Jeckle sneak into prison to sell drills, hack saws and other tools to the inmates, are caught by the prison guard, and then jailed. They trick the guard into helping them escape but the coal truck they use to get away dumps them back into the prison yard. Numerous scenes of accurately rendered z-animation (primarily involving the two magpies running from the pursuing guard dog) along with a wide range of colours for costumes and props, and an effective application of directional lighting highlight the animation of this cartoon short.

The backgrounds are expertly created evidenced by a meticulous care to accurately reflect set pieces and an application of impressive shadow effects (e.g., a pile of rocks in the prison yard cast various shadows based on the size and shape of each rock). A strong attention to aesthetics is evidenced by the various surface finishes and reflections on objects (e.g., dirt smudges, grease stains). When plaster and paint are ripped from walls, bricks and mortar are exposed underneath. Printing is legible on distant posters and bulletins. The masterful vocal talents of Dayton Allen provide convincing Brooklyn and British accents of the two magpies. The score dramatically establishes tempo, key and rhythm of a slapstick cartoon filled with chases, stunts, pranks, and gags. Evidence of a budget production include few costly camera effects, a half-dozen scenes of cycled animation, a library of sound effects that fails to accurately represent the on-screen action, and a cartoon that is around a minute shorter than average.

*Professor Tom* (1948), Fred Quimby, distributed by Metro-Goldwyn Mayer

Tom tries to teach a kitten that cats chase mice but Jerry befriends the young feline and together they outwit the instructor. The strengths of the animation include a lack of cycled artwork, a large amount of z-axis movement, and plenty of motion effects (primarily during the chase sequences). However, there was a distinct lack of shadows cast by the characters.

Artistic inconsistencies were also noted. For example, in the scene involving Tom and Jerry carrying a rug to dump into an outside pool, the artists rendered Jerry at least twice as large as he is usually drawn. Backgrounds are very well painted with both the interior and exterior scenes richly decorated with consistency in the colours, sizes, shapes and placements of objects in successive scenes. The short lacked expensive scene transitions, extreme close-

ups, or panoramic wide shots. The sound track is unexceptional at best with odd choices for certain sound effects, almost non-existent vocal talent, and a forgettable score.

*There's Good Boos To-Night* (1948), Famous Studios, distributed by Paramount Pictures

Casper does not want to scare like his ghost friends and befriends a fox. The fox is shot by hunters but his ghost rises to play with Casper. While the short offers a number of z-axis movements, a few of these scenes exhibit cumbersome character movement. The animation lacks brilliant and varied colours (i.e., mostly muted grays, blues, browns and blacks) but this feature can be explained by the fact the storyline takes place at night. There is nearly a complete absence of cycled animation and the short features plenty of great camera motion effects to follow the action.

The appropriate characters cast accurate shadows during night scenes as a result of reflections from the moon, candles, or other light sources. Being a ghost, Casper does not cast a shadow as the light shines through him. Extreme close-ups are well rendered and the depth cues problems created by a ghost that can walk through objects are handled well. The opening panoramic wide shot of the ghosts awakening at night to scare is very well animated with the title credits written on trees and rocks like epitaphs on tombstones. The sound track effectively captures a harrowing ghostly mood. Sound effects represent well the action on screen and the orchestral arrangement effectively changes in tone from frightening (ghosts on the rampage) to jovial (when Casper and the fox are at play) to mournful (when Casper finds his friend dead). Frank Gallop expertly narrates the short in a Vincent Price tone which effectively contrasts with Casper's childlike and friendly voice.

*Grape Nutty* (1949), Columbia Pictures Corporation, distributed by Columbia Pictures Corporation

The Fox and Crow fight over the last grape and end up destroying each other's homes. Character animation for the short is highlighted by the lack of directional lightning and use of shadows, a good range and application of colours, and a complete absence of both cycled and z-axis animation. The cartoon features minimalist camera motion effects with nearly all transitions consisting of cuts as opposed to more expensive fades or dissolves. The few wide shots and extreme close-ups are competently rendered.

However, there is a noticeable lack of continuity in a few scenes. For example, the crow quietly opens a door, sneaks out of his home at night to grab the last grape, is caught in

the act by the fox, and pretends he is sleepwalking. On his return trip home the door is inexplicably missing. The backgrounds are well rendered with interior spaces occupied by a variety of household objects that cast shadows, and painted using a large selection of colours. The exterior scenes are less detailed with minimal vegetation to provide depth cues. The orchestral soundtrack is unmemorable and used primarily to underscore the narrative. The vocal talent is adequate and the sound effects carried off very well. The cartoon is one of the shorter entries at just over six minutes supporting the conclusion that this cartoon was a budget production.

*Scrappy Birthday* (1949), Walter Lantz Productions, distributed by Universal Pictures

Andy Panda takes up fox hunting to catch a fox to turn into a fur coat for his girlfriend Miranda's birthday but the reynard ends up outwitting both Andy and his tracking dog. Great colour variety, no apparent cycled animation, and the absence of wide shots mark the character animation. The very few z-animation scenes are accurately rendered. There are a substantial number of expensive camera motion effects. The background art is substandard with a lack of a broad colour range (exteriors consist mostly of greens and blues), poor detail (e.g., some scenes a tree is represented by a dab of blue paint), an uneven artistic style (the art appears to be from the hand of at least two artists), a near absence of chiaroscuro, and poor depth cues are present in some scenes (due to flat horizons).

There are also errors of consistency in successive scenes. For example, the number, size and shape of the paw prints left behind by the fox near his tree hideout change between adjoining shots. Another consistency error has the location of the doorbell on Miranda's house changing in relation to the sign on the exterior of her home. The soundtrack is characterized by strong realistic sound effects but an unusual choice of vocalizations (i.e., while Andy's voice sounds like that of a teenager, Miranda's voice sounds more like that of a much older woman).

*Drip-Along Daffy* (1951), Warner Bros. Cartoons, distributed by Warner Bros.

Sheriff Daffy and sidekick Porky Pig tangle with the mean outlaw Nasty Canasta. Porky uses a toy soldier to outwit the bandit thereby becoming a hero while leaving Daffy to clean the streets of the western town. The character animation exhibits accurately rendered z-animation, a few scenes of cycled animation, and a good colour range for the western dress. However, there is a near absence of shadow effects and there are very abrupt shifts in artistic styles present throughout the short. For example, whiskers are present on Porky's face after

he has defeated the outlaw but in the next scene of Porky being carried on the shoulders of townspeople he is clean shaven. In comparison to the other shorts, there are a moderate number of camera motion effects.

The backgrounds are poorly rendered with a minimalist approach to detail, texture, and colour. The exterior western landscapes sometimes possess only a few colours, mostly browns. The town's buildings during the showdown sequence exhibit few doors or windows and no writing is present on the signs. Distant hoodoos lack shading thereby looking flat. In the interior saloon scenes, the cowboys are occasionally rendered as silhouettes. Background art is recycled as noted by the identical cloud formations in the wide shot of the western town. There are also inconsistencies in the background art in successive scenes (e.g., saloon door changes location, variances in the number and location of drops of alcohol on the surface of the saloon's bar, the size of Daffy changes in relation to the bar). The cartoon includes an original song (sung by Porky) "The Flower of Gower Gulch", a brilliant parody of sentimental cowboy-style love songs. Mel Blanc's excellent vocal talents along with realistic sound effects make the soundtrack superlative.

*French Rarebit* (1951), Warner Bros. Cartoons, distributed by Warner Bros.

Bugs Bunny lands in Paris and outwits two French chefs, Louis and François, intent on turning the rabbit into dinner specials for their respective restaurants. The short does not rely upon cycled animation, the extreme close-ups are well animated, and the characters are painted using a large colour palette. However, there are just a few scenes of z-animation, the characters do not cast shadows, and there are no expensive wide shots. The short features very few motion effects and expensive scene transitions.

The backgrounds are colourful, apply effective use of chiaroscuro, exhibit a fine attention to detail (e.g., artistic reproductions of the Arc de Triomphe and Eiffel Tower), and offer good depth cues. Nevertheless, there are inconsistencies in the backgrounds in successive shots (e.g., carving table, cutlery and containers inexplicably disappear from the kitchen in the next shot). The soundtrack consists of the great vocalizations of Mel Blanc, clever dialogue involving a play on French phrases, excellent sound effects (e.g., realistic sound representations when a chef is dropped in flour or dunked in wine), and a score that maintains a strong rhythm with the on-screen action.

*Gerald McBoing Boing's Symphony* (1953), United Productions of America, distributed by Columbia Pictures

When the symphony does not show up, Gerald McBoing Boing is asked by the station manager to use his unique vocal talents to reproduce the orchestral piece for the radio listeners. Despite getting the score mixed up with the radio script, Gerald's presentation is warmly received by his audience. UPA pioneered the technique of limited animation as a stylistic alternative to the cinematic realism in animated films at the Disney studio. This style of animation came to be the predominant method used during the 1960s and 1970s as a means to reduce production expenditures. The animation featured in the cartoon features lots of cycled animation, little z-axis movement, a few scenes of jerky character motion, and little camera movement. There is a complete absence of shadows cast by both characters and background objects, and there is no directional lighting or lighting effects. A very restricted colour palette is used in the cartoon (e.g., Gerald's clothing is one colour).

There are numerous artistic inconsistencies. Gerald's skin colour changes on a number of occasions, usually matching the main background colour. His musical score suddenly appears on the desk of the station manager where it was not present in the previous cut. Set pieces are distorted to provide poor depth cues. Backgrounds do not feature surface textures and objects are rarely found occupying interior space. The sparse animation is contrasted against the cartoon's lush soundtrack. A strong original score using a large number of musical instruments, great vocalizations (e.g., characters and the narrator talk in rhyme), and a vast number of interesting sound effects make this cartoon memorable.

*Floor Flusher* (1954), Famous Studios, distributed by Paramount Pictures

When Olive asks for Popeye's help to fix a leaky faucet, the vengeful Bluto uses the basement water pipes to flood the home causing Popeye to consume some spinach to take care of the problems. The character animation features recycled artwork, a narrow range of colours used to paint the characters (i.e., red, white and black are used primarily to paint the three main characters), and the complete absence of chiaroscuro. The few scenes involving z-animation exhibit awkward character movement (e.g., Popeye walking up the steps leading to Olive's house). The short has only a few camera motion effects or expensive scene transitions.

The backgrounds offer shadow effects but are sparsely decorated and like the character animation involve a small range of colours. There are glaring inconsistencies in the backgrounds. For example, the location of the sewer drain outside Olive's home changes between the opening and closing shots. There is a change in the size, shape and number of

walkway stones leading to Olive's home. Further, a number of cherries located on a cake Olive has decorated change on the successive shot. The voice work by Jack Mercer, Jackson Beck and Mae Questel is well intonated but some sound effects fail to accurately represent the on-screen action and the orchestral score offers little originality from other Popeye shorts. The animated cartoon is also the third shortest viewed pointing towards the conclusion that the short was produced on a tight budget.

*Deputy Droopy* (1955), Fred Quimby, distributed by Metro-Goldwyn Mayer

While the sheriff is sleeping, Droopy successfully foils the plans of two outlaws whom are intent on stealing the gold from the safe. The character animation is highlighted by a tremendous amount of wide shots and z-axis movements, all of which are competently rendered. The characters are well coloured using a large palette but they do not cast shadows. There are inconsistencies between scenes including the shape of a firecracker and the colour of an outlaw's scarf. There are also very few expensive camera movements and scene transitions. The backgrounds lack a good colour range, do not use chiaroscuro, and are deficient in detail (e.g., there is no lighting present in the western town houses as viewed from a distant wide shot). Original western themed music dominates the score with good vocal talent. The special effects exhibit a great care and attention to detail. (e.g., the sound of hissing firecrackers changes in relation to the size of the explosive).

#### b) Animation

Analyses of the cel aesthetics related to animation work for each of the 26 shorts revealed that the Metro-Goldwyn Mayer animation studio can claim to have the best animation overall with two shorts tied for third place (*Deputy Droopy* and *Little ol' Bosko and the Cannibals*) and the other tied for ninth (*Professor Tom*). Walt Disney Productions also provided well-animated cartoons with their three sample shorts, *The Robber Kitten*, *Mickey's Delayed Date*, and *How To Be a Sailor*, tied for third, seventh and ninth places respectively. Two of the five Terrytoons shorts, *Throwing the Bull* and *Free Enterprise*, finished in first and second place respectively. For the other three Terry shorts, *The Temperamental Lion* tied for third place, *The Villain Still Pursued Her* tied for twelfth place, and *Jesse and James* finished in twenty-fourth place. While the Terry studio can claim to have the two best animated shorts from the list, their 1931 entry was one of the sloppiest drawn shorts from the sample making the animation from the production facility of good but variable quality.

The UPA Production *Gerald McBoing Boing's Symphony* with its emphasis on abstract animation and crudely drawn figures, a precursor to limited animation, finished in last place. While the UPA animators were intentionally moving away from realistic Disney-like animation, the methodology adopted by the author to score the cel aesthetics for animation was designed to avoid penalizing cartoon shorts for stylistic differences. The fact that a character changes size from scene to scene in comparison to the objects around him does not promote an abstract experience but rather gives the impression the short was produced on a budget. The author asserts that through the use of animation techniques such as more frequent z-axis movement, less cycled animation, and smoother character motion the UPA animation crew would not have detracted from the abstract stylistics found in the film. Rather by enhancing the quality of cel aesthetics in the short, the viewer would have been provided with a clearer representation of the unique qualities of abstract film in terms of motion, light, rhythm and composition.

Columbia Pictures three shorts (*Grape Nutty*, *Shoemaker and the Elves*, *Scary Crows*) tied for ninth, tied for nineteenth, and tied for twenty-second respectively making the studio's animation the poorest of the studios that had the maximum three sampled shorts. The three Walter Lantz Productions entries, *Scrappy Birthday*, *The Beach Nut*, and *Hells Heels*, were also as a group very poorly animated cartoons that finished tied for twelfth, tied for nineteenth, and in twenty-fifth positions respectively. The other five studios (Van Beuren Productions, Ub Iwerks/Celebrity Productions, Fleischer Studios, Famous Studios, Warner Bros.) offered mediocre animation with their shorts finishing somewhere from seventh to twenty-second place.

### c) Backgrounds

Analyses of the cel aesthetics associated with the background art completed for each of the 26 shorts found that the studio that had the best overall backgrounds was Walt Disney Productions with one short tied for first (*The Robber Kitten*) and the other two tied for fifth place (*Mickey's Delayed Date*, and *How To Be a Sailor*). The Terrytoons cartoons overall had the some of the finest backgrounds of all the studios. Three of the four cartoons that finished tied for first place were Terry shorts (*Free Enterprise*, *The Temperamental Lion*, *Throwing the Bull*). The other two shorts, *The Villain Still Pursued Her* and *Jesse and James*, tied for eighth and twenty-second places respectively.

Similar to the abstract animation work found in the UPA Production *Gerald McBoing Boing's Symphony*, the cartoon also featured backgrounds that were bland, cartoony, and

unrealistic. While the cartoon finished tied for last place, the UPA studio could have significantly enhanced the cel aesthetics found in their backgrounds by ensuring colour consistency in successive shots, better depth cues, and a stronger colour range, all of which would not have detracted from UPA stylistics but rather enhanced the abstract experience. Walter Lantz's three shorts featured the poorest backgrounds from a studio that had the maximum three shorts sampled with *Hells Heels* tied for last place, *The Beach Nut* tied for twenty-second place, and *Scrappy Birthday* tied for eleventh. Columbia Pictures cartoons also featured very inferior backgrounds with their three shorts (*Grape Nutty*, *Shoemaker and the Elves*, *Scary Crows*) finishing in eighth, nineteenth, and twenty-second place respectively. The other studios (Metro-Goldwyn Mayer, Van Beuren Productions, Ub Iwerks/Celebrity Productions, Fleischer Studios/Famous Studios, Warner Bros.) had backgrounds that were listed around the middle of the ranked cartoons for this production element.

#### d) Soundtrack

Analyses of the cel aesthetics associated with the music, special effects, and vocal talent for each of the 26 shorts revealed the studio that had the best overall soundtrack was Warner Bros. with both shorts (*Drip-Along Daffy*, *French Rarebit*) finishing tied for second. United Productions of America also was rated as having an excellent soundtrack with its Gerald McBoing Boing short finishing tied for second. Walt Disney Productions should also be considered to have a very good soundtrack as the Silly Symphony short *The Robber Kitten* finished alone in first, *How To Be A Sailor* tied for third, while *Mickey's Delayed Date* tied for fourth. The Terrytoons shorts had mediocre soundtracks when compared to the other shorts with two shorts tied for third (*The Temperamental Lion*, *Throwing the Bull*), one tied for fourth (*Free Enterprise*), one tied for sixth (*The Villain Still Pursued Her*), and the other finishing in eighth or last place (*Jesse and James*).

The Van Beuren studio was rated as having the worst soundtrack with their two shorts finishing tied for sixth (*Molly Moo Cow and Robinson Crusoe*) and seventh (*The Fatal Note*) place. The three Columbia entries were not much better finishing tied for fourth (*The Shoemaker and the Elves*), fifth (*Grape Nutty*) and seventh (*Scary Crows*). While the only Ub Iwerks short viewed finished respectable by being tied for third, the other studio soundtracks were all considered to be mediocre with the majority of their shorts finishing somewhere between fourth to sixth of eight places.

e) Camerawork

Analyses of the cel aesthetics associated with motion effects and transitions for each of the 26 shorts found both Walt Disney Productions (*How To Be A Sailor* finished in first place, while *Mickey's Delayed Date* tied for third place and *The Robber Kitten* tied for fourth place) and Columbia Pictures (*Scary Crows* and *The Shoemaker and the Elves* finished tied for second while *Grape Nutty* earned a fourth place finish) offered the best camerawork. The Terrytoons cartoons offered slightly below average camerawork when compared to the other studio entries. Terry cartoons tied for second (*Throwing the Bull*), third (*The Temperamental Lion*), fourth (*Free Enterprise*) and fifth place (*The Villain Still Pursued Her*). The last short (*Jesse and James*) finished alone in last (seventh) place. Van Beuren (third and sixth place ties) was rated as having the worst camerawork and UPA (tied for fourth place) as being below average. The other studios would all be considered as having mediocre camerawork with a mean average score of between third and fourth place.

f) Time

To create a second of clock time requires 24 photographs to be taken of the animation cels. Each cel is individually hand painted from drawings created by animators. The cel is placed over painted backgrounds prepared by background artists before being photographed. The process is time consuming and expensive. Therefore, as the length of a short increases so does the production expenses. Grouping the cartoons by studio and then calculating the mean running times for each of the studio shorts revealed that the Metro-Goldwyn Mayer shorts had the longest mean clock time for the studio with the maximum three sampled cartoons.

The mean clock time for the Ub Iwerks studio product was longer by a large margin (29 seconds) but there was only one short sampled. Terrytoons shorts had the shortest mean clock time, 26 seconds shorter than the next group of studio shorts prepared by Fleischer/Famous. The Walter Lantz studio shorts mean time was just two seconds longer than the Fleischer/Famous shorts. The other studio shorts were grouped close together and had a mean clock time within a 34-second range (421 to 454 seconds).

g) 2-Component Analysis

An analysis of the two visual components of an animated short, the animation and backgrounds, was performed and a mean score for each cartoon was calculated. A 2-component analysis was undertaken in an attempt to examine the cel aesthetics of the

production artwork (animation cels and backgrounds) produced by the animators and background artists where the majority of the labour and production costs in animation are expended. For purposes of the 2-, 3-, 4-, and 5-component analyses, the Fleischer and Famous shorts were considered as the product of one studio because although historically the studio went through a takeover by Paramount in 1941-1942 most of the Fleischer production personnel remained with the studio after the new ownership. The individual scores for each production element were converted into a letter grade using a standard grade point chart listed below.

<b>Letter Grade Equivalent</b>	<b>Percent</b>	<b>Descriptors</b>
A+	95-100	Outstanding
A	90-94	
A-	85-89	Excellent
B+	80-84	
B	75-79	Very Good
B-	70-74	
C+	65-69	Above Satisfactory
C	60-64	
C-	55-59	Satisfactory
D	50-54	
F	45-49	Poor
F-	Less than 45	Failure

**Table 4.** Grade Point Chart.

A mean score for each cartoon was calculated and the 26 shorts ranked as noted in Table 5.

	<b>ANIMATION</b>	<b>BACKGROUNDS</b>		
<b>TITLE</b>			<b>SCORE</b>	<b>AVERAGE</b>
<i>Free Enterprise</i>	B+	A+	90	A
<i>Throwing the Bull</i>	A-	A+	90	A
<i>The Robber Kitten</i>	B	A+	87.5	A-
<i>The Temperamental Lion</i>	B	A+	87.5	A-

<i>Mickey's Delayed Date</i>	B-	A-	80	B+
<i>How To Be a Sailor</i>	C+	A-	77.5	B
<i>Professor Tom</i>	C+	A-	77.5	B
<i>There's Good Boos To-Night</i>	B-	B	75	B
<i>Grape Nutty</i>	C+	B	72.5	B-
<i>Little ol' Bosko and the Cannibals</i>	B	C+	72.5	B-
<i>The Villain Still Pursued Her</i>	C	B	70	B-
<i>Deputy Droopy</i>	B	C-	67.5	C+
<i>Scrappy Birthday</i>	C	C+	65	C+
<i>French Rarebit</i>	C	C-	60	C
<i>A Little Soap and Water</i>	C-	C+	62.5	C
<i>Drip-Along Daffy</i>	C-	C-	57.5	C-
<i>Floor Flusher</i>	C	F	55	C-
<i>Jack Frost</i>	F-	C+	55	C-
<i>Molly Moo Cow and Robinson Crusoe</i>	F	C+	57.5	C-
<i>The Fatal Note</i>	C-	F	52.5	D
<i>The Shoemaker and the Elves</i>	D	F	50	D
<i>The Beach Nut</i>	D	F-	47.5	F
<i>Gerald McBoing Boing's Symphony</i>	F-	F-	42.5	F-
<i>Jesse and James</i>	F-	F-	42.5	F-
<i>Hells Heels</i>	F-	F-	42.5	F-
<i>Scary Crows</i>	F-	F-	42.5	F-

**Table 5.** Analysis of Two Production Components for 26 Randomly Chosen Animated Shorts.

The 2-component analysis found that Walt Disney Productions had the highest mean studio score (81.7) for their three shorts. Despite having two of their shorts finish with the highest scores, and three place in the top four, Terrytoons mean score was a second (76) due to the complete failure of their 1931 short. Metro-Goldwyn Mayer (72.5) placed third, Fleischer/Famous finished fourth (66.5), and Warner Bros. finished a distant fifth (58.75). Conversely, the studio with the worst performance when considering the two production elements was UPA (42.5). The other studios had mean scores for their shorts around the satisfactory level with just over seven points differentiating the five studios (Warner Bros. (58.75), Columbia (55), Ub Iwerks (55), Van Beuren (55), and Walter Lantz (51.7)).

#### h) 3-Component Analysis

An analysis of three main audio-visual production components of an animated short, the animation, backgrounds, and sound, was performed and a mean score for each cartoon was calculated. This 3-component analysis was undertaken in an attempt to examine the cel aesthetics of the primary audio-visual components of the animated cartoon (i.e., the production artwork (animation cels and backgrounds) and sound) which focus on the cartoon characters and their relationship to each other and the environment.

	<b>ANIMATION</b>	<b>BACKGROUNDS</b>	<b>SOUND</b>		
<b>TITLE</b>				<b>SCORE</b>	<b>AVERAGE</b>
<i>The Robber Kitten</i>	B	A+	A+	90	A
<i>Throwing the Bull</i>	A-	A+	B+	89	A-
<i>The Temperamental Lion</i>	B	A+	B+	85	A-
<i>Free Enterprise</i>	B+	A+	B-	84	B+
<i>How To Be a Sailor</i>	C+	A-	B+	79	B
<i>Little ol' Bosko and the Cannibals</i>	B	C+	A	79	B
<i>Mickey's Delayed Date</i>	B-	A-	B-	77	B

<i>There's Good Boos To-Night</i>	B-	B	B+	77	B
<i>French Rarebit</i>	C	C-	A	70	B-
<i>Professor Tom</i>	C+	A-	D	69	C+
<i>Grape Nutty</i>	C+	B	C	69	C+
<i>Drip-Along Daffy</i>	C-	C-	A	69	C+
<i>Jack Frost</i>	F-	C+	B+	64	C
<i>Scrappy Birthday</i>	C	C+	C	64	C
<i>The Villain Still Pursued Her</i>	C	B	D	64	C
<i>Deputy Droopy</i>	B	C-	D	62	C
<i>Gerald McBoing Boing's Symphony</i>	F-	F-	A	59	C-
<i>Floor Flusher</i>	C	F	C	57	C-
<i>A Little Soap and Water</i>	C-	C+	F	57	C-
<i>The Shoemaker and the Elves</i>	D	F	B-	57	C-
<i>The Beach Nut</i>	D	F-	B-	55	C-
<i>Molly Moo Cow and Robinson Crusoe</i>	F	C+	D	55	C-
<i>Hells Heels</i>	F-	F-	B-	52	D
<i>The Fatal Note</i>	C-	F	F	50	D
<i>Scary Crows</i>	F-	F-	F	44	F-
<i>Jesse and James</i>	F-	F-	F-	42	F-

**Table 6.** Analysis of Three Production Components for 26 Randomly Chosen Animated Shorts.

The three element analysis found that again Walt Disney Productions had the highest mean studio score (82) for their three shorts. Despite having three of their shorts in the top four, Terrytoons mean score was a distant second (72.8), primarily due to the complete failure

of their 1931 short. Third place was a virtual tie between Metro-Goldwyn Mayer (70) and Warner Bros. (69.5). Conversely, the studio with the worst performance when considering the three production elements was the Van Beuren Studio (52.5). The other studios had mean scores for their shorts around the satisfactory level with just over seven points differentiating the five studios (Ub Iwerks (64), Fleischer/Famous (63.7), UPA (59), Walter Lantz (57), and Columbia (56.7)).

i) 4-Component Analysis

By adding another production element, camerawork, a 4-component analysis was undertaken on the 26 shorts in order to examine the effect of camerawork on the aesthetics of the animated cartoons thereby providing more points for comparison. First, the camerawork score was converted into a letter grade and then a mean score was calculated and the cartoons ranked as detailed in Table 7.

						<b>FINAL TOTAL</b>
	<b>ANIMATION</b>	<b>BACKGROUNDS</b>	<b>SOUND</b>	<b>CAMERA</b>	<b>SCORE</b>	
<i>Throwing the Bull</i>	A-	A+	B+	B	86	A-
<i>How To Be a Sailor</i>	C+	A-	B+	A-	81	B+
<i>The Robber Kitten</i>	B	A+	A+	D	81	B+
<i>The Temperamental Lion</i>	B	A+	B+	C	80	B+
<i>There's Good Boos To-Night</i>	B-	B	B+	B	77	B
<i>Free Enterprise</i>	B+	A+	B-	D	76	B
<i>Little ol' Bosko and the Cannibals</i>	B	C+	A	C	75	B
<i>Mickey's Delayed Date</i>	B-	A-	B-	C	73	B-

<i>Drip-Along Daffy</i>	C-	C-	A	B	71	B-
<i>Professor Tom</i>	C+	A-	D	B	71	B-
<i>Scrappy Birthday</i>	C	C+	C	B	67	C+
<i>French Rarebit</i>	C	C-	A	D	66	C+
<i>Grape Nutty</i>	C+	B	C	D	65	C+
<i>The Shoemaker and the Elves</i>	D	F	B-	B	62	C
<i>The Beach Nut</i>	D	F-	B-	B	61	C
<i>Jack Frost</i>	F-	C+	B+	C	61	C
<i>Deputy Droopy</i>	B	C-	D	D	60	C
<i>The Villain Still Pursued Her</i>	C	B	D	F	60	C
<i>A Little Soap and Water</i>	C-	C+	F	C	58	C-
<i>Gerald McBoing Boing's Symphony</i>	F-	F-	A	D	57	C-
<i>Floor Flusher</i>	C	F	C	D	56	C-
<i>Molly Moo Cow and Robinson Crusoe</i>	F	C+	D	D	55	C-
<i>The Fatal Note</i>	C-	F	F	C	53	D
<i>Scary Crows</i>	F-	F-	F	B	52	D
<i>Hells Heels</i>	F-	F-	B-	F	51	D
<i>Jesse and James</i>	F-	F-	F-	F-	42	F-

**Table 7.** Analysis of Four Production Components for the 26 Randomly Chosen Animated Shorts.

The 4-component analysis found that Walt Disney Productions had the highest mean studio score (78.3) for their three shorts. Despite having three of their shorts in the top six, the

Terrytoons mean score was a distant second (68.8). However, just a fraction behind were Metro-Goldwyn Mayer (68.7) and Warner Bros. (68.5). Conversely, the studio with the worst performance when considering the four production elements was the Van Beuren Studio (54). The other studios had mean scores for their shorts around the satisfactory level with just four points differentiating the five studios (Fleischer/Famous (63.7), Ub Iwerks (61), Columbia (59.7) Walter Lantz (59.7), and UPA (57)).

j) 5-Component Analysis

By adding clock time to the analyses, all five production components of an animated short were considered. The individual scores for the clock time of each short were converted into a letter grade using the standard grade point chart. A mean score for each cartoon was then calculated. The 5-component analysis was undertaken in order to consider all influences on production costs as noted in Neal-Lunsford's dissertation and detailed in Table 2. The cartoons were ranked and listed in Table 8.

	ANIMATION	BACK-GROUNDS	SOUND	CAMERA	TIME	FINAL SCORE	RANK	FINAL GRADE
<i>Little ol' Bosko and the Cannibals</i>	B	C+	A	C	A+	79	T1	B
<i>Throwing the Bull</i>	A-	A+	B+	B	D	79	T1	B
<i>The Robber Kitten</i>	B	A+	A+	D	B-	79	T1	B
<i>There's Good Boos To-Night</i>	B-	B	B+	B	A-	79	T1	B
<i>How To Be a Sailor</i>	C+	A-	B+	A-	C	77	5	B
<i>The Temperamental Lion</i>	B	A+	B+	C	C-	75	6	B
<i>Free Enterprise</i>	B+	A+	B-	D	D	71	7	B-
<i>Mickey's Delayed Date</i>	B-	A-	B-	C	C	71	8	B-

<i>Professor Tom</i>	C+	A-	D	B	B-	71	9	B-
<i>Drip-Along Daffy</i>	C-	C-	A	B	C+	70	10	B-
<i>Jack Frost</i>	F-	C+	B+	C	B+	67	T11	C+
<i>The Shoemaker and the Elves</i>	D	F	B-	B	A-	67	T11	C+
<i>French Rarebit</i>	C	C-	A	D	C+	66	13	C+
<i>Scrappy Birthday</i>	C	C+	C	B	C-	65	14	C+
<i>Grape Nutty</i>	C+	B	C	D	D	62	15	C
<i>The Beach Nut</i>	D	F-	B-	B	C-	60	16	C
<i>Deputy Droopy</i>	B	C-	D	D	C-	59	17	C-
<i>Gerald McBoing Boing's Symphony</i>	F-	F-	A	D	C	58	T18	C-
<i>The Villain Still Pursued Her</i>	C	B	D	F	D	58	T18	C-
<i>The Fatal Note</i>	C-	F	F	C	B-	57	T20	C-
<i>Molly Moo Cow and Robinson Crusoe</i>	F	C+	D	D	C+	57	T20	C-
<i>Scary Crows</i>	F-	F-	F	B	B-	56	22	C-
<i>A Little Soap and Water</i>	C-	C+	F	C	F-	55	23	C-
<i>Floor Flusher</i>	C	F	C	D	F	54	24	D
<i>Hells Heels</i>	F-	F-	B-	F	D	51	25	D
<i>Jesse and James</i>	F-	F-	F-	F-	F	42	26	F-

**Table 8.** Analysis of Five Production Components for the 26 Randomly Chosen Animated Shorts.

The 5-component analysis found that Walt Disney Productions had the highest mean studio score (75.7) for their three shorts. Despite having three of their shorts in the top seven, the Terrytoons mean score was only good for fifth place (65). When considering clock time, MGM moved up to second place (69.7), Warner Bros. finished third (68), and Ub Iwerks was fourth (67). Conversely, the studio with the worst performance when considering all five production elements was the Van Beuren Studio (57). UPA (58) and Walter Lantz (58.7) were just a little better. The other three studios had mean scores for their shorts around the

above satisfactory level with just over five points differentiating the scores (Ub Iwerks (67), Fleischer/Famous (62.7), and Columbia (61.7)).

The mean final score for each of the studios was Walt Disney Studios (75.67), Metro-Goldwyn Mayer (69.67), Warner Bros. (68), Ub Iwerks (67), Terrytoons (65), Fleischer/Famous (62.67), Columbia (61.67), Walter Lantz (58.67), United Productions of America (58), and Van Beuren (57).

## **F. Discussion**

An application of Neal-Lunsford's method of cel aesthetics on 26 Golden Age American animated cartoons found that based on the overall mean score for the animated shorts from each of the studios Walt Disney Studios finished first (75.67), Metro-Goldwyn Mayer placed second (69.67), and Warner Bros. (68) was third. The rest of the studios in order of placement from fourth to tenth were Ub Iwerks (67), Terrytoons (65), Fleischer/Famous (62.67), Columbia (61.67), Walter Lantz (58.67), United Productions of America (58), and Van Beuren (57). Walt Disney Studios was also able to achieve first place mean scores in the 2-, 3-, 4-, and 5-component analyses. Disney succeeded in achieving high group component scores because of strong cel aesthetics in backgrounds and sound and above average scores in the other production components. In the 5-component analysis, all three Disney cartoons finished in the top eight of the twenty-six shorts sampled. MGM studios placed second primarily due to high quality character animation while third place finisher Warner Bros. had outstanding sound.

The five Terrytoons cartoons sampled taken as a group were not substandard in comparison to the twenty-one other Golden Age studio shorts. Other than the 1931 Terrytoons short produced shortly after the studio was founded, the Terry product was especially strong when examining the cel aesthetics of the character animation and background art as evident in the 2-component analysis. The three later shorts produced by the studio between 1940 and 1948 all featured detailed character animation, effective use of chiaroscuro, great range in character colourisation, limited use of cycled animation, and accurately rendered z-animation. The high quality of animation found in Terry's three shorts produced over the nine year period can be explained by the fact that during the 1940s and 1950s Terry retained an animation staff of highly talented artists such as Connie Rasinski, Carlo Vinciguerra, Eddie Donnelly, and Mannie Davis all of whom, based on oral history research, had excellent reputations in the animation industry.<sup>44</sup>

The background art of the three Terrytoons cartoons released in the 1940s was represented by a strong focus on set details and surface textures, picturesque naturalistic artwork found in both interior and exterior settings, accurate depiction of directional lighting, realistic depth cues, and no apparent inconsistencies in the artwork when examining successive shots. The Terry background art of the three later produced shorts was found to be on-par with the early Disney work (Silly Symphonies) and superior than the backdrops produced for the Disney shorts from the same time period. While not implying that the artistic qualifications of the Disney background staff was inferior to Terrytoons, as detailed in Appendix A Terry's group of background artists (e.g., Bill Hilliker, Anderson Craig, George Zaffo, John Vita) had years of experience in commercial or landscape art and were tremendously gifted as evidenced by their artistic portfolios and solid reputations in the New York art scene.

While the music produced by the studio was not exceptional and based on analyses of cel aesthetics was one of his weaker production elements, Terry's musician Philip Scheib was a classically trained composer from a European school with previous experience in composing music for motion pictures. By producing original music for many of the shorts, Scheib was able to avoid incurring musical fees and royalty charges while at the same time achieved a level of competency through an effective use of sound elements on par with the other animation studio musical directors. The effective musical parody used in *Throwing the Bull* highlights Scheib's mastery over the musical form by turning grand opera into cartoon buffoonery on a superhero theme. Despite the less-than-impressive Terrytoons composite soundtrack score for the five Terry shorts sampled, the studio still retained its second place finish behind the Walt Disney Studios in the 3-component analysis which factors in both visuals (animation and backgrounds) and audio.

While the Terrytoons camerawork was workmanlike and competently executed, the photography was not spectacular by lacking a broad range of motion effects. Therefore, after factoring in camerawork along with the 3-component scores, the Terrytoons composite score fell further in the 4-component analysis to be virtually tied for second place with Metro-Goldwyn Mayer and Warner Bros. Despite the lower score, the 4-component analysis for the five Terrytoons cartoons sampled supports the conclusion that the studio produced shorts with above average cel aesthetics in comparison to the other studios. Cel aesthetics found that the weakest of the five production elements was time as the mean clock time of Terry's cartoons were the shortest of the ten studios analyzed with Terrytoons dropping from second place in the 4-component analysis to fifth place in the 5-component analysis.

The empirical validity of the writer's application of Neal-Lunsford's cel aesthetics methodology found support when making a comparison of the application's ranking of the studio shorts to the studio rankings by number of Oscars won. When the writer considered all five major production components, Walt Disney Productions finished first, Metro-Goldwyn Mayer placed second, and Warner Bros. studio ended third. The application ranking mirrors the first to third place finishes of studios ranked by number of Oscars won during the period 1931-60. Further, four of the bottom five studios in the 5-component score (i.e., Fleischer/Famous, Columbia, Walter Lantz, and Van Beuren) were never awarded an Oscar. Therefore, the 5-component ranking of the ten studios is remarkably similar to the ranking of Oscars won by studio during the Golden Age of Animation.

The major exception would be differences in the United Productions of America rankings. UPA finished ninth in the application but fourth in the Oscar tally. This dissimilarity can be explained by the fact that the UPA shorts were rendered in a deliberately abstract, non-naturalistic and minimalist fashion while the methodology used by the author to analyze cel aesthetics rewarded expensive, labor-intensive animation – production processes found in animated cartoons that attempt to capture traditional aesthetics of beauty with realistic representations of the human form. The methodology to analyze cel aesthetics was devised to not favour one stylistic paradigm over another.

The author acknowledges that the UPA abstract style promoted a low-budget appearance to the cartoons. Nevertheless, while the author's scoring system distinguished between poorly and competently executed animation (e.g., jerky vs. smooth character animation) some production features of the UPA style (e.g., details found in the facial features of the animated characters) did favour the more classical realistic style of animation. As a result, some production features of the UPA product did not score well in the application as a result of stylistic decisions made by the studio. Finally, while the UPA cartoons may have caught the attention of Oscar voters in the 1950s as fresh and innovative, these stylistic cartoons would likely not be considered so favorably by contemporary Academy voters who would acquaint the UPA graphic style to cheaply produced limited animation and who have become accustomed to the photo-realistic graphics of computer animation.

Ranking the shorts by Oscar nominations, Walt Disney, Metro-Goldwyn Mayer and Warner Bros. finished first, second, and third respectively providing further support to the application which had the same ranking. Of the studios nominated but never having won an Oscar, the rankings are Walter Lantz, Columbia, Terrytoons and Fleischer (tied with four nominations), and Van Beuren and Celebrity/Ub Iwerks (tied with no nominations). The

only major differences between the Oscar nominations ranking and the application were that both Ub Iwerks and Terrytoons scored significantly higher in the application and Lantz considerably lower. The Ub Iwerks ranking can be explained by the fact the studio was in operation for a relatively short period of time and did not have the opportunity to compete in the Oscar race for the same number of years as the other majors where the studio may have garnered Oscar wins. The difference in the Lantz scores may be due to the fact that the three Lantz shorts sampled may not have been truly representative of the studio product or there was great variability in the quality of Lantz cartoons from Oscar contenders to artistic flops.

With respect to Beck's book, similar to the Oscar ranking, Walt Disney Productions, Warner Bros. and Metro-Goldwyn Mayer studio finished as the top three studios with the most shorts in the top 50 list. However, the big difference was that Warner Bros. finished first with seventeen shorts, Walt Disney was a distant second with nine and MGM had seven cartoons in the Beck listing. Unlike both the application and Oscar rankings, Beck's book had five Fleischer shorts and one Walter Lantz short in the list. Two of the Fleischer shorts listed in *50 Greatest* were Oscar nominations while the year the Lantz short (*The Barber of Seville* (1944)) listed in Beck's book was released, the Academy considered another Lantz short (*Fish Fry* (1944)) more worthy to be nominated. The Beck listing can be seen as providing support for the writer's application due to the emphasis on Disney, Warner Bros. and MGM cartoons in the list.

Contrary to Maltin's opinions that Terrytoons cartoons were substandard in comparison to the animation of the other Golden Age studios, taken as a group the shorts finished in the top half of the pack. The mean final score for the five Terry shorts placed the studio in fifth place among the ten studios. While the Terry shorts were not able to achieve the technical brilliance found in the Walt Disney, Metro-Goldwyn Mayer, and Warner Bros. cartoons, the studio placed ahead of its three New York neighbors: United Productions of America, Fleischer/Famous, and Van Beuren studios.

The fact that only four Terrytoons cartoons were nominated for an Oscar could be a direct result of indifference by their distributor in making the shorts available for viewing by Academy voters. As posited earlier in this chapter, one possible reason for Terrytoons cartoons being overlooked by voters polled in Beck's book is that most of the Terrytoons cartoons have not been seen since their theatrical release. Other than a few shorts being released on video during the 1980s and early 1990s, the vast majority of Terrytoons animated cartoons would not have been available for public viewing or readily accessible to Beck pollsters. Another reason could be the general reputation of Paul Terry as a low-budget

producer of animated cartoons without concern for the artistic quality of his product, an opinion held by Maltin as noted in his text and based on his limited research into the studio in the late 1970s. Other than Maltin's chapter on the studio, there has been very little written on the studio. Possibly, Terry's reputation discouraged further study by film scholars and critics into Terry's artistic legacy.

As posited in Chapter One, Maltin's poor opinion of Terry's product may be due to the author reaching faulty conclusions caused by the limited research he undertook on the studio. Evidence indicates that Maltin and his research associate were under significant time constraints and limited financial resources.<sup>45</sup> If Maltin had spent the time to carefully consider all the research evidence, his conclusions may have been different. Further, some of the oral histories Maltin relied upon to prepare his chapter on Terry were from former employees, many of whom were very disgruntled with the producer for not sharing part of the proceeds of the sale of the studio in 1955. The veracity of the statements from these employees must be questioned.

A number of inferences can be drawn from the study with respect to Terry's motivations to produce quality-crafted animation and his desire to create a cartoon product that was comparable to the cartoon product of the other studios. Since Terrytoons placed fifth in overall quality of cel aesthetics, the author can conclude that Terry was successful in producing animated cartoons that were comparable to the other studios during the Golden Age of American Animation. Further, by placing in the top five studios rather than the bottom five, one can claim that he produced animated cartoons with above standard cel aesthetics. While he was unable to achieve the overall success of studios such as Disney and Metro-Goldwyn Mayer, he was able to produce animated cartoons at a higher aesthetic level than production houses such as Columbia and Van Beuren. Therefore, one can reasonably infer that Terry was motivated to producing quality crafted animation.

The author has posited that Terry's success in achieving above standard cel aesthetics was due to his achievement in retaining a very small but extremely talented core group of artists throughout the 26 years he was managing the studio. Studio records and interviews of former employees revealed that Terry employed a small staff of artists to carry on the production processes at the studio.<sup>46</sup> His dedicated, gifted, and possibly overworked staff remained with him for most of their careers helping guarantee consistency in the artistic quality of the shorts as evidenced by the cel aesthetics. Further, a loyal group of gifted artists would have fostered artistic growth in the less experienced artists through training and

mentorship. However, having a stable staff of artists may possibly have restricted creativity by reducing the influx of new ideas and storylines into the cartoon plots.

Adding further support to the inference that Terry was committed to producing quality-crafted animation is Terry's score on the 4-component analysis. The 4-component analysis is the sum total score for animation, backgrounds, sound, and camera but does not factor in the time component. The study found that Terry sought and succeeded in keeping the animation, background, sound, and camera aesthetics of his cartoon product at a level of quality comparable with the finest Golden Age studios. On the 4-component analysis, Terry's cartoons finished second, although it is conceded that the Terrytoons score (68.8) was almost identical to the third (Metro-Goldwyn Mayer (68.7)) and fourth place finishers (and Warner Bros. (68.5)).

When comparing Terrytoons' 4-component and 5-component scores, one can argue that while Terry was extremely budget-conscious, his cost-cutting efforts were not at the expense of artistic quality. In an attempt to reduce production costs further, the budget-minded Terry could have undertaken a number of cost-saving changes which decisions would have negatively impacted the cel aesthetics. However, rather than retain lower paid and lesser qualified staff to cut costs and produce an inferior product in terms of the visuals and sound, Terry chose to control production expenses by limiting the length of his cartoon shorts. Of the ten studios, his cartoons were the shortest averaging 371 seconds each<sup>47</sup> when the studio average based on the sampled shorts for the ten studios was over a minute longer.<sup>48</sup>

Since the study found that Terry succeeded in producing animation with high quality cel aesthetics in terms of the on-screen visuals and sound that was comparable to the finest Golden Age animation studios, one can infer that Terry had an artistic motivation to produce animated shorts with superior animation, backgrounds, music, and camerawork. One can also infer based on the comparison of the Terrytoons' 4-component and 5-component scores that Terry made a decision to maintain high quality standards for his animated product, providing evidence that this motivation was based on a love for the animated cartoons his studio was creating. Rather than produce an inferior product in terms of the onscreen visuals and audio, Terry chose to reduce the running time of each of his animated shorts. By minimizing expensive camera motion effects and scene transitions, avoiding costly musical royalty fees, and employing a small but highly talented staff of animation artists, Terry was able to create aesthetically pleasing entertaining cartoons at a fraction of the cost of his competitors.

Based on the very small sample of Terry shorts, the cel aesthetics of the five cartoons improved over time. Considering all five major cel aesthetic elements, *Jesse and James* (1931) scored the lowest of the sampled cartoons (26<sup>th</sup>), *The Villain Still Pursued Her* (1937) finished tied for 18<sup>th</sup> place, *Free Enterprise* (1948) finished in 7<sup>th</sup> place, while *The Temperamental Lion* (1940) and *Throwing the Bull* (1946) tied for first. One can infer that the improvement in cel aesthetics was a direct result of Terry endeavoring to improve his cartoon product aided by his exceptional group of artists. If Terry was not interested in improving the quality of his product, there may have been no improvement or a decline in the quality of the cel aesthetics over time.

In addition, Terry finished in second place in the two-component analysis which aesthetics are found in the animation artwork. In order to create character animation requires a tremendous amount of staff and labour (e.g., animators, assistant animators, tracers, opaquers, colour checkers) to produce the thousands of drawings, cels, and backgrounds. Since Terry had been involved in animation production since 1915, one can make a reasonable inference that he understood that the bulk of his labour costs were tied up in the creation of the artwork. Therefore, one could logically posit that Terry was motivated to producing quality crafted animation because he was willing to expend a significant amount of capital to create animated cartoons with great visuals.

Furthermore, one could argue that the poor production quality of the cel aesthetics of Terry's earliest cartoon, *Jesse and James* (1931), was a result of Terry's thorny partnership with Frank Moser. As noted in Chapter Three, as soon as the partnership had received complaints from their distributor as to the quality of the cartoons, Terry and Moser began disagreeing on how best to improve the product. While both Terry and Moser were parsimonious managers, Moser's frugality may have been at the expense of quality crafted animated cartoons while Terry's budget-minded behaviours may not have been. If this is true, then efforts by Terry to spend the funds to make the necessary improvements required to produce animated shorts with high cel aesthetics may have been hampered by Moser's parsimony. Evidence to support this assertion comes from the fact that after the bitter Moser-Terry trial and subsequent departure of Moser in 1936 Terry made a number of changes required to improve the cel aesthetics of his animated cartoons including increasing his staff and adding a story department.

## **G. Limitations and Strengths of the Study**

In his conclusion to his dissertation, Neal-Lunsford acknowledges that being the first of its kind his study likely has significant limitations. He offers: “Future studies may establish that additional elements of analysis may be needed to make the analysis more comprehensive, or that existing elements need further refinement.”<sup>49</sup> One additional production element that should be considered for inclusion in a revision of Neal-Lunsford’s cel aesthetics methodology is the story. The animation, background, camera, and music departments were all considered in Neal-Lunsford’s cel aesthetics yet he fails to include the work of the story department, a significant creative force for the animation studio. Plot and dialogue are essential to determining the entertainment value of the final animated product. Clever banter between characters, witty humour, and a well-crafted plot that engages the viewer can turn even a poorly animated short into an entertaining cartoon.

The expense and work involved in developing an entertaining story is significant. As the time devoted by a team of story writers to craft an appealing storyline increases, so does the production expenses. However, there may be difficulty in trying to quantify the elements of a story’s cel aesthetics. Any attempt to capture which cel aesthetics to analyze in order to compare one cartoon’s story to another may not be feasible because many of the components of a story such as humour, the quality that makes something laughable or amusing, are highly subjective experiences.

The author’s system to rate the various cel aesthetic factors proved to be extremely versatile and easy to apply across all of the sampled shorts. However, important to note is that Neal-Lunsford never formulated a precise methodology to score one cartoon against another. The method used by the author was one interpretation of Neal-Lunsford’s cel aesthetics. Therefore, there should be a cautious approach taken when applying these results beyond the study. While every attempt was made to devise a point system to accurately score the factors in each of the five production components, other point systems could be developed that improve on the current one and provide different results.

To accurately rate one animated cartoon on all factors for all five production components was a very time consuming process making the rating system extremely laborious to apply for larger sample sizes. Therefore, a small manageable sample size of 26 cartoons was chosen. Although the sample size would be too small for any study of reliability and validity, the results can be used for qualitative analyses and conclusions. Another problem posed was the great care and attention that was required to carefully analyze the

various colours, character movements, background details, camera motion effects, photographic transitions, sounds, and other production aesthetics that flash across the screen. Due to the possibility of measurement error creeping into the results, each factor was scored twice to ensure that no production components were overlooked or incorrectly applied. If there were inconsistent results, the factor was rated a third time or until consistent results were obtained.

## **H. Practical Implications of the Study**

The primary practical benefit of developing an objective empirical method to rate animated shorts is that film critics, animation historians, and scholars of the animated film genre could use the system to rate one animated cartoon against another without favoritism or partiality in order to determine the technical and artistic merits of each short. Retrospective studies could be made on past award winners such as Oscar nominees and award winners to arrive at conclusions whether the judging was accurate or biased. Further, any accurate and reliable methodology that can be used to pinpoint the strengths and weaknesses of an animated short would be a valuable tool for animation studios to help improve the quality of their cartoon product.

The method could also be applied to examining the cartoons of a specific director or an artist and comparing these cartoons to his contemporaries in order to help evaluate the artistic legacy of the individual. The artist's artistic contributions could be traced to the various studios he was employed to help better understand the influence of the artist on studio production processes and the animated film genre. Further, the cel animation found in full-length features could be studied to identify any similarities or differences in the cel aesthetics between shorts and features within the same studio or between feature animated films across studios.

## **I. Future Research**

Further study should be made to determine whether the author's interpretation of Neal-Lunsford's cel aesthetics is consistent with results for other samples of Golden Age cartoons. Different samples and larger more representative sample sizes from the population could be used. Both similar and consistent results would provide validation to the rating system and indicate that the author's methodology would be useful not only to analyze shorts from the entire population of Golden Age animated shorts but for all celluloid animation produced since the birth of animation.

Different weights could be attached to the different production elements or studies could be made of various point systems used on each of the factors in an attempt to determine whether a more accurate interpretation of cel aesthetics can be devised. Future research would help in developing more simple methods to analyze cel aesthetics making large scale sampling more feasible. Specific methodologies could be devised to analyze the cel aesthetics found in animation from the silent period of animated film, 1914-1929. Finally, systems could be developed to analyze the unique aesthetics posed by computer-generated animation, as well as puppet animation, cut-out animation, pinscreen animation, and other forms of animated filmmaking.

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<sup>1</sup> Bordwell, Staiger, and Thompson, *The Classical Hollywood Cinema*, preface, xiv.

<sup>2</sup> For the purposes of this study, the Golden Age of American Animation is a period in the United States animation history that began with the advent of sound cartoons in 1928, with a peak between the second half of the 1930s and the first half of the 1940s, and continued into the early 1960s when theatrical animated shorts slowly began losing to the new medium of television animation.

<sup>3</sup> Walt Disney Productions had garnered eleven Oscars (on 35 nominations), Metro-Goldwyn-Mayer had won eight Oscars (on 22 nominations), Warner Bros. was awarded five (on 20 nominations), United Productions of America won three (on 14 nominations), and John and Faith Hubley earned one Oscar (on 1 nomination).

<sup>4</sup> During the three decade period Walter Lantz Studios earned ten nominations, George Pal had seven nominations, Columbia Pictures garnered six nominations, Fleischer Studios had four nominations, Terrytoons Studio earned four nominations, National Film Board of Canada had two nominations, and Pintoff Productions was given one nomination. All failed to win an Academy Award in the category.

<sup>5</sup> Irving, "Co Hoedeman," 31.

<sup>6</sup> The Academy's entire active membership is eligible to select Oscar winners in all categories, although in five – Animated Short Film, Live Action Short Film, Documentary Feature, Documentary Short Subject, and Foreign Language Film – members can vote only after attesting they have seen all of the nominated films in those categories. For an explanation of the decision rules in the voting process: Gehrlein and Kher, "Decision Rules for the Academy Awards."

<sup>7</sup> Maltin, *Of Mice and Magic*, 153.

<sup>8</sup> Ibid.

<sup>9</sup> Crafton, 191.

<sup>10</sup> Barrier, *Hollywood Cartoons*, 384.

<sup>11</sup> Grant, 184.

<sup>12</sup> Falk, 17.

<sup>13</sup> Daniels, 53.

<sup>14</sup> Heraldson, 217.

<sup>15</sup> Academy award nominations for Best Short Subject (Cartoon): *All Out for 'V'* (1942), *My Boy Johnny* (1944), *Mighty Mouse in Gypsy Life* (1945). After Terry sold his studio, there was one other nomination: *Sidney's Family Tree* (1958).

<sup>16</sup> Worth, "Filmography: Al Falfa in Pink Elephants."

<sup>17</sup> Textual studies in animation include: Melody, *Children's Television*; Alwitt, Anderson, Lorch, and Levin, "Preschool Children's Visual Attention"; Beagles-Roos and Gat, "Specific Impact of Radio and Television"; Busby, "Defining the Sex-Role Standard"; Lehman, *The Colored Cartoon*; Delporte, "Humour as a Strategy."

<sup>18</sup> Beck, *The 50 Greatest Cartoons*.

<sup>19</sup> Ballots were also mailed to members of the Society for Animation Studies, one hundred animation studios, and film critics at more than one hundred periodicals. No mention is made as to whether these were located outside North America. Beck, *The 50 Greatest Cartoons*, 6.

<sup>20</sup> Ibid.

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<sup>21</sup> Ibid.

<sup>22</sup> Ibid.

<sup>23</sup> Ibid.

<sup>24</sup> Neal-Lunsford, "Cel aesthetics."

<sup>25</sup> Edmonds, *Sights and Sounds*; Johnson, *Film: Space, Time, Light, and Sound*; Zettl, *Sight, Sound, Motion*; Zettl, *Television Production Handbook*.

<sup>26</sup> Neal-Lunsford references the work of Obalil, the only known work to capture the aesthetics of the animated genre in the field of stop-motion animation (Obalil, "Aesthetics of Stop-motion Animation").

<sup>27</sup> Beardsley's most noted works include: Beardsley, *Aesthetics*; Beardsley, *Possibility of Criticism*; Beardsley, *Aesthetic Point of View*; Beardsley and Wimsatt, "The Intentional Fallacy"; Beardsley and Wimsatt. "The Affective Fallacy."

<sup>28</sup> Neal-Lunsford, "Cel aesthetics," 200.

<sup>29</sup> Ibid., v.

<sup>30</sup> Ibid., 58-59.

<sup>31</sup> Ibid., 61.

<sup>32</sup> Ibid., 61-63.

<sup>33</sup> Ibid., 204-205.

<sup>34</sup> Ibid., 205-208.

<sup>35</sup> Ibid., 208.

<sup>36</sup> In order to analyze Maltin's contentions that Terrytoons cartoons were substandard when compared to the other Golden Age studios, the researcher analyzed the product output of the eleven studios that were given separate chapters in Maltin's text.

<sup>37</sup> The exact number of animated cartoons (in bold) with associated series (in italics) were: (1) Walt Disney (**545** shorts [*Mickey Mouse, Pluto, Silly Symphonies, Goofy, Chip an' Dale, Donald Duck, Figaro, Armed Forces shorts, etc.*]); (2) Columbia (**397** shorts [*Fox and Crow, Color Rhapsody, Phantasy, Barney Google, Fables, Flippy, Krazy Kat, Lil' Abner, Scrappy*]), (3) Warner Bros. (**800** shorts [*Looney Tunes, Merrie Melodies, Private Snafu, etc.*]), (4) Metro-Goldwyn Mayer (**287** shorts [*Barney Bear, Captain and the Kids, Droopy, Tom and Jerry, Happy Harmonies, Screwy Squirrel, Spike, George and Junior, etc.*]), (5) Walter Lantz (**381** shorts [*Andy Panda, Cartune Classics, Oswald the Lucky Rabbit, Woody Woodpecker, Chilly Willy, Swing Symphony, etc.*]), (6) Fleischer (**442** shorts [*Screen Songs, Betty Boop, Popeye the Sailor, Color Classics, Animated Antics, Superman, etc.*]), (7) Famous (**331** shorts [*Popeye the Sailor, Screen Songs, Superman, Casper, Little Lulu, Herman and Katnip, Noveltoons*]), (8) Van Beuren (**194** shorts [*Rainbow Parade, Tom and Jerry, The Little King, Burt Gillett's Toddle Tales, Aesop's Fables, etc.*]), (9) Ub Iwerks (Celebrity Productions) (**78** shorts [*Comicolor, Flip the Frog, Willie Whopper, etc.*]), UPA (**83** shorts [*Jolly Frolics, Gerald McBoing Boing, Mr. Magoo, Fox and Crow*]), and Terrytoons (**604** shorts [*Farmer Alfalfa, Gandy Goose, Heckle and Jeckle, Mighty Mouse, Terry Bears, Terrytoons, Little Roquefort, etc.*]).

<sup>38</sup> The range value for each of the three categories was determined by counting the number of recycled scenes in a stratified random sample of twenty-one other Golden Age shorts. The researcher found that one-third of the shorts had no recycled artwork, one-third had 1 to 5 scenes of recycled artwork, and one-third had more than five scene of recycled artwork.

<sup>39</sup> Similarly, the range value for each of the three categories was determined by counting the number of z-axis movements in a stratified random sample of twenty-one other Golden Age shorts. A similar process was followed for the other cel aesthetics production features.

<sup>40</sup> Animation is shot at 24fps usually with 12 cels per second, each cel being shot twice.

<sup>41</sup> Neal-Lunsford, "Cel aesthetics," 137.

<sup>42</sup> Ibid., 140.

<sup>43</sup> The gait was discovered by Eadweard J. Muybridge (April 9, 1830 – May 8, 1904), an English photographer, was known primarily for his early use of multiple cameras to capture motion.

<sup>44</sup> Biographical and career data on Connie Rasinski, Carlo Vinciguerra, Eddie Donnelly, Mannie Davis, and the other former Terrytoons employees detailed later in this study including Bill Hilliker, Anderson Craig, George Zaffo, John Vita, and Phil Scheib was compiled from information found in the Paul Terry Family Collection, an archive of production contracts, studio memoranda, employee records, personal letters, diary materials, studio and family correspondence, animation production materials, financial records, studio marketing materials, oral histories, artwork, genealogical information, photographs, filmstrips and other related information. Their biographies can be found in Appendix A.

<sup>45</sup> Correspondence from his research associate Jerry Beck confirmed that he did not access a number of important research sources including the Terry family archive. The research associate acknowledges

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that based on time restraints and financial resources he and Maltin did their best under the circumstances. It should be remembered that Maltin was writing a comprehensive survey book on American animation studios when at the time information gathering would require labour intensive primary research. Both Maltin and his associate devoted approximately 30 months to the research tasks, and considering the gargantuan assignment performed well under the circumstances. Jerry Beck, electronic correspondence to author, 9 September 2007.

<sup>46</sup> Morrison, interview, 14d.

<sup>47</sup> Ub Iwerks studio had the longest mean running time of 505 seconds but only one cartoon was sampled. Metro-Goldwyn Mayer finished second (476.34), Columbia Pictures was third (453.67), Van Beuren was fourth (450), Warner Bros. was fifth (439), Walt Disney Production was sixth (436.67), United Productions of America was seventh (421), Fleischer/Famous was eighth (400), and Walter Lantz ninth (396).

<sup>48</sup> The mean average time for the ten studios was 434.87 seconds.

<sup>49</sup> Neal-Lunsford, "Cel aesthetics," 208.

## VI. CONCLUSION

### A. Major Postulations Set Forth By the Author

The author claims that errors in research methodology, including the failure to consult primary research sources and reliance on inaccurate information, and the inability of film scholars and critics to access the Terrytoons cartoon library, have resulted in Terry's legacy and contributions to the nascent medium of animated cartoons being overlooked or distorted. The author asserts that contemporary film scholarship has neglected to adequately address issues underlying film interpretation and analysis because of a failure to consider the "economic practices operating as received norms of managers", an important component of the mode of production, one of the three historical progressions that form part of the unified mode of film production. In addition, the author contends that Terry was artistically motivated to produce cartoons with high quality aesthetics and that the Terry product was aesthetically comparable to much of the production output from the other Golden Age studios.

### B. "Economic Practices Operating as Received Norms of Managers": Definition and Importance

The "economic practices operating as received norms of managers" concern management decision making with respect to the other three components of the "changes in the mode of film production" historical progression as described in the Bordwell, Thompson, and Staiger model of film analysis, namely decisions with respect to a firm's labour force, means of production, and financing of production. These practices, as defined by Staiger, encompass one or more of the following four functions: (1) Direction of Investment, (2) Production Planning; (3) Production Operation; and (4) Co-ordination of Supervision. Economic practices as "received norms" for these managers as understood by Staiger is economic behaviour a manager considers to be acceptable to follow in their usual course of business.

Economic practices of managers are a critical component of the mode of production because successful financial management of the studio involves securing talented artists through adequate remuneration, controlling expenses, and ensuring that production stays on budget in an effort to maximize profits after release of the film. The stronger the financial health of a studio, the better the organization will be in a position to deal with some of the other economic and institutional issues. In addition, economic decisions regarding financing

determine the size of a studio's budget which in turn affects the quality of the cartoon product.

C. Exploring the Psychodynamics of Economic Decision Making: The Means to Better Understanding and Predicting Economic Practices

The homo economicus model of human behaviour has been greatly criticised and discredited by studies in a number of academic disciplines. Rather than relying on rational economic logic, recent evidence has found that man makes decisions based on affective responses where utility maximization is less about profit gain and more about feelings and emotions. The current unified mode of film practice advocated by Bordwell, Thompson, and Staiger fails to consider how institutional and economic forces interact with the conscious and unconscious mental, emotional and psychological processes that influence and govern the attitudes, behaviour, and personality of the filmmaker and their creative decisions.

Based on empirical research in economic psychology, three conclusions can be drawn. The first conclusion is economic decisions cannot be standardized across all individuals but are unique to each individual based on their particular psychodynamics (or underlying psychological processes that underlie their decisions). To effectively analyze the economic practices of managers requires undertaking explorations into non-rational social, cognitive, and emotional factors involved in decision making.

Second, to better analyze film we need to improve our understanding why and how a manager makes an economic decision. This requires improving our understanding of how the film manager approaches the filmmaking process, and the conscious and unconscious mental, emotional and psychological processes that influence and govern the attitudes, behaviour, and personality of the filmmaker. The final conclusion is that to understand the psychological processes underlying the economic practices of managers requires exploring the root causes of these behaviours and the historical agents that gave rise to their economic behaviour which will help in understanding and predicting future economic conduct.

D. Purposes of the Dissertation

The primary purpose of this dissertation was to re-evaluate Terry's legacy to animated cartooning by analyzing Terry's business philosophies, production values, studio practices, and animated cartoon product. As part of this evaluation process, the author expected to determine whether by factoring in the "economic practices operating as received

norms of managers” (as revealed by their economic psychodynamics) into the current “mode of film practice” model developed by Bordwell, Thompson, and Staiger helped to improve our understanding of film form, function and style. Finally, through the application of Neal-Lunsford’s cel aesthetics framework the author sought to ascertain whether the methodology helped to analyse animated cartoons in terms of their cel aesthetics qualities, and through this study intended to show how this framework can be applied to evaluate individual cartoons, particularly in terms of comparison with other cartoons.

#### E. Research Methodology

In order to accomplish the goals of the dissertation, the author uncovered the major determinants of economic decision making, applied these determinants to Terry’s economic behaviour early in his life and career (1887-1929) to develop an economic psychodynamic model for Terry, and then tested the Terry model to determine whether this behaviour remained consistent for the period he managed his studio, 1929-1955, and to establish a better understanding of his business philosophies, production values, studio practices. To analyze Terry’s artistic and creative motivations in respect to animated cartoon making and determine whether Terry was concerned for the quality of the animated cartoons he produced, the author analyzed empirical research on motivation and creativity in relation to Terry’s managerial decisions, uncovered and examined Terry’s career contributions to animated filmmaking, surveyed the talent base of the key artists Terry relied upon to complete his artistic work, and analysed the cartoon aesthetics of a sample of Golden Age cartoons ranking the Terry product in relation to the other studios.

#### F. Framework for the “Economic Practices That Operate as Received Norms for Managers”

In Chapter Two, after conducting a literature survey of empirical studies on the economic psychology of money management, the author identified four major psychodynamic forces that have been shown to influence economic decision making. The author asserts that these four forces provide the framework for the “economic practices operating as received norms” for managers which will comprise the fourth element of the unified model’s first historical progression, “changes in the mode of film production.” The four psychodynamic forces are: (1) locus of control, (2) financial saving behaviour, or the psychological underpinning or reasoning as to why we save, (3) money management ability, or skill and aptitude involved in saving and increasing financial resources, and (4) risk taking behaviour.

The author posits that the four psychodynamic factors are actively engaged in each and every economic decision made by a manager. When referring to an economic decision, the writer is referring to any event or condition that involves an exchange of an item of economic value (e.g., assets) or economic activity (e.g., service) for payment that changes the status of the finances of two or more businesses or individuals. The author also posited that each economic decision possessed a number of components which interact with the four psychodynamic factors which will then determine the economic decision of an individual: size of the investment, risk to current net worth, expected rate of return or return on investment, perception of risk, and financial security brought by the transaction. Therefore, the framework for the “economic practices that operate as received norms for managers” is an interactive model which views the four major psychodynamic factors interacting with the five components of each financial transaction which then determines a financial decision.

G. Economic Practices Operating as Received Norms for Paul Terry Based on His Economic Decision Making, 1887 - 1929

The author posits that the four factors can be applied to predict and explain the economic behaviour of individuals involved in any financial transaction. When examining the historical evidence on the economic behaviour of Paul Terry for period of 1887-1929, his four psychodynamic factors are as follows: an external locus of control, risk-averse financial behaviour, extreme saving behaviour through precaution, and shrewd money management practices. Accordingly, based on the interaction of the four psychodynamic factors for Paul Terry to the five primary financial components for each financial decision, the author posits that one can expect him to avoid large investments, keep his production budgets small, never take a substantial risk to current net worth, restrict his financial transactions to situations where there was a large expected rate of return on a relatively risk free investment, keep his assets in risk free forms of savings and investment, and seek security through long-term financial decisions pursuing secure financial transactions based on a need for emotional security.

H. Psychodynamic Analyses of Terry’s Historical Responses to Twelve Major Economic, Technological, and Institutional Forces of Change For the Period He Operated His Terrytoons Studio, 1929-1955

In Chapter Three, the author analyzed the economic practices of Terry by focusing on Terry’s historical responses to twelve major economic, technological, or institutional forces

of change during the period 1929-1955. The major economic forces of change were: (1) the Great Depression, Hollywood economics and the slump in the motion picture industry, 1929-1935, (2) rising costs of animated film production, (3) inability of animated shorts to generate box office money for film studios, and (4) the rise of the full-length animated feature film. The major technological changes were: (1) movement towards colourised shorts, (2) innovation and experimentation: stereoptical process and the multiplane camera, and (3) the introduction of television. The major institutional changes were: (1) exhibition and distribution problems with short subjects, (2) shorts given little attention by film critics, (3) poor entertainment quality of animated cartoon shorts, (4) the rise of the unions and the labour movement, and (5) the Sherman Anti-Trust Act and the end of block booking.

After having undertaken the analyses, the author found that Terry's responses to twelve major forces of change during the period 1929-1955 could be explained by considering the four psychodynamic components which comprise his managerial practices operating as received norms. Terry's managerial practices operating as received norms during the period 1929-1955 were remarkably consistent with his economic practices for the period 1887-1929 thereby providing support both for the framework of four psychodynamic components formulated in Chapter 2 as well as the importance of considering the economic practices of managers when addressing issues underlying film interpretation and analysis. By including the economic practices of managers within the current unified mode of film production, film scholars will be better able to analyze and address the interrelationships of film style, technology and mode of production through historical change.

I. Analyses of Terry's Artistic Drive and Creative Aspirations in Animated Cartoons by Applying the Psychodynamic Framework, Motivation Research, A Historical Review of Terry's Contributions to Animation, and An Assessment of Studio Talent

In Chapter Four, the author analyzed Maltin's contention that Terry operated his studio with little desire to produce quality animation involving apathy for the product he produced, an attitude he claims developed from three early experiences in the film business. The author found that an application of the psychodynamic components for the "economic practices operating as received norms of managers" to Terry's business practices, studio working conditions, and managerial decisions offer more logical explanations for his economic behaviour than Maltin's explanations. Further, after applying empirical research on motivation theory and creativity, there is no evidence to support Maltin's conclusions that any of the three incidents undermined Terry's intrinsic motivation to create animated cartoons.

When seeking other explanations for any alleged decreased levels of creativity in the Terrytoons product, the author found that two of the psychodynamic components developed for Terry are related to low levels of creativity. Terry's lack of risk-taking may have impaired his ability to try out new ideas, explore different scenarios, and imagine future possibilities – all key attributes of creativity. Further, his external locus of control may have deprived him of the attributes necessary for creativity that internals possess such as autonomy, seeking out information that might lead to change, independence of judgment, creative self-image, and self-confidence. Other factors that were identified that may have impacted Terry and his staff's creativity included external imposition of production deadlines, the competitive nature of the animation industry, Terry's difficulty in separating the financial rewards of cartoon making from the creative processes, and his practice of undertaking surveillance measures on staff.

An analysis of Terry's contributions to the field of animated cartooning found no evidence in the historical record to suggest Terry lost any passions for or artistic motivations in the field of animation. Rather, Terry made significant contributions during his career to the animated filmmaking. He was the first to use mice in animated shorts long before Disney developed Mickey Mouse, has been credited with being the first to create a synchronized sound animated cartoon, and had developed new animation technologies such as an aerial animation camera that made possible photographing together animated cels with movie-film backgrounds. Evidence also indicates that Terry expressed a deep passion for animation through his pioneering efforts in film cartoons, his dedication to improving the art and craft of animation, his active recruitment of valuable talent (e.g., Vladimir "Bill" Tytla) for his studio, his enthusiasm for designing new animation technologies, his commitment to developing new characters, gags, plots, and stories for the cartoons his studio produced, and his support of young artists, students, and children interested in careers in animation.

The author posited that the level of the artistic talent at the Terry studio is directly related to Terry's ambitions to produce entertaining and quality crafted animated shorts, a supposition supported by Terry's admission that the quality of his cartoon product depended on the artistic talent he employed at his studio. An analysis of studio talent found that contrary to Maltin's position that Terry was unable to retain talented artists at his studio, a talent survey of the key staff revealed that Terry had created a strong stable nucleus of highly skilled artists who dedicated a significant portion of their working careers for Terry. Many of these artists were formally educated and trained at some of the most important art schools in

the United States and some began employment at Terrytoons with decades of experience in animated cartoon production including work at Disney.

Since the author's analytical approach in studying Terry's business and economic practices through the first four chapters had focused primarily upon two of the three progressions which form part of the Unified Mode of Film Production, and not on the third, film stylistics, the writer analyzed the cel aesthetics (e.g., animation, background art, sound) of the animated cartoons produced by the Golden Age studios to better understand Terry's business practices and artistic motivations. Neal-Lunsford's research found that the aesthetic qualities of cel animation are related to the artistic objectives of particular animation studios thereby emphasizing the relationship between the artistic motivations of studio management and creative result. By applying the framework of analysis outlined in Neal-Lunsford's cel aesthetics to analyze the stylistics of the Terrytoons cartoons as well as the animated shorts from the other Golden Age studios, the author hoped to determine whether Terry was artistically motivated to produce cartoons with high quality aesthetics.

J. Paul Terry's Motivation to Produce Quality Crafted Animated Cartoons as Revealed Through a Comparison of the Structural Qualities of a Sample of Golden Age Animated Cartoon Shorts by Applying Neal-Lunsford's Cel Aesthetics

1. Analyses of Cel Aesthetics: A More Penetrating Methodological Approach

The author's conclusion that Terry was committed to producing engaging and visually attractive animation based on the finding that Terry employed a group of highly talented and artistically accomplished individuals presupposes that Terry was committed to producing a quality of animation commensurate with the talent level of his staff and that he believed that the gifted group of artists he had on staff was necessary to produce an entertaining and aesthetically pleasing product. Possibly Terry employed the talented group of artists simply to meet a minimal level of production quality to keep his distributor satisfied, or conceivably the production staff suffered from artistic apathy or lacked certain skills necessary to produce top notch animation. Maybe the talent base was not deep enough to produce 26 quality crafted animated cartoons each year as stipulated in the contract or perhaps Terry was unwilling to make investments in the technology required to produce aesthetically pleasing cartoons. Therefore, a more penetrating methodological approach to determining whether Terry was motivated to producing quality crafted animation is to analyze the cel aesthetics of his animated cartoons.

## 2. Neal-Lunsford's Method to Analyze Cel Aesthetics and Relevance to Terry's Motivation to Produce Aesthetically Pleasing Animated Cartoons

In Chapter Five, the author applied Jeffrey Neal-Lunsford's framework as found in his 1994 dissertation to analyze animated cartoons in terms of their cel aesthetics qualities, an applied approach which emphasizes the relationships between the production elements used in the animated cartoon making process and how these elements influenced the aesthetic attributes of a work. To create aesthetically pleasing animated cartoons requires employing skilled artists, craftsmen, and technicians, using first-class animation equipment and technology, and instituting and applying efficient and cost-effective systems and methods of operation and organization. If Terry was artistically motivated to produce quality crafted animation, then the cel aesthetics of his cartoons should exhibit a high aesthetic quality and be comparable to the product of the other Golden Age animation studios.

## 3. An Application of Neal-Lunsford's Method to Analyze Cel Aesthetics

As Neal-Lunsford did not provide a precise empirical methodology to analyze cel aesthetics, the author's application is only one interpretation of the principles outlined in the 1994 dissertation but the framework of analysis developed remained faithful to the original intent of Neal-Lunsford's aim in developing his principles: to compare the cel aesthetics qualities of the shorts produced by the various studios. A stratified random sample of twenty-six animated cartoon shorts was chosen from a population of 4,142 theatrically released animated cartoon shorts from the Golden Age of American Animation during the period Paul Terry operated his studio, 1929-1955. Each of the animated cartoons was analyzed on five production components: animation, backgrounds, soundtrack, camerawork, and time.

The scale for each of the production features was established by first viewing an independent test sample of 24 animated shorts from the Golden Age of American Animation in order to draw baseline measurements. A score was developed for each of the production components and the sample cartoons scored and categorized from highest (more superior production values) to lowest in order to compare how each cartoon ranked in relation to the other shorts. Further, a 2-component, 3-component, 4-component and 5-component scores were drafted for further analytical comparisons. After ranking the shorts based on Neal-Lunsford's aesthetic criteria, conclusions were drawn based on the quality of the cel aesthetics features of Terry's product, and inferences were made as to his artistic motivation to produce quality crafted animation.

#### 4. Empirical Results and Discussion

The application of Neal-Lunsford's method of cel aesthetics on 26 Golden Age American animated cartoons found that based on the overall mean score for the animated shorts from each of the studios Walt Disney Studios finished first, Metro-Goldwyn Mayer placed second, and Warner Bros. was third. The rest of the studios in order of placement from fourth to tenth were Ub Iwerks, Terrytoons, Fleischer/Famous, Columbia, Walter Lantz, United Productions of America, and Van Beuren.

With respect to the individual production components, the Terry product was especially strong when examining the cel aesthetics of the character animation and background art. While the soundtracks produced by the studio were not exceptional, the musical scores were original compositions, and the audio featured an effective use of sound elements on par with the other animation studios. Similarly, while the camerawork was not spectacular by lacking a broad range of motion effects, the photography was workmanlike and competently executed. Cel aesthetics found that the weakest of the five production elements was time as the mean clock time of Terry's cartoons were the shortest of the ten studios analyzed.

The empirical validity of the writer's application found support when making a comparison of the application's five component ranking of studio shorts to the studio rankings by both number of Academy Award nominations received and total Oscars won during the period 1931-1960 and Beck's top 50 listing of greatest cartoons. The fact that only four Terrytoons cartoons were nominated for an Oscar and that the Beck listing failed to include any Terrytoons cartoons can be explained by distributor indifference, limited access to the cartoon library by scholars and critics, and the poor reputation of Paul Terry discouraging further inquiry into the producer's artistic legacy. Maltin's poor opinion of Terry's cartoons can be explained by the film historian's failure to consult major research sources on the career of Paul Terry caused by time and resource constraints, and his reliance on interviews of disgruntled former employees who may have painted an uncomplimentary portrait of the later animator-producer.

#### 5. Inferences and Conclusions Drawn from the Analysis of Cel Aesthetics

Since Terrytoons placed fifth in overall quality of cel aesthetics in the top half of the pack, the author can conclude that Terry was successful in producing animated cartoons that were comparable to the other studios during the Golden Age of American Animation.

Therefore, one can reasonably infer that Terry was motivated to producing quality crafted animation. Terry's success in achieving above standard cel aesthetics may be due to his achievement in retaining a very small but extremely talented core group of artists throughout the 26 years he was managing the studio. However, having a stable staff of artists may possibly have restricted creativity by reducing the influx of new ideas and storylines into the cartoon plots.

Adding support to the inference that Terry was committed to producing quality animation is his studio's score on the four component analysis, the sum total score for the visuals and audio (i.e., animation, backgrounds, sound, and camera) without factoring in the time component. On the four component analysis, Terry's cartoons finished a distant second from Disney with a score almost identical to the third place (Metro-Goldwyn Mayer) and fourth place (Warner Bros.) finishers.

When comparing the Terrytoons' four component and five component scores, one can argue that while Terry was extremely budget-conscious, his cost-cutting efforts were not at the expense of artistic quality. Rather than retain lower paid and lesser qualified staff to cut costs and produce an inferior product in terms of the visuals and sound, Terry chose to control production expenses by limiting the length of his cartoon shorts. From this comparison, one can infer that Terry made a decision to maintain high quality standards for the visuals and audio of his animated product. Rather than produce an inferior product in terms of the onscreen aesthetics, Terry chose to reduce the running time of each of his animated shorts.

Based on the very small sample of Terry shorts, the cel aesthetics of the five cartoons improved over time. Therefore, one can infer that the improvement in cel aesthetics was a direct result of Terry endeavouring to improve his cartoon product aided by his exceptional group of artists. Furthermore, one could argue that the poor production quality of the cel aesthetics of Terry's earliest cartoon, *Jesse and James* (1931), was a result of Terry and Moser not being able to agree as to how to improve the animated cartoons. Efforts by Terry to spend the funds to make the necessary improvements required to produce animated shorts with high cel aesthetics may have been hampered by Moser's parsimony, an assertion supported by the fact that after Moser left the firm in 1936 Terry made a number of changes required to improve the cel aesthetics of his animated cartoons.

## K. Limitations

The author recognizes that psychodynamic models which attempt to analyze the underlying psychological forces that influence human behaviour, such as the one developed by the writer to analyze the economic practices operating as received norms for managers, are difficult to scientifically validate because of problems in making observations on conscious or unconscious mental processes. Nevertheless, measurement tools, as found in the academic literature on economic psychology, have been developed to quantify the four psychodynamic components that comprise the framework (i.e., financial locus of control, financial saving behaviour, financial risk taking behaviour, and money management ability). These instruments can help provide an empirical base for future studies.

In the present study on the psychodynamic analyses of Terry, the author used a single retrospective case study to draw conclusions. Most case studies suffer from poor external validity, or an inability to generalize to a larger population. Further, Terry was never formally tested using any of the measurements tools designed to measure locus of control, risk taking behaviour, or other psychodynamics. Rather, the writer relied on archival documentation to make conclusions on Terry's financial behaviour and creative motivations in animated cartoons. The selection of documentation in case studies brings up the issues of biased selectivity, reporting bias, and the tendencies by researchers to confirm preconceived notions.

With respect to the psychodynamic analyses, the author attempted to overcome issues related to the subjective nature of data collection, interpretation, and analysis in the qualitative research by using an empirical approach. First, the writer developed the framework of four psychodynamic components based on a comprehensive study of all of the extant literature on the psycho-social factors which can influence economic decision making. Second, the writer documented events occurring in the early career of Terry to develop the psychodynamic framework for Terry and then tested the framework's hypotheses using a different data set, namely reliable recorded information on Terry's economic behaviour during the latter part of his career. Third, sampling of data was not performed. Rather, the writer reviewed and applied all types and sources of data and information including oral histories, studio documentation, financial records, personal letters, animation production materials, and empirical research studies, to ensure that all relevant information on the life of Terry was considered.

The writer also understands that the empirical research on money management behaviour that went into developing the model was never intended to be used for undertaking

case studies on the financial activities of individuals. In order to compensate for this methodological weakness, the writer applied a multi-analytic approach by first determining what the scientific community has understood to be the key psychodynamic determinants of economic behaviour and then applying these variables to Terry's documented behaviour. By using several different strategies into understanding Terry's financial behaviour the author achieved consistency of results amongst the components pointing to conclusions thereby strengthening the external validity of the study.

With respect to the writer's method devised to analyze the cel aesthetics of the sample of Golden Age cartoons, it is important to note that Neal-Lunsford did not provide a precise empirical methodology of analysis in his dissertation. Therefore, the author's application is only one interpretation of the principles outlined in the 1994 academic paper. There could conceivably be other methods devised to analyze cel aesthetics based on Neal-Lunsford's work that would result in completely different findings. Further, the application rating process was very time consuming making the rating system extremely laborious to apply for larger sample sizes. Due to the small sample size, a cautious approach should be taken when applying these results beyond the study.

#### L. Applications

The primary intention of the author in creating the psychodynamic framework for the "economic practices of managers" is to assist in the creation of new knowledge in the area of film theory and analysis, or more specifically, to help lead film scholars towards a better understanding of how the psychodynamics of economic decision making affects film function, form, and style. The author hopes that the unified mode of film practice framework which incorporates another "variable into the equation," namely, the economic practices of managers, will improve our understanding of film practice. Another objective is to inspire further research and theory into the role psychodynamic factors play in the film production process. The authors concedes that while every attempt was made to identify the key psychodynamic factors involved in economic decision making, there is the possibility that with new published studies in economic psychology these factors may change.

The primary practical benefit of developing an objective empirical method to rate animated shorts is that film critics, animation historians, and scholars of the animated film genre can use the system to rate one animated cartoon against another without favouritism or partiality in order to determine the technical and artistic merits of each short. Therefore the method could be applied to help studios improve the quality of their cartoon product and help

researchers study the works of a specific director or artist. However, any further applications of Neal-Lunsford's methodology should consider the work of the story department, a significant creative force for an animation studio whose contributions were conspicuously absent from the study.

#### M. Future Research

The author has demonstrated how the psychodynamic framework helps in understanding the business decisions Terry made during his career in animation. However, the new "unified mode of production" model which has incorporated the "economic practices of managers" as part of the first of three historical progressions should be applied across other film personalities, studios, and genres to better assess value and efficacy. Comparative studies between the Bordwell, Thompson and Staiger "unified mode of film practice" and the new unified mode which incorporates the four psychodynamic components could be undertaken in order to determine whether the revised model improves our understanding of film form, function, and style and to pinpoint areas for further study. For example, exploration could be undertaken into possibly identifying other psychodynamic components that affect economic decision making that the writer may have overlooked.

Future research would help in developing more simple methods to analyze cel aesthetics making large scale sampling more feasible. Different samples and larger more representative sample sizes from the population could be used to help validate the application while different point systems and weightings could be used in an attempt to improve on the application. Finally, other applications could also be developed for rating silent, computer generated, puppet, cut-out and other forms of animation.

The writer hopes that his studies into Terry's creativity, artistic motivations, contributions to animation, and studio practices, including his research into Terry's very talented core group of artists and the cel aesthetics of his studio, will inspire further investigations into his accomplishments. Despite a large number of books written on many of the pioneers of animation, there has yet to be published an accurate and well-researched study into the life and career of Paul Houlton Terry. A book that chronicles the achievements of Terry and his talented studio staff that created a wonderful treasury of cartoon shorts would add significantly to the growing body of published knowledge on the Golden Age of Animation as well as correct and clarify Terry's legacy to the field of animated cartoons.

## APPENDIX: BIOGRAPHICAL PROFILES OF KEY TERRYTOONS ARTISTS

**BARTSCH, Arthur.**<sup>1</sup> Arthur E. Bartsch, born on November 3, 1904 in the state of New Jersey, attended the Pratt Institute, New York City and studied architecture. He later undertook art classes at the Metropolitan Art School, Grand Central Art School, and the Phoenix Art Institute in Manhattan. After working as an art director at an advertising agency, he entered the field of animated cartoon making in the early 1930s. He began work at the Van Beuren studio as a background designer and layout person working most notably on the Rainbow Parade series, 1934-36. In 1936, Bartsch moved over to Terrytoons to head the background and layout department later moving strictly into layout work around 1940 when Anderson Craig assumed the role as the background department supervisor.

By 1947, Bartsch was animating shorts along with his usual duties as layout artist for the studio. Beginning in 1958, Bartsch was assigned directorial duties on a number of Terrytoons character shorts until the studio wound down operations in 1968. His directorial work on *Sidney's Family Tree* (1958) was nominated for "Best Short Subject, Cartoons," by the Academy in 1959. In addition to theatrical animation, Bartsch helped produce television commercials for CBS Animation, 1961-62. Bartsch was also active in illustrating Terrytoons comic books (e.g., St. John Publishing/Jubilee; K.K. Publications/Dell Comics) and many of the covers can be credited to him. He also illustrated children's books. About 1969, Bartsch moved to Chicago to work as an art director in television. Bartsch was involved in helping to build playrooms and completed interior design work in many Westchester county homes. He was ambidextrous with his artistic talent and was a member of the National Cartoonists Society. Bartsch died in Chicago, Illinois in 1971.

**CRAIG, Anderson.**<sup>2</sup> Anderson Craig, born on April 15, 1904 in Iowa City, Iowa, undertook design and illustration courses at the Kansas City Art Institute and School of Design, Kansas City, Missouri, 1922-1923 and 1925 studying under painter, lithographer Randall Vernon Davey. Anderson moved to New York City where in 1928 he founded the Experimental School of Art at his small home studio while also completing portrait commissions, most notably a series of paintings of celebrities (e.g., Theodore Dreiser and George Gershwin) for the Ferargil galleries.

Despite a number of exhibitions and sales of his works, the economic problems of the early 1930s caused problems in locating commissions so Craig found work at the Terrytoons Studio as a background artist. In the background department Craig would work alongside fellow artists George Zaffo, John Vita and Bill Hilliker, all of whom would establish strong

reputations as talented artists both in the animation industry and the New York City commercial and fine art sectors. The animation backgrounds of the Terrytoons cartoons of the late 1930s and 1940s were brilliantly rendered and much admired by other animation artists, scholars, and critics including Leonard Maltin.<sup>3</sup>

In 1942, Craig painted the portrait of Edward P. Stuart posing as Uncle Sam for a navy poster. The poster won a contest and was widely used in World War II. By the mid-1940s, Craig was appointed head of the background department and was also supplementing his Terrytoons income by working evenings as a freelance advertising artist illustrating magazine advertisements. After holding the position as background artist for over 15 years he left the studio in the early 1950s where he opened his own small animation studio undertaking commercial work in New York City. By 1960 Craig had moved to Massachusetts where he was employed as an art director for the Bay State Film Productions, a motion picture and slide production company for business industry and television. Craig died in Massachusetts in 1964.

**DAVIS, Emanuel.**<sup>4</sup> Emanuel “Mannie” Davis, born on January 23, 1894 in Yonkers, New York, was raised in an artistic family. Three of his brothers were involved in the animated cartoon field including Art (Warner Bros.), Phil (Charles Mintz, Columbia Pictures/Screen Gems, Hanna-Barbera), and Sid (Columbia Pictures/Screen Gems). Davis was a graduate of Cooper Union Art School, one of the most selective colleges in the United States, where he studied for two years and continued his art studies for another year at the Art Students’ League. He started his artistic career in the art department of the American Press Association Syndicate doing “dingbats” (decorative art) and small sketches for the stories.

Around 1916, Davis began his animation career animating for Raoul Barré and Charles Bowers on the Mutt and Jeff series with Bud Fisher. During World War I he served as a cartographer and Corporal in the 472nd Engineers, Washington, D.C. and animated medical and training films before being discharged in 1918. He returned to Barré-Bowers on the Mutt and Jeff series, eventually running the studio with Burt Gillett, where Davis stayed until 1921. He then worked for about a year alongside Otto Messmer for Pat Sullivan, producer of Felix the Cat cartoons. In 1922, he animated shorts for the Fleischer Studio on the Out of the Inkwell series (Koko the Clown and Betty Boop).

By 1924, he had moved to animate Aesop’s Fables shorts at Fables Pictures for Paul Terry and by 1927 was directing shorts at the studio. After Terry departed in 1929, under the newly organized Van Beuren studio, Davis was involved as an animator, character designer,

and director for the company while creating the Cubby Bear (Brownie Bear) character. In 1933, Davis moved over to Terrytoons where he undertook animation and directorial duties on shorts featuring most of the Terrytoons characters. In 1942, Mannie Davis directed *All Out for "V"*, an animated short that was nominated for an Academy Award and won special commendation from the United States government for wartime service. Davis retired from CBS-Terrytoons around 1963 after thirty years of service for the company. He is credited with being the first to combine live actors with animation on the screen. He was a member of the National Cartoonists Society. Davis died in New York City in 1975.

**DONNELLY, Edwin Eugene.**<sup>5</sup> Eddie Donnelly, born on April 4, 1896 in Brooklyn, New York, completed art studies at the Art Students League. His first position was as a cartoonist on the staff of the Morse Dry Dock Company illustrating advertisements for the company's sales magazine. He then spent three years as a newspaper (political) cartoonist for such newspapers as the *New York World*. In the early 1920s, he worked as a cartoonist for the newspaper *The New Era* (later the *South Shore Press*).

Donnelly started his animation career around 1923 as a tracer for Fable's Pictures working on the Aesop's Fables series and Farmer Alfalfa cartoons later animating shorts. After Terry departed in 1929, Donnelly remained with the newly formed Van Beuren studios as an animator through the early 1930's. Donnelly moved to California around 1932 and animated Silly Symphony shorts at Walt Disney Studios. In 1933, he moved back east and joined Terrytoons as an animator and in 1937 was promoted to directorial status animating and directing cartoons. In 1955, after Terry sold the studio, Donnelly moved away from directing and concentrated on animating a number of series.

In addition to his Terrytoons work, for a brief period Donnelly worked for a commercial studio in New York City doing animated television commercials and animated segments for the television show *Beat the Clock*. Donnelly retired about 1962. Ed Donnelly's significant career achievements include directing the Terrytoons short *My Boy, Johnny* (May 1944) that was nominated for an Academy Award in 1944 for "Best Animated Short Subject". Donnelly's other artistic pursuits included woodworking and miniature model making. His elaborate reproduction in miniature of the New York skyline and waterfront won him recognition in the New York press when the *New York American* and *New York Herald-Tribune* gave the model set prominent photographic display. Donnelly died in Hewlett, New York in 1979.

**FOSTER, John J.**<sup>6</sup> John Foster, born in Hoboken, New Jersey on November 27, 1886, with only amateur art experience began illustrating at Raoul Barré's cartoon unit at the Edison company studio in the Bronx, New York in 1915 creating Mutt and Jeff animated cartoons. By 1917, Foster was animating the Katzenjammer Kids series for Hearst's International Film Service. In early 1919, following military service, he returned to work for Hearst International Features Service at Cosmopolitan Studios as an animator on the Goldwyn-Bray Comic series - the Happy Hooligan, Shenanigan Kids, and Judge Rummy cartoons that were being adapted from the comic strips.<sup>7</sup> In 1923, he joined Fables Pictures working with Paul Terry on Farmer Al Falfa and Aesop's Fables cartoons being promoted to animation director in 1927.

After Van Beuren and Paul Terry parted company in 1929, Foster stayed with Van Beuren until 1933 working as a director on the Aesop's Sound Film Fables series and also running production. In 1934, Foster was animating commercials for Audio Productions/Ashton B. Collins. Around 1935, he rejoined Paul Terry as animator at the Terrytoons studio and by 1937 began directing Terrytoons shorts. Foster is credited with creating the character Gandy the Goose as well as directing *String Bean Jack* (Aug. 1938), the first Terrytoons colourised short.

In 1937, Paul Terry organized a story department, based upon advice by his ex-partner Frank Moser, and put Thomas Morrison in charge. John Foster, who had a natural knack for comedy,<sup>8</sup> and had developed a strong reputation among peers as a brilliant writer,<sup>9</sup> succeeded Morrison as department head about a year later. From 1938 to his retirement in late 1949 due to illness, although assisted by other writers, Foster was solely credited with the story work for every Terrytoons cartoon, over 250 cartoons. While in the story department, Foster was admired as an inventive idea man creating humorous gag situations, imaginative plots, and engaging storylines. Foster died in New Rochelle, New York in 1959.

**HILLIKER, Douglas H. "Bill".**<sup>10</sup> Douglas Hilliker, born on May 25, 1891 in San Francisco, California, worked in an artistic capacity for a San Francisco newspaper before moving to New York City to be employed as an illustrator. After the First World War, he became a freelance painter where his artwork was used on the covers of such magazines as *Colliers* and *Saturday Evening Post*. He also painted pictures of movie celebrities and completed illustration work for motion picture posters and other advertisements for the entertainment business.

By 1930, he was working as a commercial artist in New York City, while also completing illustrations and cover art for books and magazines. In the early 1940s, Hilliker was hired at the Terrytoons studio as a background painter where he became a valuable addition to a staff that consistently rendered very attractive and life-like landscapes, interior scenes, and other set pieces for the animation. By the early 1950s, when Craig had left the studio, Hilliker was promoted to head of the background department at Terrytoons. By this time Hilliker was financially secure as a result of sizeable earnings generated from his career in commercial art.<sup>11</sup> After the sale of Terrytoons to CBS in 1955, Hilliker remained with the studio until his retirement in 1959.<sup>12</sup> Hilliker died in New London, Connecticut in 1986.

**KUWAHARA, Robert S.**<sup>13</sup> Robert Kuwahara, born Rokuro Kuwahara, near Tokyo, Japan on August 12, 1901, immigrated to the United States with his family in 1910, settled in Los Angeles, California, and graduated from the Los Angeles Polytechnic High School in 1921. In 1929, he graduated with an art degree from the Otis Art Institute where he studied drawing and painting. In May 1929, he went off to New York City where he worked as a commercial illustrator. After the stock market crash in October 1929, Kuwahara returned to California to work as a story man/story sketch artist and story director at Walt Disney Studios, 1932 – 1937. His credits include the Silly Symphony shorts, Mickey Mouse cartoons, and the feature film *Snow White and the Seven Dwarfs* (1937).

In 1937, Kuwahara moved to the new MGM cartoon unit and worked on sets/backgrounds until 1942. After the start of World War II, he was evacuated from the Pacific Coast and spent three years in a Japanese internment camp, Heart Mountain Relocation Camp, in Wyoming. After his release, Kuwahara resettled in the summer of 1945 to Larchmont, New York. He began writing the stories and doing the artwork on a new comic strip *Little Miki* for the George Matthew Adams syndicate that was very popular in Europe earning Kuwahara large publication royalties.

In 1949, Kuwahara started working at the Terrytoons studio as a character designer and story man moving into directing animated shorts in 1959. As a result of a United Feature Syndicate contest, Kuwahara created the popular comic strip *Marvelous Mike* in 1956. While at Terrytoons, Kuwahara's most notable creation was Japanese house mouse Hashimoto San. The backgrounds to the Hashimoto cartoons he painted were in the style of Japanese artist Hokusai Katsushika (1760-1849). He also created the Lariat Sam character for the Captain Kangaroo television program and did artwork for the Terrytoons comic books and Terrytoons Barker Bill comic strip.

In 1951, he was awarded an honour medal from the Freedom Foundation at Columbia University for “outstanding achievement in bringing about a better understanding of the American way of life through the field of cartooning.” He was a member of the National Cartoonists Society and the Cartoonists Local 841. Kuwahara died in 1964 in New Rochelle, New York while still actively engaged in animation work at the Terrytoons studio.

**MORRISON, Thomas James.**<sup>14</sup> Thomas Morrison, born April 22, 1908, in Brooklyn, New York (other source: Larchmont, New York), joined Terrytoons as an apprentice about 1932 washing and cleaning celluloid and working in the camera department. Morrison then headed up the inking and painting department, 1934-35, later moving to work as in-betweener. He then worked briefly as an assistant animator, was promoted to production manager, and afterwards headed the story department for a year beginning in 1937. When John Foster was put in charge of the story department, Morrison worked under him writing many of the gags for the cartoons.

Morrison was a versatile artist working in most aspects of the cartoon business at Terrytoons including writing lyrics for the cartoons, doing voice work on theatrical characters (Little Roquefort, Percy the Cat, Gandy Goose) and television animation (Mighty Mouse for CBS), and inventing sound effects with various noisemakers and gadgets. In 1950, after Foster retired, Morrison headed the story department providing creative contributions to all of the stories. By the late 1950s Morrison found time to only edit the stories of other writers while continuing to contribute occasional story ideas until the studio stopped production in 1968. After CBS acquired the studio in 1955, he became voice director directing the dialog and acquiring all the voice talent. He also worked in the control room helping Phil Scheib and the sound engineer determine the proper orchestral balance when creating the musical score.

Outside of his studio duties, Morrison found time to write and edit animated television commercials, create material for comic strips, and edit stories for Terrytoons comic books (St. John Publishing, 1949-55). He also wrote and directed plays, appeared in numerous radio skits, dabbled in make-up, and wrote modern music. Tom Morrison retired from Terrytoons in 1973 after Viacom International Enterprises had assumed control. He was also member of the National Cartoonists Society. Morrison died in Cape Coral, Florida in 1978.

**RASINSKI, J. Conrad “Connie”.**<sup>15</sup> John Conrad “Connie” Rasinski, born in Torrington, Connecticut on January 28, 1907, exhibited great artistic promise as a child. He studied under Norman Rockwell at the Phoenix Art Institute in New York. Upon the advice of Rockwell,

Rasinski decided to pursue a career in cartooning. He undertook newspaper work in Waterbury, Connecticut as an artist and then pursued freelancing work for the Bell Publishing Company along with a number of humorous publications specializing in political cartoons and caricatures of local politicians.

In 1929, Rasinski joined the new Terrytoons studio working as an opaquer and by 1931 he had gained full animator's status. In 1937, Paul Terry appointed him a director of animation. After Isidore Klein created the Super Mouse character that first appeared in *The Mouse of Tomorrow* (1942), Rasinski went about redesigning the character into the now more familiar Mighty Mouse. Rasinski's reputation in the industry led Disney to offer him the opportunity to join his company as animator but Rasinski declined the invitation preferring to remain on the east coast near his family.

During World War II, while working at Terrytoons, Rasinski completed security animation films for the United States military. He also worked on animated television commercials and directed television cartoons (e.g., *The Adventures of Lariat Sam*). During his time at Terrytoons, Rasinski also undertook studies for two years at the Art Students League. Rasinski was a great educator in the art and craft of animation and would teach night courses on animation techniques to artists at Terrytoons. Rasinski worked as an artist on Gandy Goose, Mighty Mouse and Heckle & Jeckle comics for St. John Publishing, 1949-54. He was a member of the National Cartoonists Society.

In assessing Rasinski's legacy, both former co-workers and modern day animation scholars consider him to be one of the greatest animator-directors from the Golden Age of Animation.<sup>16</sup> Rasinski's sudden passing on October 13, 1965 caused Terrytoons executive producer William Weiss to close the studio for the day.<sup>17</sup> The Academy of Motion Picture Arts and Science nominated Rasinski's animated-directed *Mighty Mouse in Gypsy Life* (1945) for "Best Short Subject, Cartoons," 1946. Today, Connie Rasinski's animation drawings and comic book artwork are much admired and collected by fans around the world. Rasinski died in Larchmont, New York in 1965.

**SCHEIB, Philip A.**<sup>18</sup> Philip Scheib, born in Brooklyn, New York on April 14, 1894, graduated from the University of Berlin in Germany where he studied piano, violin, composition, and conducting. He completed a four-year musical course at the prestigious Stern Conservatory of Music in Berlin and graduated with an honorary diploma and a degree of pedagogy in 1914. He performed in a musical tour of Oscar Straus' *Chocolate*

*Soldier* and during World War I toured North American army camps as a violinist in concerts/recitals for the Thomas A. Edison Company.

He found work as a violinist and assistant conductor at the Strand Theater (N.Y.) adding live musical accompaniment to motion pictures, later was a musical director for Adelaide and Hughes. Over a ten year period he was a composer and musical director for a Broadway chain of theatres, with headquarters at the Adelphi Theater, primarily working on musical comedies and vaudeville. In 1920, he introduced audience participation singing in vaudeville theatres, using song slides. He also was musical director for a Canadian circuit of theatres.

Entering the field of motion picture production, Scheib became the musical director for Audio-Cinema and producer-director David W. Griffith writing the original musical score for Griffith's first sound film *The Struggle* (1931). In 1929, he began to undertake the musical work on Terrytoons cartoons while finding time to act as the musical director on two Dr. Seuss cartoons produced at the Audio Cinema facilities in 1931. When Audio-Cinema went bankrupt, Scheib was hired as musical director at Terrytoons where he worked until his retirement.

For over 30 years, Scheib was the Terrytoons musical director composing, arranging, and conducting original scores for all of the Terrytoons cartoons. He was responsible for almost 1,000 original scores composing music including the lyrics (and in the case of the operatic cartoons, the librettos) for every Terrytoons cartoon produced from 1930 to 1963. He was also the originator of numerous innovations for animated cartoons and television commercials. The fact that Terry refused to pay royalties for popular songs forced Scheib to compose his own scores. Therefore, Scheib was likely the busiest musical director amongst the Golden Age composers. Scheib retired in 1965. Scheib was a member of the Associated Musicians of Greater New York and the American Federation of Musicians, Local 802. Scheib died in New Rochelle, New York in 1969.

**TYER, James.**<sup>19</sup> James H. Tyer, born February 7, 1904 in Bridgeport, Connecticut, began his career in animation working at Fables Pictures Studios in the 1920s. After Terry left the studio in 1929, Tyer stayed with Van Beuren and was appointed director at the studio in 1933. He was assigned directorial duties on *The Little King* and *Toddle Tales* series, 1933 - 1934. Tyer left Van Beuren in 1935 to work at Walt Disney Studios in the effects animation department where he stayed for a few months then moved to Harman-Ising Studio working as a gagman and storywriter for Rudy Ising's unit.

In 1937, MGM did not renew Harman-Ising's contract so Tyer and his family moved to Detroit where he worked for the Jam Handy studio on animated commercials for Chevrolet. By the end of 1938, Tyer moved to Florida to work for the Fleischer brothers later moving with the new company, Famous Studios, back to New York. Tyer remained with the company until 1946 while directing and writing the very first Famous Studios Popeye cartoon.

By the time Tyer was hired at Terrytoons he had over 20 years in the animation business. He stayed with Terrytoons for almost twelve years as animator. He also worked in the story department and did comic artwork beginning in the late 1940's. After Paul Terry sold the studio to CBS in January 1956, Tyer left for Shamus Culhane's studio, the largest producer of commercial animation, where Tyer served as senior animator. After six to nine months, Tyer returned to work for the new CBS-Terrytoons under Gene Deitch for a few years.

Tyer then moved to the newly organized Felix the Cat Productions to produce television animation (e.g., Felix; Mighty Hercules) for Trans-Lux Television until September 1961. Tyer also completed freelance animation for Treasure Films (a "Billy Bounce" pilot), Hal Seeger Productions (Out of the Inkwell, 1963; Milton the Monster, 1964; and Batfink, 1966-67), and animation on Paramount's Snuffy Smith cartoons in 1963. He worked as a journeyman animator for Hanna-Barbera from mid-1967 to November 1968 then spent two and a half years on the Fritz the Cat animated motion picture but left in early 1971 because he was unhappy with the pornographic content. Tyer passed on in 1976 in Connecticut.

Tyer's animation did not follow the classical style of animation as best exemplified at the Disney studio. His characters were animated as if held together by loose, stretchy or stringy substances.<sup>20</sup> While Tyer saved Terry labour costs as he animated without an assistant or in-betweener, his zany style added a new dimension of humour to the Terry cartoons generated on how people performed.<sup>21</sup> Tyer's work has been carefully evaluated and appreciated by critics. New York animator Tony Eastman made an independent film in homage to Tyer's style titled *TV Baby*.<sup>22</sup> Further, Tyer is noted to have influenced leading animation personalities of the next generation (e.g., Ralph Bakshi, Howard Beckerman, Don Caulfield, Jack Dazzo, Chuck Harriton).

**VINCIGUERRA, Carlo Anthony.**<sup>23</sup> Carlo Vinciguerra, born on February 27, 1906 in New York, New York, showed artistic talent at a very early age. After graduating from high

school, he was awarded a scholarship at the prestigious National Academy of Design where he received a full classical arts education, studied for four years, and graduated with honours. In 1929, he was awarded a silver medal, the highest award for craftsmanship from the Tiffany Foundation Fellowship. From 1921 to 1932, he worked as an artist in the commercial art sector. He drew murals, landscapes for homes and business offices, and also did commercial stained glass.

In 1933, he began work at the Terrytoons studio and within a year rose to animator status specializing in difficult to animate scenes that required expressive acting, dancing, and graceful movement. After briefly working at Van Beuren studios, he moved back to Terrytoons in 1936 and remained with the studio for close to twenty years as animator except for briefly working at the Fletcher Smith studio in September 1947 during the Terrytoons strike. Vinci left Terrytoons around 1955 to animate at MGM on the Droopy, Tom and Jerry, and Spike and Tyke shorts, then worked for about 18 months at Walt Disney Studios on TV projects, and free-lanced as an animator for Paul Fennell who was doing animated commercials for television.

He was hired as one of the first three animators at the new Hanna Barbera studio in 1957 where he would work for over twenty years. At Hanna Barbera he became known as the “Master of the Flintstones” for his ability to deliver quality work at an amazingly fast pace. Vinci is noted for animating the first Flintstone episode single-handedly, and was responsible for animating an entire 24-minute episode every six weeks. He also worked as an animator for Bakshi/Krantz on *Heavy Traffic* (1973). Vinciguerra was also a comic book artist and illustrated the Flintstones characters for *Harper’s* magazine. He has been the recipient of a number of art awards. He was exhibited at the National Academy Gallery, New York City, American Art Gallery, New York City, and Grand Central Gallery, New York City. Vinciguerra retired at the age of 72. Vinciguerra died in 1993 in Thousand Oaks, California.

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<sup>1</sup> Biographical data for Mr. Bartsch was compiled from Fox’s *Dynamo* (Twentieth Century-Fox Film Corporation, “Terrytoon Creators: Arthur Bartsch,” *Dynamo* (Terrytoons Section), 15 April 1940, Chicago, Illinois, 8B), and his National Cartoonists Society biography (“Art Bartsch,” in *The National Cartoonists Society Album 1996, Fiftieth Anniversary Edition*, Bill Janocha, ed. (Buffalo, New York: National Cartoonists Society, 1996), 316).

<sup>2</sup> Biographical data for Craig was compiled from interviews with his family as found in the Paul Terry Papers, his biography in art directories (“Craig, Anderson,” *Mantle Fielding’s Dictionary*), and his obituaries (“Anderson Craig,” *Springfield Union*; “Anderson Craig, Sr.,” *Sunday Republican*).

<sup>3</sup> Maltin, *Of Mice and Magic*, 142.

<sup>4</sup> Biographical data for Mr. Davis was primarily compiled from the Deneroff interview (Davis, interview, 28 July 1970) and his obituaries (“Emanuel Davis,” (Obituaries); “Emanuel Davis,” (Obituary)). Also helpful was Twentieth Century-Fox’s special promotional magazine on Terrytoons (Twentieth Century-Fox Film Corporation, “Experts Are Born: Emanuel Davis,” *Dynamo* (Terrytoons Section), 15 April 1940, Chicago, Illinois, 5B) and his National Cartoonists Society biography

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(“Mannie Davis,” in *The National Cartoonists Society Album 1996, Fiftieth Anniversary Edition*, Bill Janocha, ed. (Buffalo, New York: National Cartoonists Society, 1996), 325).

<sup>5</sup> Biographical data for Mr. Donnelly was primarily compiled from the interviews and letters with Donnelly’s second wife, Polly Bourne Donnelly (Paul Terry Papers), and Twentieth Century-Fox’s special promotional magazine on Terrytoons (Twentieth Century-Fox Film Corporation, “Terrytoon Who’s Who: Eddie Donnelly,” *Dynamo* (Terrytoons Section), 15 April 1940, Chicago, Illinois, 4B).

<sup>6</sup> Biographical data for Foster was primarily compiled from 2 articles (“John Foster,” *The Standard-Star*; John Foster” (Obituary News)) and Fox’s *Dynamo* (Twentieth Century-Fox Film Corporation, “Terrytoon Creators: John Foster,” *Dynamo* (Terrytoons Section), 15 April 1940, Chicago, Illinois, 5B).

<sup>7</sup> Other sources indicate he left Barré and didn’t animate for Hearst on the Katzenjammer Kids series until after he returned from his war service but by then the series was completed with the last cartoon theatrically released in August 1918.

<sup>8</sup> Terry, interview, 20 December 1969, 49. Terry, interview, 13 June 1970, 106.

<sup>9</sup> Morrison, interview, 11d. Davis, interview, 24e.

<sup>10</sup> Biographical data for Hilliker was primarily compiled from reminiscences of Hilliker by Beaver River residents (Thompson, *Beaver River*) and interviews of his co-workers as found in the Paul Terry Papers.

<sup>11</sup> Focht, interview, 4.

<sup>12</sup> *Ibid.*

<sup>13</sup> Biographical data for Mr. Kuwahara was compiled from his obituary (“Kawahara, Cartoonist”(Obituary News)), his National Cartoonists Society biography (“Bob Kuwahara,” in *The National Cartoonists Society Album 1996, Fiftieth Anniversary Edition*, Bill Janocha, ed. (Buffalo, New York: National Cartoonists Society, 1996), 350), and an interview of his son (Kuwahara, interview).

<sup>14</sup> Biographical data for Morrison was primarily compiled from the Deneroff interview (Morrison, interview), Fox’s *Dynamo* (Twentieth Century-Fox Film Corporation, “Experts are Born: Thomas Morrison,” *Dynamo* (Terrytoons Section), 15 April 1940, Chicago, Illinois, 4B), and his obituary (“Thomas Morrison of Terrytoons Dies.”).

<sup>15</sup> Biographical data for Mr. Rasinski was compiled from a number of sources including interviews of his family as found in the Paul Terry Papers, his obituary (“J.C. Rasinski, Terrytoons Director Dies”), Fox’s *Dynamo* (Twentieth Century-Fox Film Corporation, “Experts Are Born: Connie Rasinski,” *Dynamo* (Terrytoons Section), 15 April 1940, Chicago, Illinois, 8B), and his National Cartoonists Society biography (“J. Conrad “Connie” Rasinski,” in *The National Cartoonists Society Album 1996, Fiftieth Anniversary Edition*, Bill Janocha, ed. (Buffalo, New York: National Cartoonists Society, 1996), 363).

<sup>16</sup> Zander, interview, 1. Tarricone, interview, 3. Gray, interview, 3. Bell, interview, 3. Weiss, interview, 20c.

<sup>17</sup> Focht, interview, 6-7.

<sup>18</sup> Biographical data for Mr. Scheib was primarily compiled from Fox’s *Dynamo* (Twentieth Century-Fox Film Corporation, “Terrytoon Who’s Who: Philip Scheib,” *Dynamo* (Terrytoons Section), 15 April 1940, Chicago, Illinois, 4B), a newspaper article covering his early career (Cushman, “New Rochellean Contributes.”), his obituary (“Philip Scheib,” *Standard Star*), and a few directories (“Scheib, Philip A.” *International Motion Picture Almanac*).

<sup>19</sup> Biographical data for Mr. Tyer was primarily retrieved from the articles: Friedwald, “Mighty Jim Tyer.”; Beck, “Comical Tyer.”; Mayerson, “Curly Howard of Cartoons.”; Bakshi, “Ralph Bakshi on Jim Tyer.”

<sup>20</sup> Friedwald, “Mighty Jim Tyer,” 30. Mayerson, “Curly Howard of Cartoons,” 41.

<sup>21</sup> Mayerson, 42.

<sup>22</sup> *Ibid.*, 43, 50-51.

<sup>23</sup> Biographical data for Vinci was primarily compiled from a number of interviews with Vinci’s former co-workers and the online ASIFA biographical article (Worth, “Vinci, Carlo.”).

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