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Universal Pictures had a good year in 2015. By summer, the studio’s annual film slate resulted in a string of mid-budget theatrical hits including *Fifty Shades of Grey* and *Pitch Perfect 2* that complemented blockbuster series instalments *Jurassic World* and *Furious 7* performing record-breaking numbers (McNary, 2015a). Anne Thompson credits Universal’s strategic targeting of wider demographics with films focusing on female, African-American, and Latino audiences domestically as well as broader global markets (A. Thompson, 2015). Even as industry analysts and scholars bemoan twenty-first-century Hollywood as the age of blockbuster franchising and ‘sequelitis’, for some Universal’s film slate may signal a larger shift in an industry production and distribution cycle towards more culturally specific content and targeted audiences (Levin, 2010; Goldstein, 2011). Universal is not alone in this move to specialise, as Sony, Fox, Warner Bros., Paramount, and Disney have also been developing and experimenting with strategies to reach new markets and audiences. Particularly in the past two decades, the majors have expanded their approach to markets outside North America and English-language territories. Through an array of production and distribution models to localise and adapt their content for key territories, Hollywood is actively changing the way it thinks about the international film business.

The importance of the global marketplace for major American film companies coalesced around World War I. The studios have maintained a consistent, albeit constantly evolving, presence in local markets outside North America for over one hundred years. However, in recent decades, filmed entertainment divisions of Sony, Warner Bros., Fox, Paramount, Universal, and Disney increasingly have come to rely on worldwide theatrical revenue (Balio, 2013; K. Thompson, 1985). In an annual theatrical market report, the Motion Picture Association of America (MPAA) illustrated that the North American market (US and Canada) has plateaued around $11 billion, in contrast to the continued growth across European, Middle Eastern and African (EMEA), Asia Pacific, and Latin American regions, which increased from $22.4 billion in 2011 to $27.2 billion in 2016 (MPAA, 2016). International film markets out-earn domestic by more than two to one, and successful studio tentpoles now make most of their theatrical gross abroad.
This stark ratio also breaks down on the individual film level. One of 2015’s top-grossing summer releases, *Jurassic World*, earned $652 million in North America; international receipts topped $1 billion (B. Lang, 2016).

Common studio logic works to explain the waning domestic box office and increased reliance on international markets. A ‘battle of the theatrical box office’ narrative drives industry and popular press coverage of Hollywood film divisions and their conglomerate parents. US-based trade headlines, such as *The Wrap*’s ‘Why America Doesn’t Count at the Box Office Anymore’ and *Variety*’s ‘Hollywood B.O. Rides O’Seas Boom’, abound (B. Lang, 2011; Stewart, 2012). Anyone working on a studio’s financial side will insist the reality of box-office returns is more complicated than ‘the rest of the world is just profits’ lore, particularly since accounting is always creatively opaque. Yet these discursive patterns mark shifting institutional and industrial priorities around the importance of international film markets outside North America for Hollywood’s operations and bottom line.

Industry lore that contrasts emerging international markets with a stable domestic market presents a mutually exclusive binary, where media circulation within these regions often seems to have little relationship or interaction with local industrial conditions, content, or cultures. How this data and market logic are framed raises a number of questions. What do scholars and industry professionals mean by the term ‘international’? Mike Goodridge argues the ‘foreign’ designation is ‘a vaguely derogatory term, of course, relegating the 50 or so significant territories outside the US with all their different tastes, audience demographics, and exhibition landscapes into one lumpen market’ (Goodridge, 2009). This vague category diminishes the scope, span, and intricacies of European, Asian Pacific, Middle Eastern, Latin American, and African media markets under a problematic ‘Othering’ reminiscent of the West versus the rest. Box-office data and splashy headlines offer little insight into how a film circulates within an individual territory or how a particular studio approaches localising content market by market. These regional markets may make up the lion’s share of studio box-office gross, yet what happens when we look beyond the numbers and vague ‘international’ category in order to understand the complex picture of how media content is produced and circulated outside the Anglophone market?

**BOOK OBJECTIVES**

Localising Hollywood explores, and complicates, the dynamic interaction between Hollywood film entertainment divisions and individual media markets: namely, how their position, partnerships, and practices operate in an era characterised by globalisation, digitisation, and convergence. The book’s objective is to move beyond universal and surface-level box-office reporting that so often characterises international operations of Sony, Fox, Warner Bros., Disney, Universal, and
Paramount to examine the macro-level forces and micro-level contexts at play. I offer a multifaceted discussion of studio activities that should be understood as translocal: partnering and circulating local-language and English-language content within and across a handful of territories. I ground my understanding of translocal processes in Patrick D. Murphy and Marwan M. Kraidy’s conceptualisation that emphasises the importance of adding ‘trans’, which ‘lies more in its capacity to comprehend the articulation of the global with the local, than its supposed ability to understand the local in isolation of large-scale structures and processes’ (Murphy and Kraidy, 2003, p. 304). My approach considers questions of locality and connectivity as inextricably linked, where industrial forces and institutional power cannot be separated from individual agents and cultural specificity (Hepp, 2009, p. 3). I am interested in interrogating earlier notions of a ‘global Hollywood’ and globalisation, where media conglomerates were viewed as economically rational or logical organisations.

What does a translocal study of contemporary Hollywood’s international operations look like? My approach challenges earlier theoretical frameworks and expands methodological practices towards understanding the globalisation of Hollywood. Local studio activities may involve territory managers overseeing local offices and teams, developing infrastructure, and making creative and financial decisions in nuanced and specific ways for each individual market. Often, how a studio tentpole film is released or a local-language film is developed varies from territory to territory due to political, economic, sociocultural, technological, and industrial conditions.

My study is based on extensive international fieldwork and interviews with Hollywood executives and managers, co-production partners, policymakers, film commissioners, lobbyists, financiers, independent producers, and distributors across Brazil, Spain, Germany, France, Belgium, the UK, and US. This mid-level approach serves as the foundation of my methodology and is complemented by consulting trade and popular publications, box-office data, policy reports, and marketing and promotional materials. I acquired access to studio country managers, local directors of production, and international executives through years of building contacts and gaining introductions. I conducted more than fifty interviews over a six-year period representing a broad range of individual personalities and positions. Each interview offers a range of voices: I heard from individuals developing and implementing plans to distribute and market Warner Bros.’ products like *Man of Steel* (2013) in the German theatrical market, and I learned about how Sony implements its local-language production strategy of partnering with local co-producers in Brazil. How do these media professionals understand and navigate studio cultures, corporate and creative strategies, and their own role at the intersection of Hollywood’s local presence and global network?
Rather than trying to provide an exhaustive account of each Hollywood studio’s international operations, I gathered and selected a series of case studies exploring dominant strategies among a diverse set of managers, executives, producers, and distributors. I aimed to understand networks and partnerships, how studio professionals and partners interacted on various levels. Because I explore different roles, practices, and priorities at the six studios in vastly different local territories, the localised perspective sacrifices some breadth (the expansive intricacies of Asian, Latin American, and European markets) for depth (how studio activities intersect with local media climates and conditions in a handful of markets). This approach was intended partially to make the project manageable, since each studio has dozens of local operations worldwide. Although Sony, Warner Bros., and their peers may maintain local production and distribution operations across Europe, Latin America, and Asia, I limit my focus to a handful of territories in the former two regions.

Additionally, my decision to focus on five or six key territories evolved from my own cultural, linguistic, and professional access in these markets. The scope of this project emerged from my earlier work on the Brazilian film industry and the success of Portuguese-language studio co-productions beginning in the 1990s. Depending on who I asked in the local industry, whether studio country managers or independent producers, I received a different answer for classifying these film products. Were they Brazilian or Hollywood? Local or global? Commercial or state-supported? This questioning led me to other markets in order to understand how the major studios approach local production and distribution in increasingly different ways. By focusing on studio-specific case studies, this book explores the forces involved and different priorities of the various local players alongside how studio content is increasingly localised for mid-size markets around the world. In turn, I offer a close analysis of lesser-known localisation strategies to cultivate audiences, adapt franchises, manage industrial relationships, and promote Hollywood activities worldwide.

**CRITICAL APPROACHES**

The historic presence of Hollywood studios outside North America is a centrally debated and contentious area of film and media studies. Three key areas of research characterise work on studio international operations – historical, political economy, and, more recently, critical media industry studies. First, a historical and largely archival body of work maps Hollywood institutions’ growing dependence on global audiences from the classical studio system to conglomerate era. Thomas Schatz, Tino Balio, and Alisa Perren trace institutional histories of studios such as Universal, United Artists, and Miramax during pivotal industrial moments of transformation wherein the authors directly or indirectly identify the increased reliance on international markets. Other industry scholars such as Jennifer Holt
and Paul McDonald explore how shifting policies and technological platforms resulted in structural changes for global ownership and distribution patterns. Kristin Thompson and John Trumpbour directly link how the international market developed alongside the emerging studios from the 1900s to their post-World War II heyday. These broader industry studies offer insights into the diverse institutional practices and cultures of production that facilitated a long-term steady growth in international activities for the Hollywood studios. Additionally, a recent wave of international studio history is emerging and includes works by Ross Melnick on theatrical ownership and exhibition, Nolwenn Mingant on local territory offices in the Middle East, and Daniel Steinhart on the first wave of runaway European productions in the 1950s (Melnick, 2015, 2016; Mingant, 2010, 2015; Steinhart, 2013).

Political economy serves as the second approach to understanding Hollywood's global footprint. Namely, the legacy of scholarship by Thomas Guback, Janet Wasko, Eileen Meehan, Douglas Gomery, and Toby Miller cements a distinct conversation regarding Hollywood activities expanding beyond North America and is vital to understanding questions of ownership, capital, and distribution monopolies in the twenty-first century. In arguably the most influential work on the movie industry’s political economy, Global Hollywood 2, Toby Miller, Nitin Govil, John McMurria, Richard Maxwell, and Ting Wang utilise a Marxist framework and interrogate Hollywood’s hegemonic position as central to the unequal flow of media worldwide in a globalised moment. They contend: ““Hollywood” appears in nearly all descriptions of globalisation’s effects – left, right, and Third ways – as a floating signifier, a kind of cultural smoke rising from a US-led struggle to convert the world to capitalism’ (Miller et al., 2005, p. 51). Grounding their critique in histories of colonialism and imperialism, the authors characterise the state of film industry studies as apolitical empiricist archivism and uncritical celebration that gives too much power to an active audience (Miller et al., 2005, p. 4). Global Hollywood offers a critical view of American media and telecommunications industries and contributes to a discussion of policy, economics, and labour practices benefiting the studios’ international activities through what they call an increasingly mobile and flexible New International Division of Cultural Labour.

However, Global Hollywood takes an overly deterministic view of the studios as global institutions. Hollywood is presented as a monolithic entity, and not as what I argue represents a handful of film companies operating inside diverse transnational media conglomerates constantly in flux due to shifting institutional structures, management roles, economic resources, and cultural practices. Furthermore, Miller and his co-authors assert that, due to the pervasive nature of studio content, ‘we are all experts at understanding Hollywood movies … [global] audiences are mostly watching fiction conceived, made, and owned by Hollywood. It symbolises an invitation to replication and domination, an invitation both desired and disavowed’ (Miller et al.,
2005, p. 1, emphasis added). From this viewpoint, the six major studios maintain an unshakable grip on power, a one-way flow of productions to media markets and audiences worldwide. In turn, I raise the question of exactly what, beyond this limited viewpoint, Hollywood signifies today. And what does Hollywood mean in a translocal media climate? All films involving a major studio are not conceived and made the same way for a vague global audience. This is not Henry Ford’s automatic assembly-line, stamping out identical studio strategies or products for unquestioning audiences to consume in the same manner worldwide. Instead, we find ourselves in a post-Fordist moment where the decentralised studio units are scrambling to address increasingly localised media tastes, cultures, and processes. Therefore, what happens when we move from the broader global view of Hollywood activities to understand how content is produced and circulated more locally?

In this aspect, *Global Hollywood*’s approach offers a limited view of media conglomerates as unified, coherent, and all-powerful entities dominating local media industries through vast financial resources and ideological concerns. The authors provide little insight into the specific organisational or individual activities of these diverse companies operating across multiple continents. At best, assumptions are made about the individuals and teams working within and partnering with Hollywood studios inside various industries worldwide; at worst, these industry agents are not considered or are completely ignored. Again, as with trade press discussions of the global box office, we find ourselves back at a place where Hollywood studios are powerful players in a vague space and place known as the international market. The nature of film practices on a transnational level is more complex and multifaceted than the earlier, one-way-flow model assumes. *Localising Hollywood* offers a different perspective on studio divisions cultivating and negotiating relationships across Latin America, Europe, and increasingly Asia Pacific. While this project acknowledges the historically hegemonic position these studios hold internationally, I do not give unyielding weight to the political and economic might of these organisations.

How can we as media industries scholars best understand how local production and distribution divisions and strategies are set up and operate to develop local partnerships and content? Earlier conversations about Hollywood’s global influence and footprint relied heavily on broader notions of globalisation. A slippery and abstract concept, globalisation is understood as unified global time or simultaneity, involving the increased emergence of transnational institutions and agencies, destabilised nation-states, the development of further forms of global communication, and a change in standards of citizenship across local, national, regional, and transnational spaces (Featherstone, 1990, p. 6). While many of these factors directly shape Warner Bros. or Sony’s territory offices in Spain, Brazil, or Germany, focusing solely on these macro-level issues also clouds the day-to-day interactions and complexities of micro-level processes. Michael Curtin argues:
globalization of media therefore should not be understood reductively as cultural homogenization or Western hegemony. Instead it is part of a larger set of processes that operate translocally, interactively, and dynamically in a variety of spheres: economic, institutional, technological, and ideological. (Curtin, 2007, p. 9)

Dismissing Hollywood’s local production and distribution activities as universal or monolithic ignores these rich and complex translocal dynamics. Instead, I work to situate ‘local Hollywood’ as the site where transnational studios and local industry priorities intersect as an opportunity to unpack the so-called media industries ‘spheres’.

The final approach, and the central framework of this book, is what Timothy Havens, Amanda D. Lotz, and Serra Tinic call ‘critical media industry studies’. In the tradition of media industries scholarship, Curtin and others employ fieldwork and ethnographic methods to explore the dynamics and processes of international institutions and professionals on a more local level. I adapt Havens, Lotz, and Tinic’s call for a mid-level approach for this institutional and industrial research based on understanding the role of media professionals as individual agents. The authors position what they categorise as a ‘critical media industry studies’ approach through ‘a “helicopter” level view of industry operations, a focus on agency with industry operations, a Gramscian theory of power that does not lead to complete domination, and a view of society and culture grounded in structuration and articulation’ (Havens, Lotz, and Tinic, 2009, p. 246). The authors emphasise mid-level research as a way to understand corporate business cultures and how particular media texts and practices arise from and reshape industrial practices. This approach focuses on media professionals – producers, distributors, managers – making day-to-day decisions and negotiating relationships with their corporate executives and creative partners. As Havens, Lotz, and Tinic contend,

the way in which institutional discourses are internalized and acted upon by cultural workers is an important missing link between political economy’s concentration on larger economic structural forces and much of cultural studies’ analyses of end products such as media texts and audience interpretations. (Havens, Lotz, and Tinic, 2009, p. 247)

Institutional discourses and cultural workers’ levels of negotiation and participation are vital to analysing local production and distribution processes within Sony, Fox, Warner Bros., and the other studios.

The authors continue by arguing

the imperative of case study methods that shed light on the ways in which members of the media industries define the conventions of production and distribution based on their assumptions of the prevailing cultural values and issues of the time. (Havens, Lotz, and Tinic, 2009, p. 247)
In other words, institutional and individual case studies can reveal the contradictions and fissures between how media professionals’ day-to-day processes and decision-making are negotiated with institutional priorities and strategies and local industrial conditions and media cultures. In their seminal cultural studies work on the Sony Walkman, Paul du Gay, Stuart Hall, Linda Janes, Hugh Mackay, and Keith Negus introduce the ‘circuit of culture’ framework, which is particularly helpful in this instance. The authors argue against privileging one condition or factor in order to understand cultural products. They propose a ‘combination of processes’ in their articulation, specifically the connection or ‘linkage’ across a variety of cultural texts – representation, identity, production, consumption, regulation (Du Gay et al., 1997, p. 3). Therefore, instead of privileging merely the economic or political factors of globalisation and media, I am concerned with how local studio professionals, strategies, and relationships are ‘represented, what social identities are associated with it, how it is produced and consumed, and what mechanisms regulate its distribution and use’ (Du Gay et al., 1997, p. 3). A significant contribution of this book to critical media industry debates is my consideration of management identity formation, industry lore, and individual agency alongside the constantly evolving studio practices and partnerships inside these local markets. My methods contribute a unique, on-the-ground perspective missing from current conversations about Hollywood’s international operations by offering privileged information, institutional memory, and personal insights unavailable from trade and popular press coverage and earlier scholarship.

CHAPTER SUMMARIES

Localising Hollywood offers the reader an unprecedented industrial overview of Hollywood international operations since the 1990s that engages with key scholarly and industrial debates. I incorporate first-hand accounts gathered from extensive fieldwork and research about the wide scope of international operations, from creative partnerships and production strategies to promotional and distribution processes. By exploring how decision-making processes and creative negotiation between Hollywood media executives and local forces operate, this study reveals the complex picture of film-making and circulation in an era often characterised by the forces of conglomeration, digitisation, and globalisation. Chapter 2 traces a broad history of Hollywood global operations from the rise of the studio system to the first wave of conglomeration in the 1960s and 1970s. What emerges is the central importance of international markets during industry-wide cyclical shifts. Studios relied more heavily on global audiences during significant times of industrial transformation such as the coming of sound or the crumbling of vertical integration.
By focusing on the international market from the 1980s to 2016, Chapter 3 explores how the second wave of conglomeration reshaped film studios into diversified entertainment divisions inside expanding global media companies. I briefly outline Sony Pictures Entertainment’s early international expansion, particularly into the Latin American television market, as an example of early division-wide localisation. The remainder of the chapter examines dual globalisation and localisation strategies for international film operations. First, I map Hollywood’s changing ‘international market’. The increased importance of global audiences for tentpole films has led to reimagined production and circulation patterns on the local level. This results in local studio units becoming more involved in the distribution of English-language studio films. Second, the local-language strategy emerges during the 1990s as an industry-wide attempt at localising content on a smaller scale for a number of mid-sized territories. Beginning with industry pioneers Sony and Warner Bros., I trace how the local-language production strategy (LLP) – a Hollywood commercial co-production between a local studio unit and independent partners intended for an individual market – becomes an experiment for all six filmed entertainment divisions, with varying results, by the 2010s. Shifting from a broad industry discussion of local production and distribution, the next chapter is the result of dozens of conversations with local studio management in offices across Brazil and Europe. This access provides unparalleled first-hand observations of local studio operations, country manager system, and LLP strategies. Specifically, Chapter 4 describes the management structure, or country manager model, driving many local studio operations. In challenging earlier scholarly and popular notions of studio management as top-down suits, I argue how managing directors for local offices of Fox, Warner Bros., Sony, and their peers function as cultural intermediaries. Country managers, also known as managing directors, utilise dispositional and tactical strategies to manage relationships in local industries as well as show their value internally. The other case study in this chapter considers the role of local production directors and their processes for pitching, co-producing, and releasing LLPs in individual markets Brazil, Germany, and Spain. Similar to their country manager bosses employing circumscribed agency, directors of production must balance creative and financial negotiations and distinct priorities among local unit operations, independent producing partners, and international home office.

Chapter 5 explores local Hollywood’s increased operational footprint across a network of international media hubs worldwide. I examine the complex dynamic of studio production sites, offices, and business operations as they navigate particular industry spaces and places. An important aspect of Hollywood’s presence and positionality within local media centres is a reliance on specific locational factors, everything from the material to symbolic resources available from Europe to Asia. Whether developing international co-productions or investing in local studio
infrastructure, the majors rely heavily on financial, physical, geographical, and labour resources inside key creative clusters. First, I engage with scholarly debates around runaway productions in an effort to extend the conversation. I consider how studio operations intersect local media sectors in the case of Rio de Janeiro as a growing international hub. Next, Germany’s regionalised studio complexes and infrastructure have become a key site for international co-productions, with the Berlin-Brandenburg region home to Studio Babelsberg. The complex facilitates partnerships between big-budget productions and the country’s growing support services like the VFX sector and also housed Sony’s early attempts at an LLP unit. Finally, through on-site observations, I examine UK’s Leavesden Studios as a historic site of international production purchased and reimagined by Warner Bros. Nestled inside the working studio complex and located on a handful of soundstages, ‘The Making of Harry Potter’ tour simultaneously operates as a promotional space for the franchise and works to legitimate Warner Bros.’ position within the London area creative sector.

Chapter 6 offers a unique discussion of the Motion Picture Association [MPA], the international division of Hollywood’s trade alliance, the Motion Picture Association of America. My goal is to complicate scholarly views of the organisation as merely a monolithic entity operating under a central agenda. I take a close look at MPA regional operations (Latin America and EMEA) through three priorities – policy and market regulation, piracy, and promotional activities. What emerges is an organisation dealing with internal changes, with a strategic shift away from ‘confrontation’ to ‘cooperation’, and the external challenges posed by the rise of piracy and competing studio member interests. In talking with former and current MPA executives and territory managers, a broader view of their roles in expanding local studio operations and how they understand their positionality in working with other industry groups for advantageous policy emerges.

The last chapter considers how studios employ franchising practices and convergence strategies with local-language productions. Through their massively successful High School Musical (HSM) property, Disney almost immediately began to localise marketing and broadcast efforts for the English-language films. Through its local operations, Disney also developed a handful of HSM LLPs in Latin America and Asia that illustrate the company’s long-time investment in ‘total entertainment’ and tightly controlled brand management. Additionally, through one of its most successful LLP units, Warner Bros. developed a co-production strategy in Germany based on star power, prominent producing partners, and family entertainment films. Originally a rom-com star vehicle, Keinohrhasen (Rabbit without Ears, 2007) evolved into a cross-media family franchise driven by its paratextual toys. The two case studies, which illustrate two different strategies for Disney and Warner Bros. that both rely on franchising and cross-media practices, illustrate the difficulty of managing property extensions on a localised level.
Conversations with media professionals making day-to-day production and distribution decisions and negotiating relationships with their corporate executives and creative partners provide a critical window into the management cultures, business models, and power structures of a twenty-first-century globalised Hollywood. This study considers the competing visions, financial and creative decisions, and daily industry processes involved in films operating simultaneously as local media and Hollywood products. In turn, my research relies on unparalleled access to studio executives and management. My ability to achieve introductions and network with high-level professionals at Warner Bros., Sony, or Fox reinforces the closed nature of studio culture. In general, once I gained access to an international division or local operation, most of these individuals were open and accommodating to my questions, at times showing production slates, sharing budgets, and speaking critically of their companies and competitors. While my fieldwork process shows how precarious understandings of studio ‘power’ can be, I also discovered how invisible most of the international mid-level management and practices are to the academic community and general public. Many of these individuals were eager to champion their role in the local market and help contextualise current studio activities.

International operations are not totalising examples of Hollywood power within the global film industry. This work illustrates something the studios themselves learned in recent decades: there is no clear formula or strict rulebook for localising and adapting their business for an individual territory beyond North America. Instead, my attention to fieldwork, interviews, trade and press coverage, and studio promotional materials from various angles – international executives, local management, diverse institutional partners – reveals how management and production cultures, financial and creative investment, and public and private priorities swing widely from alignment to conflict to negotiation. In speaking with local operations, it becomes remarkably evident how value and knowledge circulate differently depending on which part of a Hollywood conglomerate is examined. A studio’s local management and projects must be understood within a dynamic of shifting translocal contexts and internal studio cultures. Localising Hollywood is not just the story of one industry’s global expansion and adaptation; it also reflects local industry cultures and histories often seen as separate or disconnected from domestic operations. The book offers a new approach for understanding Hollywood’s local presence and practices, whether successes or failures, against the backdrop of constantly evolving media industries.
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