The Power of Female Driven Content
Created by PGA Women’s Impact Network and Women and Hollywood
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# CONTENTS

- **Introduction** 3  
- **Debunking the Myths** 4  
  - *The Bechdel Test* 5  
- **What is Female Storytelling?** 6  
- **The Power of Women as a Market** 8  
- **The Influential Power of the Female Audience** 10  
- **The International Landscape** 11  
- **Distribution, Marketing, and Exhibition** 12  
- **Independent Film** 13  
- **The Future of Television** 14  
- **Video on Demand & Digital Platforms** 16  
- **Advertising & Marketing** 18  
- **Social Media** 20  
- **Opportunity is Knocking…Anybody Home?** 22  
- **Brave New World…Where We Are Headed** 23  
- **Action Steps** 24  
- **Acknowledgements** 25  
- **Addendums** 26  
  - *Top Grossing Female-Driven Movies* 26  
  - *Top Grossing Women Directors* 27  
- **Citations** 28
Many decision-makers in the entertainment industry are operating under the misperception that female-driven content is not commercially viable. If you went to the movies in 2014, you may have noticed that far fewer films in the top 100 grossing movies had female protagonists. Even worse, only two films in the top 100 grossing movies were directed by women. The conundrum is that while women working on both sides of the camera are severely underrepresented, market data in movies and television dramatically supports the fact that female driven content is profitable.

Women are the major consumer decision makers and money spenders in the US. Even so, there are gender barriers at each step of the pipeline (the creation and financing process) and the value chain (marketing, distribution, and exhibition). Dr. Stacy L. Smith, Director of USC Annenberg’s Media, Diversity and Social Change Initiative, has found that female creatives, when lining up financing for movies, face a “fiscal cliff” that amounts to a gender barrier, which helps to explain why the stats about female representation in movies have not changed in the last fifteen years. The lack of a critical mass of women decision makers at all levels of the pipeline, from development to exhibition, has created a very one-sided business.

It is time to drop the “women don’t make money” mindset because this narrative is false. The reality is that by not supporting female-driven content in our business, there is a significant underserved female audience, and there is a lot of money being left at the door.

The Producers Guild of America represents over 7,000 US producers in film, television, and new media. Women and Hollywood educates, advocates, and agitates for gender parity across the entertainment industry. PGA Women’s Impact Network and Women and Hollywood are providing a “toolkit,” with current data and trends in one overview for all producers and filmmakers pitching female-driven content. The goal is to provide tools that show key decision-makers and influencers — financiers, talent agents, foreign sales agents, distributors, exhibitors and marketers — that new opportunities abound in a very powerful market.
DEBUNKING THE MYTHS

Two of the film industry's most widespread and damaging myths are that “less money is made with female stars, or female-driven properties” and that “women frequent the movies less than men do.”

In actuality, female moviegoers outnumber male moviegoers. According to the MPAA, over the last six years, women have outnumbered male audience members.

In her 2014 Oscar acceptance speech, actress Cate Blanchett asserted that movies about women make money, and thanked the audience for rebuffing “those in the industry who are still foolishly clinging to the idea that female films with women at the center are niche experiences. They are not. Audiences want to see them, and in fact they earn money. The world is round, people!”

Blanchett was not merely making claims – she was stating facts. Market data supports the reality that there is a high demand for female-driven movies.

The New York Times writes, “The success of Catching Fire and Frozen (#1 and #3 top-grossers of 2013) should put to rest the assumption that audiences don’t want to see female-centric movies, especially female-led action-adventure stories, an assumption that is often trotted out as a defense of gender imbalance on the screen.”5 Time writes, “By May, 2014, Frozen became the highest grossing animated movie, and fifth-highest-grossing movie of all time at $1.219 billion, proving once and for all that viewers will buy tickets to movies with female leads. Audiences loved the story of two strong sisters in an icy kingdom, for whom ‘true love’s kiss’ doesn’t have anything to do with a Prince.”6

The commercial success of these movies doesn’t make them anomalies in the world of female-centric films: there is plenty of evidence to substantiate the fact that films about girls and women do exceedingly well at the box office. In fact, a look at the 100 highest-grossing movies of 2013 reveals that movies with a female protagonist earned 20% more on average than movies with a male protagonist.7

Here’s the breakdown:

$116 million gross on average for female-led movies
$97 million gross on average for male-led ones

In 2014 and 2015, we have seen the continued breakthrough of female lead characters driving big-budget $100m+ Hollywood films with high worldwide box-office returns like The Hunger Games: Mockingjay–Part 1 ($752m), Maleficent ($758m), and The Divergent Series: Insurgent ($290m). Female led films in the $50-100m budget range also did remarkably well, such as Cinderella ($538m), and Annie ($134m). Mid-budgeted ($25-50m) female-centric success stories include Pitch Perfect 2 ($273m) and 50 Shades of Grey ($570m). Lower budget films (under $20m) with female protagonists also scored big numbers at the international box-office, among them The Fault in Our Stars ($307m), Wild ($52m), and If I Stay ($78m).
The Bechdel Test

The FiveThirtyEight blog, founded by statistician Nate Silver, used The Bechdel Test – a tool to measure women’s representation in film – to analyze the box office success of films that have women in them. **To pass the Bechdel Test, a film only has to have two female characters talk to each other about something other than a man.** This is just about the lowest bar possible, but many films fail to meet it nonetheless.

The site looked at 1,615 films released from 1990 to 2013 and found that less than 50% of the films passed the test. The budgets afforded those films that passed were 35% lower than ones that failed, yet those same films that passed the test enjoyed a 37% higher return on investment in the US.

FiveThirtyEight concludes, “Hollywood is in the business of making money. Since our data demonstrates that films containing meaningful interactions between women do better at the box office than movies that don’t, it may be only a matter of time before the data of dollars and cents overcomes the rumors and prejudices defining the budgeting process of films for, by and about women.”
WHAT IS FEMALE STORYTELLING?

“How stories are told, who tells them, when they’re told, how many stories are told, are really dependent on power. Power is the ability not just to tell the story of another person, but to make it the definitive story of that person...Start the story with the arrows of the Native Americans, and not with the arrival of the British, and you have an entirely different story. Start the story with the failure of the African state, and not with the colonial creation of the African state, and you have an entirely different story.”

- Chimamende Ngozi Adichie
TED Talk (The Danger of A Single Story)

Storytelling perspectives are informed and conveyed by producers, writers, directors, and actors. Female storytellers bring a unique point of view to their stories. Melissa Silverstein from Women and Hollywood observes, “Women tell stories differently. We have different life experiences and those experiences inform our stories and the lens with which we view the world.”

More female storytelling would diversify the cinematic landscape. For instance, one study examined 900 motion pictures released between 2001 and 2005 including the number of women working as producers, directors, writers, and actors. The results demonstrated that “the greater the participation of women, the more thought-provoking but less violent and fear-inducing is the resulting cinematic product.” And because female characters are often oversexualized, including in marketing materials, it is worth noting that the same study found that “sex and nudity do not, on the average, boost box office performance.”

In general, however, stories about women are not valued in the same way as stories about men. Even with successful track records, films with a story driven by a clear female protagonist are a small percentage of all films. After winning the Oscar for playing June Carter Cash, Reese Witherspoon realized that other than one studio, nobody was developing films with a female lead. In a conversation with The New York Times, Witherspoon shared her reaction to this lack of opportunities: “I’m a complex person with so many different aspects in my personality...It just hit me like a ton of bricks. And I was so mad. And then I thought: ‘Why am I so upset about this? Why don’t I do something about it?’” She decided to start her own production company, Pacific Standard, to address this dilemma and in 2014, Witherspoon produced Gone Girl as well as the adaptation of Cheryl Strayed’s Wild, in which she stars, and for which she received a Best Actress Academy Award nomination. “To me, I find the character in Wild much more likeable than a lot of characters I’ve played, but somehow, I have had this reductive experience where I’m put into this tiny little box. To me, likeable is human, and real, and honest.”

In a Q&A following a screening of Selma, director Ava DuVernay talked about taking over the film that previously had four different male directors attached, and how the number of female characters changed in the script. Not only was she intent on democratically honoring the major civil rights activists, it was also important to her to give visibility to the women involved on these front lines.

Similar waves are happening in television where women are pushing for stronger female characters on the small screen. The Good Wife just completed its sixth season and has received five Emmy awards. Shonda Rhimes and Betsy Beers are breaking new ground with every new series coming from their company, Shondaland. Lori McCreary, PGA President and the Executive Producer of Madam Secretary, shares that the show has a 60% overall female audience and averages a
12.5 rating with women 50+, who comprise 49% of the audience. It is the most watched scripted series on Sunday. McCreary says, “After seeing Hillary Clinton, Condi Rice and Madeleine Albright in operation, our lead character is simply a reflection of who we really are as women, what we can be, and how the world should see us in the year 2015. We strive week after week to give the viewers, male and female, a character who is a believable strong woman, a reflection of so many of the women who we see in our lives every day.”

Streaming companies are also hiring women to bring bold and frank storytelling to the screen. Jill Soloway found a platform for the unconventional representations of female desire and sexuality on the wildly popular Amazon Prime series Transparent. This 2015 Golden Globe-winning series portrays queer and transgender individuals with a powerful honesty and sense of humanity. “I feel like it’s really my responsibility as a feminist and as a filmmaker to take the opportunity to place the camera in terms of how it feels to be a woman, instead of how women look,” Soloway has explained.
Women have tremendous spending power in America today, and in fact make upwards of 85% of all consumer buying decisions – and this power is growing.14 By 2018, wives will outearn husbands in the U.S.15

Women have money, spend money, and make the majority of household decisions. And the scope of that spending is notably vast. In addition to handling the bulk of the purchasing decisions for consumer goods in the U.S., women are also likely to influence or manage many other big ticket purchases – homes, autos, appliances, furniture, etc. – not to mention a large portion of the apparel, groceries and everyday purchases.”16 Women are also powerful influencers for colleagues, friends and family.

The emergence of shifting demographics involves two key dynamics. First, women are earning money in places they’ve never earned money before, and second, more women are living independent lives than ever before. Women and men are creating families in nontraditional ways, with spouses taking on more responsibility, and women are also creating family structures outside of marriage. (Almost half of first births are now to unmarried women).17

Women are now closing the gap on middle management, and yet at the top, the numbers are still small and barely increasing. But those who follow society’s shifting values with a precision lens see a world moving in a female direction.18

Here’s the changing picture of women today:

- Women earn roughly 77 cents on the dollar when compared to white men, but the average American woman is expected to earn more than the average American male by 2028.19, 20
- In education, women now earn more than 57% of all bachelor’s, 59% of master’s and 52% of doctoral degrees, as well as from one-third to half of professional degrees—and in every case, these proportions are increasing.21
- Women now account for nearly half of the overall labor force (as compared with just over 38% in 1970).22 More than 9 million firms, or 30% of all privately held firms, are owned by women.23
- Women have been starting businesses at a higher rate than men for the last 20 years.24
Women are Key Drivers of Economic Growth

“Investing in women is not only the right thing to do, but also the smart thing to do.”
-Hillary Clinton

8M
BUSINESSES
Women own nearly 8 million businesses in the United States, accounting for $1.2 trillion of our GDP

$$$
MORE INCOME
Women tend to spend more of their earned income than men on the health and education of their families.

48%
OF ALL JOBS
In the US, women went from holding 37% of all jobs to holding nearly 48% over the past forty years.

BY ADDRESSING CHALLENGES AND BARRIERS FACING WOMEN, WE CAN TRANSFORM OUR ECONOMIES

-9% America
+13% Euro Zone
+16% Japan

Reductions in barriers to female labor force participation would increase the size of the GDP.

66% ROI capital
53% return on equity
42% return on sales

Companies with more women board directors outperform those with the least by:

Could raise total agricultural output in developing countries by 2.5 to 4%
Reduce the number of hungry people in the world by up to 150 million people

The World Economic Forum Gender Gap report states that the U.S. has experienced 11% growth over the last 40 years as a direct result of the increased participation of women in the economy, which has translated into $3.5 trillion. A recent report “All in For Her” from Women Moving Millions cites a 2009 Boston Consulting Group report estimating that women control 27% of the world’s wealth – this translates into approximately $20 trillion dollars. It is estimated that “by 2030 women-controlled wealth [will be] be $75.4 trillion.” Fleishman-Hillard Inc., a global communications firm, posits that women will control approximately “two-thirds of the consumer wealth in the U.S. over the next decade and be the beneficiaries of the largest transference of wealth in our country’s history.”

As gender power dynamics evolve, women have greater access to vastly increased kinds of practical choices. A clear trajectory is becoming apparent: Women constitute an immensely powerful market, and one that is growing exponentially in strength and influence.
THE INFLUENTIAL POWER OF THE FEMALE AUDIENCE

The power and influence of female fandom is looming large and filmmakers are taking notice. Phil Lord and Christopher Miller, who wrote and directed The Lego Movie, recently said the film’s sequel will have more female characters. “It’s important to us that the movie plays broadly and that we inspire young women as much as we inspire young men,” Lord said. The Lego Movie pulled in more than $468 million worldwide.28

Consider the outstanding success of the Twilight franchise. Twi-Mania was driven by girls and women. The first Twilight film, directed by Catherine Hardwicke, brought in nearly $70 million in its opening weekend – almost double the film’s budget, and females comprised 75% of its audience.29

In many of these successful films, it is not only the leads, but the overall casting that reflects reality in their gender balance. The entire ecology of the film matters. Female characters comprise 40% or more of the films listed below. Gender balance succeeds at the box office. Here is the breakdown of female characters for some films based on Dr. Smith’s MDSC research:30

<table>
<thead>
<tr>
<th>Film</th>
<th>% Female Characters</th>
</tr>
</thead>
<tbody>
<tr>
<td>Twilight</td>
<td>41%</td>
</tr>
<tr>
<td>The Hunger Games: Catching Fire</td>
<td>47%</td>
</tr>
<tr>
<td>If I Stay</td>
<td>50%</td>
</tr>
<tr>
<td>The Fault in Our Stars</td>
<td>53%</td>
</tr>
<tr>
<td>Winter’s Bone</td>
<td>45%</td>
</tr>
<tr>
<td>Maleficent</td>
<td>44%</td>
</tr>
</tbody>
</table>

The trend of female-oriented youth movies with huge box office successes has broken the barrier to making films targeted at the under-25 female demographic. In the past, studios have stayed focused on romantic comedies, fantasy, and adventure stories for girls and young women. As studios begin to have more confidence in making a variety of different genres for this age group, doors are opening for dramatic films like the recent hit The Fault in Our Stars.

One of 2014’s biggest success stories, The Fault in Our Stars, grossed over $300 million worldwide – $125 million domestically and over $180 million in foreign box office – on a modest $12 million budget.31 These huge numbers can be attributed to female audiences: The group constituted 82% of the film’s viewers opening weekend, and 80% of those women were under 25.32 In turn the studios are rewarded because the girls are showing up again and again, creating repeat business, multiple engagements and additional revenue streams.

But girls and women aren’t the only ones interested in female protagonists. The first installment of the Hunger Games franchise grossed over $152 million on opening weekend, and its audience was made up of 61% women and 39% men. Catching Fire, its sequel, earned over $158 million opening weekend, and this time around, women accounted for 49% of moviegoers.33 The third installment, Mockingjay–Part 1, landed the biggest domestic box office weekend of 2014, with women comprising 60% of the audience.34 Catching Fire and Mockingjay–Part 1 were the first and second top-grossing domestic movies in 2013 and 2014 respectively. Prior to 2013, a female-led film had not topped the box office in 40 years since The Exorcist.35 Female audiences and protagonists have become powerful catalysts in achieving box office success.
The International Landscape

In recent years, the DVD market has crashed and the US market for theatrical is battling for survival due to issues including saturation, a shift to digital platforms, and piracy. In addition, the power of global filmmaking has shifted the balance of power away from the US domestic market. An average of seventy-two cents of every dollar of revenue for a US studio film is now made overseas.

Foreign sales is an area where the significance of the female audience has also been neglected. “As the vast majority of films are now financed through the independent market – not by major studios – an increasingly important source of funding is foreign pre-sales,” said Cathy Schulman, Oscar-winning producer of Crash (2004) and president of Women In Film. What this means is that in advance of filming, producers will sell the rights to distribute their films to international buyers. Producers say they stand a better chance of selling these rights at a high price if the movies are attached to internationally popular male actors.

The analysis referenced earlier by FiveThirtyEight regarding the Bechdel Test shows that the higher return on female-centric films in investment in international markets is comparable to male-centric films. This research debunks the myth that the growing foreign box office is made up of viewers interested only in male-driven films.

The Geena Davis Institute on Gender in Media recently released results of an international study which stated, “While Hollywood is quick to capitalize on new audiences and opportunities abroad, the industry is slow to progress in creating compelling and complex roles for females. This tendency to under and misrepresent women is not just an American phenomenon. Gender imbalance occurs on a worldwide scale.”

This 2014 study, conducted by Dr. Stacy L. Smith and her team, illustrates how many female characters appear in popular films (roughly equivalent to a G, PG and PG-13 rating in the US) from the top eleven box office grossing countries around the world. The study found that only 23% of the films distributed internationally from 2010-2013 featured female leads or co-leads and only 31% of the speaking characters were women. A few countries fare better than the global norm. More speaking characters appear in the UK (38%), Brazil (37.1%), and Korea (35.9%) – but two samples fall behind, US/UK hybrid films (23.6%) and Indian films (24.9%). These last two samples show female characters in less than one quarter of all speaking roles.

This international study also noted that when girls and women did appear onscreen, they were often sexualized: they wore more revealing clothing, were thinner, and more likely to be partially or fully naked than their male counterparts. Of particular concern is that teen females (13-20) were just as likely as adult females (21-39) to be sexualized. In terms of career depictions in films, women characters were less likely than men to have accomplished careers: only 14.8% of doctors in movies were women; 9.5% of high-level politicians; 13.9% of executives; 9.1% of lawyers; 8.9% of engineers; and 4.1% of sports figures.
John Fithian of the National Association of Theatre Owners (NATO) notes, “Perhaps the dominance of men in the creative side of the business can be explained partially by the overwhelmingly male bias in the way production, distribution and exhibition decisions are made. If men decide which movies will be made and distributed, and men decide which movies will be licensed and exhibited, it seems logical that movies reflecting a male creative vision might hold greater appeal.”  

Fithian continues, “Of the top ten companies in North America – all the top film buyers are men. So what gets booked and decisions around show times, etc. are being made by men. We ask the question – if these numbers were more even – would we be making different decisions and selling more tickets? We know that the dynamic in most American families is that women are making the entertainment decisions. NATO has been involved in messaging the concept that more women mean more business for the theatres. But it’s the underrepresentation of women in all elements of film, and in marketing and distribution that is hurting the business.”

This lack of understanding presents a major problem because “most of a movie’s opening gross is about marketing,” explains the president of Sony Screen Gems, Clint Culpepper. He elaborates: “You can have the most terrific movie in the world, and if you can’t convey that fact in fifteen-and thirty-second TV ads it’s like having bad speakers on a great stereo. If you don’t understand who you are trying to sell your movie to – and how to sell it to them – it’s going to be a challenge to get as many women to the theatre as possible.”

Fithian notes there are a few companies that are starting to collect granular data on movie audiences. But while plenty of analysis has been performed on the content of movies and their overall revenue at the box office, there has not been enough emphasis on studying the business side of decision-making in distribution, marketing, exhibition, and ticket buying. These resulting numbers would help to educate decision-makers across the value chain and prove to theatre owners, cable broadcasters, and DVD sellers that more women – and diversity-centric movies – translate into more profit.

It is also important to note that we need to look beyond gender as well for growing markets, as change is happening across the demographic spectrum in the US. The multi-cultural segment is growing at a rapid rate and by 2035, whites will become a minority in the US.
Given the rapidly changing landscape for content distribution, perhaps it’s time that we redefine what amounts to a successful film. **NATO recognizes that women have always been important in the theatrical release industry and that women have a great participation in independent films. They see the support of independent films as a way of addressing the shrinking theatrical numbers and garnering more support from the female audience.**

For example, take 2010 Jennifer Lawrence’s breakout vehicle *Winter’s Bone*. It earned “only” $16 million at the box office – but it was made on a $2 million budget. The film, which was directed and written by women – Debra Granik and Anne Rosellini – and focused on a female protagonist went on to garner critical acclaim with Lawrence and the film receiving an Academy Award nomination. That same year marked the release of *The Kids Are All Right* (written and directed by Lisa Cholodenko) which was made for $3.5 million and grossed $36 million in theaters. In addition to being a box office success story, the film and its stars were recognized throughout awards season. The film focused on women, and (two middle-aged lesbian women, no less) and filmgoers showed up en masse. These films certainly don’t compare to the numbers that super hero films draw on their opening weekends – not even close – but remember, they weren’t made on super hero budgets.

Women are succeeding on even smaller film budgets as well. Actress Lake Bell made her directorial debut with 2013’s *In a World...* offering an empowering narrative about a woman, played by Bell, navigating – and ultimately succeeding in – a male-dominated industry. Bell, who also wrote the script, worked with a budget of less than a million dollars and the film earned $3 million at the domestic box office. It was one of the year’s ‘freshest’ movies on Rotten Tomatoes. 2014’s *Obvious Child*, directed and written by Gillian Robespierre, focused on subject matter that many women can relate to but are rarely given the chance to see represented on screen – abortion. In her first feature-length project, Robespierre was able to take her modest budget and deliver a $3.1 million domestic gross, getting rave reviews and awards kudos in the process.
THE FUTURE OF TELEVISION

Women have been the majority of the mainstream network audience for a long time now. That is only becoming more true as men – especially young men – are peeled off from the audience by gaming and other forms of digital entertainment.

Programs airing on ABC featured the highest percentage of female characters (44%), followed by CBS (42%), Fox (41%), CW (40%), and NBC (39%).

Understanding who pulls the strings behind the scenes helps to contextualize who we see – and see less of – on the small screen.

- For programs airing on the broadcast networks, cable channels and Netflix in 2013-14, women comprise only 25% of all individuals working as creators, directors, writers, producers, executive producers, editors, and directors of photography.

- Women create 19% of the shows, account for 26% of writers, and make up 40% of major characters and speaking roles.

- When there is a female writer, women characters appear on-screen 46% of the time compared with 39%, and TV shows with at least one woman writer had casts that were 43% female. Additionally, shows with at least one female creator had casts that were 47% female.

- Women producers are on the rise in television, accounting for 40% of all producers (21% of executive producers). Still lagging, however, are women directors, who made up 13% of all television directors this year, only an increase of only five percent since 1997-98. According to the Directors Guild of America, of more than 3,500 episodes produced in the 2013-2014 network television season and the 2013 cable television season, Caucasian females directed 12% of all episodes and minority females directed 2% of all episodes.

Character goals also differed by gender. Female characters were more likely than male characters to have the goal of helping others (15% vs. 9%), whereas male char-
acters were more likely than female characters to have work-related goals (52% vs. 35%).

Female characters were more likely than male characters to play personal life-related roles (such as wife, mother, girlfriend) (43% vs. 24%). Male characters were more likely than female characters to play work-related roles (66% vs. 41%).

Movie-star actresses went to cable in previous years because the platform has allowed for more complexity in the writing of multidimensional female characters. Recently there has been a sea change in network TV, and, along with creation of additional digital platforms there are now more interesting leading roles for women than ever before. In the past, female leads on network had to be funny and “likeable” – and that’s about it. Fortunately we are now seeing more diverse roles – from quirky (Zooey Deschanel, New Girl), to bi-polar (Claire Danes in Homeland), to morally ambiguous (Viola Davis, How to Get Away with Murder), and to Machiavellian (Robin Wright, House of Cards). As The Atlantic observes, “Strong Female Characters on network TV make up a sizable chunk of the pie – and their numbers have increased dramatically in the last three years.”

Also, at long last we are being offered more racially diverse female characters and casts in series such as Empire, Jane the Virgin, Orange is the New Black, and Black-ish. Cable continues to bring unique female stories forward. The Atlantic details the renaissance occurring in the world of female characters on TV: “The idea that a woman could be truly unlikeable, like so many male characters, [used to be] anathema.” Fortunately, audiences are no longer restricted to seeing idealized and conservative depictions of what it means to be a woman on the small screen. Would we have ever seen a female character who looks and behaves like Girls’ Hannah Horvath if Lena Dunham hadn’t created the character and maintained control of Hannah’s evolution through writing and directing the popular HBO series? The story of Virginia Johnson, the pioneering sex researcher, has become more widely known thanks to Lizzy Caplan’s portrayal in Showtime’s Masters of Sex (created by Michelle Ashford). Virginia is having an affair with a married man, often neglects her children, and manipulates situations and people to advance her professional career, yet audiences remain captivated by the character and her narrative arc.

Peggy Olsen, who New York Magazine has identified as the secret protagonist of AMC’s Mad Men, has also played the role of ‘the other woman’ and is often cast in an unflattering light, engaging in conflict with coworkers and plagued by insecurity and stubbornness. Despite these characteristics, or arguably because of them, it is Peggy who is consistently referred to – by both the media and viewers – as the most relatable character on the series.

The significance of the female audience in television is still underestimated partially due to prevailing myths about what women want to see on the screen. Producer Gale Anne Hurd, executive producer of AMC’s The Walking Dead, shares a recent experience: “When I was in Europe promoting the Season 5 premiere, women journalists (even more so than men!) assumed that very few women watched the show. I asked them what statistics they were relying upon to come to that conclusion and they said they were assuming that women would not watch a show about zombies. I explained to them that (at least in the US), The Walking Dead is the top rated show among women. They were utterly and truly shocked. I reiterated that the series focuses on the characters, a multi-racial group which includes strong women in a number of roles; in fact, The Walking Dead refers to the survivors of the zombie apocalypse and NOT to the zombies!”

As the 2013-14 pilot season got underway, Broadcasting & Cable reported, “With the Big Four broadcast networks ordering 100 or so pilots during the current development season, it will be interesting to see what they ultimately select and how many of those series will aggressively target men. Based on the ratings numbers, the shows that do skew more male will be facing an uphill battle.”
VIDEO ON DEMAND AND DIGITAL PLATFORMS

Over the last two years, video on demand (VOD) has arrived as a significant platform for content delivery. Available in over 60% of households, VOD is increasingly contributing to greater viewing potential.60

U.S. women watch more content onscreen across all platforms. In 2012, Females 18 and older watched an average of 191:34 hours of video each month. Comparatively men watched 174:51 hours.61

MONTHLY TIME SPENT WATCHING VIDEO: WOMEN AGES 18+

<table>
<thead>
<tr>
<th>Quarter</th>
<th>Traditional TV</th>
<th>Time-Shifted TV (all homes)</th>
<th>On the Internet</th>
<th>On a Mobile Phone</th>
</tr>
</thead>
<tbody>
<tr>
<td>Q4 2012</td>
<td>179:20</td>
<td>15:06</td>
<td>7:12</td>
<td>5:02</td>
</tr>
<tr>
<td>Q4 2011</td>
<td>174:33</td>
<td>14:03</td>
<td>4:58</td>
<td>4:41</td>
</tr>
</tbody>
</table>

Read as: Women ages 18+ watched 179 hours and 20 minutes of live TV in the fourth quarter of 2012.

Source: Nielsen62
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Technology has enabled increased choice and consumers have become accustomed to controlling the wide array of content at their fingertips. At the center of it all is the consumer experience in interacting and accessing that content. Some people want their content live on their TV screen delivered via a traditional or broadband-enabled connection. Some will want to watch it at a different time, while others will increasingly look for it on the go and on demand, on their mobile devices. With smart phones topping 70% penetration and tablets inching toward the 50% mark, the growth in digital consumption will only increase.63

A LOOK AT SMARTPHONE AND TABLET USERS BY GENDER
MONTHLY USAGE OF APPS AND MOBILE WEB

Source: Nielsen Mobile via Electronic Mobile Measurement, Qtr 4, 2013 & 2012, P18+
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Time-shifted viewing has become increasingly important to networks and advertisers, with some networks seeing over 50% of their 18-34 aged viewership coming in the seven-day window after the live airing. Netflix is the world’s leading Internet television network with over 50 million members in nearly 50 countries enjoying more than two billion hours of TV shows and movies per month, including original series. Additionally, women account for more of the unique visitors to Netflix and Hulu. Netflix Senior Data Scientist Mohammad Sabah has said that the company is capturing and analyzing an incredible amount of data to try and figure out what you want to watch next. Netflix, and other services like Amazon Prime lean hard on data-driven approaches to determine their programming. Netflix looks at 30 million “plays” a day (including when you pause, rewind and fast forward) four million ratings by Netflix subscribers, three million searches, as well as the time of day when shows are watched and on what devices.

US AUDIENCES ON YouTube BY AGE AND GENDER

<table>
<thead>
<tr>
<th>Demographics</th>
<th>US Online Audience Reach</th>
<th>US Monthly Users</th>
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</thead>
<tbody>
<tr>
<td>Total Audience</td>
<td>58%</td>
<td>128.2 M</td>
</tr>
<tr>
<td>Ages 18-34</td>
<td>67%</td>
<td>38.7 M</td>
</tr>
<tr>
<td>Ages 35-49</td>
<td>59%</td>
<td>34.2 M</td>
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<tr>
<td>Ages 50-64</td>
<td>52%</td>
<td>25.7 M</td>
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<tr>
<td>Ages 65+</td>
<td>48%</td>
<td>10.9 M</td>
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<tr>
<td>Male</td>
<td>58%</td>
<td>60.5 M</td>
</tr>
<tr>
<td>Female</td>
<td>58%</td>
<td>67.7 M</td>
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</table>

Ted Sarandos, Chief Content Officer for Netflix, has stated that those at Netflix were initially surprised that female audiences were watching *House of Cards*, perhaps because it had a “strong male lead” rather than a “strong female lead.” In an interview with *The Hollywood Reporter* last year, he noted that women liked the show due to the presence of Robin Wright and Kate Mara. When asked how he knew this is why women watched, he answered, “You see it in what else they watch – the algorithmic similarities to what else they’re watching and why they’re watching. And then we can very directly focus-group with them and survey them about what their attractions are. So we found that there’s overlap with *Gossip Girl* and *House of Cards*.”

The busiest “television” platform in the world is YouTube, which is owned by Google and has a billion unique visitors watching six billion hours of video every month. Ynon Kreiz, the executive chairman of Maker Studios, the world’s largest provider of online content, noted that its series “Epic Rap Battles of History,” broadcast on YouTube, and which offers comical face-offs between, say, a faux Miley Cyrus and Joan of Arc, attracts an average forty million viewers – almost four times the viewership of the finale of AMC’s *Breaking Bad*.
ADVERTISING AND MARKETING

Television is different from the movies in that it is driven by advertising. And even as advertising is changing, considering the spending power that women wield in today’s marketplace, it’s particularly important for marketing messaging to resonate with them.

Research shows that the female audience is discerning. They often make decisions after speaking with friends and seeking recommendations.

A new survey found that:

- **51%** of women liked pro-female ads because they felt they broke gender barriers.
- **4 out of 5** women thought it was important for younger generations to see a positive portrayal of women. An overwhelming majority felt that how women are seen in campaigns has a direct effect on girls’ self-esteem.
- **71%** said brands should be held responsible for how they use their advertising to promote positive messages about women – and **3 out of 5** women believed that any brand can be pro-women.
- **94%** said that using women as sex symbols was harmful to the gender. More desirable qualities were sense of humor, creativity, compassion, care.
- **75%** said they liked ads that featured everyday women.

In terms of connecting with women today, two important segments are seen as “Chief Household Officers” and “Young Women on the Go.”

**CHIEF HOUSEHOLD OFFICERS**

| Median Age | 38 |

- 50% are married
- 51% have kids
- 59% work
- 19% stay at home
- 65% work in white-collar jobs
- 23% live in urban areas (income $58k)
- 40% have bachelors and graduate degrees
- 96% use cell phones at home
- 23% use TV as a primary source on new products.

Chief Household Officers represent 33% of women and have huge buying power in a number of big-ticket categories, including food, auto, furniture, investments, and travel. They have learned to manage their hectic lives and can be reached by appealing to their desire to balance between health, career and family and self-assured decision-making.
Young Women on the Go (YWG) represent 15% of women 18-54 and have huge buying power and influence across multiple categories such as financial services, groceries, restaurants, education, and travel. YWG are very self-reliant and don’t typically depend on others. They desire to make the most informed decisions possible. Their priorities in 2014 were education, healthcare, the job market and fuel costs. They are tech savvy, extremely social with a large network, and love new brands.

“Marketing to women in ways that are empowering isn’t just good for women – it makes economic sense. Young women easily see hundreds of advertisements a day. As industry influencers, either we continue marketing in ways that perpetuate stereotypes or, instead, we can use messages that educate and empower. We can continue to accept images of women being sexualized and subjugated or replace them with images of women with agency and power. Marketing more effectively to women will improve the bottom line of our companies – and lead to greater equality in our society.”

- Sheryl Sandberg
SOCIAL MEDIA

Any discussion of women as a market would be incomplete without considering their social media usage – and acknowledging their formidable clout across these platforms.

Not only do women have tremendous buying power, women also drive the conversation online. “Digital Women Influences,” a survey conducted by Weber Shandwick and KRC Research, showed that marketers would be in peril if they “ignore the strength – in number and influence – of women who use social media.”

Since 2000, women have surpassed men in internet usage. In December 2012, 116 million U.S. women were active on the Web, compared with 102 million males. Women represent the majority of the online market and use the top social media channels more than men in almost every network.

- \textbf{33\% of US online adult females use Pinterest, compared to 8\% of men.}
- \textbf{76\% of US online adult females use Facebook, compared to 66\% of men.}
- \textbf{Brands are more likely to get a response on social media from females vs. males: 54\% of females will show support for a brand and 53\% will access offers, compared to 44\% and 36\% of males, respectively.}
- \textbf{55\% of the Twitter account holders are women and women tweet 30\% more.}

More women also use social media as a creative outlet, particularly for blogging and uploading/sharing photos (28\% women vs. 23\% men) and for entertainment purposes (48\% women vs. 45\% men). Twitter has become a popular destination where fans can talk about their favorite TV shows in real-time. Nielsen has provided a study that shows statistical evidence of a link between broadcast TV tune-in for a program and the Twitter conversation around that program. The study used time series analysis to determine if Twitter activity drives increased tune-in rates for broadcast TV and if broadcast TV tune-in leads to increased Twitter activity. By analyzing minute-to-minute trends in Nielsen’s live TV ratings and tweets for 221 broadcast primetime program episodes using Nielsen Social, the study found that live TV ratings had a meaningful impact in related tweets among 48 percent of the episodes sampled. The results also showed that the volume of tweets caused significant changes in live TV ratings among 29 percent of the episodes.

“Social media saved my career,” says Mara Brock-Akil, creator of Being Mary Jane and The Game: “When the CW cancelled The Game in 2008, the social-media outcry led BET to pick the series up. It’s now in its seventh season. Netflix and Hulu offer viewers the opportunity to catch up on an entire season of shows they may have missed, and that’s good for the networks because these ‘catch-up’ viewers can then join the existing loyal fan base.”

Shonda Rhimes’ Scandal became a success story – but it didn’t start off as one. Critics and viewers were not immediate converts, or “Gladiators,” as the fan’s most ardent supporters are known as. Indeed, the series was almost cancelled after its first season due to poor ratings. By the conclusion of season two the tide had turned: The season finale boasted 9.12 million U.S. viewers. Scandal’s turnaround is attributable largely to Twitter – the show generates approximately 350,000 tweets per episode. Writers and actors used their Twitter accounts to promote upcoming episodes, live-tweet while they aired, and engage directly with their audience using hashtags (#Scandal, #ScandalABC, #AskScandal). Scandal transported the TV water cooler into the Twitterverse – and its ratings skyrocketed.
WEB SERIES

The success of women content creators and female stories in the form of web series shows that, given the opportunity and the resources, female-driven content can attract a strong and devoted audience. A number of web series by women are bringing more complex portrayals of women to the screen and succeeding as well. Indiewire writes, “Online stories about women are quite rich as well and have been for years. A year after lonelygirl15 rose to fame by giving geek boys their ultimate cam girl, Felicia Day’s The Guild delivered a counter-punch: a serious awkward, geek girl, a trend that persists today. Major networks put women at the center of genre stories, as NBC did with Gemini Division and MTV did with Valemont. Indie creators build out niches: Anyone But Me told the story of serious teen girls who were very seriously in love. Issa Rae’s Awkward Black Girl gave black women a complicated lead before Scandal, and put her on the map as storyteller, writer, content creator, and producer with a necessary and unique voice.”

When actress Felicia Day created her own web series, The Guild, in 2007 she couldn’t have imagined how popular the enterprise would become: “We filled rooms at Comic-Con that TV shows usually fill,” she notes. The series lasted six seasons – Day was its sole writer throughout – and she was awarded the Talent Gold honor at Adweek’s first Watch Awards, a ceremony celebrating excellence in online video. “There was never a role that I felt really represented me,” Day has explained. “I used to get shunted to the sidelines as the third best friend or the secretary. I have an unusual background and interests that don’t really align with mainstream entertainment, so I wrote myself a central role.”

Popular female-centric web series include, Broad City (now a Comedy Central TV show), Chloe and Zoe, East WillyB, Famous Farrah, F to 7th, MisSpelled, Hellow Cupid, and Tiffany Schlain’s Emmy-nominated, The Future Starts Here.

Aymar Jean Christian for Indiewire writes, “Web series, or independent television, are valuable because creators can hone their voice and audience outside corporate development. Indie TV is more diverse than traditional TV, where many networks have few or no shows by and about women and people of color. Networks like Comedy Central and HBO should be commended for green-lighting shows by promising young women, but we’re a long way from parity.”
Despite a few notable exceptions, there are very few high-profile female directors. Women comprised just 7% of all directors, 11% of all writers, 19% of all executive producers, and 23% of all producers working on the top 250 films of 2014, according to the Center for the Study of Women in Television and Film at San Diego State University. The picture is slightly brighter on television where women account for 20 percent of creators yet directed only 13% of episodes.

Women comprised just 7% of all directors, 11% of all writers, 19% of all executive producers, and 23% of all producers working on the top 250 films of 2014.

- Center for the Study of Women in Television and Film at San Diego State University.

There are women out there who are amassing power in the industry and they’re using it to support the next generation of female creatives. We see that having a woman at the helm affects the kind of stories being told. Female producers, directors, and writers are more likely to feature girls and women on screen. Women are also flexing their muscle as producers. For example, Megan Ellison of Annapurna Pictures funded the $45 million dollar budget of Kathryn Bigelow's Zero Dark Thirty.

“\textit{We want to make commercial movies and television with strong female characters.}”

- Alison Owen

Nina Jacobson is a former president of Buena Vista Motion Pictures Group, a subsidiary of The Walt Disney Company. She established her own production company, Color Force, in 2007 and is the producer of The Hunger Games movies.

Producers Alison Owen (Saving Mr. Banks, Jane Eyre, The Other Boleyn Girl) and Debra Hayward (Les Misérables, Tinker Taylor Soldier Spy) are also taking a proactive approach. The two teamed up to form Monumental Pictures, and Owen has made their aim explicit: “We want to make commercial movies and television with strong female characters.” The company’s first project will be a screen adaptation of Caitlin Moran's bestselling semi-autobiographical novel How to Build a Girl.

Similar waves of opportunities for more complex characters are happening in television: when women have power and decision making options behind the scenes they also use their clout to hire women and that translates into more women onscreen. The most powerful show-runner today is Shonda Rhimes, who has hired multiple women and people of color onscreen and behind the scenes for her ABC shows Grey’s Anatomy, Private Practice, Scandal, and How to Get Away With Murder.

Another successful example is Nashville, created by Oscar winning writer of Thelma and Louise, Callie Khouri. For the last two seasons she had a predominantly female writing room and hired almost 50% female directors, a number unheard of in TV. In addition, women directors accounted for 50% of the fourth season of Girls (created by Lena Dunham with Dunham and Jenni Konner as showrunners) and on the first season of Jill Soloway's Transparent all episodes were directed by women.
BRAVE NEW WORLD...
Where we are headed

There have been a lot of discussions in the entertainment field this past year around the value of female perspectives in our industry. Women are moving forward, and businesses must evolve alongside them in order to thrive – and survive. Women as a market are the key to successful businesses. But one thing is clear: to get women’s money you need to give them the content they want.

John Fithian CEO of NATO says, “We need more women in the movie business to sell more tickets at the box office.” But while movie studios still lag far behind proportionally in terms of gender equality, change is beginning to happen on all other platforms across the industry due to data being sourced from a more direct connection to audiences in the digital age, and opportunities provided by platforms like YouTube and Yahoo that democratically allow for more diverse storytelling.

The Sundance and Women in Film LA Research Study on female filmmakers points to four areas for potential solutions to overcome the obstacles for female filmmakers: Mentorship, Financial Access, Raising Awareness, and Networking. Several strategic priorities are indicated including the examination of hiring and financing practices.91

The advertisers and exhibitors need to feed the other part of the buying audience, and quality films with female characters are doing just that...Gender biases are melting away and girls are dreaming of becoming Secretary of State or even President. Some may want to end hunger or educate the world about human trafficking. The young heroines in these movies feed into that mentality and give their followers the motivation and confidence necessary to go after those dreams.”92

We’ve seen that women want to see more stories about their lives, experiences, and dreams. Former Sr Exec VP of NBC Universal Lauren Zalaznick recently said, “The success of female driven content and the volume of shows prominently featuring female characters in television is unparalleled. It could be cyclical or it could be systemic. We hope it’s systemic change. I believe that the opportunities for women will change—not because it’s the right thing to do—but because it’s the economic thing to do.”93

“Gender biases are melting away and girls are dreaming of becoming Secretary of State or even President.”

-Kathy Arnold
ACTION STEPS

1. Raise awareness by educating industry members and debunking myths that perpetuate gender bias. Use these stats when you create your financing proposals to counter financiers who see gender as limiting. When they say, “Less money is made with female leads, female stars, or female-driven properties,” or “Women aren’t our target audience”—be ready with the stats that support your film to show female participation is connected to profitable and pro-social outcomes.

2. Producers can practice a modified version of the NFL’s Rooney Rule (which requires NFL teams to interview minority candidates for head coaching and senior football operations jobs). Make it standard practice to consider female candidates for directing and writing positions. Request that all studio and agency director lists, actor lists, and crew lists for a specific project are balanced in gender and diversity.

3. When creating content, think about these stats and how to balance the gender landscape of your story. If five female characters were added to scripts going into production, gender balance could be achieved across the top 100 films in 4 years.

4. Hire women in all steps of the creative process to make sure you are getting a balanced perspective and that you are not ignoring potential audience members that can lead to dollars. Producers have the ability to create and alter contracts in the hiring process. If top producers make it a priority to add an “equity rider” to contracts of directors/writers, gender balance could be achieved overnight. An “equity rider” states that onscreen, the cast should be 50% female when it makes sense for the story.

5. Do not forget women when you are marketing. Pull in and engage the female audience by promoting the female perspective.

6. Use the stats and infographics, that are downloadable and shareable, in social media and for embedding on web pages.

7. Follow and Share your story with us:

**TWITTER:** @PGAWomen @WomenaHollywood @melsil @queendean

**FACEBOOK:** PGA WIN, Women and Hollywood

Lydia Dean Pilcher is an American independent film and television producer of over 35 feature films, and founder of Cine Mosaic, a production company based in New York City. She is VP of Motion Pictures, Producer’s Guild of America, and Chair of PGA Women’s Impact Network.

Melissa Silverstein is a writer and speaker with an extensive expertise in the area of women and Hollywood. She is the founder and editor of Women and Hollywood. She is the co-founder and Artistic Director of The Athena Film Festival.

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Layout and Illustrations
Alex Kahn
Addendum i: Top Grossing Female-Driven Films

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<tr>
<th>Film</th>
<th>Year</th>
<th>Director</th>
<th>Writer(s)</th>
<th>Opening Weekend</th>
<th>Domestic Gross</th>
<th>Foreign Gross</th>
<th>Total</th>
<th>Budget</th>
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<tbody>
<tr>
<td>Mamma Mia!</td>
<td>2008</td>
<td>Phyllida Lloyd</td>
<td>Catherine Johnson</td>
<td>$27 million</td>
<td>$144 million</td>
<td>$466 million</td>
<td>$609 million</td>
<td>$52 million</td>
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<tr>
<td>Twilight</td>
<td>2008</td>
<td>Catherine Hardwicke</td>
<td>Melissa Rosenberg</td>
<td>$69 million</td>
<td>$191 million</td>
<td>$199 million</td>
<td>$383 million</td>
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<td>Twilight: New Moon</td>
<td>2008</td>
<td>Melissa Rosenberg</td>
<td>By Karen Rosenfelt</td>
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<td>$413 million</td>
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<td>Twilight: Eclipse</td>
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<td>Melissa Rosenberg</td>
<td>By Karen Rosenfelt</td>
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<td>$398 million</td>
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<td>Twilight: Breaking Dawn, Part 2</td>
<td>2012</td>
<td>Melissa Rosenberg</td>
<td>By Karen Rosenfelt and Stephenie Meyer</td>
<td>$141 million</td>
<td>$292 million</td>
<td>$537 million</td>
<td>$829 million</td>
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<td>Bridesmaids</td>
<td>2011</td>
<td>Kristen Wiig and Annie Mumulo</td>
<td>Jennifer Lee</td>
<td>$26 million</td>
<td>$169 million</td>
<td>$119 million</td>
<td>$288 million</td>
<td>$32 million</td>
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<td>Frozen</td>
<td>2013</td>
<td>Jennifer Lee</td>
<td>By Linda Woolverton</td>
<td>$67 million</td>
<td>$400 million</td>
<td>$858 million</td>
<td>$1.2 billion</td>
<td>$150 million</td>
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<tr>
<td>Gravity</td>
<td>2013</td>
<td>Academy Award Winner</td>
<td>By Jennifer Lee</td>
<td>$56 million</td>
<td>$274 million</td>
<td>$442 million</td>
<td>$716 million</td>
<td>$100 million</td>
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<td>Maleficent</td>
<td>2014</td>
<td>Linda Woolverton</td>
<td>By Linda Woolverton</td>
<td>$69 million</td>
<td>$240 million</td>
<td>$516 million</td>
<td>$756 million</td>
<td>$180 million</td>
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<td>Lucy</td>
<td>2014</td>
<td>By Virginia Silla</td>
<td>Written by Linda Woolverton</td>
<td>$44 million</td>
<td>$126 million</td>
<td>$332 million</td>
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<td>Alice in Wonderland</td>
<td>2010</td>
<td>By Linda Woolverton</td>
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<td>$116 million</td>
<td>$334 million</td>
<td>$691 million</td>
<td>$1.025 billion</td>
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<td>The Hunger Games</td>
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<td>Written by Suzanne Collins</td>
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<td>$121 million</td>
<td>$337 million</td>
<td>$415 million</td>
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<tr>
<td>The Hunger Games: Mockingjay - Part 2</td>
<td>2014</td>
<td>By Nina Jacobson</td>
<td>Produced by Nina Jacobson</td>
<td>$66 million</td>
<td>$237 million</td>
<td>$301 million</td>
<td>$538 million</td>
<td>$185 million</td>
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# Addendum ii. Top Grossing Women Directors

<table>
<thead>
<tr>
<th>Director</th>
<th>Film</th>
<th>Gross</th>
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<tr>
<td>Jennifer Lee</td>
<td>Frozen</td>
<td>$1.274 Billion</td>
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<tr>
<td>Jennifer Yuh Nelson</td>
<td>Kung Fu Panda 2</td>
<td>$665 million</td>
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<tr>
<td>Phyllida Lloyd</td>
<td>Mamma Mia!</td>
<td>$609.8 million</td>
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<td>Brenda Chapman</td>
<td>Brave</td>
<td>$539 million</td>
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<td>Vicky Jenson</td>
<td>Shrek</td>
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<td>Catherine Hardwicke</td>
<td>Twilight</td>
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<td>Mimi Leder</td>
<td>Deep Impact</td>
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<td>Ann Fletcher</td>
<td>The Proposal</td>
<td>$317.4 million</td>
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<tr>
<td>Amy Heckerling</td>
<td>Look Who’s Talking</td>
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<tr>
<td>Betty Thomas</td>
<td>Doctor Dolittle</td>
<td>$294.5 million</td>
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7. Box Office Mojo. (2013). 2013 Domestic Grosses. Box Office Mojo. http://boxofficemojo.com/yearly/chart/?yr=2013 Note: This analysis is limited by a number of factors including all the variables at play in production costs, tax incentives, and factors impacting ROI.


