MEDIA & SOCIETY

RESEARCH RESULTS

VRIJE UNIVERSITEIT BRUSSEL

LIMITED DISTRIBUTION

European Film Market / DocSalon

Sunday, 10 February, 10.00am - 11:00am

Eline Livémont & Dr. Willemien Sanders

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LaScam*
*Société civile des auteurs multimedia

VAF
VLAAMS AUDIOVISUEEL FONDS

RESEARCHERS

Eline Livémont (Eline.Livemont@vub.be) is a junior researcher, PhD candidate and teaching assistant at imec-SMIT-Vrije Universiteit Brussel (VUB). Her Ph.D. focuses on the production, distribution, consumption and policies concerning documentaries in Europe and is supervised by Prof. Dr. Karen Donders and Prof. Dr. / Rector Caroline Pauwels.

Willemien Sanders (W.Sanders@uu.nl) holds a PhD in Media Studies and is a lecturer at the Department of Media and Culture Studies, Utrecht University. Her research interests include but are not limited to documentary film and non-fiction film and television production. She is currently investigating documentary impact production. She is a co-chair of the Media Production Analysis working group of IAMCR.

ACKNOWLEDGMENTS

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They were conducted by Paul Pauwels (EDN) and analysed by Willemien Sanders.

The researchers conducted the analysis of both the survey and the focus groups on a voluntary basis

.CONTACT

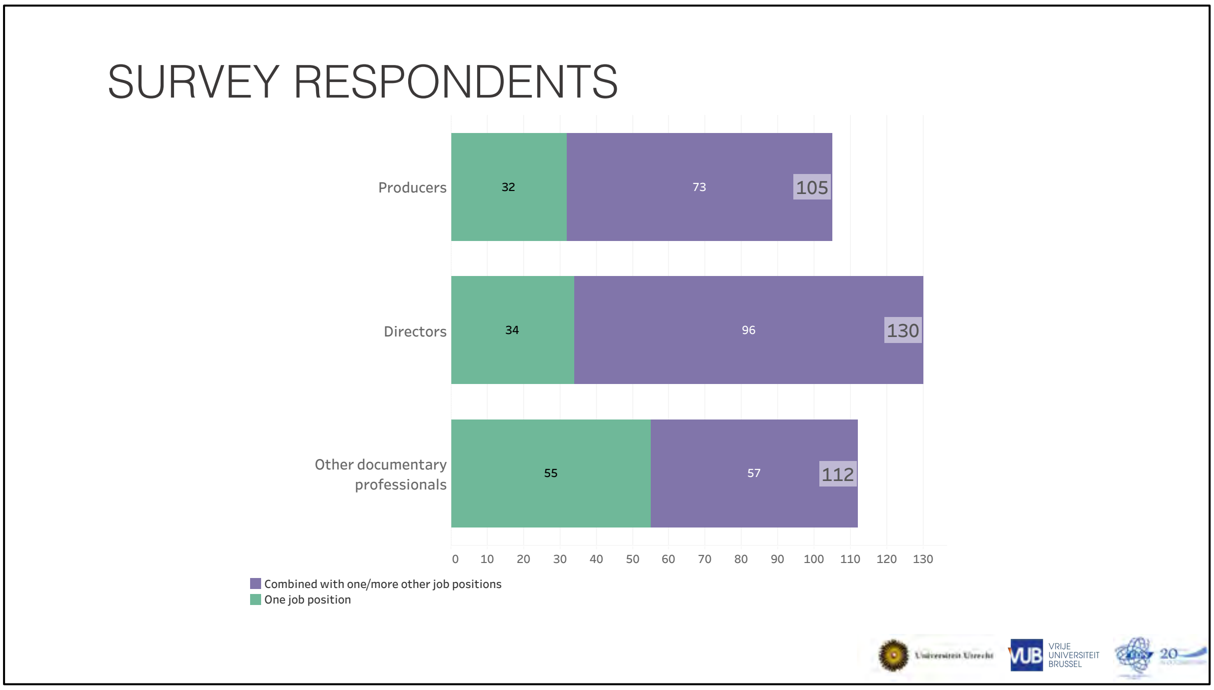
European Documentary Network
edn@edn.network
+45 33 13 11 22

RESEARCH CONTEXT

Documentary professionals in Europe are concerned about the economic sustainability of documentary production. Public broadcasters are faced with budget cuts, dedicated subsidies in various European countries are decreasing, and new distribution platforms are not providing the alternatives they seem to provide in other sectors yet . Not surprisingly, representatives of the sector have repeatedly asked for more government investments, with limited success. Faced with this situation, while taking into account the societal and cultural significance of documentary, it is essential to formulate sector-driven policy proposals, founded on research and data about the sector. This report provides those data.
Together with the European Documentary Network (EDN), imec-SMIT-VUB designed a pilot study to grasp the state of documentary in Europe. At the same time, a number of meetings were organized throughout Europe in which professionals involved in documentary discussed, in focus groups, core challenges, opportunities and policy priorities. The moderator produced reports and participants also shared their ideas in writing. The following is an overview of the main statistical and thematic findings.

1. Survey

Admittedly, the study is not representative for the whole documentary sector in Europe. However, it can be an important first step in building up some 'facts & figures' about this sector and in developing future tools to monitor the sector and guide policies and strategies.



The survey has been sent out to a wide variety of professionals within the European documentary sector, in an attempt to be as inclusive as possible. 211 respondents filled out the complete survey during the first semester of 2018. Most of the respondents indicated that they exercise more than one job position within the documentary field. The majority of them identified themselves with the profession of a director (130) and with that of a producer (105). 'Other documentary professionals' (112) represent various professions that are less related to the 'independent' production of documentary, such as commissioning editors, teachers, sales agents etc.

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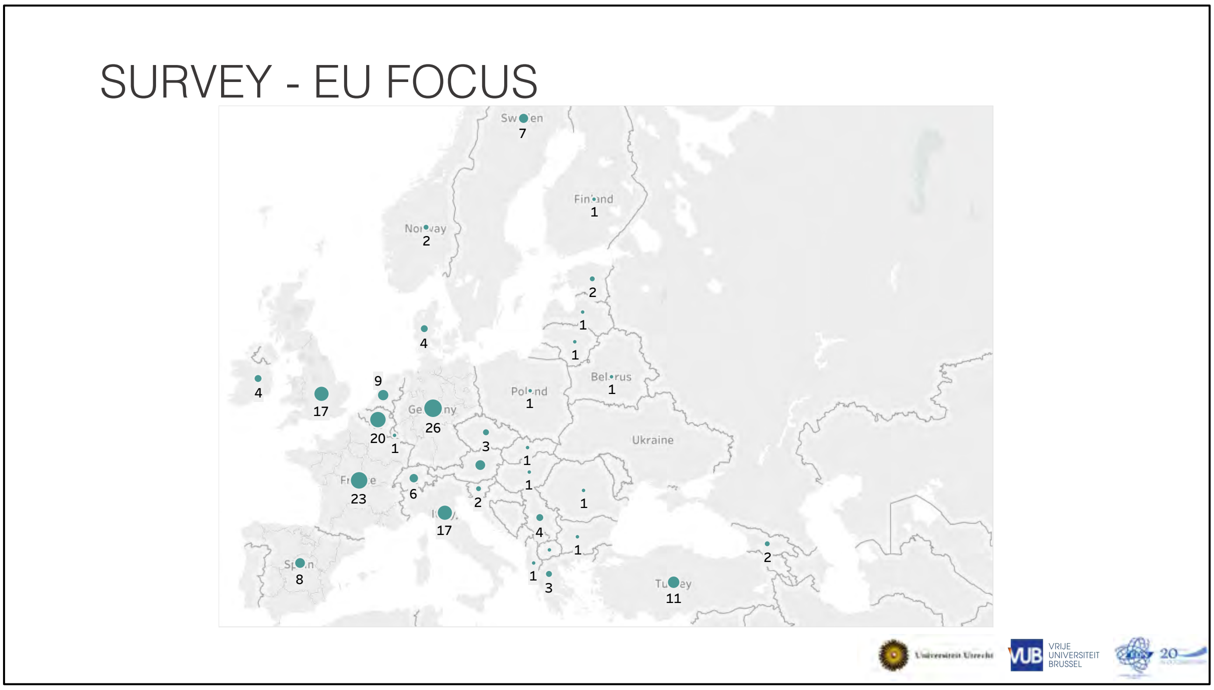
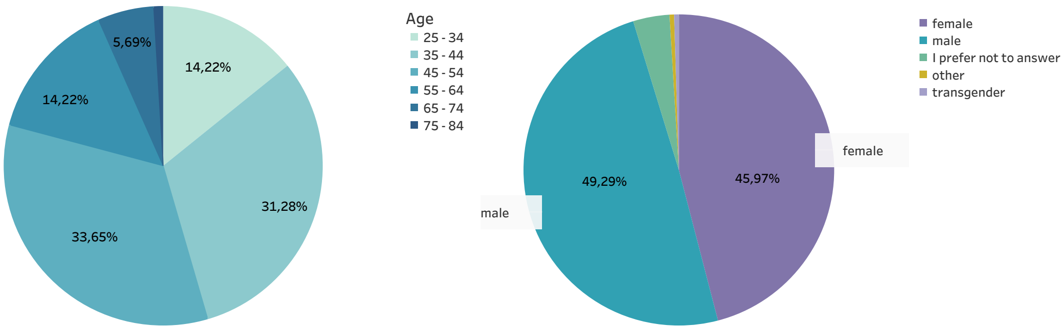


90,52% of the respondents live in Europe (of which 5,21% living in Turkey) and 9,48% of the answers are coming from non-European professionals. This last group doesn't necessarily reflect a 'European' view on the matter but most certainly an interesting one that can enrich the analysis.

SURVEY - AGE & GENDER BALANCE



In addition, the survey reflects a balanced gender representation, with 46% female and 50% male respondents. Also different age categories are well represented in this survey.

2. Focus groups

FOCUS GROUP - LOCATIONS

Date	City	moderator's report	#forms
25 January	Prague	yes	22
29 February	Glasgow	yes (bullet points)	9
22 March	Copenhagen	yes	1
29 March	Leuven	yes	5
03 May	London	yes	15
09 May	Belgrade	no	18
10 May	Sofia	no	2
			72

Seven focus group interviews were conducted in the cities listed above. 72 participants shared their ideas both in the focus group conversation and in writing.

FOCUS GROUP - DATA

reports moderators

forms

open questions:

. challenges

. opportunities

. policy priorities

statements: important for further discussion?

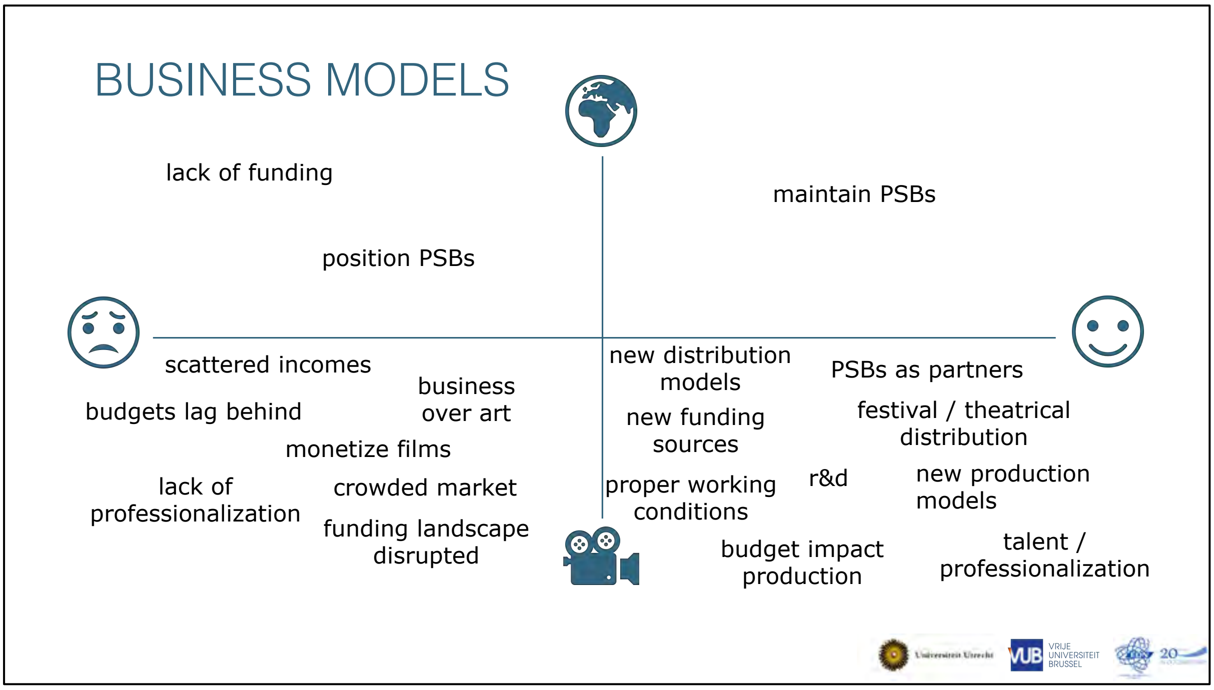
. challenges / opportunities / policy (/ threat)

. yes / no

The moderators of the focus groups provided reports of the conversations. In addition, from the second focus group on, main findings were translated into statements reflecting specific challenges, opportunities and policy priorities. Participants were invited to complete forms indicating their own ideas about the challenges, opportunities and policy priorities as well as whether they thought the issues in the statements were important for further discussion.

RESULTS

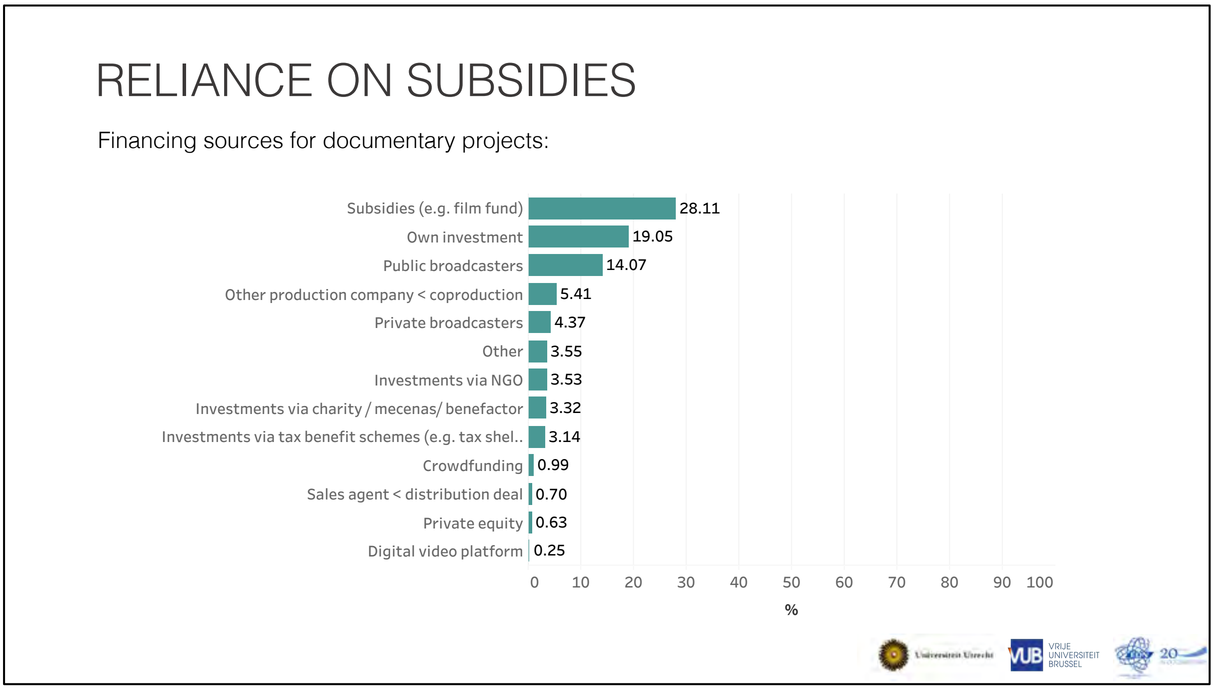
1. Business models



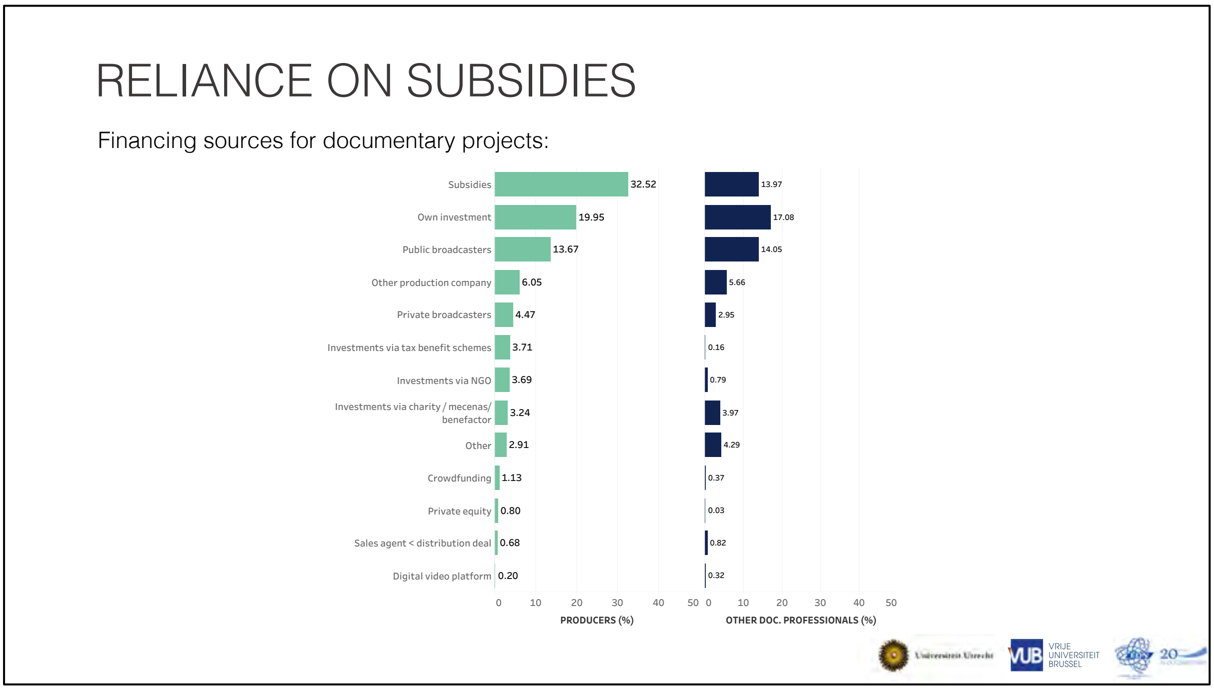
The left part of the slide represents challenges, the right side represents opportunities and policy priorities. The upper part refers to ideas concerning the world outside of the documentary sector, the lower part refers to the documentary sector itself.

A general lack of funding for media and the arts and the precarious position of public service broadcasting in general are main challenges. Within the sector the main challenges are small budgets, a crowded market, a disrupted funding landscape and scattered incomes, altogether reflecting a fragmented industry. Another concern is the need to prioritize business interests over artistic interests.

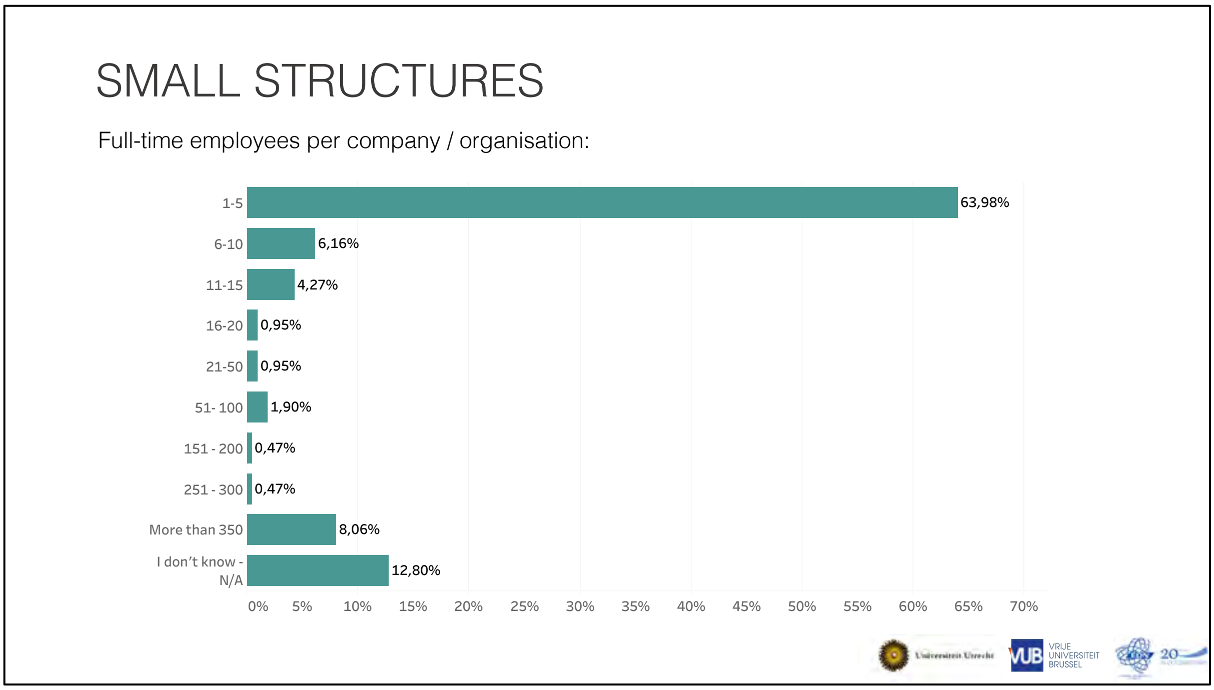
Respondents regard the continued existence of PSB as an important policy priority. They see it as an important partner. Although there are opportunities for new funding, production and distribution models, respondents also hold on to broadcasting and theatrical distribution. They suggest to focus more on research and development, impact production and professionalization to better develop their businesses.



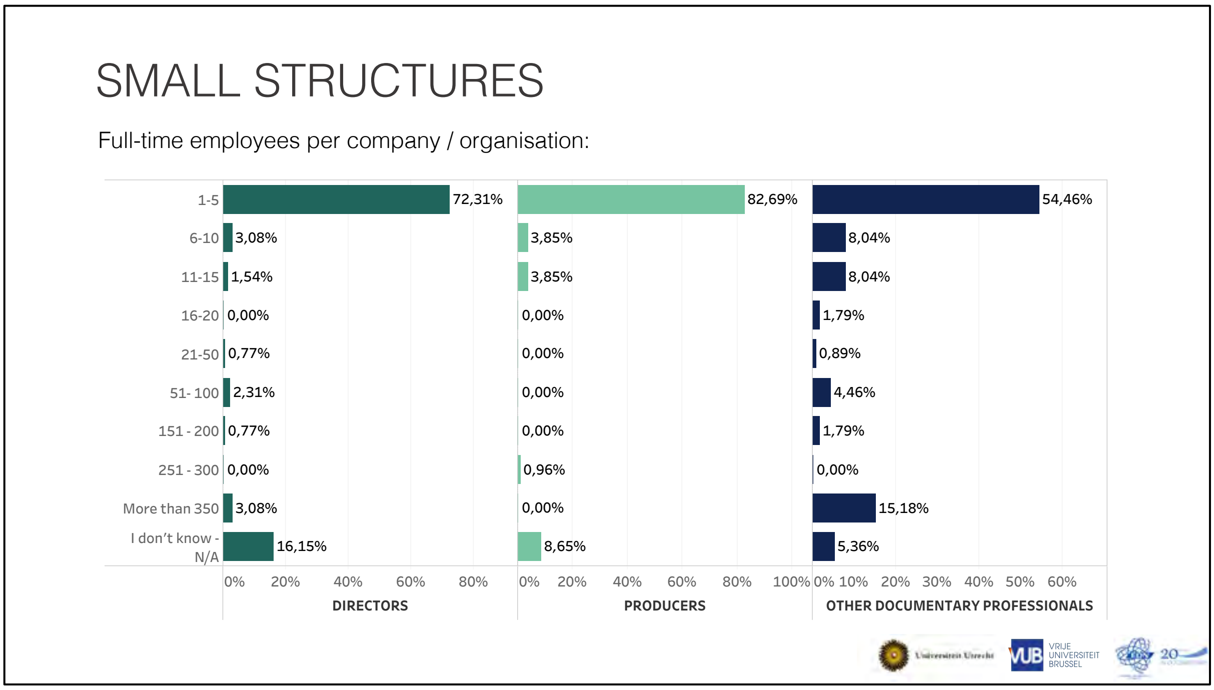
The upfront budgets to realise documentary projects consist mainly of subsidies (28%), own investments of directors and/or producers (19%) and public broadcasters' contributions (14%). Investments from commercial players are only at 6% in total.

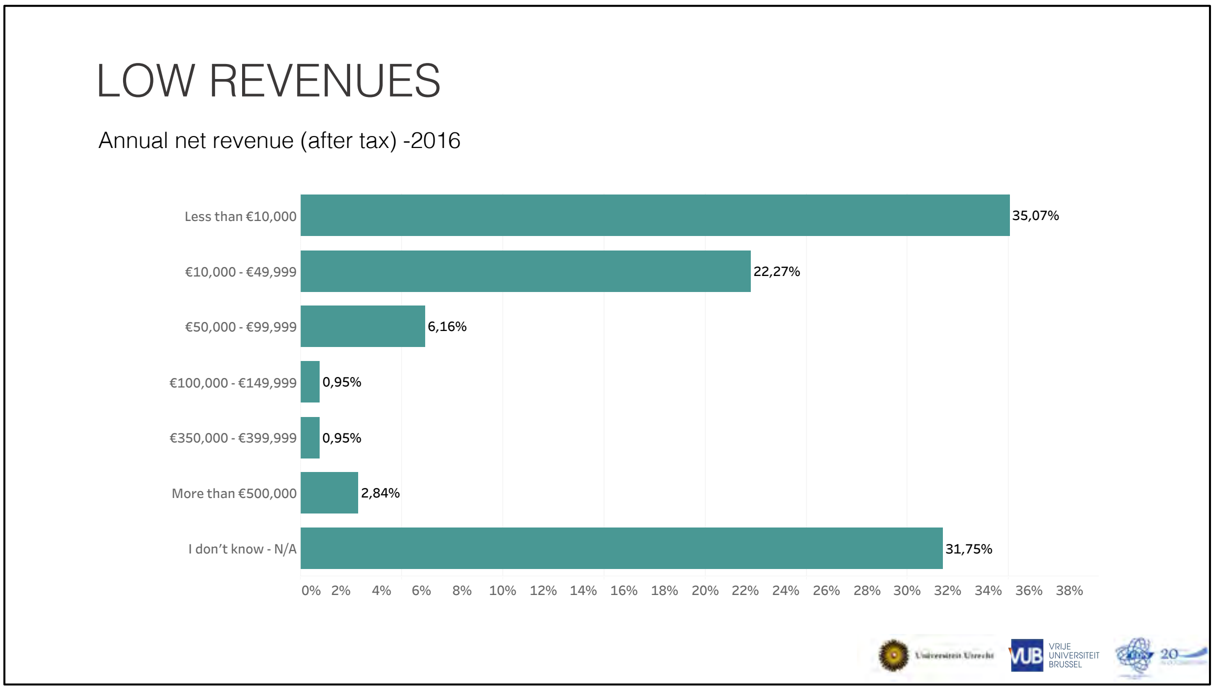


When we split these results for the categories 'Producers' and 'Other documentary professionals', the dependency on public money - especially subsidies - becomes even more apparent for the former. Respondents also claim that the support of a public broadcaster and/or public fund is often necessary to convince other financing stakeholders to invest in their project. This creates a vicious cycle which makes it difficult for the documentary sector to be independent.

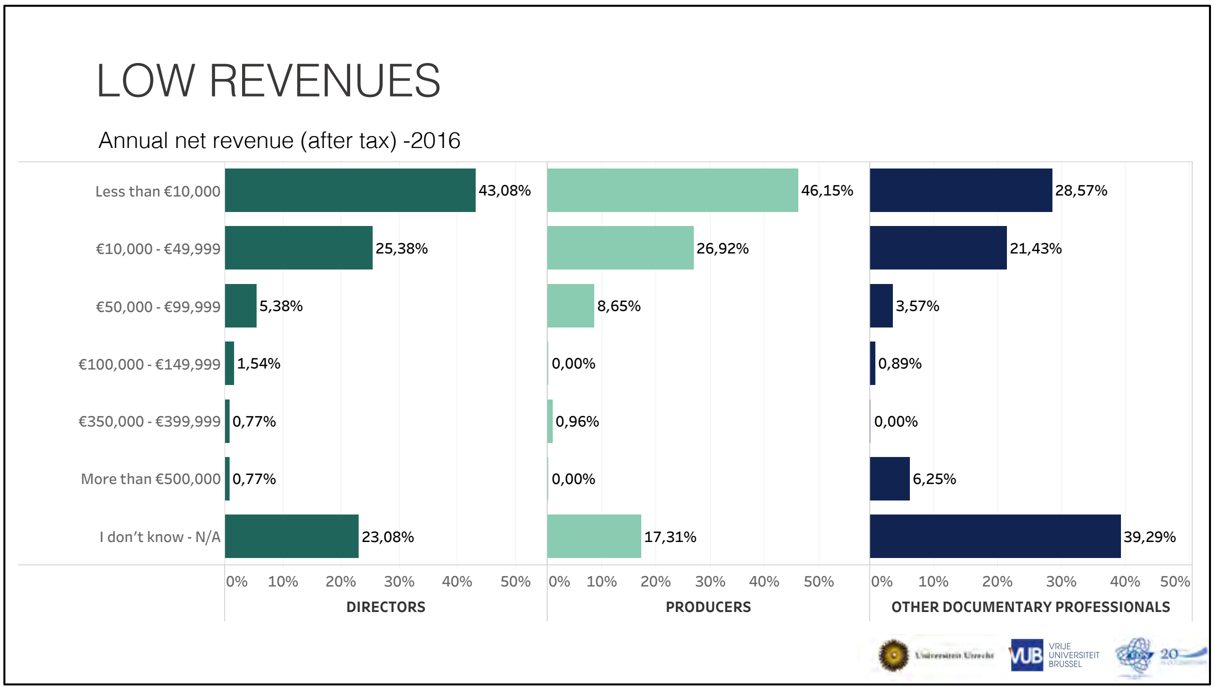


The small business structures of these companies and organisations are striking: almost two third of the respondents (64%) state that the organisation or company that they own/work for employs one to five people. These small organisational structures, together with the economic realities and low commercial ambitions we identified in our analysis, reveal the precariousness of the sector and its difficulty to evolve into sustainable businesses.



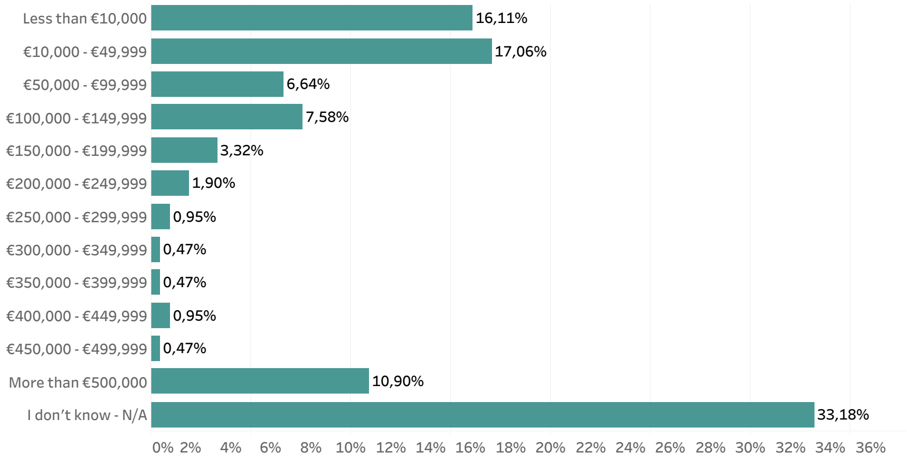


Working in the documentary field doesn't seem commercially viable, considering that more than 55% of the respondents estimate the annual net revenue for the year 2016 for the company/organisation they own/work less than €50,000, of which 35% claims the revenues are less than €10,000.



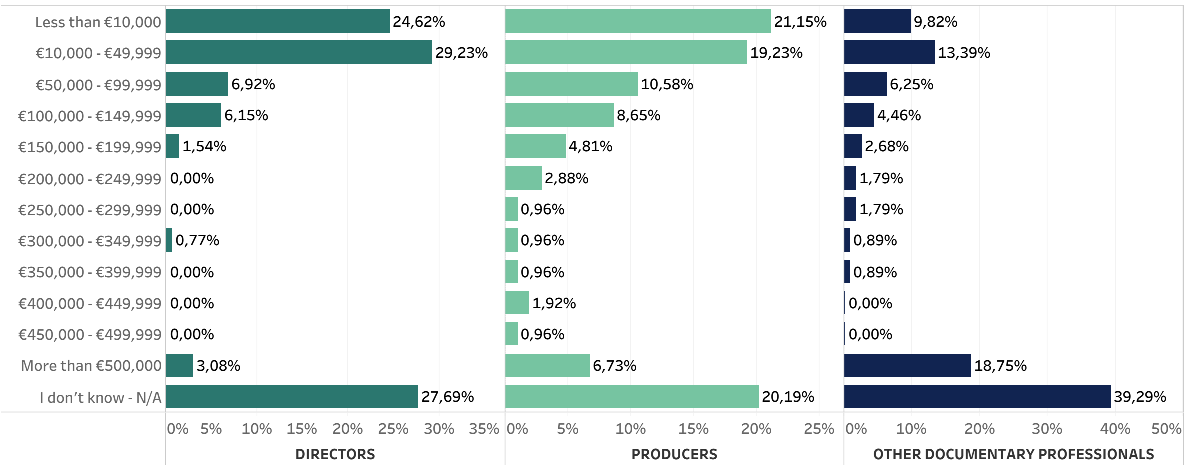
LOW TURNOVER

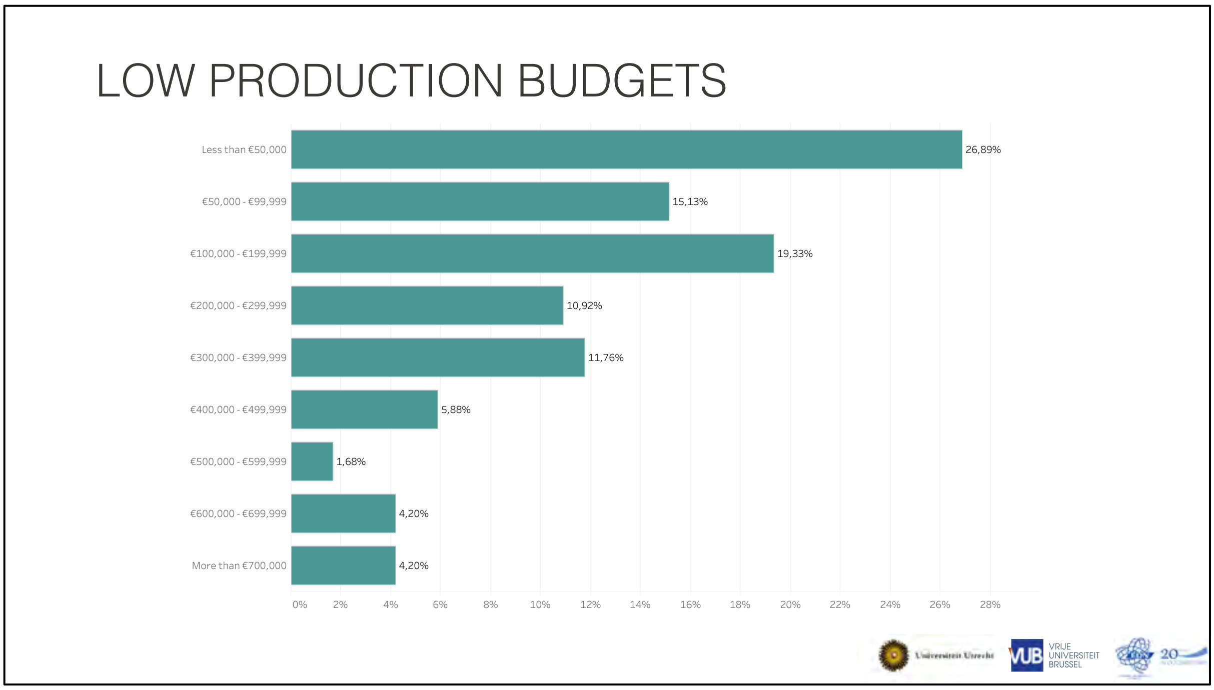
Annual turnover -2016



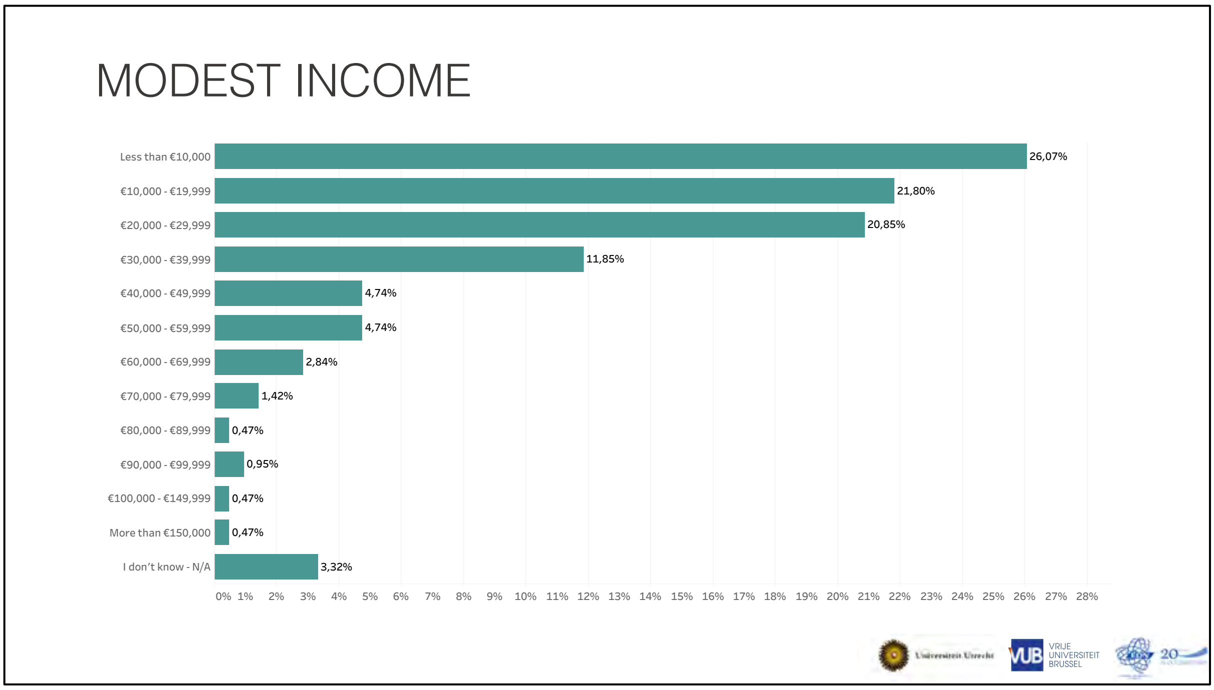
LOW TURNOVER

Annual turnover -2016



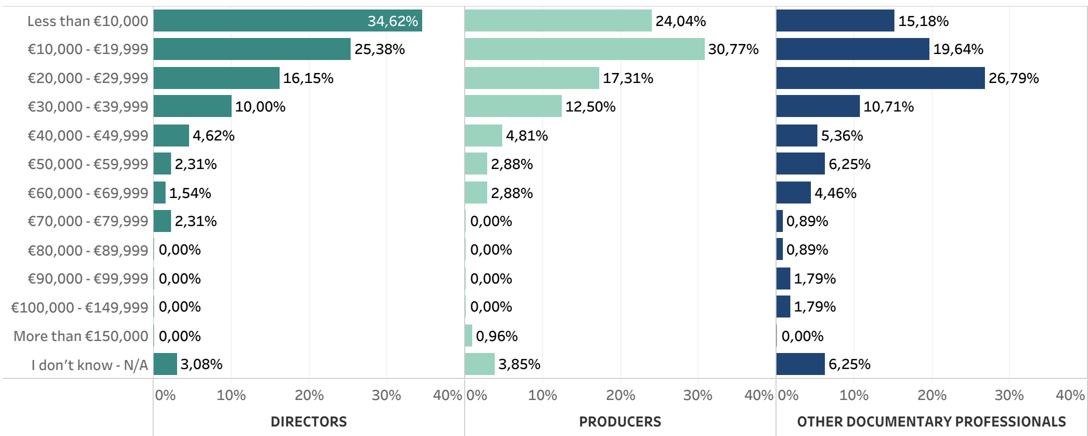


The production budgets are rather low - 42% of the respondents claim that the representative documentary project they put forward for their activities had a production budget under 100.000€.



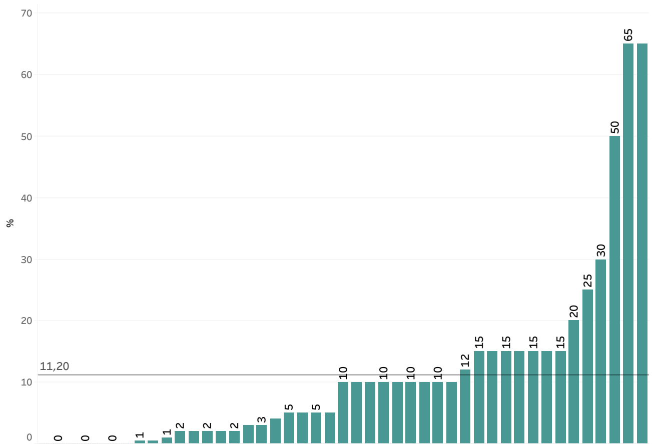
The personal yearly net income (after tax) of the 211 respondents is modest. More than one out of four respondents (26%) reports that he/she earns less than €10,000 net on average on a yearly basis. Another 22% and 21% gain respectively between €10,000 and €19,999, and €20,000 and €29,999 per year. There are only very few professionals in the income categories above €30,000. This relates to revenues derived from activities in the documentary sector.

MODEST INCOME



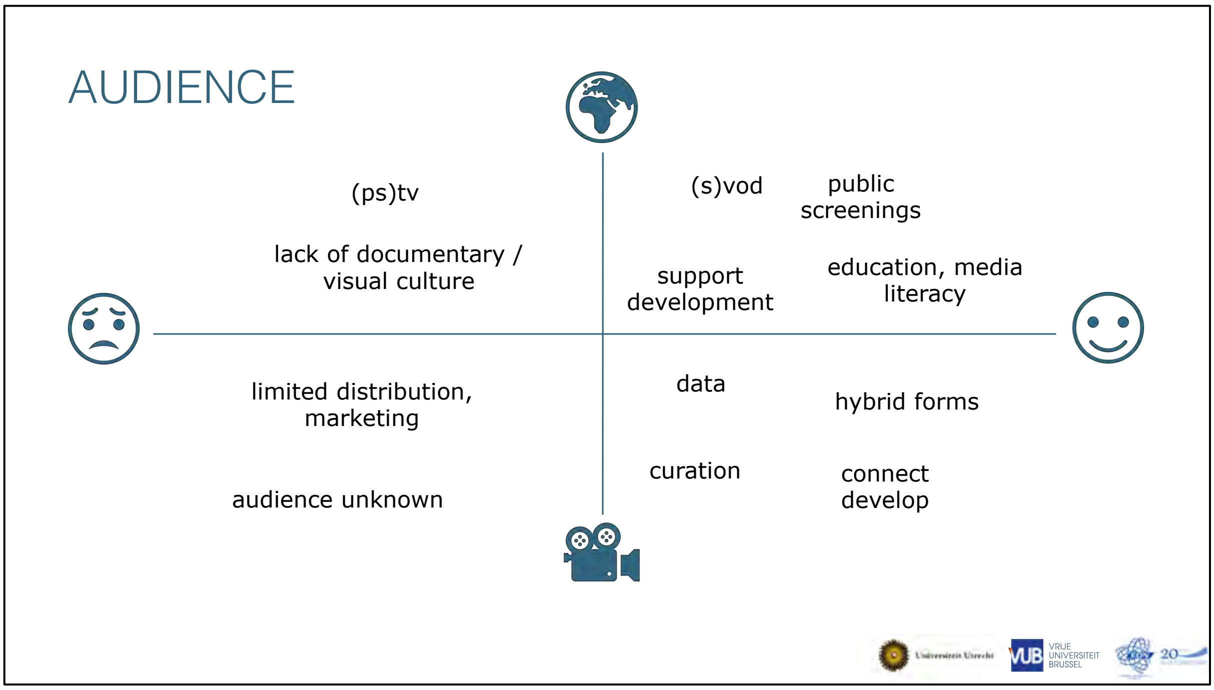
LOW BOX OFFICE REVENUES

Total box office revenues = **11,20% of the total production budget** on average



In addition, the group of producers stated that the total box office revenues (sales and rental) represent only 11% of the total production budget, on average. These production budgets are rather low – over 42% of respondents claim that the documentary project they consider to be representative for their work had a production budget of under €100,000.

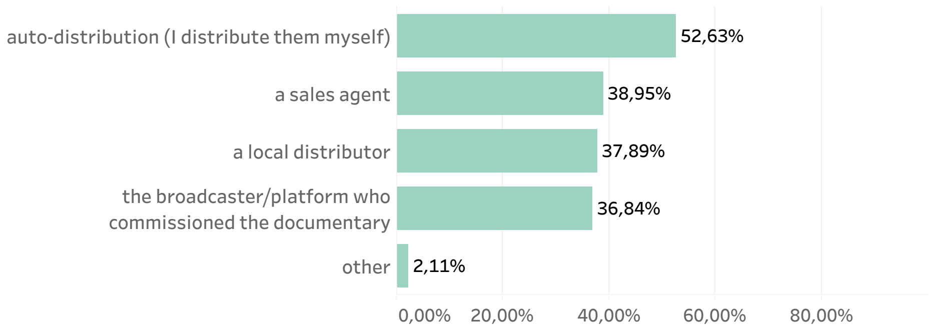
2. Audience



Audiences are a main concern for respondents. Audiences are no longer to be found in front of their tellies but move to other platforms (especially the younger audiences). These platforms also provide opportunities for documentaries. Media literacy and education are important to connect to younger audiences and teach the value of documentary.

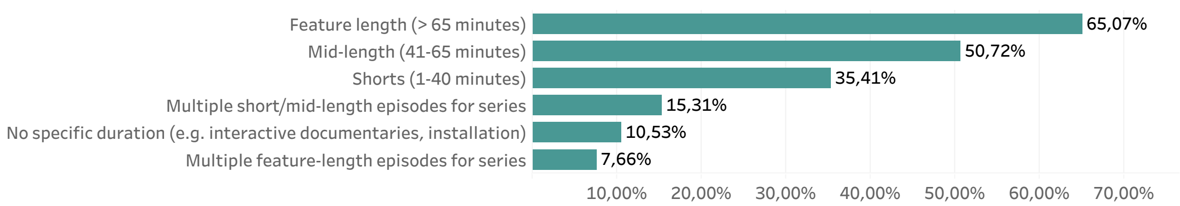
Currently, there are limited distribution opportunities and there is little knowledge about audiences. New technologies make such knowledge possible and this should be exploited better. Hybrid forms and curation are also needed (more) to develop audiences.

OFTEN AUTO-DISTRIBUTION

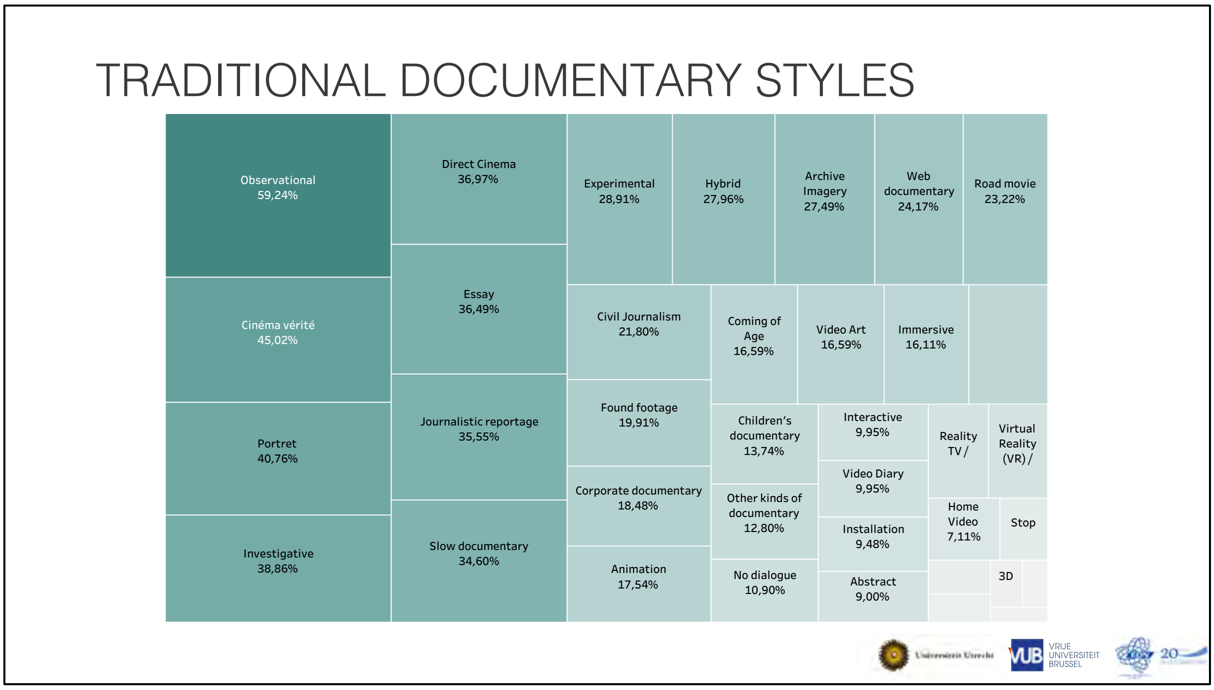


While there is a clear willingness amongst professionals to start up new collaborations and to find alternative ways to produce and distribute documentary films, ideas are still in their infancy. The fact that so few collaborations are taking place with online players, might also negatively impact the development of ambitious distribution strategies in the sector. In addition, 39% of the producers assign the distribution of their project to sales agents. Half of the producers (53%) that filled in the survey say that they distribute their documentaries themselves.

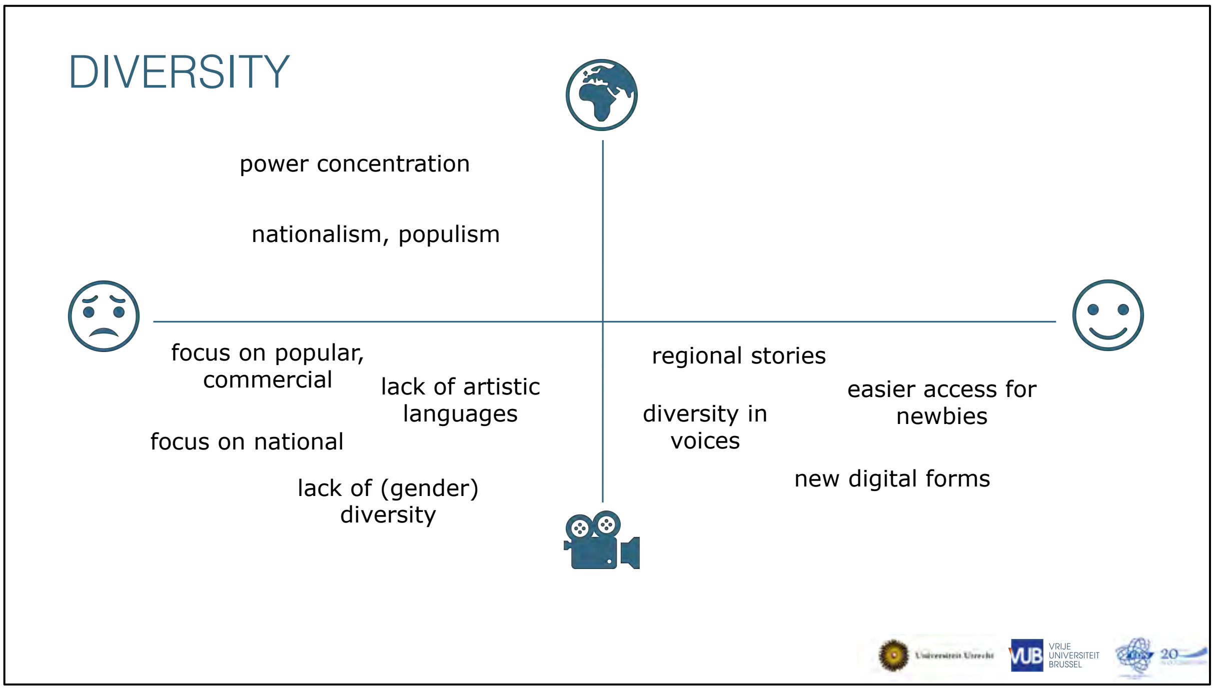
PRIMARILY FEATURE LENGTH DOCS



In the open questions, many of the respondents state that they are open to experimenting and innovation in telling a documentary story. Yet, they remain very focused on feature length documentaries in their activities. 65% are generally involved in feature length docs vs. 15% in multiple short/mid-length episodes for documentary series, and 11% in docs with no specific duration, such as interactive documentaries. Also, the style of the documentary projects the respondents describe is primarily related to traditional documentary forms compared to more innovative styles.

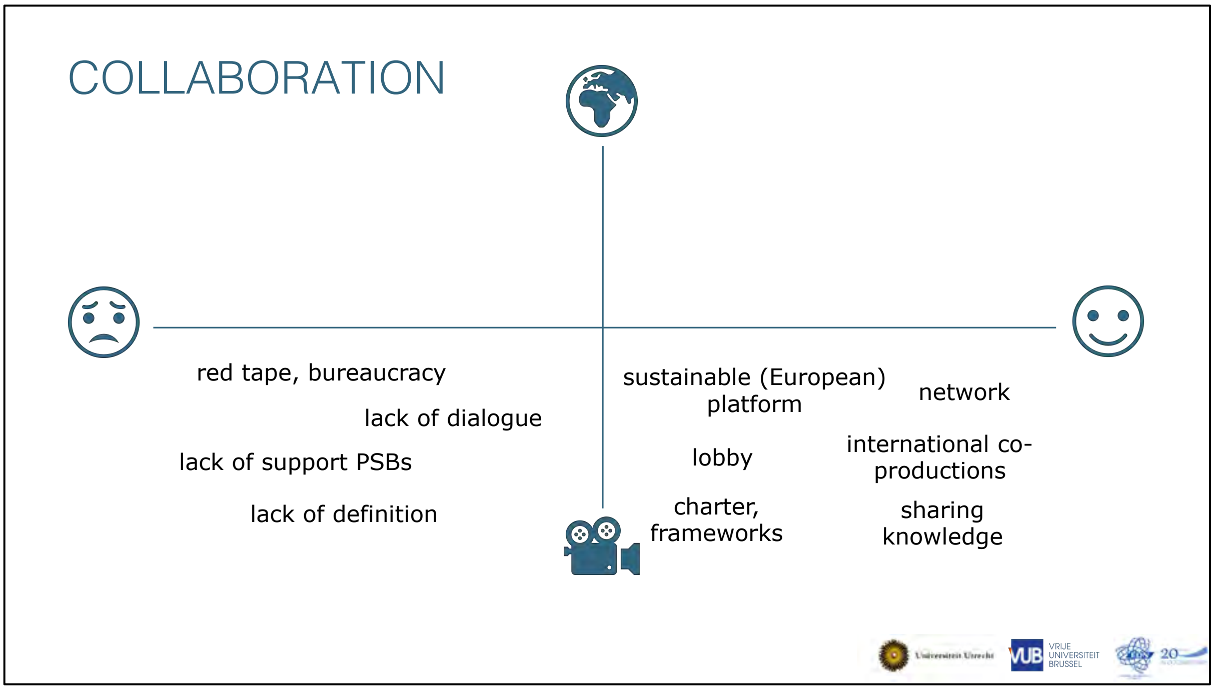


3. Diversity



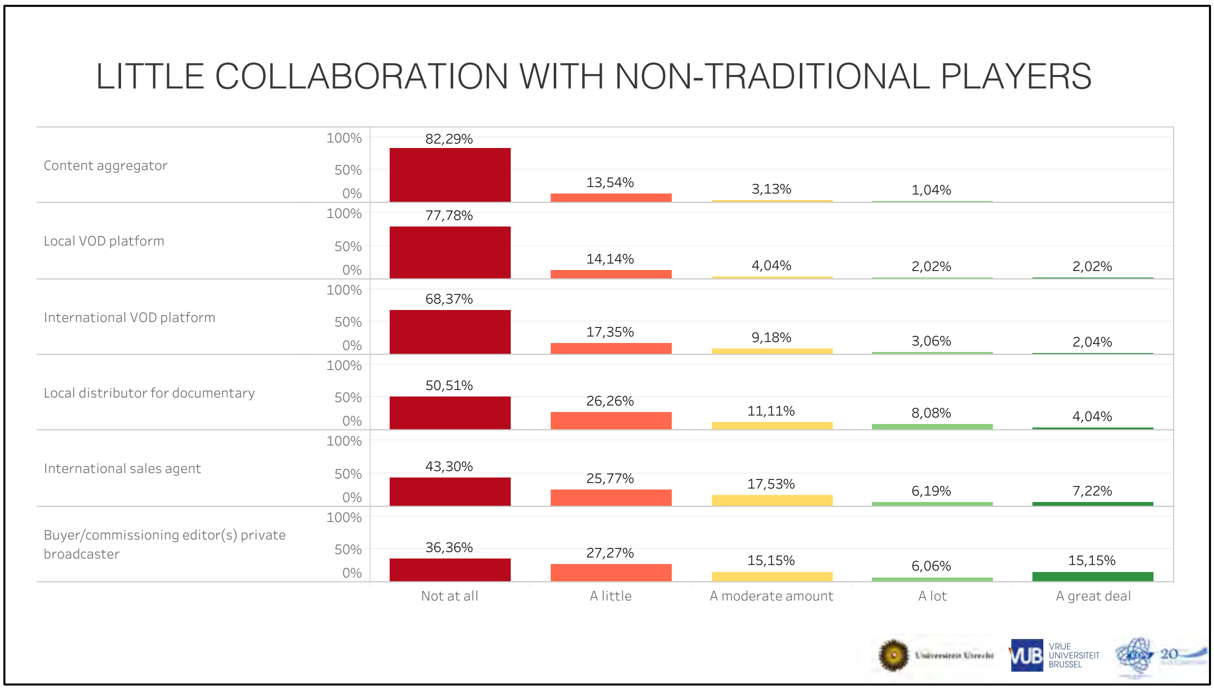
Both power concentration and nationalistic and populist discourses threaten diversity, both in terms of stories and voices and of the people who tell these stories, according to respondents. There should be more attention to geographical, gender and artistic diversity, amongst others by lowering the threshold.

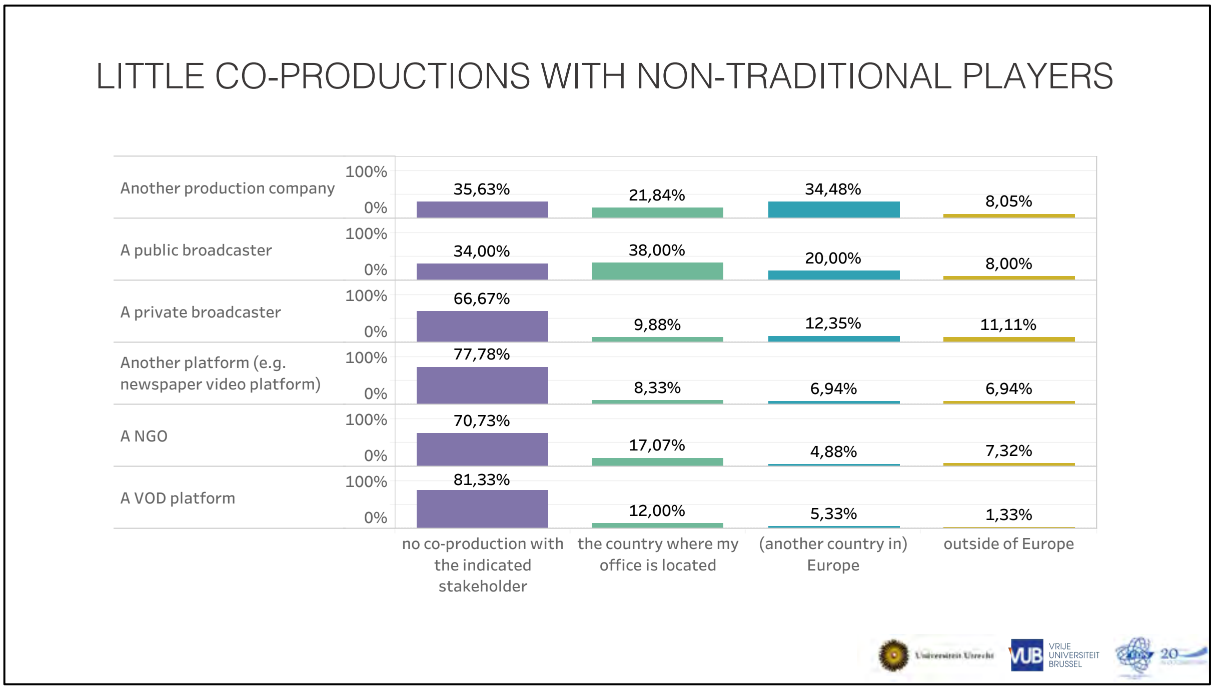
4. Collaboration



Connected to the fragmentation (see above) is a lack of collaboration and tuning within the sector. More collaboration, networking, an organized lobby, and a

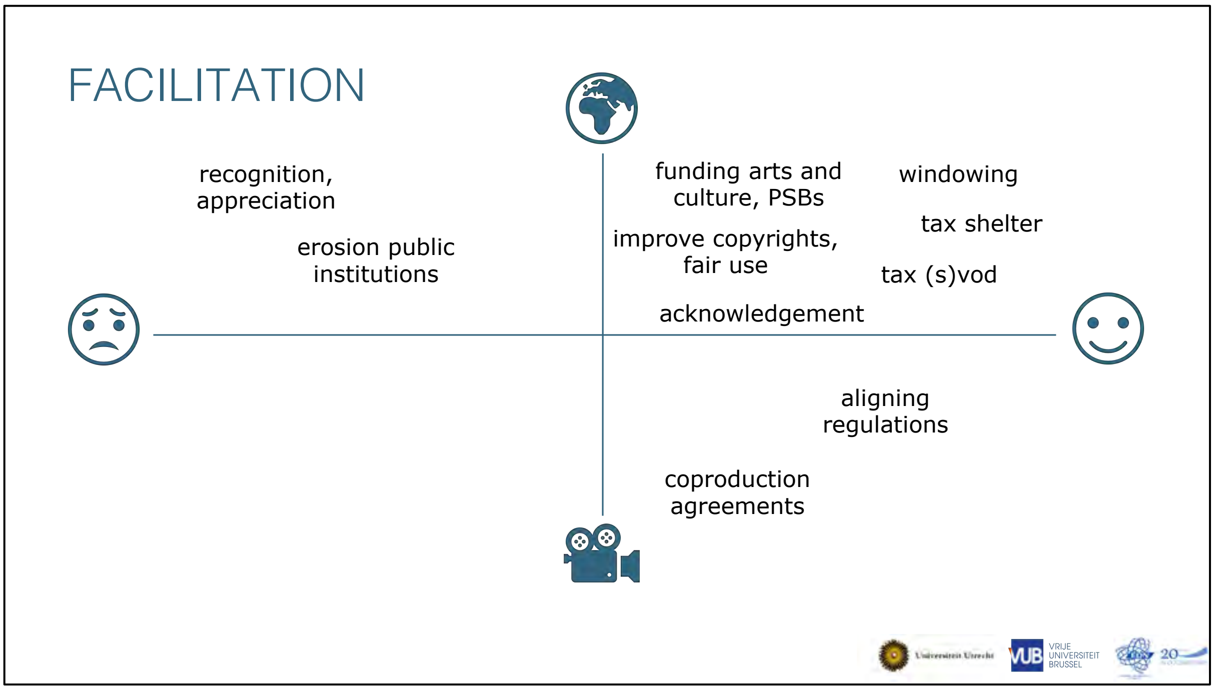
European platform for documentary are deemed necessary to increase collaboration and make the sector stronger. This also entails sharing knowledge.





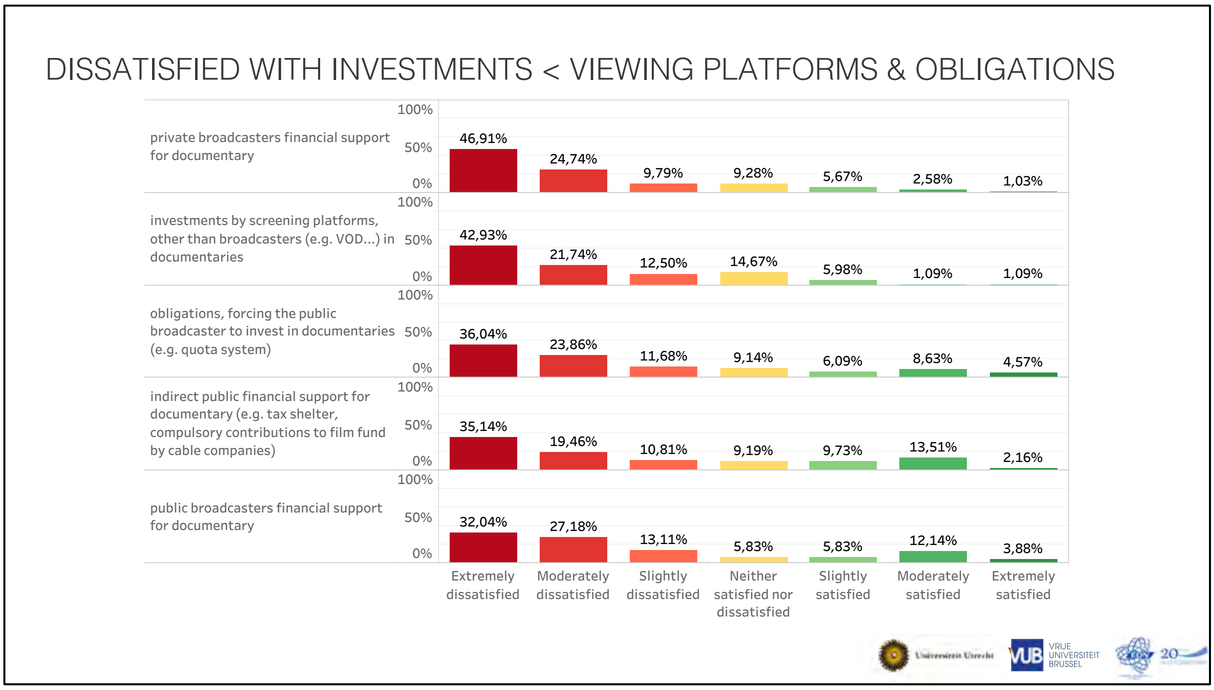
Producers indicate that they co-produce mostly with traditional stakeholders, such as other production companies and public broadcasters. There is a low number of co-productions with non-traditional and/or emerging players, such as VOD platforms. Interestingly, an important part of these co-productions is taking place across European borders. This implies that the documentary sector is already quite familiar with the trends of internationalisation and increased co-production.

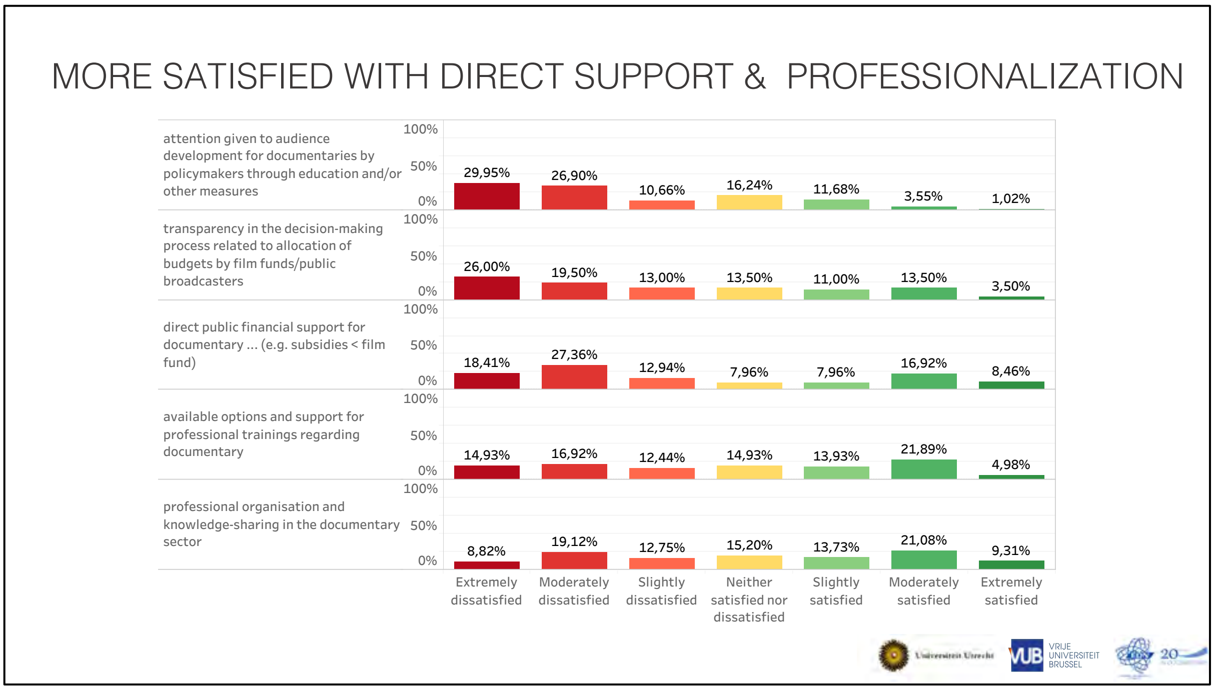
5. Facilitation



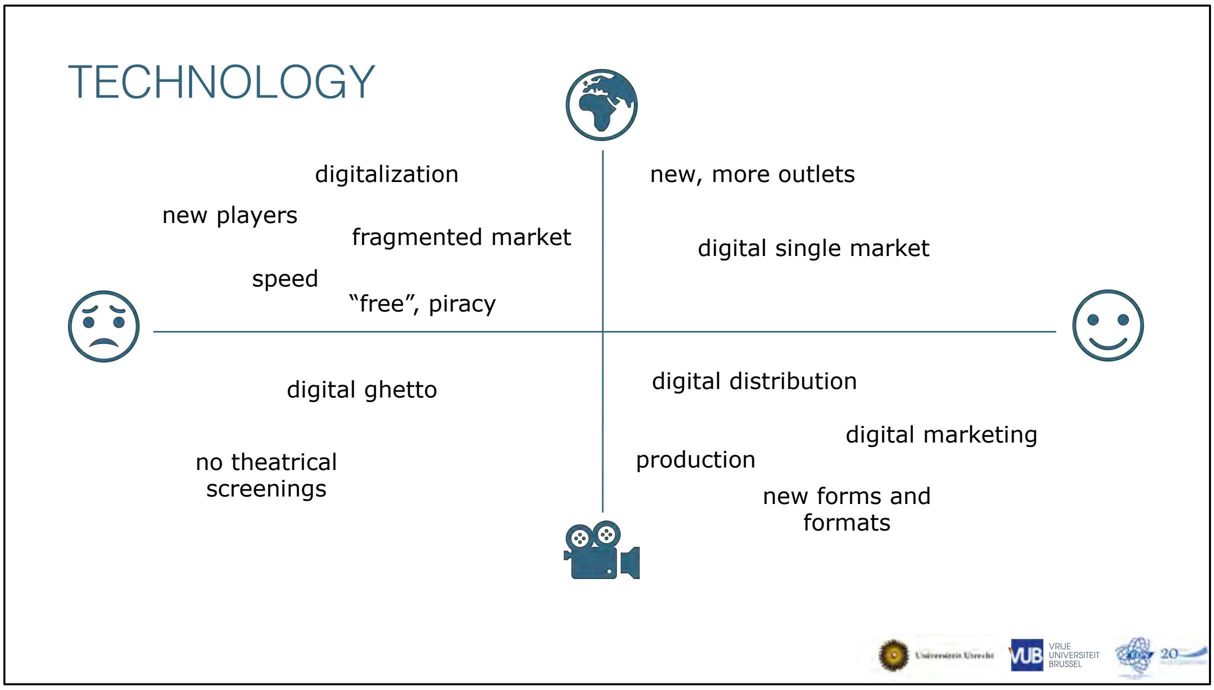
Respondents report a lack of recognition from the 'outside world' and see an erosion of public institutions, some of which they have been intimately tied to for a long time. The outside world is called upon to facilitate the documentary sector not just with funds but also with better regulation and legislation.

The sector itself could align procedures and practices to facilitate collaboration, respondents observe.



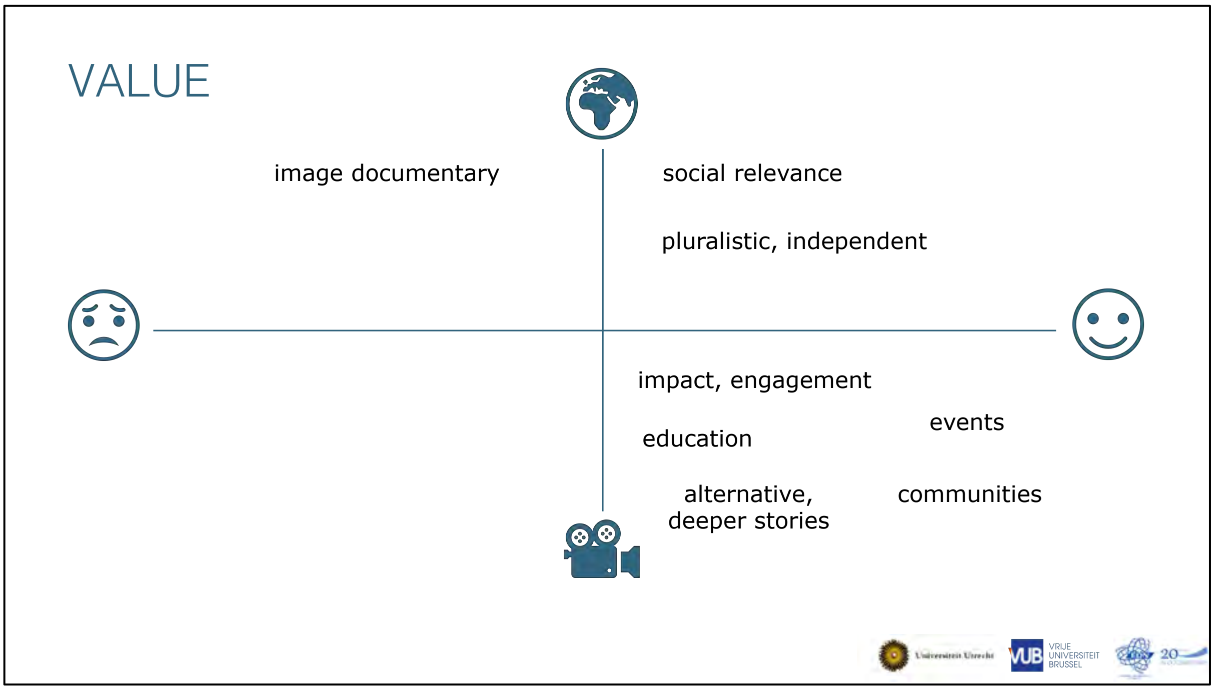


6. Technology



The implication of technological developments runs through all of the themes but is also tightly related to specific challenges and opportunities. Digitization, the new players it brought, the increased speed of the media are both challenges and opportunities. The technologies threaten distribution 'as we know it' and fragment the market into niches, respondents say. On the other hand, they support new distribution channels and the creation of new documentary forms. A digital single market would support exploitation of these opportunities.

7. Value



On a more general level, respondents observe that documentary suffers from a negative image that needs to be revamped. The relevance of the genre as a counterweight to (fake) news needs to be argued better as well as the importance of the genre in a pluralistic democracy.

Within the sector, opportunities for impact production, collaboration with the educational sector, the creation of stories different from news and current affairs and connections with events and communities can help achieve this.

SOCIETAL VALUE OF DOCUMENTARY