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THE STORY BEHIND THE FADING TELEVISION DOCUMENTARY

The Documentary Organization of Canada / l'Association des documentaristes du Canada (DOC) has published the 5th volume of *Getting Real: an Economic Profile of the Canadian Documentary Industry*. The report is an in-depth look at the state of Canadian documentary production up to the end of 2010/11 in both the English- and French- language markets. Data for *Getting Real* is predominantly derived from the broadcast and theatrical market sectors in Canada.

In spite of audience demand and in spite of finding new means of financing, the data indicates that Canadian documentary production is facing its steepest decline in production volume in almost a decade.

The facts are stark and some of the numbers alarming:

- Overall documentary production volume has declined by \$100M since 2008/09 going from \$495M to \$390M
- 4,000 jobs (full time equivalents) have been lost
- 457 documentary projects were produced in 2010/11 compared to 591 projects in 2008/09
- Documentary production in the English-language market declined by 25% from 2008/09 (with almost all regions of the country being affected)
- While French-language documentary programming was managing a modest growth rate of 3% at the time of the last report, total French-language documentary production volume has decreased by nearly 12% since 2008
- Total English-language private broadcaster licence fees dropped from a high of \$117 million in 2008/09 to \$74 million in both 2009/10 and 2010/11, a decrease of 37% overall
- Since 2008, French-language private broadcaster licence fees also fell 28% to \$13 million in 2010/11

Although the digital revolution has been at the heart of a profound shift in modes of storytelling, modes of production and consumption trends, television remains – at least for the time being – the main market for Canadian documentaries and its primary funding trigger. But the consolidation that has taken place in the Canadian broadcast sector in recent years has meant the collapse of the orderly marketplace, with fewer separate windows generating licence fees and reduced revenue opportunities for documentary producers.

Are these downward trends definitive? It is too early to tell. It appears that overall production volume increased in 2012, as attested to by research published in CMPA's *Profile* in February 2013. But until analysis is undertaken, we can't know what these

numbers mean: are they attributable to the “benefits bulge”? Or are broadcasters bulking up for the introduction of the PNI regime imposed by the CRTC?

“Documentary makers are a creative and resilient lot, but these market conditions are testing even the most resourceful content creators. The confluence of various factors is contributing to a perfect storm: the digital disruption combined with outdated policies and a lack of imagination to properly showcase the kinds of documentaries on our television screens that Canadian audiences are having to seek elsewhere means that documentary production is at risk of becoming a cottage industry” says DOC’s Executive Director, Lisa Fitzgibbons.

Indeed, the story the data doesn’t tell is the fact that many experienced documentary makers are leaving the field, unable to grow their businesses or to find funding partners for their projects. This is a net loss for what is ostensibly Canada’s national art form.

The Chair of DOC, filmmaker Pepita Ferrari for her part states: “It’s obvious that the funding model is broken for documentary production in this country. We invite all industry stakeholders to join us in seeking innovative and inventive ways to respond to these changing times. There has never been a greater demand for documentary so working together to create new funding models can only benefit us all.”

Getting Real is a longitudinal study that monitors the trends affecting Canadian documentary production, and provides analysis into those trends. Data for *Getting Real 5* was collected by Nordicity Group and the analysis provided by Suebee Media Consulting. The publication received financial support from the Ontario Media Development Corporation, the Rogers Group of Funds and the Canada Media Fund.

An electronic of the full report is available at www.docorg.ca

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The Documentary Organization of Canada / l’Association des documentaristes du Canada is the collective voice of independent documentary filmmakers across Canada. DOC is a national nonprofit association representing over 800 directors, producers and craftspeople in the Canadian documentary community. DOC advocates on behalf of its members to foster an environment conducive to documentary production and strives to strengthen the sector within the broader film production industry.

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