

# Hollywood and its Global Audiences

## *A Comparative Study of the Biggest Box Office Hits in the United States and Outside the United States Since the 1970s*

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For almost a century, film industry representatives, politicians, scholars and cultural commentators have been debating the relationship between Hollywood and the world beyond the borders of the United States.<sup>1</sup> Non-American film audiences play a two-fold role in these debates. On the one hand, there is a widespread assumption that Hollywood exports have long been very successful in cinemas (and later also on television, video and DVD) around the world and that, therefore, Hollywood has played an important part in the life of non-American film audiences, exerting various kinds of cultural and ideological influence on them, which are usually subsumed under the heading 'Americanisation'.<sup>2</sup> On the other hand, precisely because Hollywood's successful exports have generated a considerable share of the industry's overall income, the film preferences and objections of non-American audiences (the latter often mediated through censorship boards and other official organisations in particular countries) can in turn be assumed to have played an important part in the operations of Hollywood and influencing its output.<sup>3</sup>

As Joseph Garncarz has pointed out, the discussion of Hollywood's success around the world has traditionally relied on figures relating to supply – that is, to Hollywood's share of all films released in a particular country – rather than to demand, expressed as Hollywood's share of total ticket sales in that country (Garncarz, 1994, p. 96). His analysis of the German market across much of the twentieth century strongly suggests that Hollywood's often dominant share of film

supply in countries around the world has rarely translated into an equivalent share of ticket sales; indeed, before the 1980s, in countries such as West Germany, France and Japan, Hollywood's share of box-office revenues tended to be less than 50%, with the majority of revenues going to domestic productions and imports from neighbouring countries.<sup>4</sup> Investigations of Hollywood's influence around the world have to take these limits of its success into account, and may also usefully concentrate on those Hollywood imports that are most successful in each country (Krämer, 2005a). At the same time, if the number of widely successful Hollywood exports is not as large as is often assumed, it is important to identify those outstanding films that do in fact succeed in a range of countries because they are in the most likely position to exert some kind of global influence.

Reversing the perspective, the influence that audiences around the world can exert on Hollywood's output usually depends on the share of Hollywood's overall income generated in their countries. This in turn depends on the relative size of that market, the share of ticket sales (as well as television, video and DVD sales) going to Hollywood films, and the exchange rate between the local currency and the dollar. Hence it is worth determining precisely in which countries Hollywood earns most of its export revenues. Additionally, one might ask which films earn the lion's share of this export income (presumably by being successful with audiences in all or most of the major export markets), because Hollywood will be more inclined to invest in the types of film that repeatedly perform extremely well abroad than in those that are consistently less successful. This raises the further question of whether Hollywood's biggest export hits are the same films, or at least the same types of films, as its greatest domestic successes (in which case the film preferences of foreign audiences would not make much difference to Hollywood's operations), or whether the two sets of hits form different patterns (in which case the distinctive pattern of export hits might influence Hollywood's output).

This chapter offers a comparative study of Hollywood's domestic and foreign theatrical markets since the 1970s, leaving non-theatrical film markets and developments up to the 1970s aside for future research.<sup>5</sup> The first section identifies which foreign markets generate most of Hollywood's export revenues for theatrical releases, relating them to the total world cinema market and the total world population, and demonstrating that Hollywood earns most of its foreign theatrical revenues in a small number of highly developed mid-sized countries. The second section compares Hollywood's biggest theatrical hits in its domestic market since 1977 with its biggest theatrical hits in foreign markets, outlining both overlap and differences along generic and thematic lines between the two lists. The third section then offers a case study of one of Hollywood's biggest foreign markets, comparing German box-office charts with their American counterparts and showing that some of the differences between the two are in line with the differences explored in the previous section, while others are specific to Germany.

## Major Export Markets

Hollywood has long been dependent on income from the theatrical release of its films outside the United States. Since World War II, the share of Hollywood's total theatrical revenues coming from abroad has been in the region of 30–50%.<sup>6</sup> The majority of Hollywood's revenues from foreign theatrical distribution come from a small number of countries. *Screen Finance* calculated in 1989 that 70% of the rental income of the major Hollywood studios from outside the United States came from Japan, Canada, France, West Germany, the UK, Italy, Spain and Australia (listed here in order of market share).<sup>7</sup> In 1999, the share of total non-US theatrical revenues for both the major studios and American independents coming from these eight markets was about 80%.<sup>8</sup> These eight countries contain less than 10% of the world's population outside the United States, and only about a fifth of the world's cinema screens outside the United States.<sup>9</sup> What is more, average annual cinema admissions per head in these eight countries were much lower than they were, for example, in India, Singapore and Hong Kong, and not much higher than they were in many other countries in the world: in 1997, for example, the annual average was 1.12 cinema admissions per head in Japan, compared to 0.93 in much more populous Indonesia (Acland, 2003, pp. 250–255).

The eight markets making up the vast majority of the American film industry's international theatrical revenues account for only a small fraction of worldwide paid cinema admissions. Indeed, ticket sales in India alone have far exceeded ticket sales in Hollywood's eight main foreign markets, and in the 1980s the same was true for ticket sales in China (Acland, 2003, pp. 253–255). The huge number of admissions in foreign markets outside these eight countries do not translate into substantial box-office income for Hollywood for several reasons. Most obviously, the market share of US exports in those countries may be comparatively small. In the two largest markets in terms of cinema admissions since the 1970s, India and China, Hollywood has accounted for only a small share of paid admissions (Lent, 2008, p. 280; Govil, 2008, p. 286). More generally, ticket prices in developing countries are much lower, and unfavourable exchange rates may prevent box-office income from translating into substantial amounts of dollars.

This brief overview suggests two cautions concerning claims about Hollywood's influence on global audiences, and the influence of global audiences on Hollywood. Firstly, with regard to India, China and other of the world's most populous countries, the exposure of cinemagoers to Hollywood movies on the big screen is probably extremely limited.<sup>10</sup> Secondly, despite the tremendous growth potential for Hollywood exports in the world's most populous countries, the majority of Hollywood's export revenues since the 1970s have consistently come from a few mid-sized countries, and only the cinemagoers in these countries are likely to have exerted any influence on Hollywood's output. But are their film preferences different from those of American audiences?

## Domestic Versus Export Hits

For several years, Hollywood has made box-office returns from foreign markets publicly available through its trade press and various websites. The most accessible source for these data is the Internet Movie Database's 'All-Time Non-USA Box Office' chart (<http://www.imdb.com/boxoffice/alltimegross?region-non-us>). As with most available box-office data, the IMDb includes Canadian revenues with those for the domestic US market, so that 'non-USA' in fact means: outside the United States and Canada.<sup>11</sup> The chart lists all films with a box office gross of \$100 million or more outside the United States and Canada. Because of ticket price inflation around the world and fluctuating exchange rates, the revenue figures given for films in this chart are not comparable across decades, but the scale of these variations can be significantly reduced by breaking the chart down into 5-year periods. The IMDb chart does not include a single film made before the 1970s, and only three films made before 1977: *The Godfather* (1972), *The Exorcist* (1973) and *Jaws* (1975). From 1977 onwards, however, several films from each year appear on it. For this and other reasons to do with changing hit patterns in the United States and Canada before and after 1977, I have chosen 1977 as my starting point (Krämer, 2005b). For each 5-year period, I have listed the 10 top grossing films outside the United States and Canada in Table 9.1, as well as the 10 top domestic hits.<sup>12</sup>

There is considerable overlap between the two lists and, on average, six titles appear in both top tens in each 5-year period. Examining the films that do not make it into both top ten lists provides some indication of which broad types of Hollywood product fare better in which market. Only four of the animated films in the domestic top tens are also in the foreign top tens: *Beauty and the Beast* (1991), *Aladdin* (1992), *The Lion King* (1994) and *Finding Nemo* (2003). The domestic animated hits that do not make it into the foreign top tens are: *Toy Story* (1995), *Toy Story 2* (1999), *Shrek* (2001), *Monsters Inc.* (2001) and *Shrek 2* (2004). While one might expect animation to transfer with particular ease from one country to the rest of the world, the received wisdom that humour on the big screen is difficult to export may find some confirmation here; after all, these animated films are comedies. In addition, there are a range of other comedies that appear in the domestic but not in the foreign top ten lists: *Smokey and the Bandit* (1977), *Animal House* (1978), *Tootsie* (1982), *Ghostbusters* (1984), *Beverly Hills Cop* (1984), *Three Men and A Baby* (1987), *Mrs Doubtfire* (1993) and *How the Grinch Stole Christmas* (2000).

It is worth noting that these are not primarily romantic comedies (although several of these films, especially *Smokey and the Bandit* and *Tootsie*, feature romantic relationships). By comparison, films placing a strong emphasis on romantic comedy frequently appear in both top tens, most notably *Pretty Woman* (1990), but also *Grease*, *Aladdin* and *Beauty and the Beast*, as well as the more action-oriented *Crocodile Dundee* (1986). Romantic dramas also tend to appear in both charts, especially when they are infused with a sense of tragedy or loss, most notably in the case of

**Table 9.1** Top grossing films in the United States and Canada, and outside the United States and Canada. Box-office figures are not adjusted for inflation or for changing exchange rates. They include revenues from re-releases. Films that do *not* appear in both the domestic and the foreign top ten are in bold italics.

<i>Top grossing films in the United States and Canada</i>	<i>Top grossing films outside the United States and Canada</i>
1977–1981	
1 <i>Star Wars</i> (1977, \$461 m)	<i>Star Wars</i> (1977, \$337 m)
2 <i>The Empire Strikes Back</i> (1980, \$290 m)	<i>The Empire Strikes Back</i> (1980, \$244 m)
3 <i>Raiders of the Lost Ark</i> (1981, \$242 m)	<i>Grease</i> (1978, \$199 m)
4 <i>Grease</i> (1978, \$181 m)	<i>Close Encounters of the Third Kind</i> (1977, \$172 m)
5 <b><i>Animal House</i></b> (1978, \$142 m)	<i>Superman</i> (1978, \$155 m)
6 <i>Superman</i> (1978, \$134 m)	<b><i>Saturday Night Fever</i></b> (1977, \$143 m)
7 <i>Close Encounters of the Third Kind</i> (1977, \$128 m)	<i>Raiders of the Lost Ark</i> (1981, \$142 m)
8 <b><i>Smokey and the Bandit</i></b> (1977, \$127 m)	<b><i>Moonraker</i></b> (1979, \$140 m)
9 <b><i>On Golden Pond</i></b> (1981, \$119 m)	<b><i>The Spy Who Loved Me</i></b> (1977, \$139 m)
10 <b><i>Superman II</i></b> (1980, \$108 m)	<b><i>For Your Eyes Only</i></b> (1981, \$133 m)
1982–86	
1 <i>E.T.</i> (1982, \$444 m)	<i>E.T.</i> (1982, \$322 m)
2 <i>Return of the Jedi</i> (1983, \$309 m)	<i>Return of the Jedi</i> (1983, \$264 m)
3 <b><i>Ghostbusters</i></b> (1984, \$239 m)	<b><i>Rocky IV</i></b> (1985, \$173 m)
4 <b><i>Beverly Hills Cop</i></b> (1984, \$244 m)	<i>Top Gun</i> (1986, \$168 m)
5 <i>Back to the Future</i> (1985, \$211 m)	<i>Crocodile Dundee</i> (1986, \$154 m)
6 <i>Indiana Jones and the Temple of Doom</i> (1984, \$180 m)	<i>Indiana Jones and the Temple of Doom</i> (1984, \$153 m)
7 <b><i>Tootsie</i></b> (1982, \$177 m)	<b><i>Out of Africa</i></b> (1985, \$152 m)
8 <i>Top Gun</i> (1986, \$177 m)	<i>Rambo: First Blood Part II</i> (1985, \$150 m)
9 <i>Crocodile Dundee</i> (1986, \$175 m)	<i>Back to the Future</i> (1985, \$140 m)
10 <i>Rambo: First Blood Part II</i> (1985, \$150 m)	<b><i>Octopussy</i></b> (1983, \$116 m)
1987–91	
1 <i>Home Alone</i> (1990, \$286 m)	<i>Terminator 2</i> (1991, \$312 m)
2 <b><i>Batman</i></b> (1989, \$251 m)	<i>Ghost</i> (1990, \$300 m)
3 <i>Ghost</i> (1990, \$218 m)	<i>Indiana Jones and the Last Crusade</i> (1989, \$298 m)
4 <i>Terminator 2</i> (1991, \$205 m)	<i>Pretty Woman</i> (1990, \$285 m)
5 <i>Indiana Jones and the Last Crusade</i> (1989, \$197 m)	<i>Home Alone</i> (1990, \$248 m)
6 <i>Dances With Wolves</i> (1990, \$184 m)	<i>Rain Man</i> (1988, \$240 m)
7 <i>Pretty Woman</i> (1990, \$178 m)	<i>Dances With Wolves</i> (1990, \$240 m)
8 <i>Rain Man</i> (1988, \$173 m)	<b><i>Robin Hood</i></b> (1991, \$225 m)
9 <i>Beauty and the Beast</i> (1991, \$171 m)	<b><i>Back to the Future II</i></b> (1989, \$214 m)
10 <b><i>Three Men and a Baby</i></b> (1987, \$168 m)	<i>Beauty and the Beast</i> (1991, \$207 m)
1992–96	
1 <i>Jurassic Park</i> (1993, \$357 m)	<i>Jurassic Park</i> (1993, \$563 m)
2 <i>Forrest Gump</i> (1994, \$330 m)	<i>Independence Day</i> (1996, \$505 m)
3 <i>The Lion King</i> (1994, \$328 m)	<i>The Lion King</i> (1994, \$455 m)
4 <i>Independence Day</i> (1996, \$306 m)	<i>Forrest Gump</i> (1994, \$350 m)
5 <i>Twister</i> (1996, \$242 m)	<b><i>The Bodyguard</i></b> (1992, \$289 m)
6 <b><i>Mrs Doubtfire</i></b> (1993, \$219 m)	<i>Aladdin</i> (1992, \$285 m)

(continued)

**Table 9.1** (Cont'd).

<i>Top grossing films in the United States and Canada</i>	<i>Top grossing films outside the United States and Canada</i>
7 <i>Aladdin</i> (1992, \$217 m)	<b>Mission: Impossible</b> (1996, \$272 m)
8 <b>Toy Story</b> (1995, \$192 m)	<b>Die Hard with a Vengeance</b> (1995, \$265 m)
9 <b>Batman Forever</b> (1995, \$184 m)	Twister (1996, \$253 m)
10 <b>The Fugitive</b> (1993, \$184 m)	<b>Se7en</b> (1995, \$250 m)
1997–2001	
1 <i>Titanic</i> (1997, \$601 m)	<i>Titanic</i> (1997, \$1,235 m)
2 <i>Star Wars: Episode I – The Phantom Menace</i> (1999, \$431 m)	<i>Harry Potter and the Philosopher’s Stone</i> (2001, \$651 m)
3 <i>Harry Potter and the Sorcerer’s Stone</i> (2001, \$318 m)	<i>The Lord of the Rings: The Fellowship of the Ring</i> (2001, \$547 m)
4 <i>The Lord of the Rings: The Fellowship of the Ring</i> (2001, \$314 m)	<i>Star Wars: Episode I – The Phantom Menace</i> (1999, \$491 m)
5 <i>The Sixth Sense</i> (1999, \$294 m)	<b>The Lost World: Jurassic Park</b> (1997, \$385 m)
6 <b>Shrek</b> (2001, \$268 m)	<i>The Sixth Sense</i> (1999, \$368 m)
7 <b>How the Grinch Stole Christmas</b> (2000, \$260 m)	<b>Armageddon</b> (1998, \$353 m)
8 <b>Monsters, Inc.</b> (2001, \$256 m)	<i>Men in Black</i> (1997, \$337 m)
9 <i>Men in Black</i> (1997, \$250 m)	<b>Mission: Impossible II</b> (2000, \$330 m)
10 <b>Toy Story 2</b> (1999, \$246 m)	<b>The Matrix</b> (1999, \$285 m)
2002–06	
1 <b>Shrek 2</b> (2004, \$436 m)	<i>The Lord of the Rings: The Return of the King</i> (2003, \$752 m)
2 <i>Pirates of the Caribbean: Dead Man’s Chest</i> (2006, \$423 m)	<i>Pirates of the Caribbean: Dead Man’s Chest</i> (2006, \$637 m)
3 <b>Spider-Man</b> (2002, \$408 m)	<b>Harry Potter and the Chamber of Secrets</b> (2002, \$604 m)
4 <i>Star Wars: Episode III: Revenge of the Sith</i> (2005, \$380 m)	<b>Harry Potter and the Goblet of Fire</b> (2005, \$602 m)
5 <i>The Lord of the Rings: The Return of the King</i> (2003, \$377 m)	<i>The Lord of the Rings: The Two Towers</i> (2002, \$581 m)
6 <b>Spider-Man 2</b> (2004, \$373 m)	<b>Harry Potter and the Prisoner of Azkaban</b> (2004, \$540 m)
7 <b>The Passion of the Christ</b> (2004, \$370 m)	<b>The Da Vinci Code</b> (2006, \$540 m)
8 <i>The Lord of the Rings: The Two Towers</i> (2002, \$340 m)	<i>Finding Nemo</i> (2003, \$525 m)
9 <i>Finding Nemo</i> (2003, \$340 m)	<i>Star Wars: Episode III – Revenge of the Sith</i> (2005, \$468 m)
10 <b>Star Wars: Episode II – Attack of the Clones</b> (2002, \$311 m)	<b>The Matrix Reloaded</b> (2003, \$454 m)

Source: Internet Movie Database, <http://www.imdb.com/boxoffice/alltimegross>, <http://www.imdb.com/boxoffice/alltimegross?region-non-us>, accessed 12 August 2007.

*Ghost* (1990) and *Titanic* (1997); one might also include *Forrest Gump* (1994) here. Two similarly inflected romantic dramas, *Out of Africa* (1985) and *The Bodyguard* (1992), are in the foreign top ten lists but not in the domestic ones, supporting the overall impression created by these lists that romantic dramas do better outside the United States and Canada.

Films based on classic American comic strips are significantly less successful in foreign markets. Only *Superman* (1978) appears in both lists, while *Superman II* (1980), *Batman* (1989), *Batman Forever* (1995), *Spider-Man* (2002) and *Spider-Man 2* (2004) only appear in the domestic top tens.<sup>13</sup> Similarly, the adaptation of the classic American children's book *How the Grinch Stole Christmas* only makes it into the domestic top ten list. At the same time, many films based on well-known non-American source material (usually British novels) in the foreign top tens fail to make it into the domestic top tens, including four James Bond films, *Out of Africa* (based on a Danish novel) and three Harry Potter adaptations (only the first is in both lists); one could also add *Robin Hood: Prince of Thieves* (1991) as it is based on a legendary figure in English history. Among the adaptations of foreign source material that do appear in the domestic top ten, two have changed the originals' foreign settings into American settings: *Three Men and a Baby*, which is a remake of a French movie (*Trois Hommes et un Couffin*, 1985), and *Mrs Doubtfire*, which is an adaptation of a British children's novel (*Alias Madame Doubtfire*, 1988).

Perhaps not surprisingly, films with foreign settings, often featuring foreign actors, are much more prominent in the foreign top tens than in the domestic ones: *Rocky IV* (1985, partly set in Russia), *Mission: Impossible* (1996, Europe), *The Lost World: Jurassic Park* (1997, exotic island), *Mission: Impossible II* (2000, Australia), *The Da Vinci Code* (2006, Europe).<sup>14</sup> Of course, many of the fantasy, futuristic and animated films appearing in both sets of top tens have non-American settings featuring some non-American actors, but the tendency for hit movies to do so is much more pronounced in the foreign top tens. By contrast, almost all of the (largely non-romantic) non-animated comedies that failed to translate their domestic success into a place on the foreign top tens have American settings and stars.

Finally, there are hints at other possible patterns. For example, the presence of *Se7en* (1995) in the foreign top ten and its absence from the domestic list might indicate that extremely violent films do better in foreign markets than in the United States and Canada. Similarly, the fact that *The Passion of the Christ* (2004) has been more successful domestically than abroad could indicate the greater resonance of emphatically Christian films in the United States and Canada. There is also an indication that the status of star vehicles for African Americans may have changed. The biggest such domestic hit before 1997, the Eddie Murphy vehicle *Beverly Hills Cop* (1984), does not make it into the foreign top ten, but the Will Smith vehicle *Men in Black* (1997) is in both lists.

It is also important to compare the actual domestic and foreign earnings of films, rather than just their respective rankings. To begin with, some general

observations can be made. During the decade 1977–86, films appearing in both top ten lists tend to have higher earnings in the domestic market than abroad. After 1986, this relationship is reversed.<sup>15</sup> Indeed, for several films appearing in both top tens, such as *Terminator 2* (1991), *Pretty Woman* (1990) and *Independence Day* (1996), foreign earnings are about 50% higher than the domestic earnings. In extreme cases, foreign earnings are twice as high as the domestic figure: *Titanic* (1997), *Harry Potter and the Philosopher's Stone* (2001) and *The Lord of the Rings: The Return of the King* (2003). Set against this general trend, it is possible to identify some exceptional films. For example, *Close Encounters of the Third Kind* (1977) made more money abroad than domestically during a period when most top ten films did better domestically. Conversely, *Home Alone* (1990) did better domestically when most other top ten films during this period earned more abroad, while *Forrest Gump* (1994) and *Twister* (1996) were among the few top ten films after 1986 to earn almost as much domestically as in the foreign market.

These exceptional films broadly support the patterns identified earlier, emphasising the success in foreign markets of romantic comedies and dramas and films based on foreign source material, while non-romantic comedies (both animated and live action) often fail to translate their domestic success into the same level of profitability in foreign markets. Perhaps the comparatively low foreign earnings of *Forrest Gump* (when compared to the film's domestic earnings) relate to the earlier observation that films that are rooted too specifically in particular aspects of American popular culture often fail to replicate their domestic success abroad. On the other hand, the comparatively high foreign earnings of *Close Encounters of the Third Kind*, *Terminator 2* and *Independence Day* suggest that films dealing with transformative events for humanity as a whole (encounters with extraterrestrials of a redemptive or destructive nature, the imminent destruction of most of mankind by computers) can have a particularly strong appeal in foreign markets (Krämer, 2009).

The potential importance of such divergent hit patterns for Hollywood's operations is indicated by the substantial share of the industry's total theatrical revenues that is generated by a small number of big hits. In 2000, for example, the major studios had foreign theatrical revenues of \$6.6 billion. *Mission: Impossible II*, one of the top ten export hits of 1997–2001, but not on the equivalent domestic list, earned 5% of these \$6.6 billion, while *How the Grinch Stole Christmas*, a film on the domestic list but not the foreign one, earned 3.5% of the \$7.5 billion total US theatrical revenues (Hayes, 2001). If the differences between domestic and foreign hit patterns observed for the limited number of films discussed here also applied to a wider range of films (e.g. the annual top ten, which between them usually account for about a quarter of Hollywood's theatrical revenues), then it is conceivable that export markets could exert a distinctive influence on Hollywood's output by, for example, encouraging the production of romantic comedies and dramas, and of films with non-American settings and those based on foreign source material.

## Case Study: Germany

Since the 1970s, Germany has been one of Hollywood's main sources of export revenues, making up around 10% of Hollywood's foreign box office (Krämer, 2008, p. 242). Until the early 1970s, West German box-office charts were dominated by domestic productions, in conjunction with imports from Austria in the 1950s and from other European countries in the 1960s.<sup>16</sup> Hollywood imports only rose to a very prominent position during the 1970s and only came to dominate the annual top ten list in the 1980s. Comparing the annual top ten hits in West Germany (until 1990) and the reunified Germany (after 1990) with those in the United States and Canada reveals considerable overlap.<sup>17</sup> There are, however, some striking differences, including the continuing presence of one or two German productions or European imports in each year's German charts. Continuing trends established in the late 1960s and early 1970s, certain kinds of American imports achieved much higher levels of success in Germany than in their domestic market. This applies especially to Disney films and to erotic films: *Mandingo* was the seventh highest grossing film in West Germany in 1975; *Caligula* fourth in 1980, and *The Blue Lagoon* tenth in 1981; none of these were in the domestic top ten.

In sharp contrast to the virtual absence of traditional Disney productions from the domestic top ten until 1989, it is remarkable that the company placed on average one animated feature or live action children's film per year in the West German top ten between 1975 and 1988, taking one of the two top positions on six occasions.<sup>18</sup> West German audiences' enthusiasm for animation, in evidence since the late 1960s, also supported Disney's rivals, notably ex-Disney animator Don Bluth, whose films *The Secret of NIMH* (sixth in 1982) and *The Land Before Time* (seventh in 1989) were much more successful in West Germany than in the United States and Canada. After 1990, Hollywood animation was about as prominent in the German top tens as it was in the American/Canadian top tens, although the animated films making it into the respective top tens were not necessarily the same. The German preference for animation before 1989 indicates that Hollywood animation can travel well across national borders, while the variations found after 1990 confirm my earlier observation that huge success for Hollywood's animated features in the domestic market does not always translate into the same level of success abroad.

Like animated films, James Bond films were also much more successful in West Germany in the 1970s and 1980s than they were in the United States and Canada, where they disappeared from the domestic top ten list for over a decade after *Octopussy* (1983). In West Germany, however, *Never Say Never Again* was fifth in 1984, *A View to a Kill* seventh in 1985, *The Living Daylights* fourth in 1987, and *License to Kill* fifth in 1989. A noticeable difference between the German and American charts concerns films relating to the Nazi era and war. In the wake of the top ten success of the German documentary *Hitler – Eine Karriere* (*Hitler, a Career*), Ingmar Bergman's Nazi drama *Das Schlangenei* (*The Serpent's Egg*, a German-American co-production), and the epic United Artists release *A Bridge Too Far* in 1977, a range

of films about World War II and also about other wars appeared in the West German top ten list, including several Hollywood productions that did not make it into the domestic top ten. As part of this general trend at the West German box office, a series of Vietnam movies became major hits: *Apocalypse Now* (sixth in 1979); *First Blood* (seventh in 1983), *Rambo: First Blood Part II* (fourth in 1985), *Platoon* (sixth in 1987) and *Full Metal Jacket* (ninth in 1983). While *Apocalypse Now*, *Rambo II* and *Platoon* also entered the domestic top ten, the West German market quite surprisingly generated a larger number of top ten hits about the Vietnam war.

A striking feature of the German top ten is the outstanding success of romantic comedies and romantic dramas, which took one of the two top positions in the annual charts from the mid-1980s to the mid-1990s much more frequently than such films did in the United States and Canada. The high point of the reign of romances came in the mid-1980s, when three West German productions, the comedy *Männer* (*Men*, 1986) and two romantic farces featuring TV comedian Otto, *Otto – Der Film* (*Otto – The Movie*, 1985) and *Otto – Der neue Film* (*Otto – The New Movie*, 1987), occupied first place. American imports profiting from this trend included *Out of Africa* (second in 1986), *The Bodyguard* (second in 1993) and *While You Were Sleeping* (second in 1994), whereas the success of *Basic Instinct* (first in 1992) echoes the appearance of sexually explicit films in the German top ten of earlier decades. While most of these Hollywood imports also featured in the domestic top tens, they were ranked much lower. These observations about the German market are in line with my earlier discussion of Hollywood's foreign markets in general.

In addition to conducting such comparisons between the annual top tens, we can also compare the top grossing films across a longer period.<sup>19</sup> The lists of the 30 highest grossing films from 1990 to 2004 in the United States and Germany both include the romantic epics *Titanic* (by far the most popular film in both markets) and *Forrest Gump*, as well as a number of animated, science fiction, fantasy and action films with strong romantic storylines. The German list also includes the straightforwardly romantic imports *Pretty Woman* (1990), *The Bodyguard* (1992) and *What Women Want* (2000) as well as the sex comedies *American Pie* (1999) and *American Pie 2* (2001), again indicating that sexually explicit material and romantic films do better in Germany than in the United States and Canada. By contrast, films featuring classic American comic strip characters or based on classic American children's books do much better in their domestic market than in Germany: neither of the two *Spider-Man* movies nor *How the Grinch Stole Christmas* replicated their domestic success. The German list also includes much more English material: it features the British slapstick comedy *Bean* (1997) and includes all of the first three Harry Potter films – whereas only one of them makes the American list. The *Lord of the Rings* trilogy also ranks much higher, providing a further example of the differences between Hollywood's domestic and foreign markets discussed in the first section of this chapter.

The most obvious difference between the lists of the most popular films in Germany and the United States and Canada is, not surprisingly, the former's German bias. The top 30 for 1990–2004 include the German-themed Hollywood

import *Schindler's List* (1993) as well as the German comedies *Der bewegte Mann* (1995), *Der Schuh des Manitou* (*Manitou's Shoe*, 2001), *Good Bye, Lenin!* (2003), *(T) Raumschiff Surprise – Periode 1* (*Dreamship Surprise, Period 1*, 2004) and *7 Zwerge – Männer allein im Wald* (*Seven Dwarfs*, 2004). Even in the new millennium, individual German productions, especially those featuring TV comedians, have competed with Hollywood imports in the German market as successfully as the Otto films and *Männer* did in the 1980s. The German example would, therefore, lead us to expect that even in those countries with a preponderance of Hollywood imports in their annual charts, the top grossing films of recent years are likely to include a small number of domestic productions, and that the Hollywood hits in those countries will form some distinctive patterns. Even though audiences in different countries may share a strong inclination towards Hollywood, they still make distinctive film choices.

## Conclusion

As an audience study, the preceding discussion is obviously very limited. Audiences feature only as abstract aggregates; actual people or sociologically profiled social groups are absent from it. As a comparative study of domestic and foreign hit patterns, it also has severe limitations. It focuses only on the top ten movies for each 5-year period, is merely observational and looks only at broad generic and thematic trends. A much wider range of films could be selected, statistical analysis could be employed, and a broader range of factors (ranging from budgets to the presence of stars) could be examined.<sup>20</sup> Alternatively, a more qualitative approach could be taken, exploring the textual meanings and attractions offered by individual films in more detail, examining the marketing materials that frame their reception, analysing the responses of critics and cultural commentators, and conducting surveys, focus group discussions or interviews about these films with actual audience members (see, e.g., Barker and Mathijs, 2008). Furthermore, the focus of this study has been only on theatrical exhibition when in fact most Hollywood films since the 1970s have been viewed on the small screen (through television broadcasts, video and DVD), and since the mid-1980s Hollywood has generated most of its income through video and later DVD. Finally, the study has largely been concerned with patterns discernible fairly consistently across a 30-year period, rather than with changes taking place within those 30 years, or with longer-term processes of historical change.<sup>21</sup>

Having said all this, my preliminary investigation has illuminated two points that may prompt future research. Firstly, much greater attention needs to be paid to those countries in which most of the world's population lives (notably China, India, Indonesia, Brazil, Pakistan, Bangladesh and Russia, which between them contain half of the world's population), and in which most film viewing takes place. These markets have only generated a tiny portion of Hollywood's overall income, and Hollywood films in turn have probably had only a small, even negligible presence

in most of them.<sup>22</sup> Secondly, a film's success at the American box office does not always translate straightforwardly into success abroad; both the export market as a whole (perceived in terms of financial returns rather than in terms of ticket sales) and individual countries are characterised by distinctive hit patterns. It continues to be worth asking why this is so, and what these similarities and differences might tell us about the cultural exchanges between the populations of different countries after a century of 'Americanisation'.

## Notes

- 1 See, for example, Kristin Thompson, *Exporting Entertainment: America in the World Film Market 1907–1934* (London: BFI, 1985); and Deniz Göktürk, *Künstler, Cowboys, Ingenieure: Kultur- und mediengeschichtliche Studien zu deutschen Amerika-Texten 1912–1920* (München: Wilhelm Fink Verlag, 1998).
- 2 For a recent critical summary of debates about 'Americanisation' see Richard Maltby, 'Introduction: "The Americanisation of the World"', in Melvyn Stokes and Richard Maltby (eds), *Hollywood Abroad: Audiences and Cultural Exchange* (London: BFI, 2004), pp. 1–20.
- 3 See, for example, Stephen Prince's comments on the importance of foreign markets for the careers of action stars Sylvester Stallone and Arnold Schwarzenegger, in *A New Pot of Gold: Hollywood Under the Electronic Rainbow, 1980–1989* (Berkeley: University of California Press, 2000), pp. 175, 183; Ruth Vasey, *The World According to Hollywood, 1918–1939* (Exeter: University of Exeter Press, 1997).
- 4 David Waterman, *Hollywood's Road to Riches* (Cambridge, MA: Harvard University Press, 2005), pp. 4, 158, 182. Waterman concludes (on p. 273): 'other things equal, movie patrons prefer domestically produced movie content.'
- 5 For a discussion of one European market, The Netherlands, in the 1930s, see Clara Pafort-Overduin (Chapter 6) in this volume.
- 6 David A. Cook, *Lost Illusions: American Cinema in the Shadow of Watergate and Vietnam* (New York: Scribner's, 2000), p. 21. Kerry Segrave, *American Films Abroad: Hollywood's Domination of the World's Movie Screens from the 1890s to the Present* (Jefferson: McFarland, 1997), pp. 287–288. Figures can vary considerably from source to source, depending on whether only the major studios or all American production companies are counted, and on whether Canada is included as part of the domestic rather than the foreign market.
- 7 Soaring Overseas Demand Creates Studio Upheaval. *Screen Finance*, 17 May 1989, p. 10.
- 8 Int'l Shrinks for Studios, Boosts Indies. *Screen International*, 28 July 2000, p. 6.
- 9 *The Economist, Pocket World in Figures 2007. A Concise Edition* (London: Profile Books, 2007).
- 10 This is not to deny that these films may be more widely viewed on television, video and DVD, or that the films dominating the cinema screens may be influenced by Hollywood productions.
- 11 Canadian revenues make up around 5% of US revenues. Soaring Overseas Demand Creates Studio Upheaval, *Screen Finance*, 17 May 1989, pp. 8–10; and Acland (2003), p. 6.
- 12 It should be noted that box-office figures include revenues from much later re-releases, which means that initially films such as the *Star Wars* trilogy and *E.T.* were not quite as far ahead of the competition as they are here; nevertheless, their top rankings are not dependent on the inclusion of re-release revenues.
- 13 *Men in Black* (1997), which appears in both lists, was based on an obscure comic strip first published in 1990.
- 14 Considering their post-apocalyptic settings, *The Matrix* (1999) and *The Matrix Reloaded* (2003) could also be included here.
- 15 This is not simply a consequence of the general increase in revenues from foreign theatrical markets. Throughout the 1980s, the share of the American film industry's box-office revenues coming from outside the United States remained fairly stable, with only a slight rise at the very

- end of the decade. See 'Soaring Overseas Demand Creates Studio Upheaval', *Screen Finance*, 17 May 1989, pp. 8–9. A somewhat more volatile picture (with a decline of export revenues share at the beginning of the decade and an increase at the end) emerges from statistics provided in Segrave, K. (1997) *American Films Abroad: Hollywood's Domination of the World's Movie Screens from the 1890s to the Present*. McFarland, Jefferson, NC, p. 288.
- 16 Both the charts and a thorough analysis of the major trends within them, in particular the changing role of Hollywood imports, can be found in Garncarz (1994), pp. 94–135.
- 17 For the German market, I have used the charts up to 1990 reprinted in Garncarz's essay and, for the period after 1990, I have used the annual charts printed in one of the January issues of the German trade paper *Filmecho/Filmwoche*. For the American charts I have used data from a range of sources, which all rely on the American trade paper *Variety*. Unfortunately, the (West) German charts do not account for a film's total ticket sales, but only for sales within a given calendar year, whereas the American/Canadian charts I have compiled are based on a film's total ticket sales. Hence, films released late in the year are likely to do much better in the American/Canadian chart. Although the figures in the two charts are not, therefore, exactly comparable, their differences do not invalidate the broad conclusions I draw from them.
- 18 *Robin Hood*, second in 1975; *The Rescuers*, second in 1978; *The Jungle Book*, first in 1980 and second in 1988; *The Aristocats*, second in 1981; and *The Fox and the Hound*, first in 1982.
- 19 The list for the United States and Canada is derived from Box Office Mojo, 'Domestic Grosses Adjusted for Ticket Price Inflation' (<http://www.boxoffice-mojo.com/alltime/adjusted.htm>), accessed 13 August 2007; the German list is derived from figures published in German trade papers since 1990.
- 20 See, for example, the analysis of generic patterns in annual hit lists in David Waterman, *Hollywood's Road to Riches* (Cambridge, MA: Harvard University Press, 2005), pp. 226–227, 320–324.
- 21 For a study of changes in hit patterns from the 1940s to the 1980s in the US, see Krämer (2005b).
- 22 It is worth keeping in mind what Jeremy Tunstall has recently concluded about American media influences: 'Even in small population countries the majority of audience time goes to national media. In larger population countries the national, regional, local, and across-the-border media typically achieve audiences between 6 and 12 times those of global or American media.' Jeremy Tunstall, *The Media Were American: U.S. Mass Media in Decline* (New York: Oxford University Press, 2008), p. 10.

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