



Staying power

The enduring footprint of Australian film



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There isn't a more pervasive prism for reflecting and shaping Australia's national identity than screen content. Its ability to tell our stories through image and sound, infused with cultural nuances, has a powerful impact on how Australians see themselves, how they see others and how others see Australians.

Feature films lead this charge. They start with a buzz amplified by the big screen before traversing every small screen possible and remaining accessible in different ways, in many corners of the world, for many years after release. When our very vernacular changes we know they make a difference.

In 2011, Screen Australia published *Beyond the Box Office: Understanding Audiences in a Multi-screen World*.¹ This discussion paper analysed the patterns of screen media consumption in Australia over a five-year period, helping to map shifts in what people are watching and how they are watching it.

This was followed in early 2012 with *What to Watch? Audience Motivation in a Multi-screen World*,² a companion piece that not only looked at the size and shape of audiences but also questioned why people watch what they watch and to what extent their motivations change for different content on different platforms over time.

Together they reveal valuable insights into how audiences are engaging with professionally made and distributed screen stories amid collapsing release windows, converging distribution platforms and fragmenting devices.

These insights highlight an important distinction between professional productions and the growing prevalence of user-generated content. While feature films, as an example, are inherently high-risk investments with large budgets, they are also very durable. This durability is, in part, a consequence of their need to mitigate risk by being exploited across as many platforms in as many territories as possible.

The scale and inherent risk involved in a feature film informs the creative process, with long gestation periods in which the story is developed and refined, as well as the contribution of strong creative teams and the delivery of content with higher production values. Time and time again, they have found audiences and created impacts in ways that often other forms of screen content cannot.

Yet, quantifying film's enduring footprint can be challenging.

¹ Screen Australia, *Beyond the Box Office: Understanding Audiences in a Multi-screen World*, April 2011 (http://www.screenaustralia.gov.au/research/beyond_box_office.aspx)

² Screen Australia, *What to Watch? Audience Motivation in a Multi-screen World*, June 2012 (http://www.screenaustralia.gov.au/research/what_to_watch.aspx)

TOWARDS INDICATORS OF LONGER-TERM IMPACT

Both *Beyond the Box Office* and *What to Watch?* address some of the challenges inherent in trying to measure engagement, and ultimately success. These challenges occur even when tackling what should be the most tangible of outcomes, such as the number of times a film has been viewed, let alone its wider impact.

A single holistic measure that considers revenues, critical acclaim and cultural influence would be ideal, but this approach may also run the risk of over-simplifying a complex mix of outcomes.

Another approach is to use case studies to highlight the myriad of ways a piece of content has found and impacted on an audience across its whole life cycle.

Take Stephan Elliott's feature film *The Adventures of Priscilla, Queen of the Desert* as an example. In terms of its theatrical release, it is among the most successful Australian films of all time, with an impressive \$16.5 million gross domestic box office in 1994.³ However, these earnings reveal just a small part of its overall success. It continues to find a new generation of viewers while also morphing into unexpected forms.

The wider impact of this film stretches two decades, from the big screen to the small screen, from Australia to Iceland, from celluloid to the grease paint of Broadway, and beyond. All these factors combine to illustrate the enduring impact of a film that speaks on one level to the idiosyncrasies of Australian culture while on the other telling a universal story of acceptance that resonates with audiences across the world.

In this report, we explore five indicators of success and longer-term impact, based on analysis of a selection of films from 15-20 years ago. These indicators are:

- *Primary release*: the breadth of domestic and international release
- *Revenues*: earnings across all platforms for all territories
- *Ongoing access*: continued availability across platforms over time
- *Acclaim*: festival screenings and awards won
- *Wider impact*: new iterations and cultural awareness of the original form

To varying degrees, different pieces of content will achieve different levels of activity against each of these longevity attributes. However, not all attributes have to be met in order for it to be considered a success. Some attributes have a wider impact than others and maybe more relevant to some content as opposed to other content.

³ Motion Picture Distributors Association of Australia, accessed via Screen Australia, 'Top 100 Australian feature films of all time, ranked by total reported gross Australian box office', January 2012, not adjusted for inflation (<http://www.screenaustralia.gov.au/research/statistics/mrboxaust.asp>)

The Adventures of Priscilla, Queen of the Desert is a great example of performance across each of these indicators of longevity. But, it isn't alone: many locally produced feature films have also had an enduring impact and it is worth reminding ourselves of some of these success stories.

PRIMARY RELEASE: The breadth of domestic and international theatrical release

In the current environment, it takes on average 2.5 years for a feature film to traverse its first cycle from theatrical release, through video to television and now the online markets.⁴

Although it is dangerous to judge long-term audience engagement from just the primary release, it is important to remember that the initial theatrical release is an important indicator. In some instances a film may build momentum, finding a comparatively larger audience downstream, but typically, success breeds success from one platform to the next.

In the five years from 1993 to 1997 there were 94 Australian feature films (other than documentaries) that had a commercial release in local cinemas.⁵ Of these, 64 films also had an international theatrical release, across more than 70 countries combined.⁶

Twenty of these films could be defined as 'standout' performers in primary release, earning more than \$2.5 million at the Australian box office (not adjusted for inflation)⁷ and/or achieving international release in 10 countries or more. See page 9 for a summary of these titles.

When picking apart the scale of these international sales, five films were released in more than 35 countries. *Babe* led the pack, followed by *The Piano*, *Shine*, *Muriel's Wedding* and *The Adventures of Priscilla, Queen of the Desert*. Not only was *Babe* remarkable for its release in over 50 countries it is also noteworthy for doing so in around a year. *Kiss or Kill* took five years to reach 10 countries.

Of course, not all of territories are equally lucrative and the price paid for individual titles also fluctuates.⁸ For example, in

⁴ Screen Australia, 'Did You Know?: Australian films on Australian Screens', Jan. 2012 (www.screenaustralia.gov.au/news_and_events/bulletins/didyouknow/2012/01/Jan12.aspx)

⁵ Only those Australian feature films which have had a commercial cinema release. This includes Australian productions and productions with overseas partners where creative control is shared (i.e. with a mix of Australians in key creative positions).

⁶ The list of countries have been compiled from a variety of sources over the last 20 years, primarily Nielsen EDI, Rentrak and the Independent Film and Television Alliance as well as other sources such as sales agents and producers where required.

⁷ As reported to the Motion Picture Distributors Association of Australia.

⁸ The Film Finance Corporation Australia (a predecessor agency of Screen Australia) tracked the overseas sales of feature films in which it invested from 1988 to 2007. The prices listed are for various types of acquisition deals; no presales are included. Some are 'outright' deals where no overages will be paid regardless of the performance of a film. Some prices reflect 'minimum guarantees or advances'. In the latter case, commissions and/or royalties have been negotiated for each of the rights licensed, and if the film performs well, overages may be paid in addition to the guaranteed amount.

the late 1990s, the price for Australian feature films sold into North America reached US\$500,000 while sales into Scandinavia and the Middle East were just US\$128,000 and US\$40,000 respectively.⁹

Nevertheless, it is important to note that these cultural products are reaching out to audiences in many diverse countries, from Mexico to Bolivia and Argentina to Japan.

REVENUES: Earnings across all platforms for all territories

The majority of theatrical revenues for the 20 standout performers in primary release came from the mature, English-speaking markets of Australia, North America, United Kingdom and Ireland. Together, these films achieved a combined theatrical gross of \$482.4 million across the key markets. North America accounted for 56 per cent of returns (\$269.0 million) while the UK and Ireland contributed 19 per cent (\$91.6 million).¹⁰

In addition to theatrical revenues, returns are also derived both locally and internationally from sell-through and rental physical video (DVD and Blu-ray) and electronic download, free-to-air, subscription and pay-per-view television and other types of screenings such as those on airlines or in motels.

To better understand the contribution of these rights we can look at three of the standout performers, *The Adventures of Priscilla, Queen of the Desert*, *Muriel's Wedding* and *Napoleon*, as examples.¹¹

All three of these films reached profit. *Muriel's Wedding* was the fastest, taking less than a year once released, followed by *The Adventures of Priscilla, Queen of the Desert*, which took around two years, and *Napoleon*, which took five years. But importantly, their earnings haven't dried up, with the three films combined returning more than \$2.5 million to investors over the last five years. These titles sold across many territories, with sales typically including a mixture of rights. Such international sources of revenue can be very lucrative to a film's investor. In the case of *The Adventures of Priscilla, Queen of the Desert*, for example, foreign returns have accounted for 88 per cent of all revenues over the life of the project, while for *Napoleon* it is 77 per cent and *Muriel's Wedding* 60 per cent.

ONGOING ACCESS: Continued availability across platforms over time

The theatrical release window is relatively small and finite, but some films become perennial favourites through the long shelf life of video and television screenings. All the standout performers have been released on physical video (VHS and/or DVD) and on free-to-air or subscription television, with some also available now as Blu-ray editions and via electronic download services.

Again, performance against this indicator can best be illustrated by looking at a few films from the list of standout performers. In this instance *Babe*, *Shine*, *The Adventures of Priscilla, Queen of the Desert*, *Muriel's Wedding* and *The Castle* are all good examples. These titles took 7–9 months to be first released on video after their theatrical premiere and have subsequently been issued across VHS, DVD, Blu-ray or electronic download an average of 14 times each since the release of the first edition.¹²

There have been 18 physical video editions of *The Adventures of Priscilla, Queen of the Desert* since April 1995, as well as a downloadable version on Bigpond Movies. This has included a number of standard releases, as well as bundled with other film titles and stand-alone special releases including the 10th Anniversary Edition, Fabulous Edition, Pink Range Edition, a Limited Edition, and most recently, a Blu-ray release. In fact, it has been consistently re-versioned every two-to-three years.

In terms of television release, most of these titles took 1.5–2 years to be first screened on free-to-air or subscription after their theatrical premiere and they have screened at least once annually in 9 out of 13 years on average on free-to-air television alone.¹³

The Castle has had the highest number of screenings in the shortest time on free-to-air television. It has been broadcast 16 times since 1998, with an average audience surpassing 1 million viewers nationally more than half a dozen times – most recently in March 2009 with 1.1 million. It was screened twice more by Nine in 2009, with ratings of 906,000 and 917,000 respectively.

Their continued presence on video and television highlights a strong impact for these five titles in the last five years alone. Together, they have had estimated retail DVD and Blu-ray sales of close to 1 million units¹⁴ and cumulative average audience on free-to-air and subscription television in excess of 9 million.¹⁵

⁹ Screen Australia, 'Overseas sales of FFC-supported productions: Sales reported January 1998 to December 2000', archived page accessed September 2012 (<http://www.screenaustralia.gov.au/research/statistics/archsalesfeats.asp#Rdh50441>)

¹⁰ Rentrak and Screen Australia databases.

¹¹ Based on information supplied to Screen Australia, and the former Film Finance Corporation Australia from sources including producers, sales agents and distributors

¹² Physical video editions sourced from Trade Service of Australia and GfK Retail and Technology Australia. Electronic versions sourced from iTunes, Bigpond Movies and Quickflix streaming and download catalogues.

¹³ OzTam and ACNielsen, prior to 2001.

¹⁴ Screen Australia estimate compiled from GfK Retail and Technology Australia data, 1 January 2007 to 31 December 2011.

¹⁵ Cumulative average audience is derived from adding together the average audience for each screening. Free-to-air television: consolidated, five-city-metro and regional, OzTAM and RegionalTAM (excluding WA), 1 January 2008

ACCLAIM:

Festival screenings and awards won

Festivals and awards can often appear to be all about red carpets, sequins and photo opportunities. But beyond the mascara and patent leather shoes, the true value lies in distribution opportunities and high level of coverage generated in both industry and mainstream media, especially at top-tier events such as Cannes or the Academy Awards®.

A screening at an international festival or a nomination at an awards event can put a film with limited audience potential into the international spotlight, exposing it to a diverse range of people, and opening doors into unexpected markets. It can spearhead or strengthen a film's primary release, while the sales that flow through as a result will also increase revenues and perhaps ensure ongoing access on other platforms.

Of the standout performers from 1993-97, ten films were screened, nominated or won an award at Berlin, Cannes, Rotterdam, Sundance, Toronto and/or Venice, with both *Muriel's Wedding* and *Shine* appearing at four out of the six festivals. Furthermore, four of the films won an Academy Award®.¹⁶

The benefit derived from acceptance into major festivals is, however, probably best felt by films that are considered to be more challenging to audiences. Hollywood action blockbusters are not likely to benefit much from claiming a top prize at a prestigious festival. However, Jane Campion's seminal and challenging film *The Piano* is a different story.

The Piano won the Palm d'Or, as well as the Best Actress award, at the Cannes Film Festival five months before its Australian release in August 1993. This was, and remains, the first time a woman has won the Festival's highest award. The film went on to win three Oscars® at the 1994 Academy Awards® as well as screening dozens of times at festivals all around the world. It is hard to imagine that this acclaim did not significantly contribute to the film's commercial success.

Similarly, *The Adventures of Priscilla, Queen of the Desert* claimed the Prix du Publique, the most popular film voted by the public, at the 1994 Cannes Film Festival four months prior to its August release. This was followed by numerous screenings at international festivals and an Academy Award® in 1995.

WIDER IMPACT:

New iterations and cultural awareness of the original form

Not all films have spin-offs, but when they do, the breadth of this impact can be surprising and, occasionally, unforeseen.

Some spin-offs, like soundtracks, are factored into the overall release strategy of the film. Sequels, too, can already be in the pipeline, ready to go once the success of the original property is assured. Yet, some consequences are unintended and lie in the hands of audiences. For example, when dialogue enters the vernacular it clearly highlights an intangible outcome beyond anything money can buy, striking a chord in the national psyche.

Who hasn't heard variations of the quotes 'You're terrible, Muriel', 'That'll do, pig', 'This is going straight to the pool room' and 'Tell him he's dreaming' or 'That's just what this country needs: a cock in a frock on a rock' from *Muriel's Wedding*, *Babe*, *The Castle* and *The Adventures of Priscilla, Queen of the Desert* respectively.

In fact, of all the standout performers, it is *Priscilla* that probably best demonstrates just how wide the impact can be.

The soundtrack to *The Adventures of Priscilla, Queen of the Desert* went four times platinum within five months of its release in September 1994, with more than 280,000 units sold. After debuting at number six on the ARIA charts, the soundtrack rose to number one in its second week where it remained for a further four consecutive weeks.¹⁷

The film also spawned a hit musical some 12 years after its initial release. In 2006, *Priscilla the Musical* debuted at Sydney's Star Casino and ran for almost a year. From there, the show moved to Melbourne for a short run before packing its heels and heading overseas.¹⁸ The Australian production resulted in a cast recording which achieved gold status, with sales in excess of 35,000, within its first year of release.¹⁹

After a three-year run in London, *Priscilla the Musical* made its North American debut for three months in Toronto before transferring to a season on Broadway that ran for 16 months. You can still catch the show in Sao Paulo, Brazil, where it

¹⁷ Compiled from published and unpublished ARIA Charts (<http://www.aria.com.au/pages/aria-charts-end-of-year-charts-top-50albums-1994.htm>)

¹⁸ Based on various media articles, including Larry Rivera, 'Priscilla Queen of the Desert the Musical', About.com accessed September 2012 (<http://goaustralia.about.com/od/theatreperformingarts/a/priscilla.htm>); Mark Shenton, 'Priscilla Queen of the Desert - the Musical Arrives in London's West End March 10', Playbill.com accessed September 2012 (<http://www.playbill.com/news/article/127079-Priscilla-Queen-of-the-Desert-the-Musical-Arrives-in-London's-West-End-March-10>); and, Kenneth Jones, 'The Queen Finds a Palace on Broadway; Priscilla Will Open March 20, 2011' Playbill.com accessed September 2012 (<http://www.playbill.com/news/article/143023-The-Queen-Finds-a-Palace-on-Broadway-Priscilla-Will-Open-March-20-2011>)

¹⁹ Compiled published ARIA Charts (<http://www.aria.com.au/pages/httpwww.aria.com.aupagesARIACharts-Accreditations-2007Albums.htm>)

- 31 July 2012. Subscription television: consolidated, national, OzTAM, 1 January 2008 - 31 July 2012.

¹⁶ Screen Australia tracking of Berlin International Film Festival, Germany, Cannes Film Festival, France, International Film Festival Rotterdam, Netherlands, Sundance Film Festival, US, Toronto International Film Festival, Canada, Venice International Film Festival, Italy and Academy Awards®, US. The four Academy Award winners were *Babe*, *The Piano*, *Shine* and *Adventures of Priscilla, Queen of the Desert*

opened in March 2012. As well as being restaged in three countries, a further ten countries will stage it for the first time.

In addition to this large-scale production, there is also a long-running performance occurring at the Imperial Hotel in Sydney's Erskineville.²⁰ From 1995 to 2007, *The Priscilla Show* played three nights a week at the same venue that was used in the opening scenes of the film. Although there was a short hiatus while renovations were undertaken, the show reopened in 2010 and continues to draw crowds today.²¹

Not content with the big screen or stages of the world, *The Adventures of Priscilla, Queen of the Desert* has given rise 18 years later to *I Will Survive*, a light entertainment series screened on Network Ten in 2012.

The broadcaster describes it as a unique television event that follows 12 male contestants of different backgrounds as they strive to realise their ambition of performing on the grandest stage of all. Inspired by the film, contestants will climb aboard the famous silver bus and follow the *Priscilla* trail. Furthermore, one of the judges happens to be Stephan Elliott himself, the writer and director of the original.²²

A successful film can also have strong grassroots effects, with Broken Hill also reaping the rewards. In addition to *I Will Survive* shooting there during its production, one of the original film's major locations, The Palace Hotel, continues to trade on

the success and cultural impact of the film with a room called the *Priscilla Room*,²³ and the bus that was used in the stage adaptation has been donated to the town.²⁴

In fact, Stephan Elliot had even forgone a \$1 million private offer for the bus and on announcing the deal in September 2012, the NSW Minister for Tourism and Major Events, George Souris, summarised the film's wider impact, saying:

The Adventures of Priscilla, Queen of the Desert was a massive film and stage hit, drawing huge audiences and critical acclaim from all over the world. It is fitting we should preserve one of our cultural giants, so I am pleased that the NSW government and the Broken Hill City Council will share the cost of returning Priscilla to its 'spiritual' home ... (offering) a new lease of life as a tourist attraction that contributes to the economic and social wellbeing of the Broken Hill area.²⁵

This is by no means the full extent of the wider impact for *The Adventures of Priscilla, Queen of the Desert*. In fact, for a film released ten years before the phenomenon of YouTube, it's extraordinary that there are more than 1,500 results when you search on the film's full title today. These videos range from music clips and trailers to excerpts and full versions of the movie, with several achieving more than 500,000 views and together accounting for millions both in Australia and far beyond our shores.²⁶

²⁰ The Imperial Hotel (http://theimperialhotel.com.au/site/?page_id=610)

²¹ Rachel Olding, 'Feathers fly as an old girl gets a tarting up', Sydney Morning Herald accessed October 2012 (<http://www.smh.com.au/entertainment/restaurants-and-bars/feathers-fly-as-an-old-girl-gets-a-tarting-up-20101001-160zy.html>)

²² Network Ten (<http://iwillurvivetv.com.au/the-show.htm>)

²³ Noah Schultz-Byard, 'Priscilla's Palace Hotel receives further funding boost', ABC, March 2011 (<http://www.abc.net.au/local/stories/2011/03/18/3167853.htm>) as well as various other media articles and Visit Broken Hill (http://www.visitbrokenhill.com.au/accom_result1/the-palace-hotel/).

²⁴ Margaret Paul, 'Iconic Priscilla bus given to Broken Hill', ABC, July 2012 (<http://www.abc.net.au/news/2012-07-02/priscilla-bus-gifted-to-broken-hill/4105722>)

²⁵ Media release: George Souris MP, Minister for Tourism, Major Events, Hospitality and Racing and Minister for the Arts, 'Priscilla Finds New Home in Broken Hill', September 2012.

²⁶ YouTube search for *The Adventure of Priscilla, Queen of the Desert* (http://www.youtube.com/results?search_query=the+adventures+of+priscilla+queen+of+the+desert&oq=the+adventures+of+priscilla+queen+of+the+dese rt&gs_l=youtube.3...0.0.0.247929.0.0.0.0.0.0.0.0...1ac.1)

SUMMARY: STANDOUT PERFORMERS (1993-97)

	PRIMARY RELEASE		GROSS REVENUES		ONGOING ACCESS						ACCLAIM		WIDER IMPACT	
	No. countries theatrical release ¹	Aust. theatrical release date	Aust. box office ²	Mature, English-speaking markets box office ³	Aust. video release date ⁴	No. Aust. video editions ⁵	Blu-ray edition ⁶	Online service ⁷	Aust. FTV release date ⁸	Annual Aust. FTV screening ⁹	Major festival screening ¹⁰	Major festival or award or nom. ¹¹	Sound-track release	Spin-offs, sequels, stage adapt or observed cultural impact
The Adventures of Priscilla...	36	08/09/1994	\$16.5m	\$34.7m	13/04/1995	18	Y	BP	15/06/1997	10	1	2	Y	Y
Angel Baby	16	26/10/1995	\$1.1m	\$1.0m	19/09/1997	2	N	-	26/07/1998	2	3	1		
Babe	58	14/12/1995	\$36.8m	\$165.4m	27/09/1996	19	Y	BP/QF	22/11/1998	6	-	7	Y	Y
Bad Boy Bubby	13	01/08/1994	\$0.8m	\$0.8m	23/02/1995	5	Y	-	27/09/1997	1	6	5		
The Castle	15	10/04/1997	\$10.3m	\$12.8m	04/11/1997	8	N	BP	14/11/1999	11	1	-	Y	Y
Children of the Revolution	11	26/12/1996	\$1.0m	\$1.6m	03/06/1997	3	N	-	05/02/2000	2	2	-	Y	
Cosi	9	21/03/1996	\$2.9m	\$2.9m	24/10/1996	4	N	BP	16/05/1999	3	-	-		
Country Life	12	27/10/1994	\$0.4m	\$0.6m	14/09/1995	2	N	BP	28/03/1999	2	1	-		
Dating the Enemy	3	19/09/1996	\$2.6m	\$2.7m	03/03/1997	3	N	BP	23/05/1999	7	-	-	Y	
Kiss or Kill	11	11/09/1997	\$0.9m	\$2.2m	10/02/1998	3	N	-	-	-	2	-		
Lightning Jack	21	30/03/1994	\$6.4m	\$31.6m	24/11/1994	2	N	-	29/09/1996	4	-	-	Y	
Muriel's Wedding	40	29/09/1994	\$15.8m	\$39.9m	18/05/1995	13	N	IT	21/09/1997	10	4	-	Y	Y
Napoleon	13	26/12/1996	\$2.1m	\$2.2m	21/05/1997	6	N	-	09/10/1999	4	-	-		
Paradise Road	30	06/06/1997	\$3.0m	\$5.7m	16/12/1997	8	N	IT/BP	06/05/2001	3	-	-	Y	
The Piano	46	05/08/1993	\$11.2m	\$82.7m	10/11/1994	5	Y	BP	08/09/1996	3	3	5	Y	
Reckless Kelly	4	08/04/1993	\$5.4m	\$5.7m	16/12/1993	2	N	IT	19/02/1995	3	-	-	Y	
Shine	43	15/08/1996	\$10.2m	\$63.9m	13/05/1997	5	N	IT	28/06/1998	6	5	1-	Y	Y
Sirens	20	28/04/1994	\$2.8m	\$19.2m	10/11/1994	3	N	BP	16/03/1997	3	1	-	Y	
The Sum of Us	8	28/07/1994	\$3.3m	\$4.3m	24/02/1995	8	N	-	10/03/1996	4	1	-	Y	
The Wiggles Movie	2	12/12/1997	\$2.7m	\$2.7m	17/06/1998	10	N	-	5/10/2003	1	-	-	Y	

Sources:

- The list of countries has been compiled from a variety of sources over the last 20 years, primarily Nielsen EDI, Rentrak and the Independent Film and Television Alliance as well as other sources such as sales agents and producers where required.
- Rentrak and Screen Australia databases.
- Australia, United States, United Kingdom and Ireland sourced from Rentrak
- Trade Service Australia
- Trade Service Australia and GfK Retail and Technology Australia
- Trade Service Australia
- IT: iTunes Australia; BP: Bigpond Movies; QF: Quickflix catalogues, September 2012
- Television guides and OzTAM and RegionalTAM since 2002
- Television guides and OzTAM and RegionalTAM since 2002
- Berlin International Film Festival, Germany; Cannes Film Festival, France; International Film Festival Rotterdam, Netherlands; Sundance Film Festival, US; Toronto International Film Festival, Canada; and Venice International Film Festival, Italy
- Same as footnote 10 with the addition of Academy Awards®, US