

THE STATE OF THE DOCUMENTARY FIELD:

2018 STUDY OF DOCUMENTARY PROFESSIONALS

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ABOUT THE CENTER FOR MEDIA & SOCIAL IMPACT

The Center for Media & Social Impact (CMSI), based at American University's School of Communication in Washington, D.C., is an innovation lab and research center that creates, studies, and showcases media for social impact. Focusing on independent, documentary, entertainment, and public media, CMSI bridges boundaries between scholars, producers, and communication practitioners who work across media production, media impact, public policy, and audience engagement. The Center produces resources for the field and research, convenes conferences and events, and works collaboratively to understand and design media that matter. Directed by American University Professor Caty Borum Chattoo, CMSI was founded (as the Center for Social Media) in 2001 by American University Professor Patricia Aufderheide. www.cmsimpact.org

ABOUT THE STATE OF THE DOCUMENTARY FIELD PROJECT

The State of the Documentary Field initiative was shaped by the Center for Media & Social Impact, in collaboration with Simon Kilmurry, executive director of the International Documentary Association (IDA), with review also provided by Patricia Aufderheide, CMSI founder. CMSI affiliate researcher Bill Harder consulted on survey programming and also served as an additional data analyst. CMSI communications and program manager Varsha Ramani served as communication director and publication editor. Olivia Klaus, documentary filmmaker and graphic designer, created the report design. The State of the Documentary Field initiative is supported by an award from the National Endowment for the Arts' Media Arts program.



National Endowment for the Arts

INTRODUCTION



THE DOCUMENTARY FIELD IN 2018: OPPORTUNITY & CHALLENGE

The evolving digital era presents new opportunities for documentary makers and audiences as platforms shift, new storytellers emerge, and media systems transform. Documentary has long enjoyed a vibrant space in the media ecology, and the marketplace for creative nonfiction storytelling continues to expand. Although the digital age began in the latter part of the 20th century, its practical implications have manifested for documentary storytellers and fans within the last 10-15 years – the era of YouTube, social media, streaming networks, and accessible filmmaking equipment. Audiences are finding nonfiction stories in new ways, organizations have emerged at the intersection of documentary and public engagement, and a global community of documentary makers continues to grow. Despite an expansive landscape for documentary filmmakers and audiences, particular challenges are persistent. Questions about sustainable systems and sources of revenue that can support career-making documentary work are perennial. Issues of racial, ethnic, and gender diversity require attention and scrutiny. As viewers continue to discover documentary storytelling across various platforms, and as new filmmakers enter the craft, tracking industry professionals' perspectives and lived experiences is a vital pursuit.

ABOUT THE STUDY

Overview & Objectives

In 2016, in collaboration with the International Documentary Association, the Center for Media & Social Impact identified a need to understand documentary trends, as well as the motivations, concerns, and perspectives of documentary industry professionals and makers at a moment of transition and opportunity. Sparked by this need and curiosity, we launched a pilot phase of this research in 2016, which was released at the 2016 IDA Getting Real convening. Two years later, this 2018 report reveals the first formal foray into this work. The State of the Documentary Field study will be repeated every other year.

The CMSI State of the Documentary Field study is the first research to reveal trends and experiences of contemporary documentary professionals primarily based in the United States.¹ Crafted by CMSI with feedback from the International Documentary Association (IDA), the study was informed by insights and questions derived from documentary professionals. The survey included 33 content questions and standard demographic questions (age, race, ethnicity, sexual orientation, education, and country of residence, along with membership in documentary-related organizations). The study was designed to understand documentary industry members' perspectives and lived experiences based on four key themes:

DOCUMENTARY MOTIVATIONS, OPPORTUNITIES & CHALLENGES

DOCUMENTARY CAREER SUSTAINABILITY, ECONOMICS & FUNDING

DOCUMENTARY DIVERSITY

DOCUMENTARY DISTRIBUTION & PLATFORMS



To assure robust participation from documentary film professionals, the International Documentary Association, which includes more than 2,100 members, promoted the survey on its website and social media channels. CMSI promoted the survey through its semi-monthly e-newsletter. Additionally, CMSI and IDA asked additional documentary groups and communities to participate in outreach; these groups notified their members and encouraged participation in the survey through email lists and social media promotion. The full list of participating outreach organizations includes:

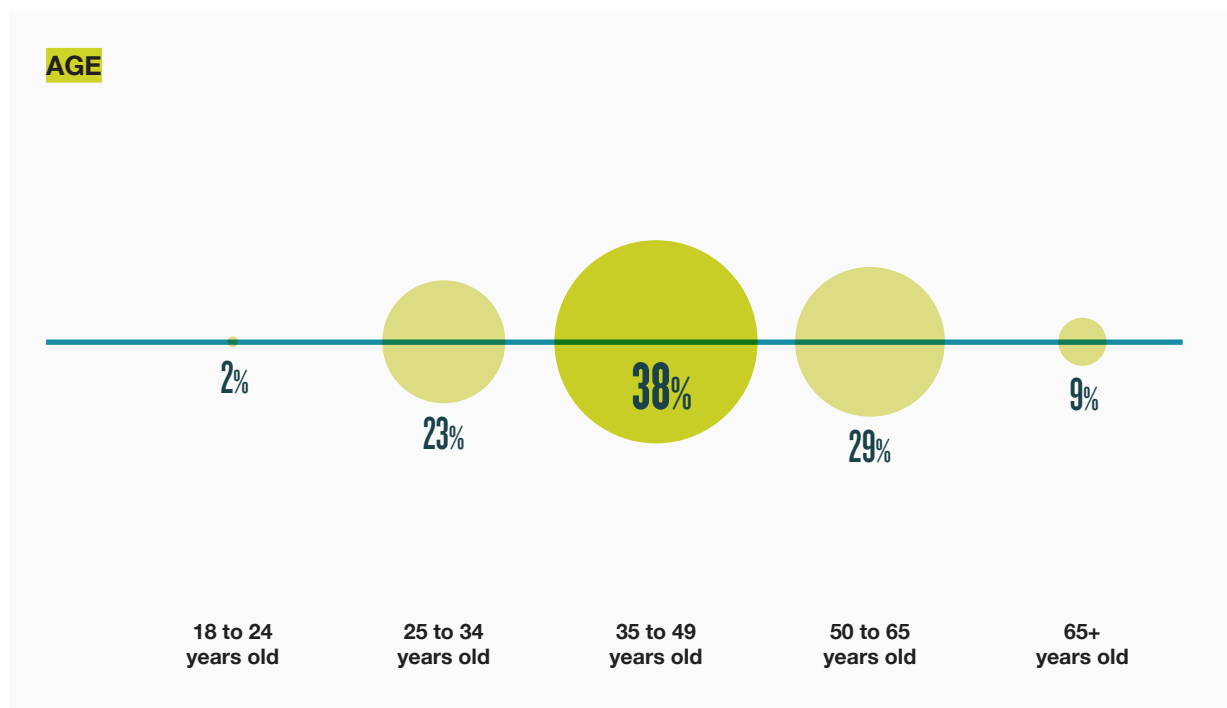
- Bay Area Video Coalition (BVAC)
- Center for Asian American Media (CAAM)
- The D-Word
- Documentary Producers Alliance
- Firelight Media
- International Documentary Association
- Independent Television Service (ITVS)
- Latino Public Broadcasting
- Black Public Media
- New Day Films
- Pacific Islanders in Communication
- Sundance Institute Documentary Program
- Vision Maker Media
- Women Make Movies

DEMOGRAPHICS OF THE RESPONDENTS

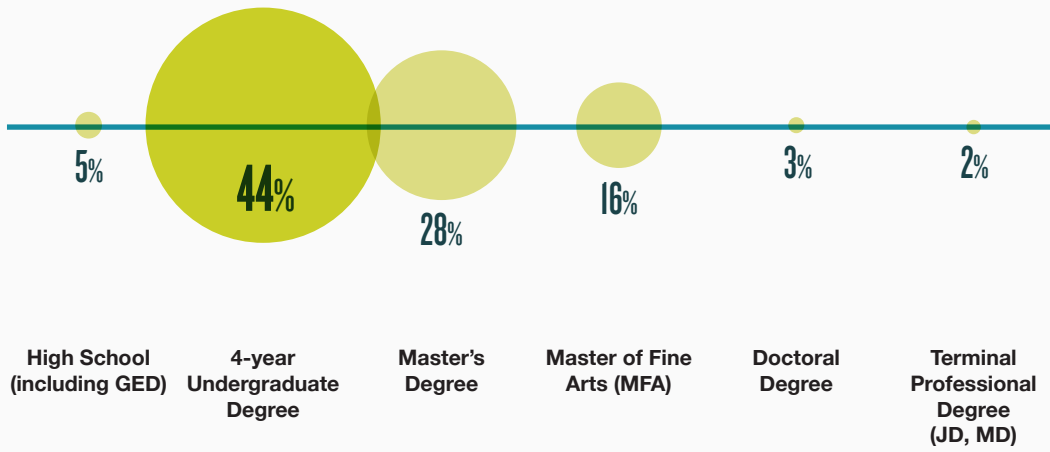
These survey findings are based on the perspectives of approximately 550 documentary industry professionals.² The survey was designed in two parts:

Based on a filter question that asked respondents to indicate their “primary position” in documentary, Part One offered opportunities for all self-described members of the documentary profession to respond; this group of respondents included those who identified their primary role as directors, producers, editors, directors of photography, as well as non-profit professionals, impact producers or strategists, film festival professionals, broadcasters, professors, and funders.

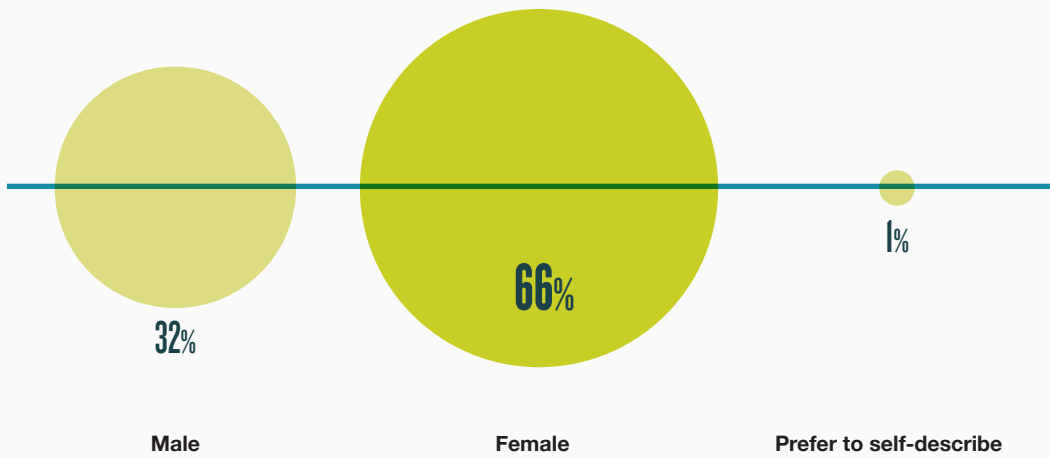
Part Two included questions customized for self-described directors and/or producers (that is, those who indicated that either “director” or “producer” was their primary role), given their creative, business, and financial decision-making roles in documentary work. In this way, we were able to ascertain film economics information and other insights from decision-making documentary filmmakers. About 335 directors and producers answered these “primary makers” questions.



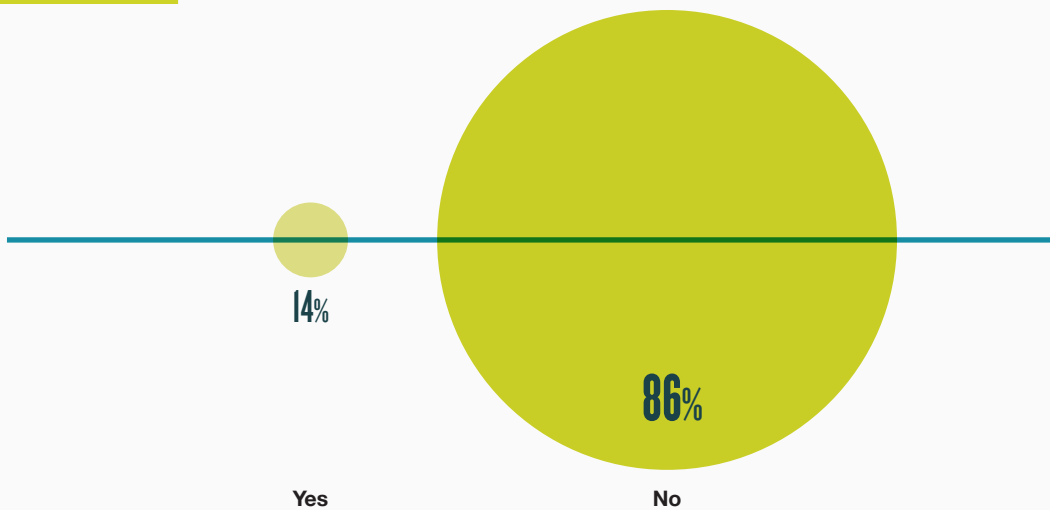
EDUCATION



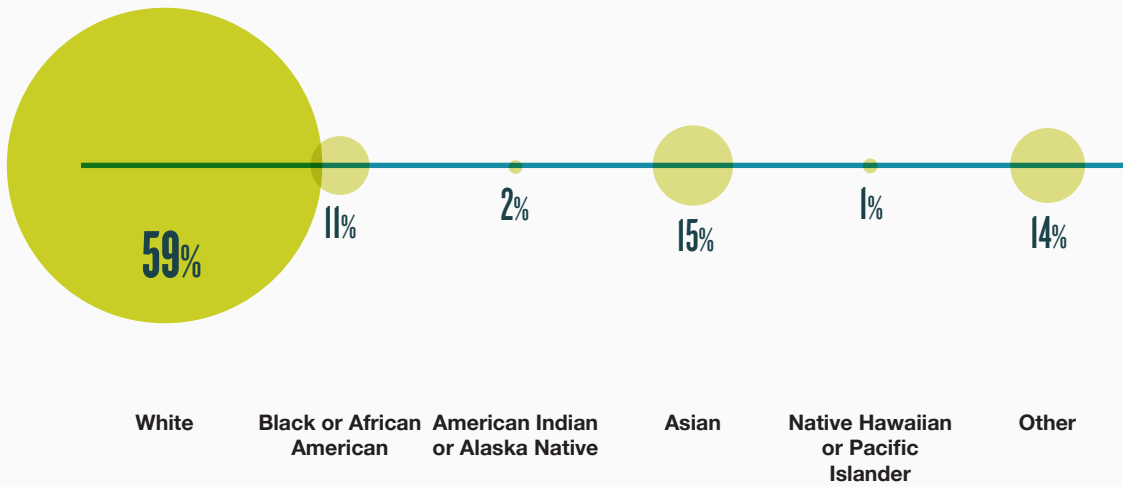
GENDER IDENTIFICATION³



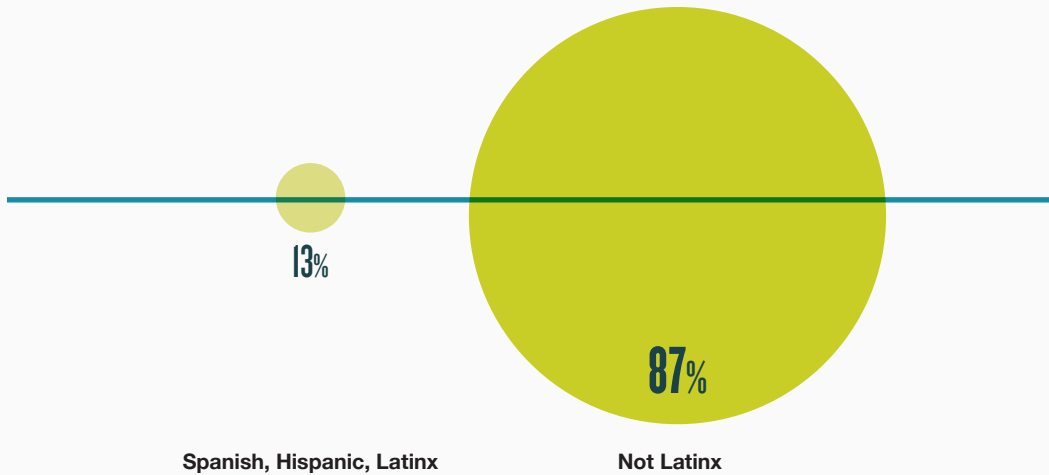
LGBT COMMUNITY⁴



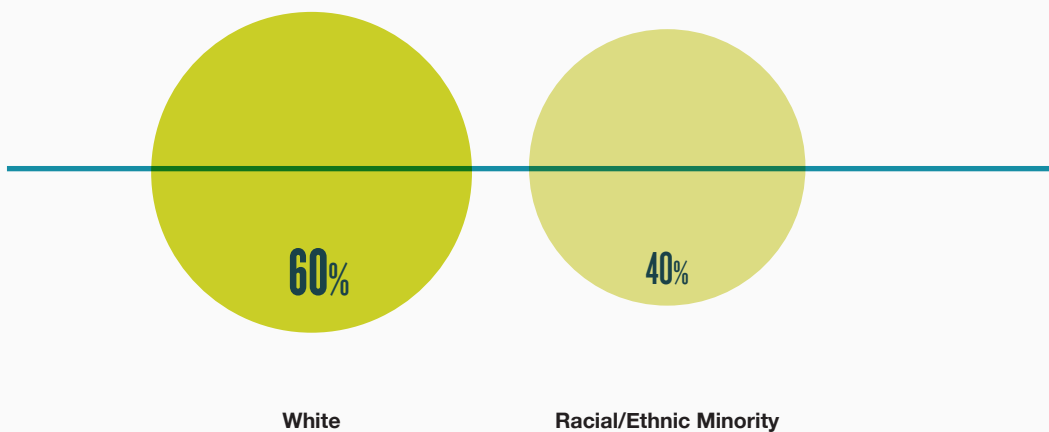
RACE AND ETHNICITY⁵



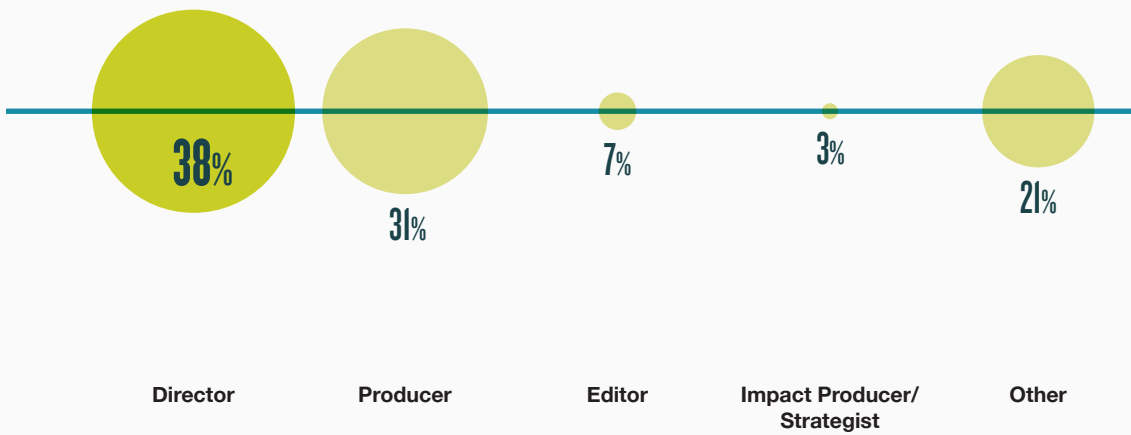
HISPANIC/LATINX



RACIAL/ETHNIC MINORITY VS. WHITE⁶



TOP IDENTIFIED DOCUMENTARY ROLES⁷



SUMMARY FINDING & ANALYSIS

Part One reveals the major findings of the survey based on all respondents – “documentary professionals”. Part Two reveals the perspectives of “primary documentary makers” (directors and producers as key creative and business decision-makers on a film).

We analyzed the data to examine meaningful (statistically significant) differences between key demographic categories: race and ethnicity, gender, and filmmaker “generations” (number of years in the documentary field).⁸ In terms of documentary filmmaker “generations,” based on respondents’ answers to a particular survey question (“How many years have you been in the documentary industry?”), we created two aggregate groups: “New Doc Pros” (those who joined the industry over the last 15 years), and “Original Doc Pros” (those who have been in the industry for more than 15 years). Where those differences exist, they are included here; if no differences were found between those demographic categories, they are not reported here.

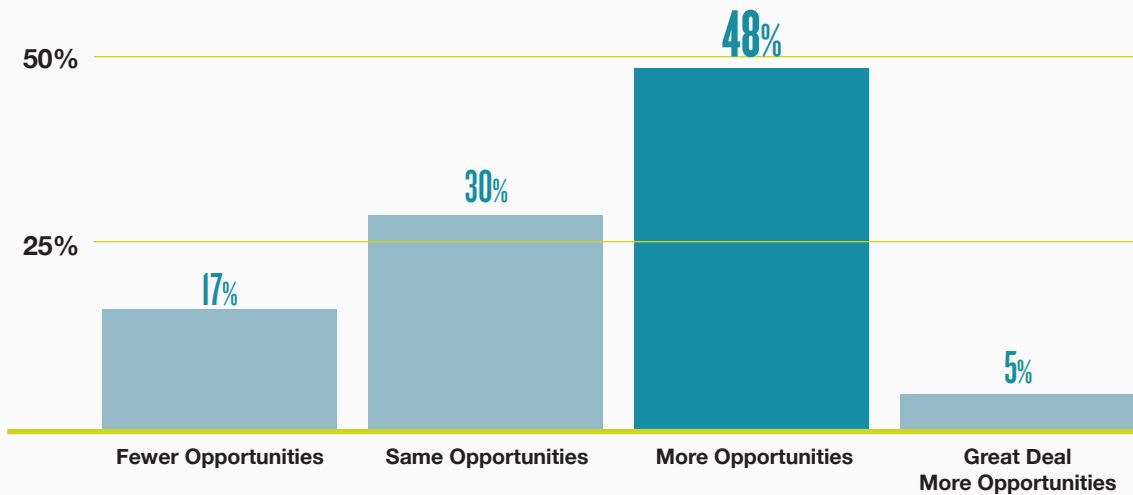
EXECUTIVE SUMMARY



CHALLENGES & MOTIVATIONS

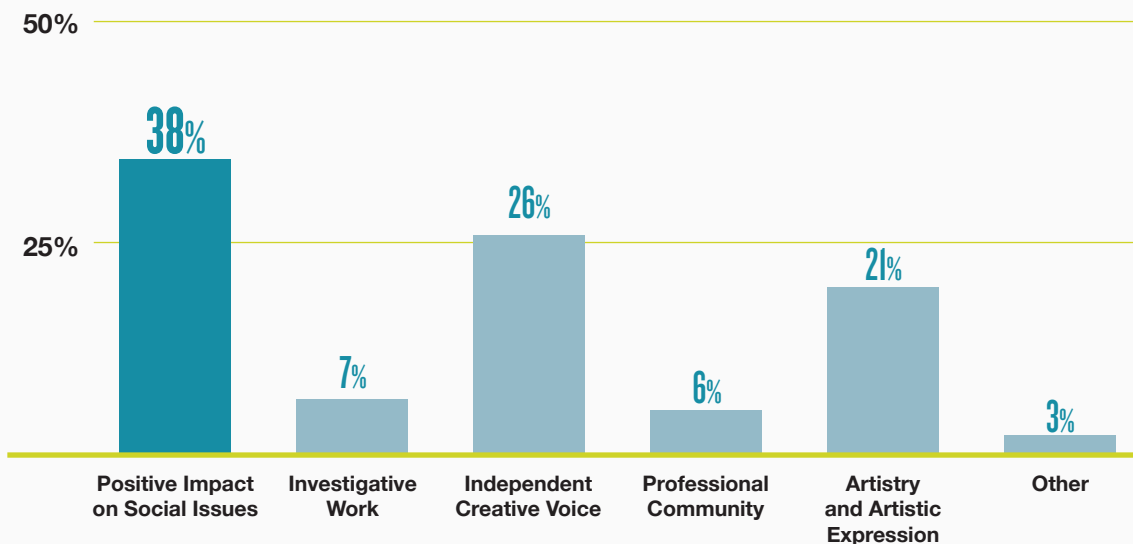
Documentary professionals are motivated by the future in their field, but they see room for improvement in terms of opportunities. Almost half of documentary professionals (48%) believe there are more opportunities for documentary makers now, compared to the last two years.

PERCEPTION OF OPPORTUNITIES IN DOCUMENTARY



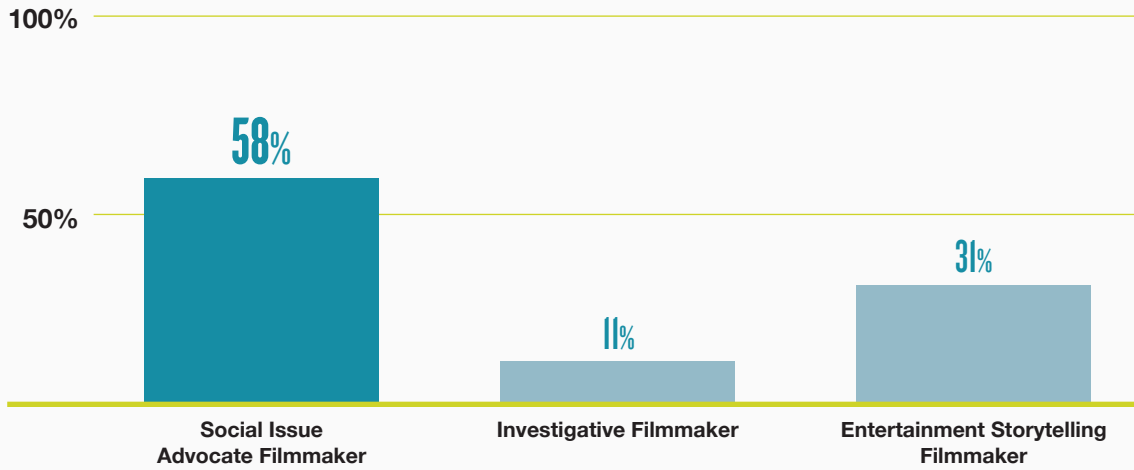
When thinking about some of documentary's core values, the documentary professionals represented here say "the impact on social issues" is most meaningful to them about documentary work; 38% of documentary professionals gave this response the top billing. Maintaining an independent editorial and creative voice is also a core value and meaningful aspect of documentary work.

MOST MEANINGFUL ASPECT OF DOCUMENTARY FILM WORK



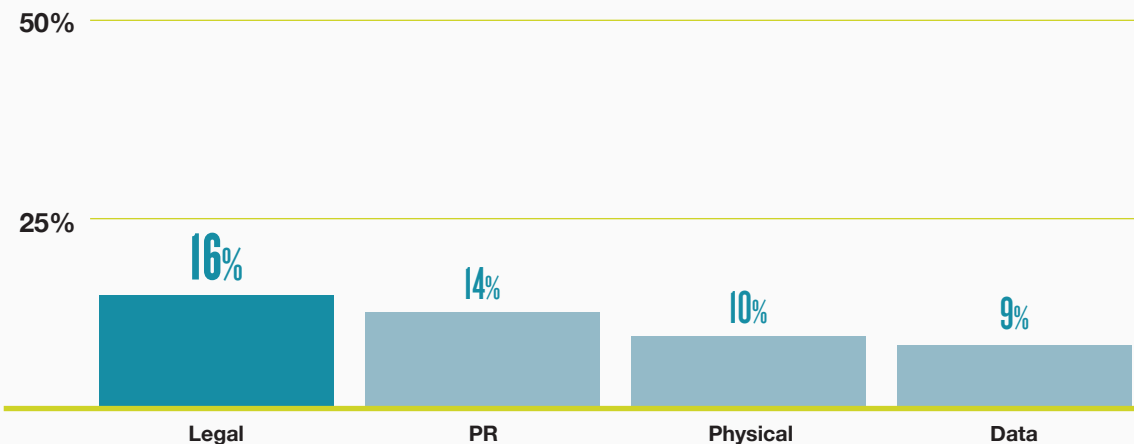
The documentary directors and producers represented here identify themselves strongly as creative individuals working to make a difference in social challenges. The majority of these primary documentary makers – directors and producers – describe themselves as social-issue advocate filmmakers (58%).

HOW DOCUMENTARY DIRECTORS & PRODUCERS DESCRIBE THEMSELVES



In terms of risks in their work, although the strong majority of makers did not report facing these kinds of risks in their work, these documentary directors and producers were more likely to face a legal threat of some kind (legal challenges to fair use claims; legal attacks on the film by a company, government entity or individual; legal attack on film characters by a company, government entity or individual), compared to a public relations, physical, or data threat. (It's important to note, however, the difference between a legal "threat" (such as a letter) vs. a formal legal action, which is rare in this context.)

RISKS FACING DOCUMENTARY FILMMAKERS

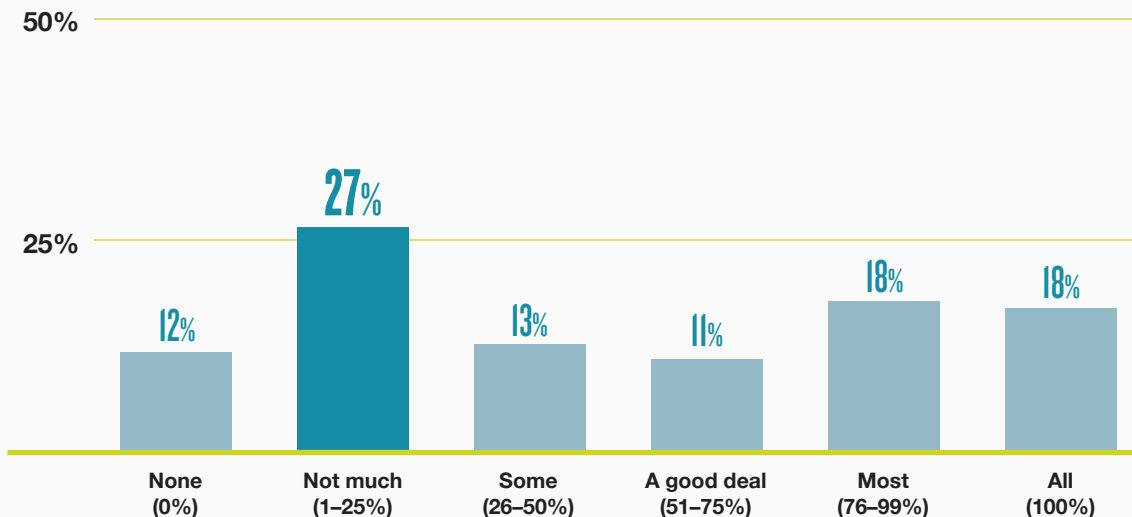


ECONOMICS & FUNDING

Income from documentary work is inconsistent. About 4 in 10 documentary professionals (39%) say that less than a quarter of their personal annual income came from documentary over the past year. (We asked respondents to indicate: “Over the last year, what percentage of your personal gross income came from documentary work, as an estimate?”).

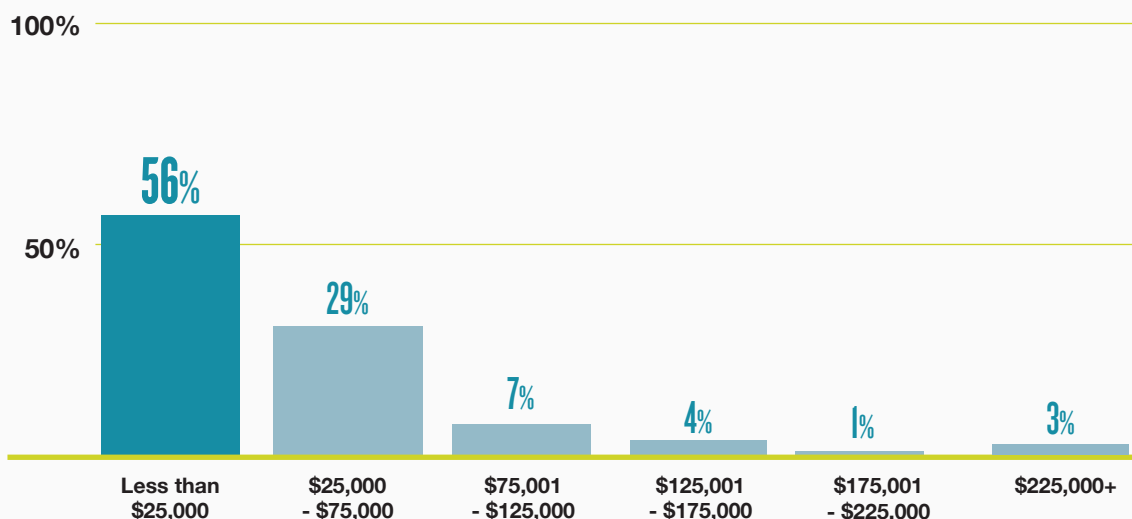
(“Documentary professionals” includes the full group of all respondents, which comprises documentary directors, producers, editors, cinematographers, festival executives, nonprofit organization employees, impact producers, broadcasters, funders, professors.)

DOCUMENTARY PROFESSIONALS' ANNUAL INCOME FROM DOCUMENTARY WORK



For primary documentary makers (directors and producers), personal income from their films is low – and inconsistent. More than half of documentary filmmakers (56%) received less than \$25,000 (as gross personal income) from their most recent documentary film. A combined 8 in 10 documentary filmmakers (85%) received a range of less than \$25,000 up to \$75,000 of personal gross income generated by their most recent documentary film.

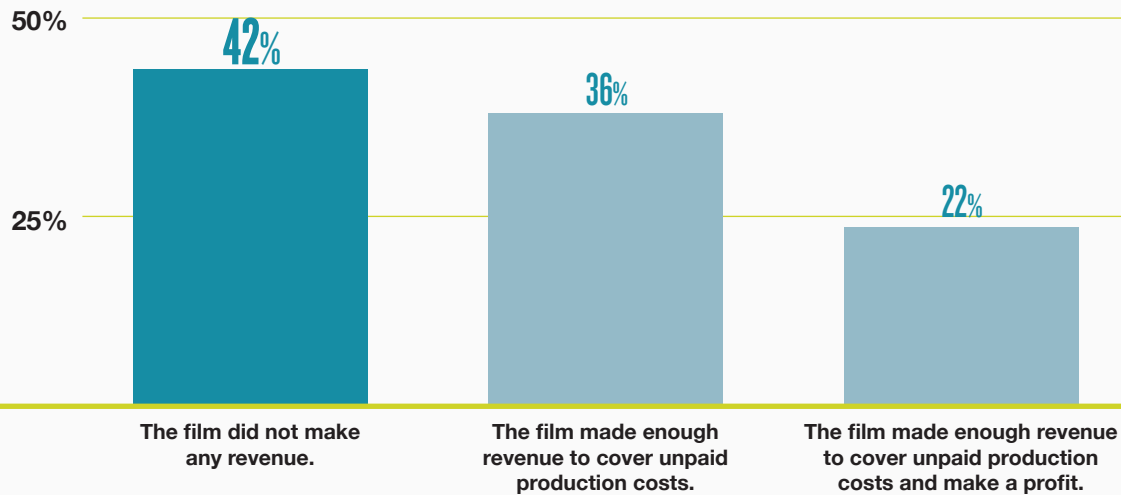
AMOUNT OF INCOME FOR DOCUMENTARY DIRECTORS & PRODUCERS (MOST RECENT FILM)



Revenue from documentary film is inconsistent across documentary makers (directors and producers). About 4 in 10 documentary filmmakers (42%) reported that their most recent film did not generate any revenue. Less than a quarter of documentary filmmakers (22%) reported that their most recent documentary film made enough revenue to cover unpaid production costs and make a profit.

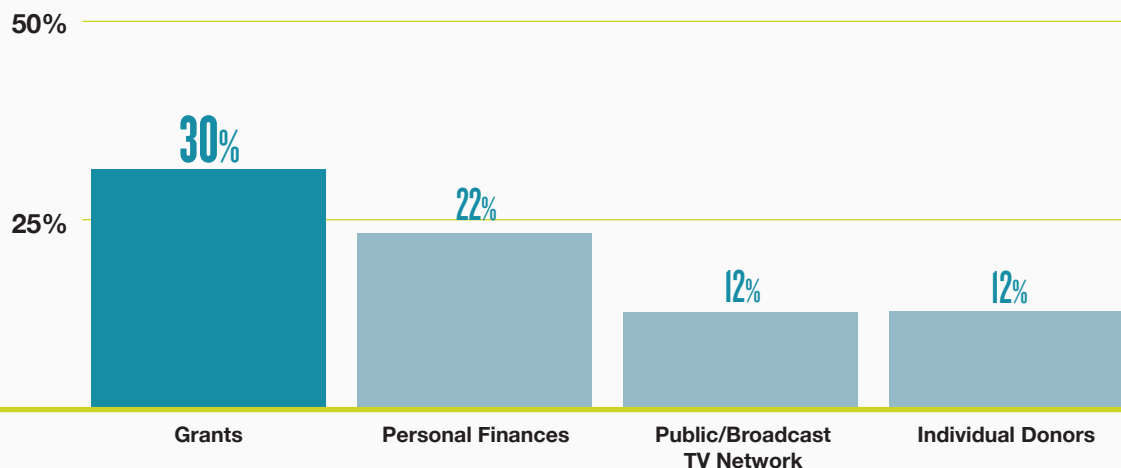
This pattern is more pronounced for documentary filmmakers from racial and ethnic minority groups, who were more likely than white filmmakers to report that their film did not make any revenue (49% compared to 35%).

DOCUMENTARY FILM REVENUE (MOST RECENT FILM)



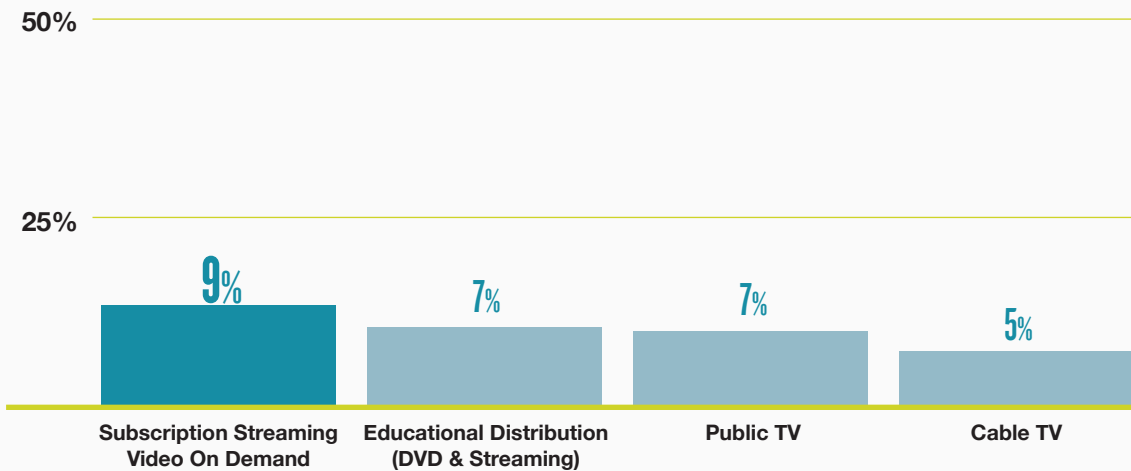
For documentary makers' most recent documentary films, the top four sources of funding to make their films represented are: foundation grants (30%), personal finances (22%), and a tie between public/broadcast TV networks (PBS, NBC, etc.) and individual donors (12%). Remaining sources of funding were widely dispersed among a range of sources. (Note: Responding to a comprehensive list of potential documentary funding sources, we asked documentary directors and producers to indicate whether each funding source was either "not a source of funding," a "contributing source of funding" or a "main source of funding." The responses here reveal the results of the "main source of funding" answers.)

MAIN SOURCES OF DOCUMENTARY FUNDING



For documentary makers' most recent films, revenue streams from their documentaries are widely dispersed across a variety of sources – no sole or dominant source emerges. The top four sources of documentary revenue for documentary filmmakers (for their most recent films) were: (1) subscription streaming video on demand (Netflix, Amazon Prime) (9%); (2) public TV (7%), (3) educational distribution (including DVDs and streaming) (7%); and cable TV (5%). (Note: Responding to a comprehensive list of potential revenue sources for documentaries, we asked documentary directors and producers to indicate whether each revenue source was either “not a source of revenue,” a “contributing source of revenue” or a “main source of revenue.” The responses here reveal the results of the “main source of revenue” answers.)

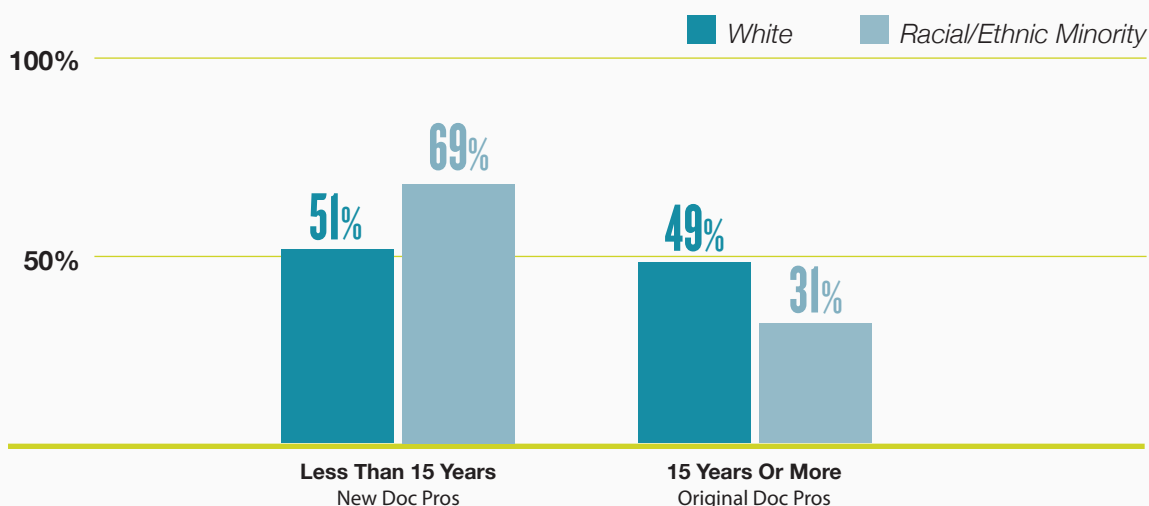
MAIN SOURCES OF DOCUMENTARY REVENUE



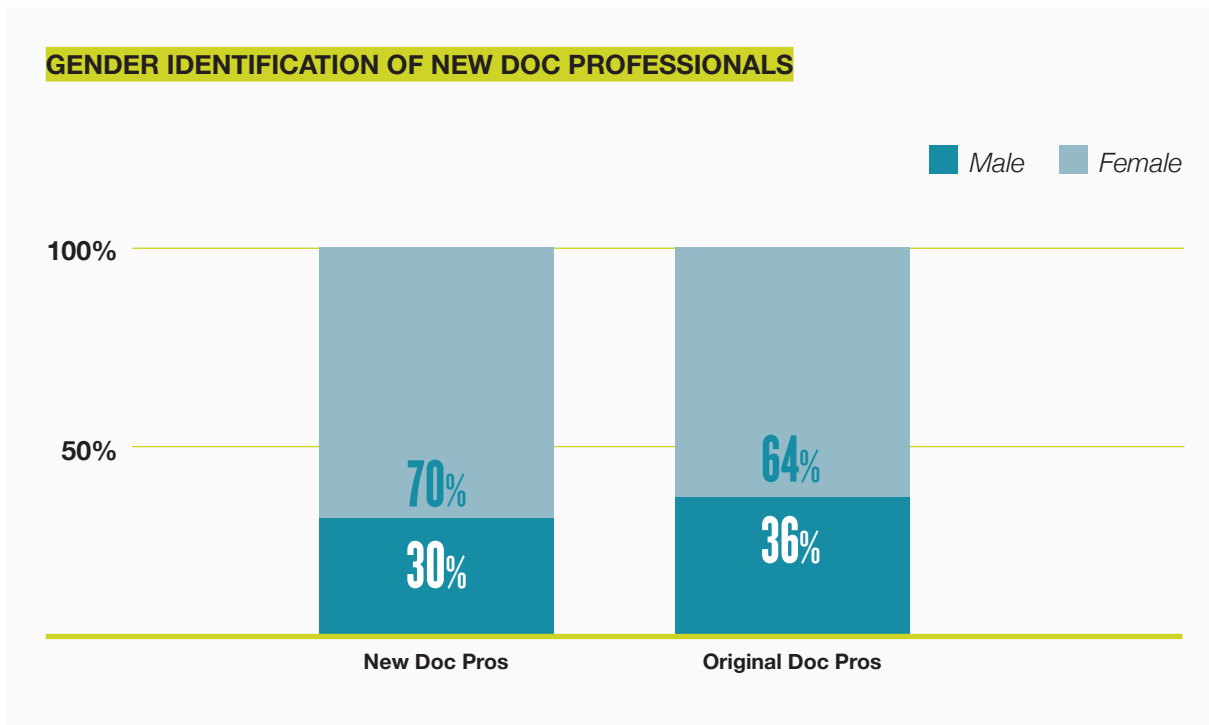
DIVERSITY

New documentary professionals are more racially and ethnically diverse. Professionals entering and/or newer to the documentary field – that is, those who have joined the industry over the last 15 years (we call them “New Doc Pros” in this analysis and report) – are significantly more likely to be members of racial and ethnic minority groups; almost 7 in 10 (69%) of new documentary professionals are members of racial and ethnic minority groups.

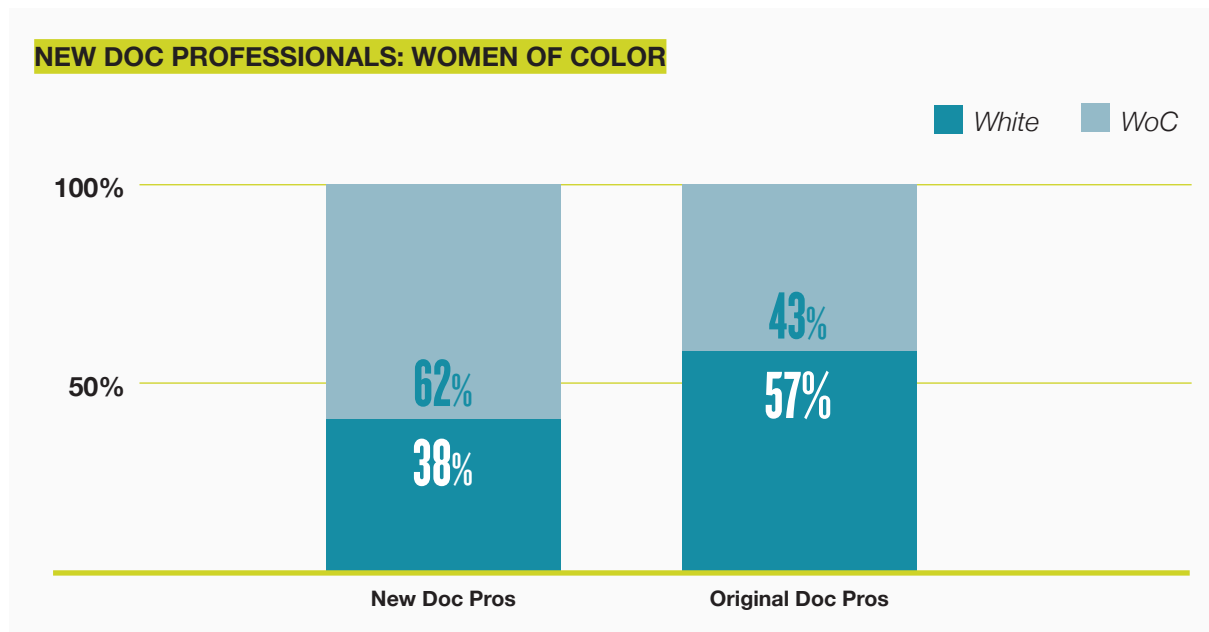
DOCUMENTARY GENERATIONS: RACE & ETHNICITY OF NEW DOC PROFESSIONALS



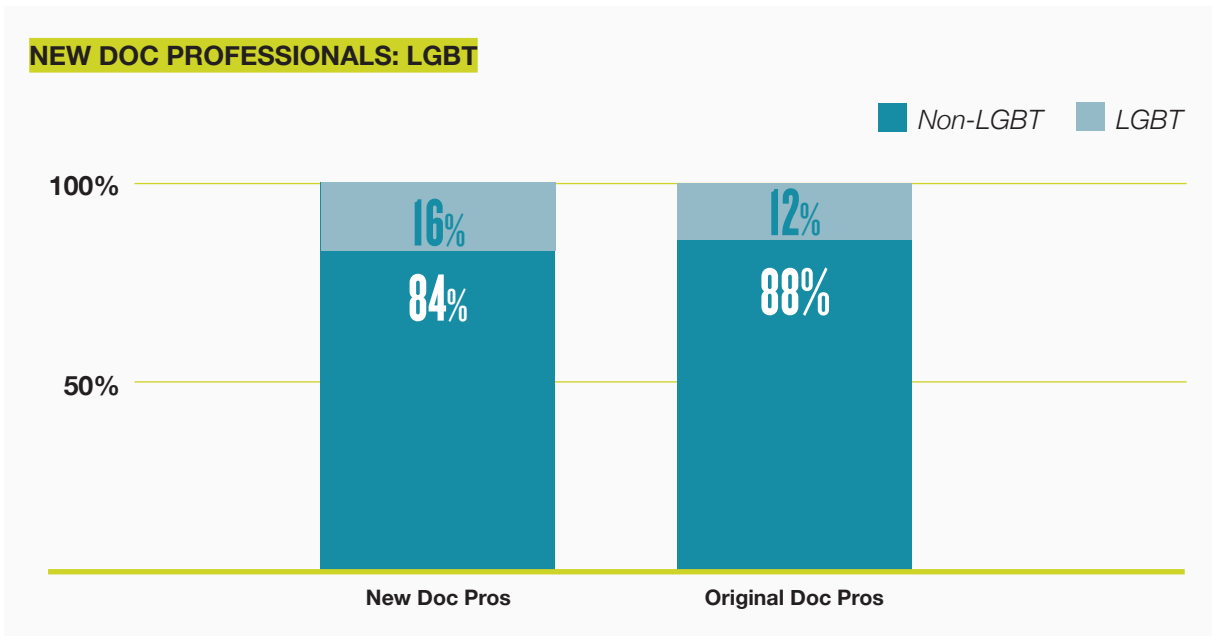
More women are also joining the documentary profession. 70% of the new doc professionals represented here are women.



Women joining the documentary field are more likely to be women of color. For these respondents, more than half (62%) of women who have entered the industry within the last 15 years are women of color.

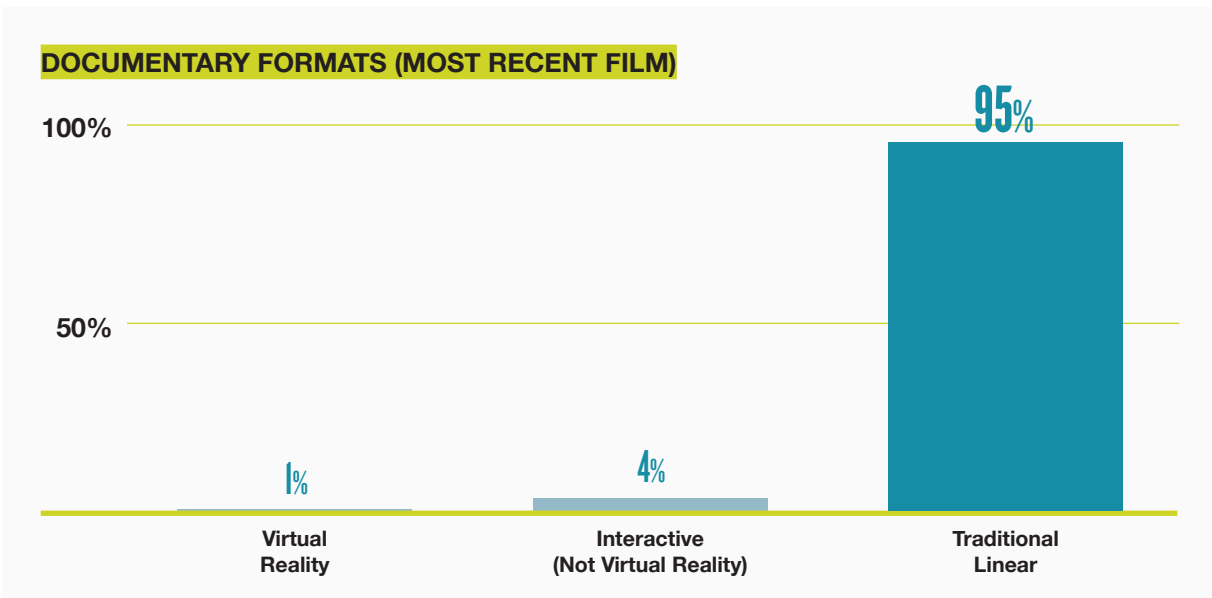


Documentary professionals who identify as LGBT are also on the rise among the documentary film community; about 16% of new documentary professionals in this respondent group identify as LGBT.

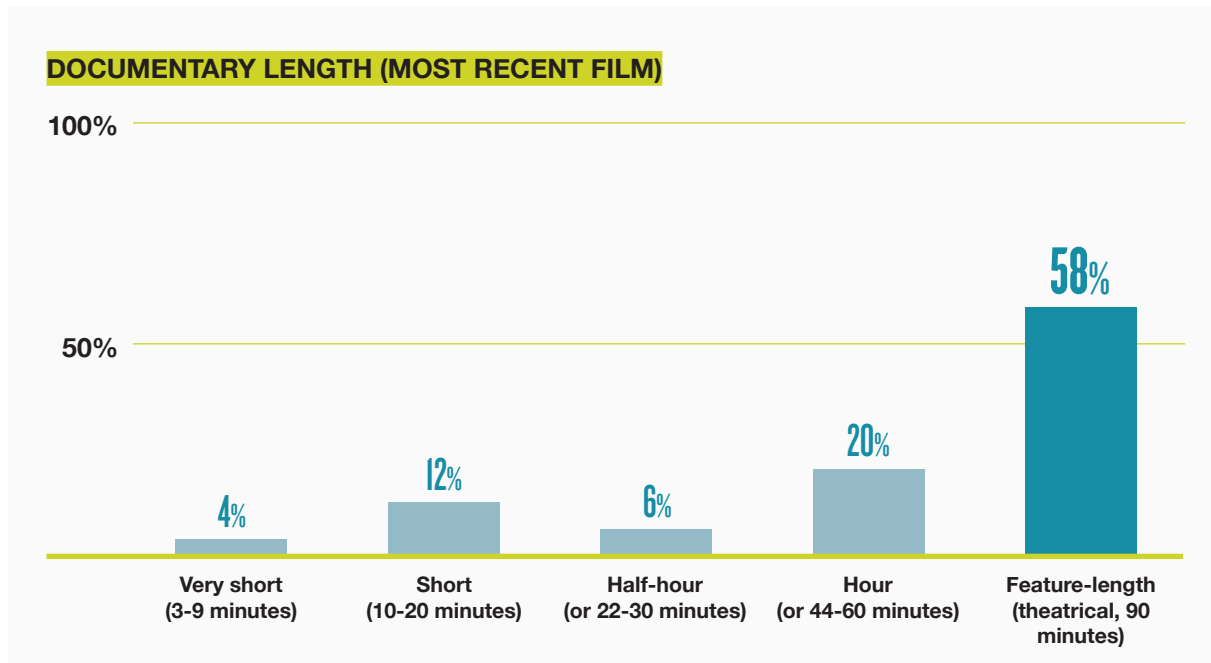


DISTRIBUTION & PLATFORMS

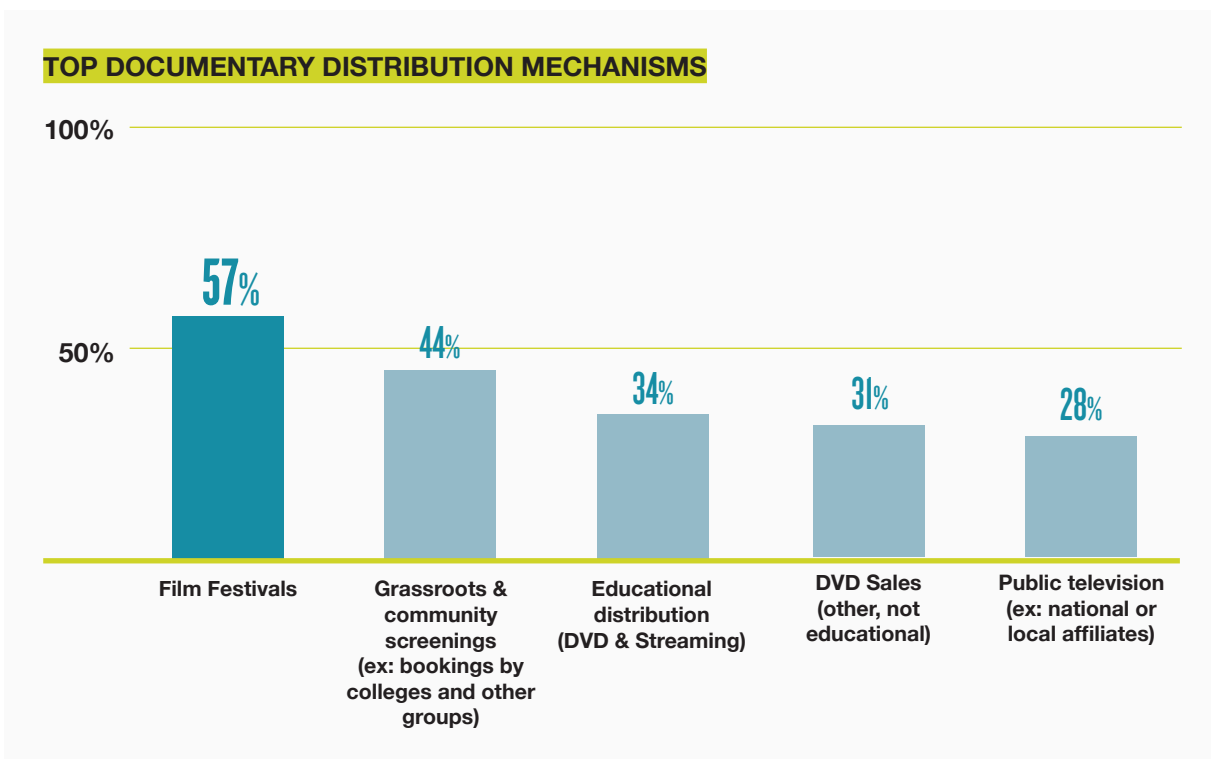
Traditional linear documentary filmmaking still reigns over interactive or virtual reality – by a wide margin. Almost all of the documentary filmmakers in this sample (directors and producers) said their most recent documentary film was a traditional linear format (95%), rather than interactive (4%) or virtual reality (less than 1%).



The majority of documentary makers (directors and producers) in this sample (58%) are currently making feature-length documentary films (90 minutes). But documentary filmmakers from racial and ethnic minority groups are significantly more likely to be making short-form films (18% makers of color compared to 7% white filmmakers), and less likely to be making feature-length films than white filmmakers (50% compared to 64%).



The top five distribution mechanisms for documentaries produced by these documentary directors and producers are: (1) film festivals, (2) grassroots community screenings, (3) educational distribution (DVD and streaming), (4) DVD sales (not educational), and (5) public TV. (Most respondents indicated more than one distribution mechanism.) (Note: From a comprehensive list of potential documentary distribution mechanisms, we asked respondents to answer “How was your most recent documentary distributed?” Respondents were able to choose multiple answers in order to reveal the complex layers of documentary distribution. This data shows the top five distribution mechanisms indicated by documentary producers and directors.)



COMPLETE FINDINGS



SECTION I



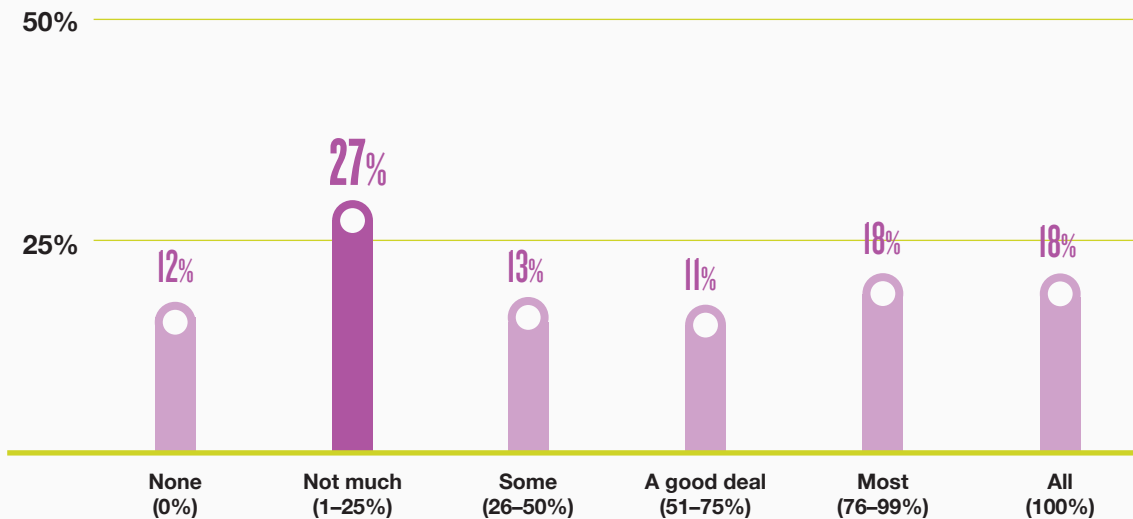
DOCUMENTARY PROFESSIONALS TODAY: MOTIVATIONS, OPPORTUNITIES, CHALLENGES

What do the professionals who work in the documentary field – including directors, producers, editors, cinematographers, impact producers, funders, academics, broadcasters, distributors – think about the current and future state of the field?

Percentage of Personal Income from Documentary Work

Income from documentary work is inconsistent. For documentary professionals, about 4 in 10 (39%) say that a quarter or less of their personal annual income came from documentary over the past year. But 36% say most or all of their annual income came from documentary work.

DOC PROFESSIONALS' INCOME FROM DOCUMENTARY WORK (PAST YEAR)



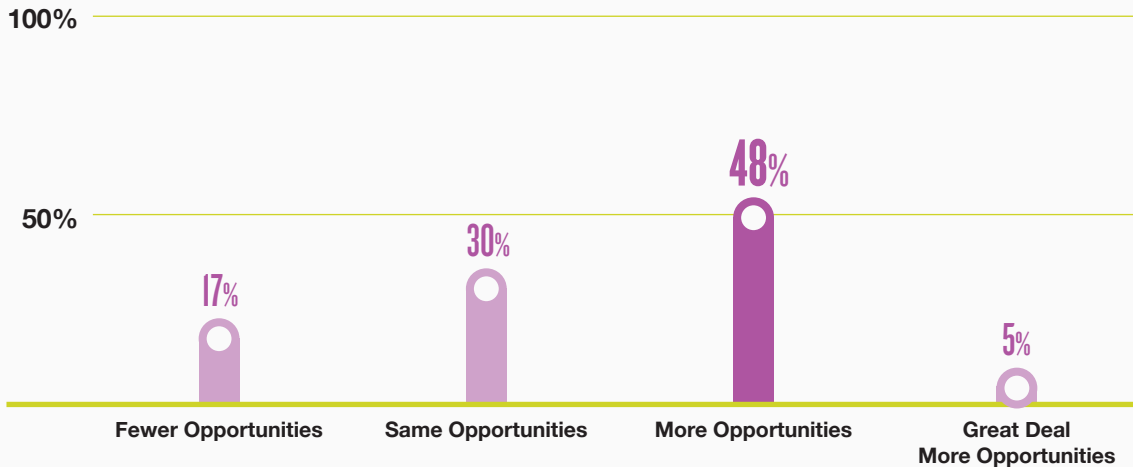
I feel I've learned a huge amount just a half generation younger than me, and the issues that they are going through, producing in the time of Black Lives Matter and Me Too. I'm learning from their perspectives that my generation or my age didn't look as closely as we should have done.



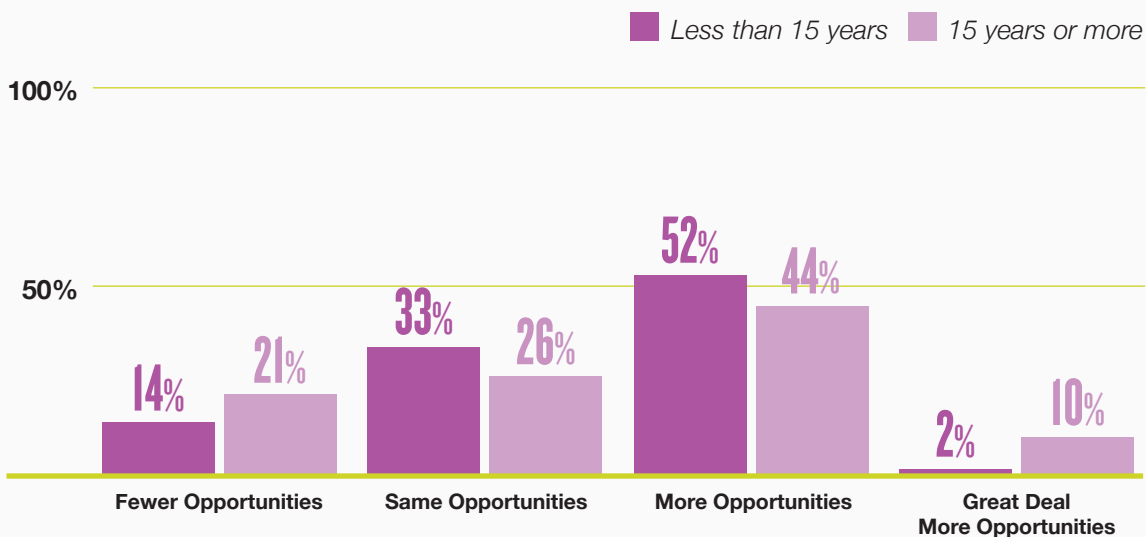
Opportunities for All Documentary Makers

Documentary professionals are motivated by the future in their field, but they see room for improvement in terms of opportunities. Almost half of documentary professionals (48%) believe there are more opportunities for documentary makers over the last two years. However, the New Doc Pros in the field for 15 years or less, are significantly less likely to say there are a “great deal more” opportunities than the Original Doc Pros (2% vs. 10%). (We asked respondents to indicate their answers to: “Which statement best reflects your perspective about opportunities for documentary filmmakers over the past two years?” Response statements included: fewer, same level, more, or great deal more opportunities.)

PERCEPTIONS OF DOCUMENTARY OPPORTUNITIES



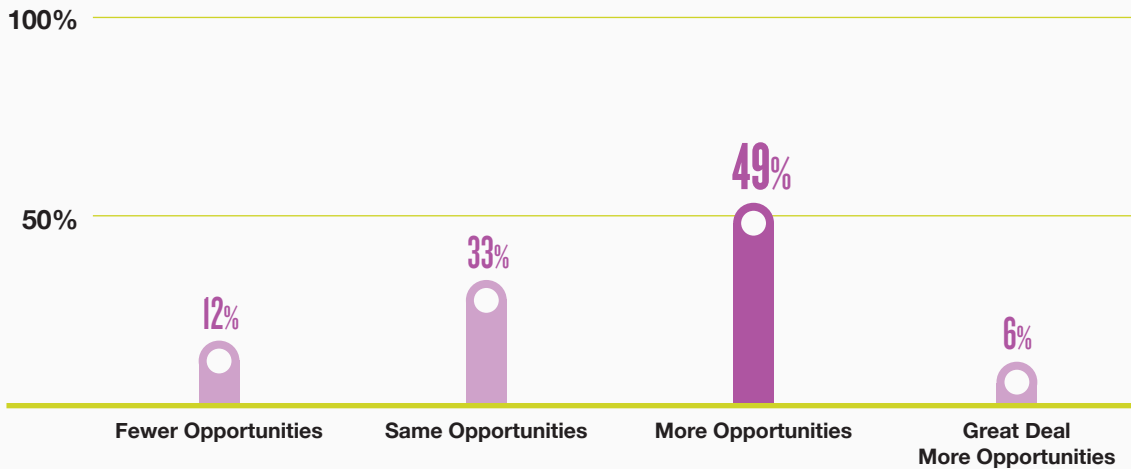
PERCEPTIONS OF DOCUMENTARY OPPORTUNITIES: NEW DOC PROS VS. ORIGINAL DOC PROS



Opportunities for Documentary Makers from Racial & Ethnic Minority Groups

Half (49%) of the documentary professionals in this study say there are more opportunities for makers from racial and ethnic minority groups over the past few years. However, significant racial differences emerge: 40% of documentary professionals from racial and ethnic minority groups agree there are more opportunities for them, compared to 57% of white documentary professionals who agree there are more opportunities for documentary professionals who are members of racial and ethnic minority groups. (We asked respondents to indicate their answers to: “Which statement best reflects your perspective about opportunities for documentary filmmakers from underrepresented racial and ethnic groups, over the past two years?” Response statements included: fewer, same level, more, or great deal more opportunities.)

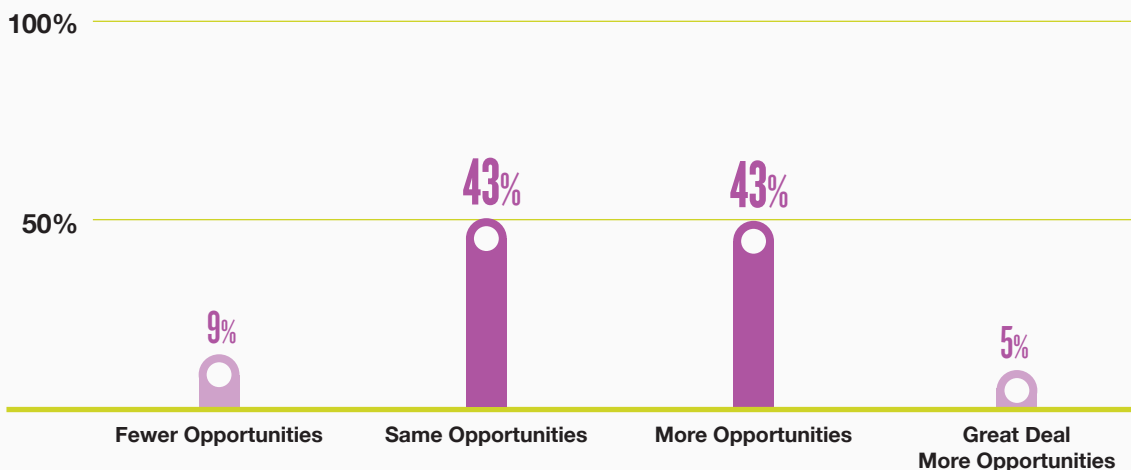
PERCEPTIONS OF DOCUMENTARY OPPORTUNITIES FOR FILMMAKERS OF COLOR



Opportunities for Women Documentary Makers

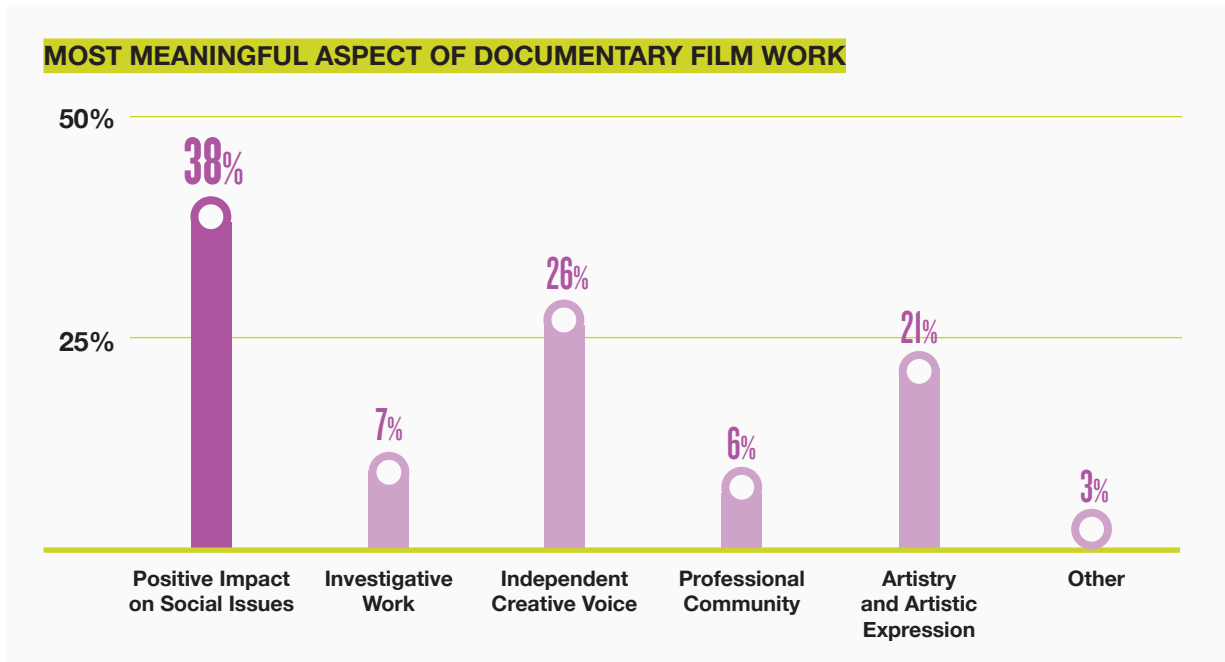
In terms of opportunities for women documentary professionals, the perception is mixed: About 4 in 10 (43%) documentary professionals see the same level of opportunity for women as before, and the same proportion (43%) sees more opportunities for women makers. However, significant gender differences emerge: Female documentary professionals are significantly more likely to say opportunities for them have remained the same (47% say this) compared to 32% of male documentary professionals, and men are significantly more likely than women to say there is a “great deal more” opportunity for women. (We asked respondents to indicate their answers to: “Which statement best reflects your perspective about opportunities for women documentary filmmakers, over the past two years?” Response statements included: fewer, same level, more, or great deal more opportunities.)

PERCEPTIONS OF DOCUMENTARY OPPORTUNITIES FOR WOMEN FILMMAKERS



What is Most Meaningful About Documentary-Related Work, According to Industry Professionals?

When thinking about some of documentary's core values, the documentary professionals represented here say that "the impact on social issues" is what is most meaningful to them about documentary work; 38% of documentary professionals gave this the top billing. Maintaining an independent editorial and creative voice was also indicated as the most meaningful aspect of documentary work.

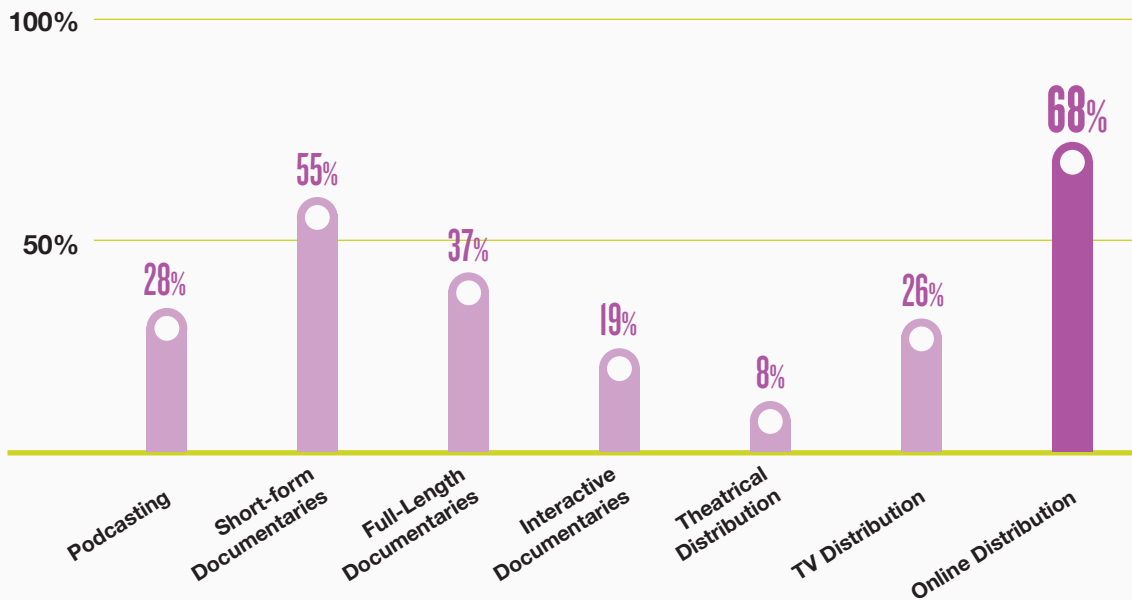


“ I have found nothing more rewarding than the process of telling a very engaging, human story, being able to tell a story that can not necessarily always change but open up the hearts and minds of the viewers in a new way. That’s the impact I want to make. That’s why I do this. ”

What Formats Offer the Most Promising Future Opportunity for Documentary?

In terms of documentary formats, documentary professionals feel that the greatest opportunity can be found in short-form documentaries; 55% say there is “great opportunity” here for the future. Less than a quarter see great opportunity for interactive documentaries. Documentary professionals also feel most optimistic about online distribution as a great opportunity (68% say there is great opportunity here). (We asked respondents to indicate their answers to this question: “In terms of format & distribution, to what extent do you feel these areas offer positive future opportunities for documentary?” Response options included: not at all an opportunity, not much of an opportunity, an opportunity, or a great opportunity. The data here shows “a great opportunity” responses.)

PROMISING FORMATS FOR DOCUMENTARY WORK



SECTION 2

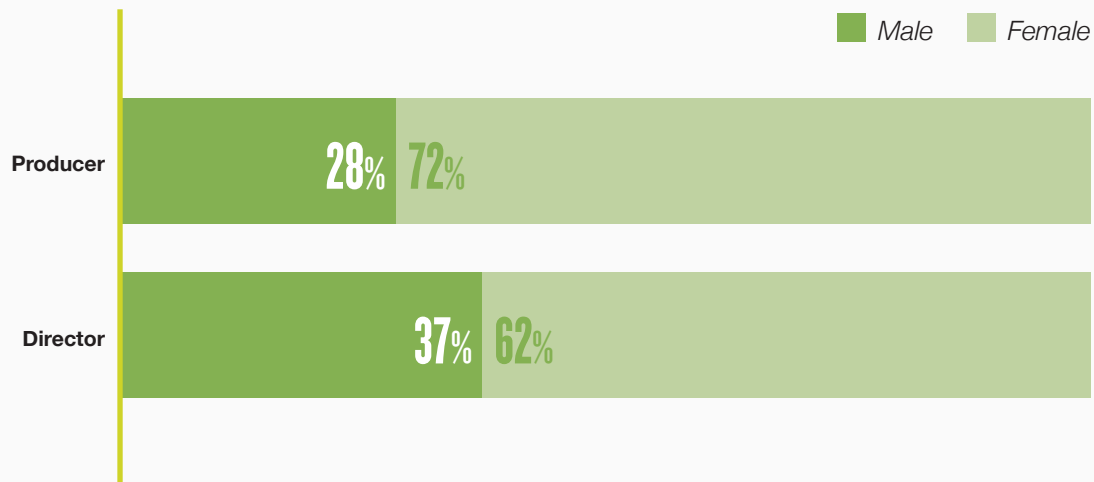


DOCUMENTARY DIRECTORS & PRODUCERS: MOTIVATIONS, FORMATS & RISKS

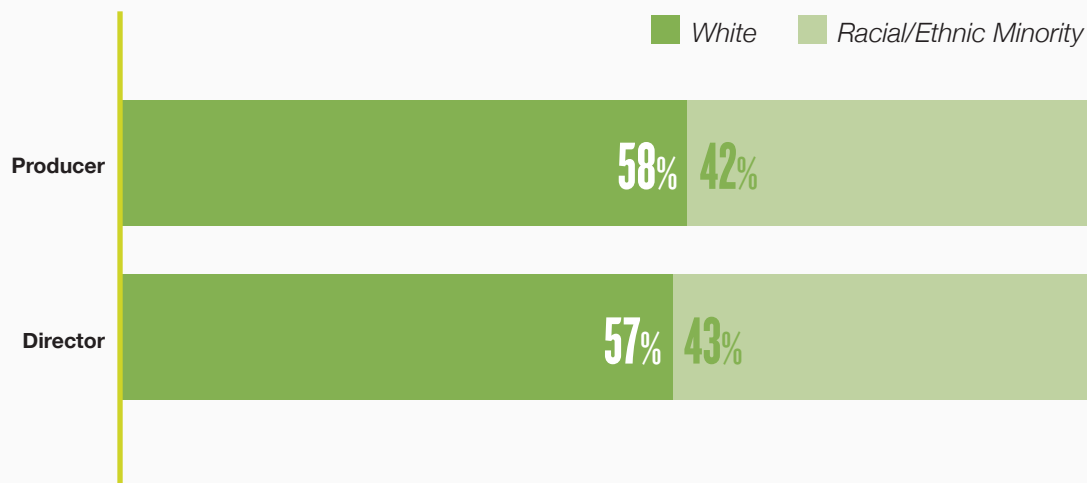
Directors and producers, the creative and business decision-makers in documentary storytelling, are uniquely equipped to share insights about the art and business of their craft. How do they see their field, in terms of why they do the work, as well as opportunities for the future in terms of format and distribution? And what kinds of threats and risks do they face along the way?

Directors & Producers: Demographics

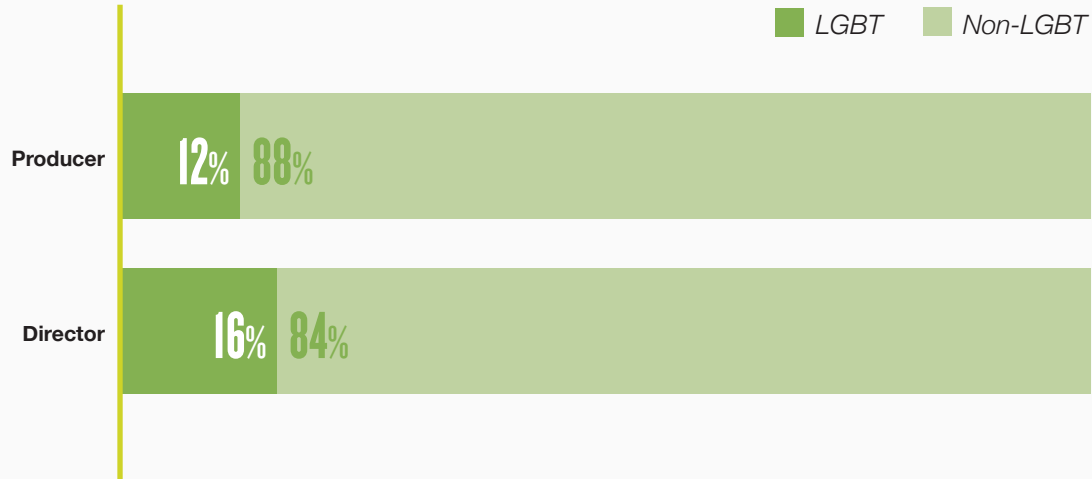
GENDER



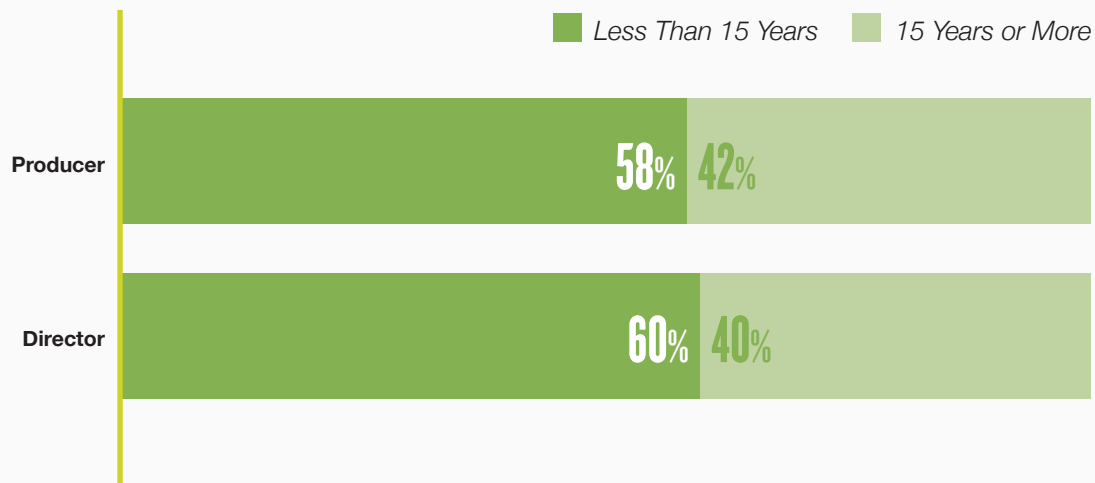
RACE & ETHNICITY



LGBT



GENERATIONS



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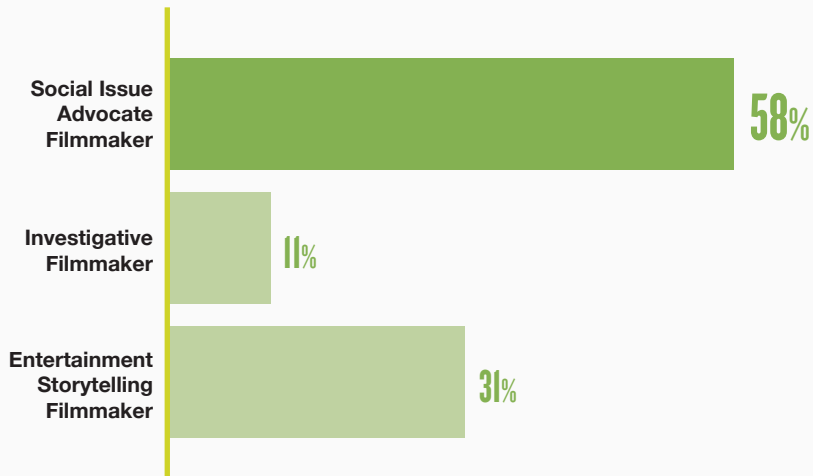
Documentary is very generous community. I'm on the mentor side, but I'm still learning from the other mentors. You're talking about things and you're learning, and you're learning from other people's experiences.

”

How Documentary Makers (Directors & Producers) Describe Themselves

The documentary directors and producers represented here strongly identify as creative individuals working to make a difference in social challenges. The majority of these documentary makers – directors and producers – describe themselves primarily as social-issue advocate filmmakers (58%), compared to entertainment storytelling filmmakers (31%). (We asked respondents to answer this question with one response: “Thinking of yourself as a documentary maker, what primary description would you use, of the ones presented here?” Responses include social-issue storyteller, entertainment storyteller, or investigative storyteller, although we recognize these are not mutually exclusive categories. The information here provides a broad, general sense of description.)

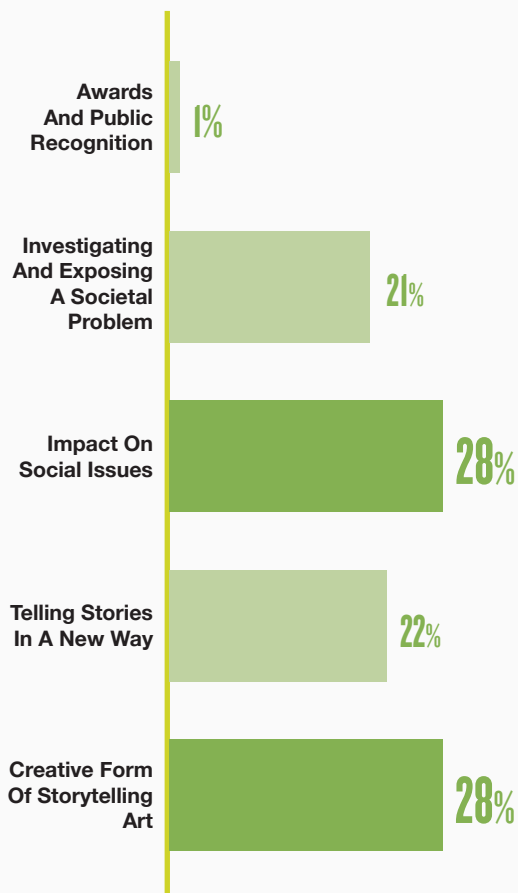
DOCUMENTARY DIRECTORS & PRODUCERS: SELF-DESCRIPTIONS



What Motivates Directors & Producers to Work in Documentary?

Documentary makers are motivated by two primary values in documentary storytelling: working in creative, artistic storytelling (28%) and making an impact on social issues (28%).⁹ (We asked respondents to answer: “What motivates you to work in documentary?” Response options included: not at all a motivation, not a motivation, a motivation, or a main motivation. The data here shows “a main motivation” responses.)⁹

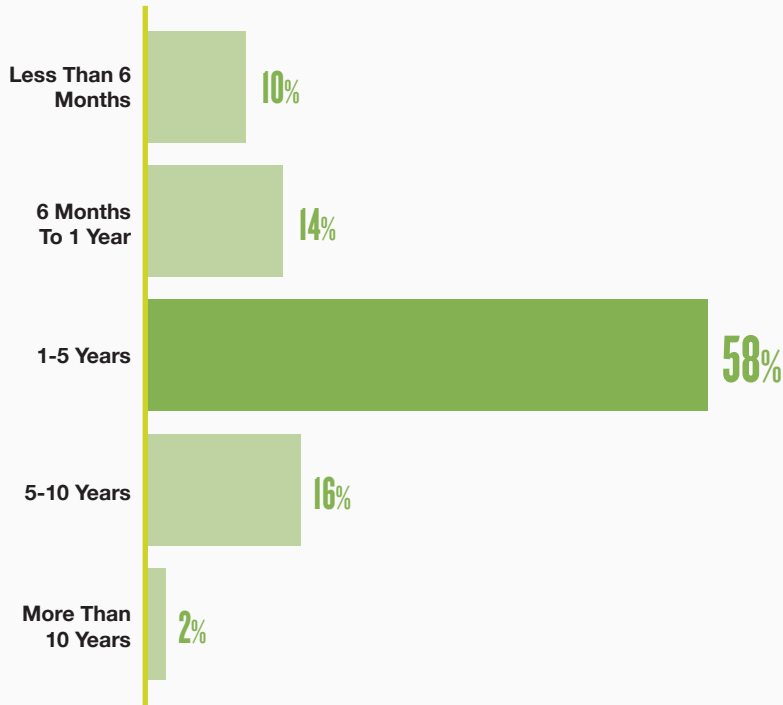
DOCUMENTARY DIRECTORS & PRODUCERS: MOTIVATIONS



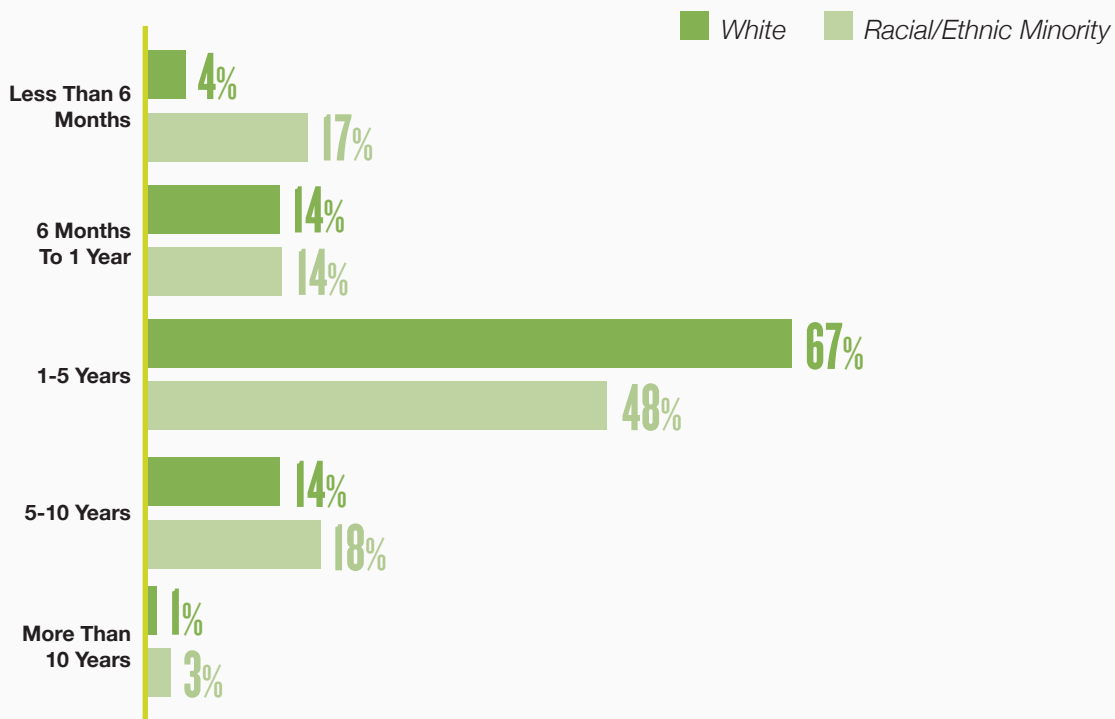
How Long Does It Take to Make A Documentary?

For most documentary makers, it takes between 1-5 years to complete a film (58% said this). But filmmakers from racial and ethnic minority groups were significantly more likely to have made their most recent film in less time than white filmmakers; 17% of filmmakers from racial and ethnic minority groups made their most recent film in less than six months, compared to white filmmakers (4%).

AMOUNT OF TIME TO MAKE A DOCUMENTARY FILM (ALL MAKERS)



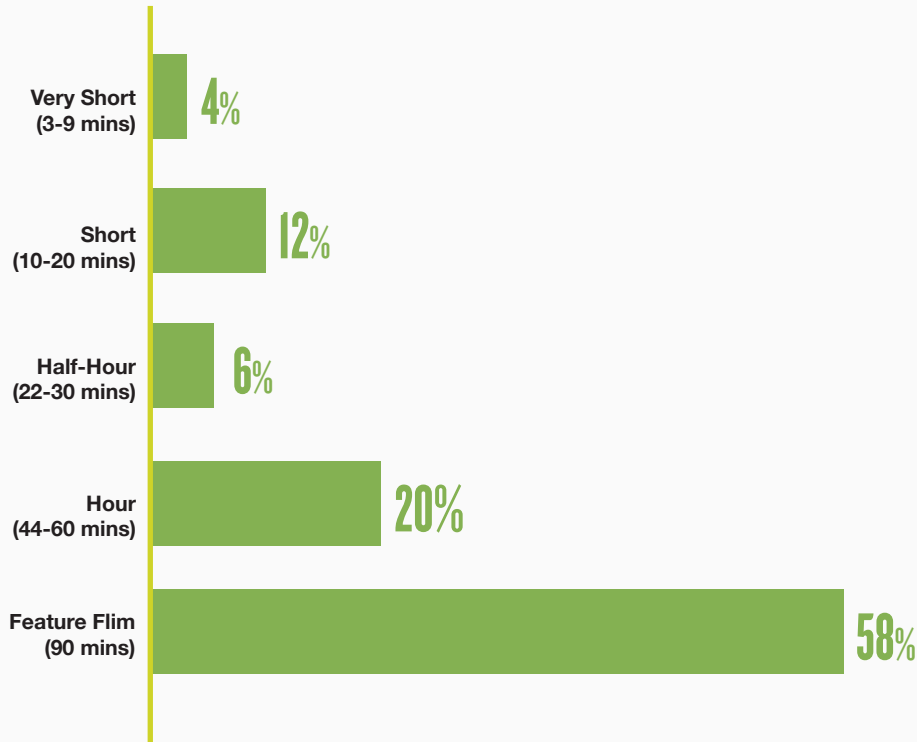
AMOUNT OF TIME TO MAKE A DOCUMENTARY FILM: RACE & ETHNICITY COMPARISON



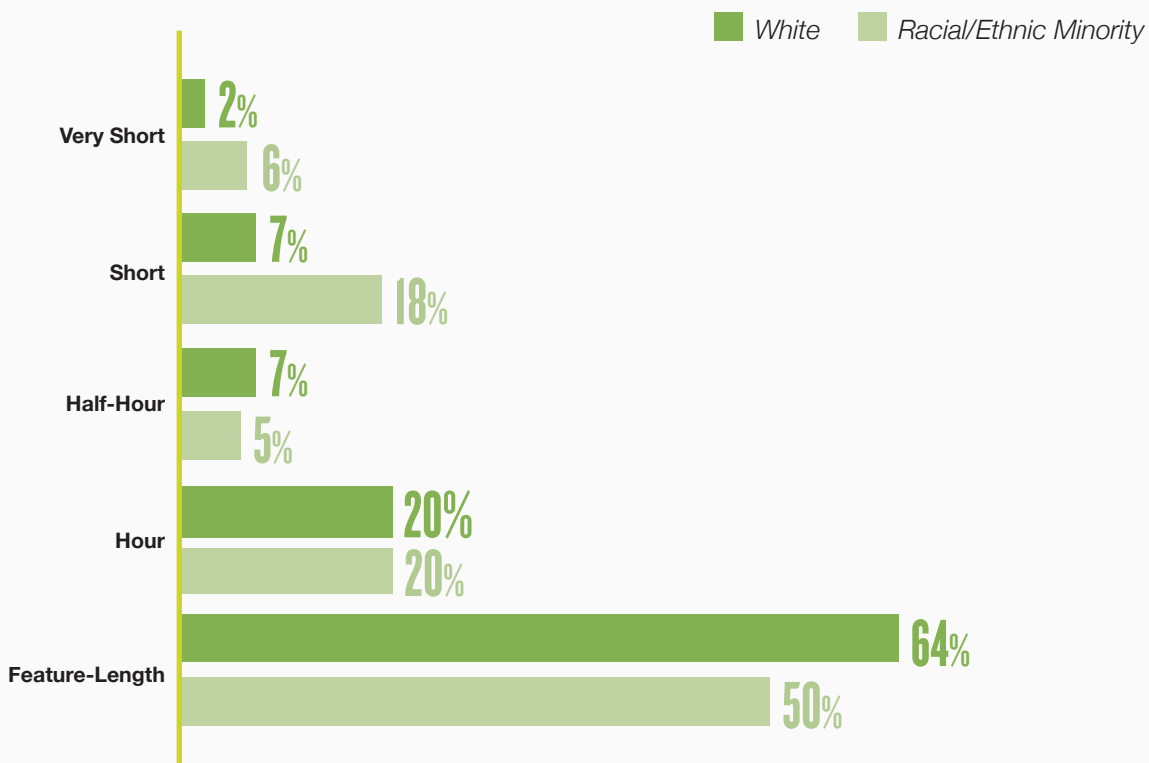
Documentary Length (Most Recent Film)

The majority of documentary filmmakers in this sample (58%) are currently making feature-length documentary films (90 minutes). New documentary professionals (more likely to be documentary filmmakers from racial and ethnic minority groups) show great versatility in their storytelling skills.

DOCUMENTARY LENGTH (MOST RECENT FILM)



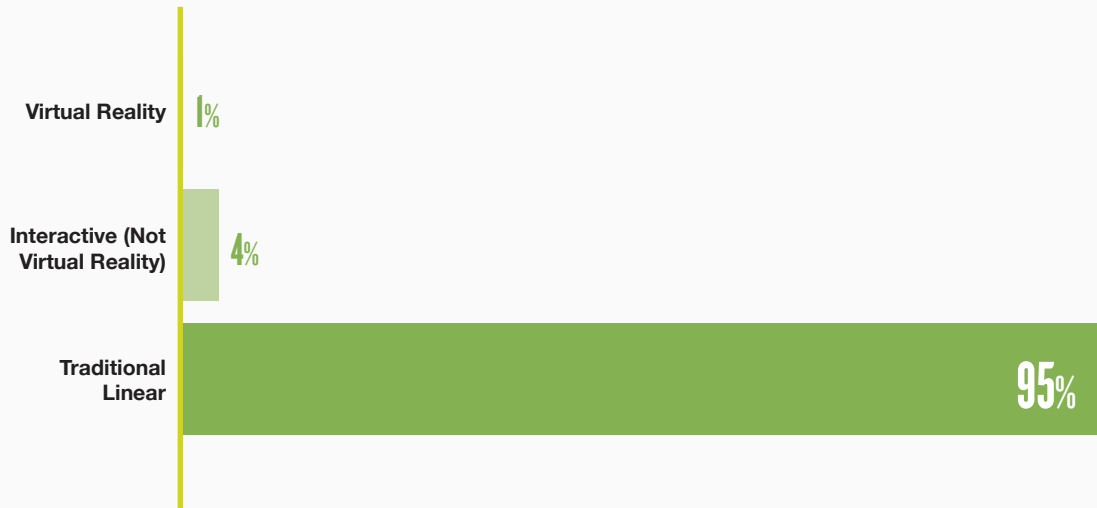
DOCUMENTARY FILM LENGTH (MOST RECENT FILM): RACIAL/ETHNIC MINORITY VS. WHITE



Documentary Format (Most Recent Film)

Traditional linear documentary filmmaking still rules over interactive or VR – by a wide gap. Almost all of the documentary filmmakers in this sample said their most recent documentary film was a traditional linear format (95%), rather than interactive (4%) or virtual reality (less than 1%).

DOCUMENTARY FORMAT (MOST RECENT FILM)



“

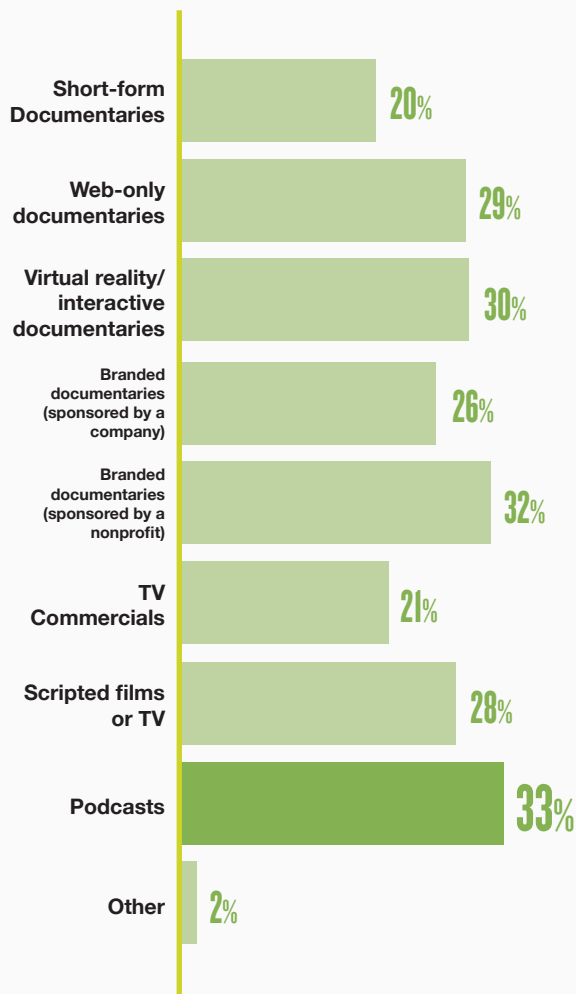
A voice to the underrepresented, wanting to make a difference, I think, in some small way, but also wanting to make entertainment and make a difference and make something entertaining at the same time.”

”

Documentary Format: Future Plans

These documentary directors and producers indicate a wide array of interests for producing additional documentary forms in the future, with the most enthusiasm for podcasts (33%), branded documentaries sponsored by a nonprofit (32%), VR (30%) or Web-only (29%). (Note: The results here show the responses that indicated “I have not produced this yet but plan to do so in the future.”)

DOCUMENTARY FORMAT: FUTURE PLANS

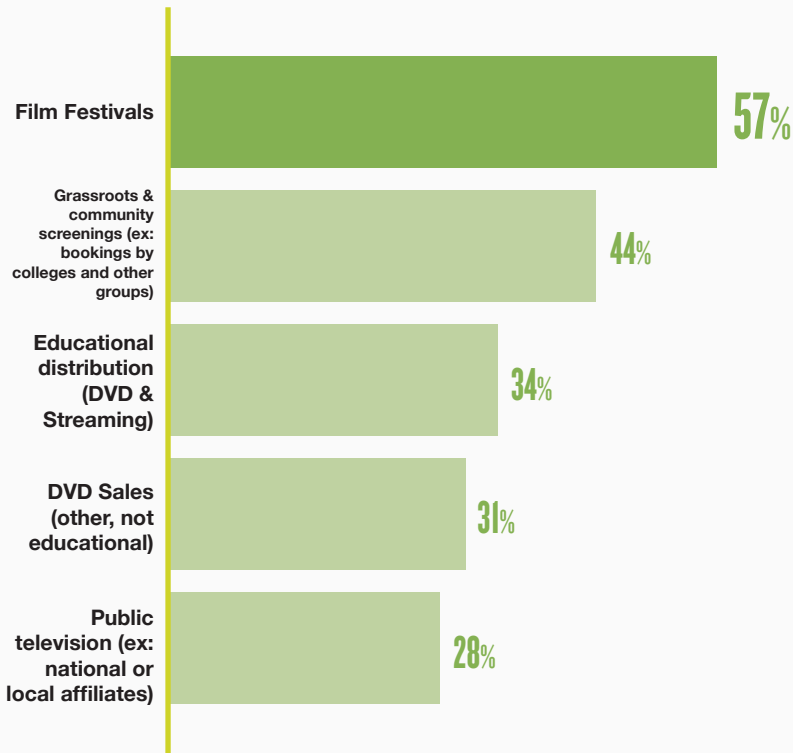


People are really nice in the documentary industry. It is actually a really positive community. People want to, tend to be, really interested. They tend to want to put positive ideas into the world. And they're also courageous storytellers.

Documentary Distribution (Most Recent Film)

The top five distribution mechanisms for documentaries produced by these makers are: (1) film festivals, (2) grassroots community screenings, (3) educational distribution (DVD and streaming), (4) DVD sales (not including educational), and (5) public TV. (Most respondents indicated more than one distribution mechanism.) This top-five list holds true for all demographic categories.¹⁰

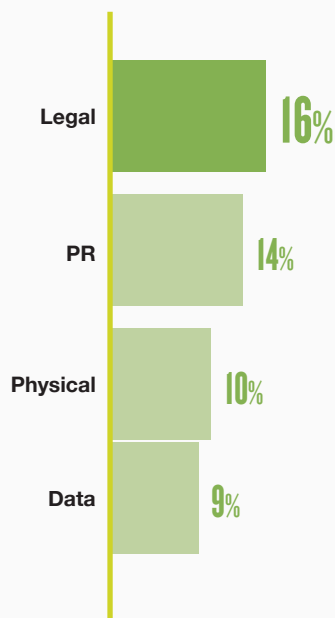
TOP DISTRIBUTION MECHANISMS FOR DOCUMENTARY FILMS (MOST RECENT FILM)



Threats Faced While Making Documentary (Most Recent Film)

Most of the documentary makers here had not experienced threats or risks in making their most recent films, but when they did, it was likely to be a legal threat of some kind (legal challenges to fair use claims; legal attacks on the film by a company, government entity or individual; legal attack on film characters by a company, government entity or individual). (It's important to note, however, the difference between a legal "threat" (such as a letter) vs. a formal legal action, which is rare in this context.)

RISKS MAKING DOCUMENTARY FILMS



“ I love the diversity of stories I get to work with. I love the fact that we're hitting head on with key issues of today. For good or for bad, I mean, that's part of being independent, isn't it? ”

SECTION 3



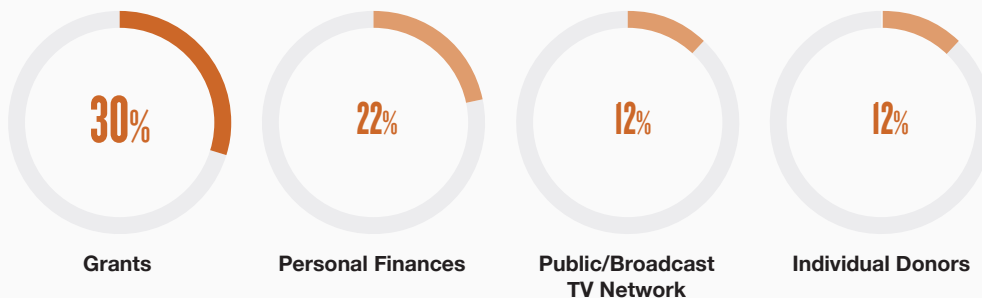
DOCUMENTARY DIRECTORS & PRODUCERS: CAREER SUSTAINABILITY & ECONOMICS

The ability for documentary directors and producers to sustain a career and make a living from their creative documentary work is an important question for an industry in transition. What do these documentary makers have to say about their lived experiences and the economics of their work?

Sources of Documentary Funding (Most Recent Film)¹¹

For their most recent documentary films, the leading “main sources” of funding for documentary makers (directors and producers) are: foundation grants (30%), personal finances (22%), and a tie between public and broadcast TV networks (PBS, NBC, etc.) and individual donors (12%). Remaining main sources of funding were widely dispersed among a range of sources. Funding is elusive from film studios (83% said this is not a source of film funding for their last film), streaming network (75% said not a source of funding), cable TV network (74% said not a source of funding) or academic institution (72% said not a source of funding). (Note: Responding to a comprehensive list of potential documentary funding sources, we asked documentary directors and producers to indicate whether each funding source was either “not a source of funding,” a “contributing source of funding” or a “main source of funding.” The responses here reveal the results of the “main source of funding” answers.)

MAIN SOURCES OF DOCUMENTARY FUNDING



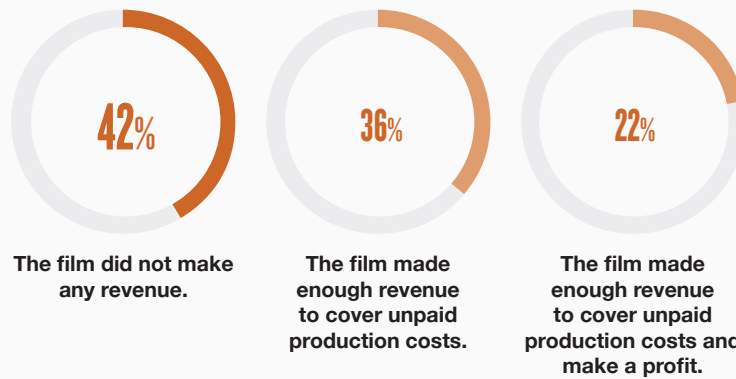
“ My income has solely been – in terms of documentary production – it has been from line items in the budget. I haven’t been a part of any backend revenue streams.



Amount of Revenue from Documentary (Most Recent Film)

Revenue from documentary film is inconsistent across documentary makers. About 4 in 10 documentary filmmakers (42%) reported that their most recent film did not generate any revenue. Further, less than a quarter of documentary filmmakers (22%) reported that their most recent documentary film made enough revenue to cover unpaid production costs and make a profit. This pattern is more pronounced for documentary filmmakers from racial and ethnic minority groups, who were more likely than white filmmakers to report that their film did not make any revenue (49% compared to 35%).

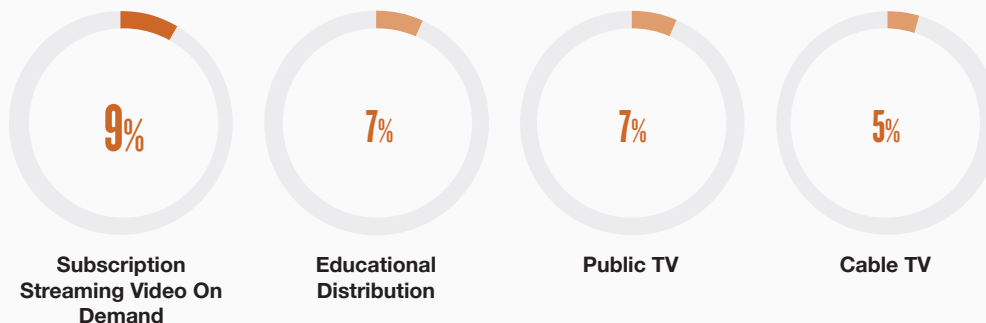
AMOUNT OF DOCUMENTARY FILM REVENUE (MOST RECENT FILM)



Sources of Documentary Revenue (Most Recent Film)¹²

For documentary filmmakers' most recent films, documentary revenue streams are widely dispersed across a variety of sources – no sole or dominant source emerges. The top four “main” sources of documentary revenue for documentary filmmakers on their most recent films were: (1) subscription streaming video on demand (Netflix, Amazon Prime) (9%); (2) public TV (7%), (3) educational distribution (including DVDs and streaming) (7%); and (4) cable TV (5%). (Note: Responding to a comprehensive list of potential revenue sources for documentaries, we asked documentary directors and producers to indicate whether each revenue source was either “not a source of revenue,” a “contributing source of revenue” or a “main source of revenue.” The responses here reveal the results of the “main source of revenue” answers.)

MAIN SOURCES OF DOCUMENTARY REVENUE

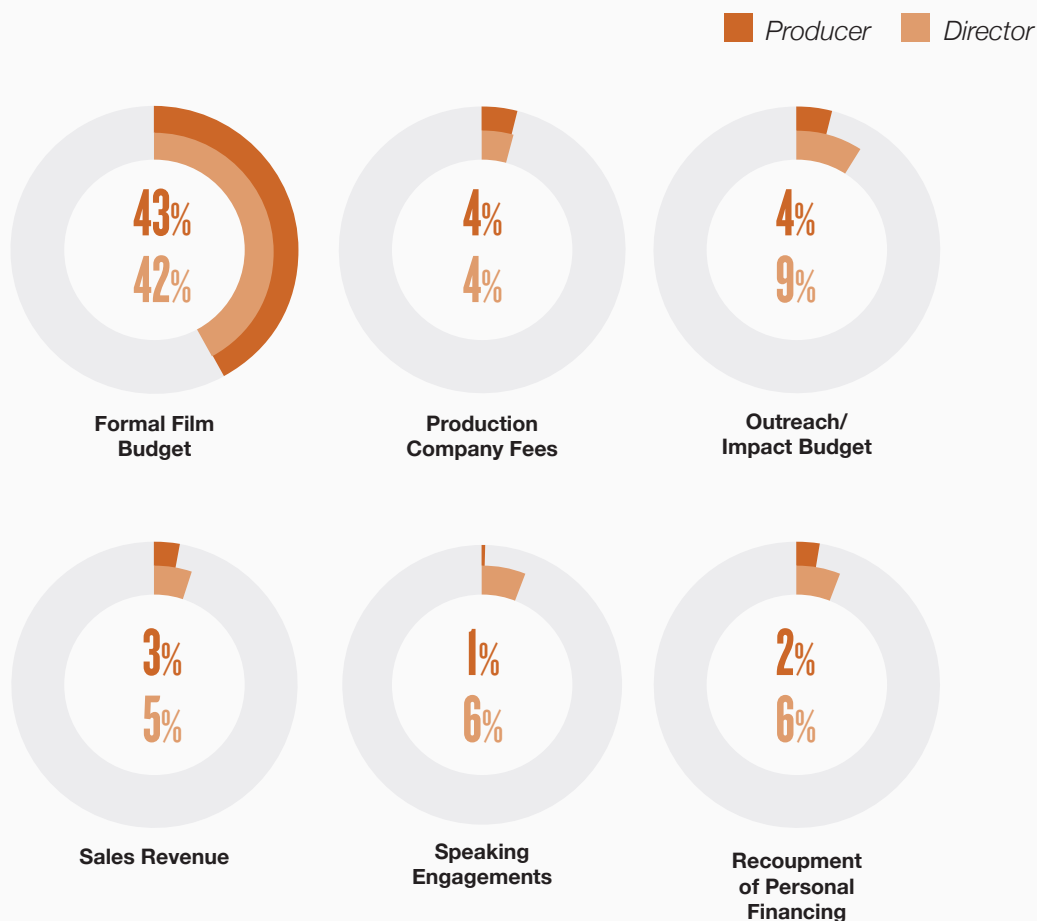


Sources of Personal Income from Documentary (Most Recent Film)¹³

We asked directors and producers to characterize their personal income generated by each potential source of revenue from their most recent documentary film (respondents were able to indicate “not a source,” “contributing source” or “main source” for each option). For these filmmakers, directors and producers were equally likely to receive personal income from the formal film budget (paid either as regular intervals or as funding allowed) and production company fees.

However, documentary directors were significantly more likely than producers to receive personal income from revenue sources past the production phase, including the outreach/impact budget, sales revenue, and speaking engagements.

MAIN SOURCES OF INCOME FROM DOCUMENTARY: DIRECTORS & PRODUCERS



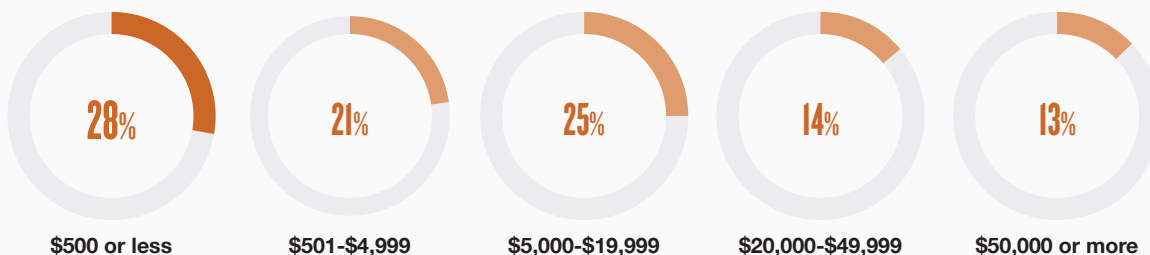
“ It used to be that we worked daily, and I don’t know about other producers, but more and more as we juggle multiple projects at a time, I think a lot of us have gone to an hourly rate. When you’re working an hour here and an hour there, you can’t often make what might be a \$500-a-day day rate.”



Makers' Personal Money Spent to Make Documentary (Most Recent Film)

The majority of these documentary directors and producers self-finance their films in some way. More than a quarter (27%) of documentary filmmakers say they have spent between \$20,000 to upwards of \$50,000 of their own money to make their most recent documentary, and another quarter (25%) spent \$5,000 to \$19,000 on their most recent film.

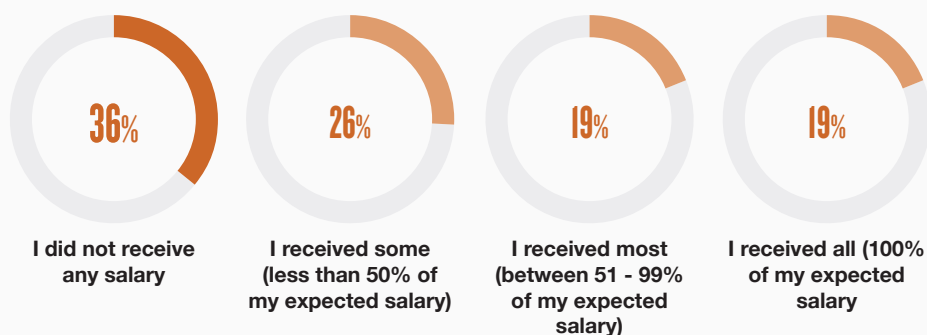
AMOUNT OF FILMMAKER'S PERSONAL MONEY SPENT ON MOST RECENT DOCUMENTARY



Filmmaker Salary from Documentary (Most Recent Film)

Less than a fifth of documentary directors and producers (19%) received a full expected salary from their most recent documentary film. About 36% of filmmakers received no salary at all from their most recent film. (For this question, we asked respondents choose one response to this statement: "For your most recent documentary project, choose the option that most accurately describes your salary." The response options were: "I did not receive any salary," "I received less than 50% of my expected salary," "I received between 51 - 99% of my expected salary," or "I received 100% of my expected salary.")

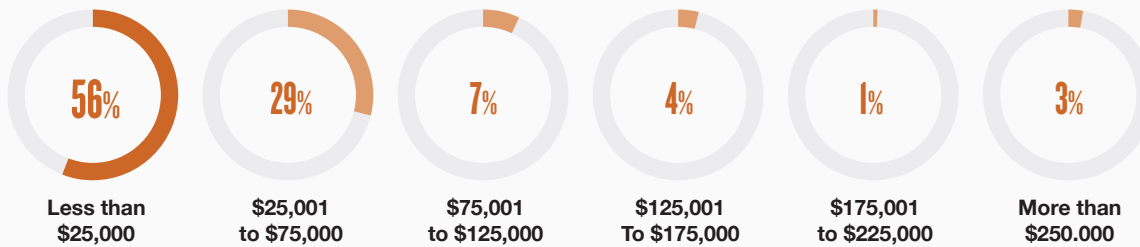
FILMMAKER SALARY RECEIVED (MOST RECENT DOCUMENTARY)



Filmmaker Personal Income Amount from Documentary (Most Recent Film)

For documentary directors and producers, personal income from their films is low – and inconsistent. More than half of documentary filmmakers (56%) received less than \$25,000 (as gross personal income) from their most recent documentary film. A combined 8 in 10 documentary filmmakers (85%) received a range of less than \$25,000 up to \$75,000 on their most recent documentary film.

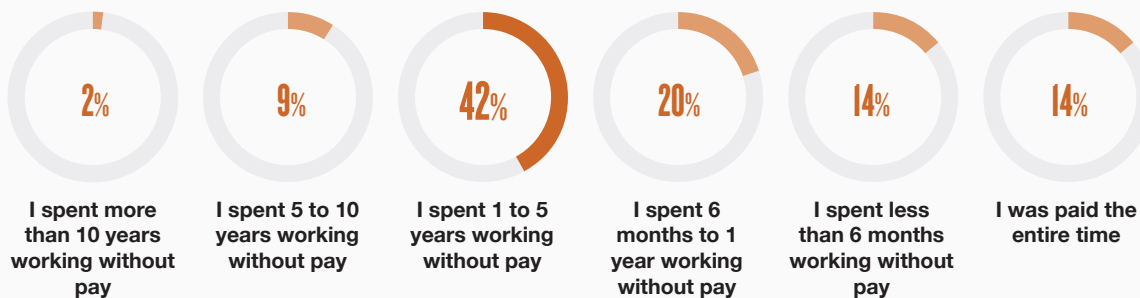
AMOUNT OF INCOME FOR DOCUMENTARY DIRECTORS & PRODUCERS (MOST RECENT FILM)



Amount of Time Spent Working Without Pay (Most Recent Film)

A small number of documentary directors and producers are paid through their entire film production cycle. More than 4 in 10 documentary filmmakers (42%) spent 1-5 years working without pay on their most recent documentary film. About 1 in 10 (14%) were paid the entire time working on their most recent film.

AMOUNT OF FILMMAKER TIME WITHOUT PAY (MOST RECENT DOCUMENTARY)



END NOTES

- ¹ The research is primarily focused on respondents in the United States. We did not restrict the survey from international respondents; however, a comprehensive international documentary examination should be a separate study, and one we hope to complete in the near future. That said, 10% of the respondents to this survey came from outside the United States, and they are included in the full findings reported here. Of international respondents (10% of the total sample), the highest proportion of respondents (between 2-9% of the international sample) originated from: Canada, UK, Australia, Germany, Mexico. The remaining international countries include: Bangladesh, Brazil, Chile, France, Guatemala, Jordan, Kenya, Netherlands, Norway, Philippines, Romania, South Africa, Spain, and Switzerland.
- ² Because respondents were permitted to skip some questions, the exact number of people who answered varies from question to question, but not in a way that is numerically meaningful. In total, 679 people completed at least part of the survey, and about 550 people answered the majority of the questions; thus, the reporting and analysis here is based on the sample of 550.
- ³ The phrasing and response options for the gender identification question originated from the Human Rights Campaign online resource, *Collecting Transgender-Inclusive Gender Data in Workplace and Other Surveys*. Available at <https://www.hrc.org/resources/collecting-transgender-inclusive-gender-data-in-workplace-and-other-surveys>
- ⁴ The phrasing and response options for the LGBT community question originated from the Human Rights Campaign online resource, *Collecting Transgender-Inclusive Gender Data in Workplace and Other Surveys*. Available at <https://www.hrc.org/resources/collecting-transgender-inclusive-gender-data-in-workplace-and-other-surveys>
- ⁵ The phrasing and response options for the race and ethnic identification questions originated from the Qualtrics (online survey platform) demographics questions, which are sourced from the U.S. Census. Respondents were first asked to indicate the races by which they identify. Respondents were able to indicate that they identified as more than one race. All respondents were then asked a separate ethnicity question to allow them to indicate their identification as “Spanish, Hispanic, or Latino,” per the U.S. Census framing. If a respondent indicated that she/he/they identifies as any race other than “white” (even if she/he/they also indicated “white”) or indicated that she/he/they identified ethnically as “Spanish, Hispanic, or Latino,” she/he/they was coded as a “Racial/Ethnic Minority.” For this reason, the category “white” should be interpreted as “non-Hispanic white.” Also note: Percentages add up to 102% due to decimal rounding calculations, but raw calculations equal 100%.
- ⁶ For purposes of analysis throughout the report, this racial/ethnic summary represents white respondents compared to the composite of all categories of racial and ethnic minority groups. This allows calculations to assess differences in lived experiences for white documentary professionals compared to members of racial and ethnic minority groups, a meaningful distinction in an examination of diversity in the documentary field. In the racial identification survey question, respondents were permitted to indicate more than one racial category. To aggregate the data in order to compare “white” vs. “racial/ethnic minority,” any respondents who indicated racial identification other than white was included in “racial/ethnic minority” grouping shown here.
- ⁷ In order to complete additional analysis based on decision-making creative roles (to reflect the experiences of documentary directors and producers), we asked respondents to indicate one primary role that best self-describes their dominant work in the documentary field. Roles identified by at least 1% of the respondents include: Director (38%), Producer (31%), Editor (7%), Employee of Film-Related Organization (4%), Impact Strategist/Producer (3%), Cinematographer (2%), Professor (2%), Film Festival Professional (2%), Broadcaster (2%), Writer (2%), Funder (2%), Distributor (1%), Audio Technician (1%), Production Assistant (1%).

⁸ In this survey, we asked about and show the proportion of LGBT documentary professionals here in the demographic representation section. However, the sample size for LGBT documentary professionals was too small for deeper comparative analysis.

⁹ This question is based on similar motivations for investigative journalists; adapted from Poynter (4 Types of Journalists) <https://www.poynter.org/news/4-types-journalists-how-they-tick-and-what-we-can-learn-them>

¹⁰ The other distribution platforms, in order of response from documentary makers: transactional streaming video on demand (iTunes, Vimeo, Amazon) (9%), international broadcast (streaming, broadcast, airline) (7%), subscription streaming on demand (Netflix, Amazon Prime) (7%), theatrical (not including festival) (6%), cable TV (3%), cable or satellite video on demand (DirecTV, DISH) (2%), NGO sponsorship or licensing (2%), premium cable (1%), corporate sponsorship or licensing (1%).

¹¹ The percentages in the “sources of documentary funding” and “sources of documentary revenue” reflect the total number of respondents who indicated that they are producers or directors. As a result, percentages can be interpreted as: ___% of producers and directors included in the study indicated that _____ is a major source of funding/revenue. (Respondents were asked, whether each source of review was “not at all” a source of funding/revenue, “a contributing” source of funding/revenue, or “a main” source of funding/revenue. This graph reflects the findings from “main” source of funding indicated by documentary producers and directors.)

¹² The percentages in the “sources of documentary funding” and “sources of documentary revenue” reflect the total number of respondents who indicated that they are producers or directors. As a result, percentages can be interpreted as: ___% of producers and directors included in the study indicated that _____ is a major source of funding/revenue. (Respondents were asked, whether each source of review was “not at all” a source of funding/revenue, “a contributing” source of funding/revenue, or “a main” source of funding/revenue. This graph reflects the findings from “main” source of revenue indicated by documentary producers and directors.)

¹³ The “Formal Film Budget” category includes payment from the producer’s and director’s line items at regular intervals and/or as funding allowed. The “Outreach/Impact Budget” category includes both the producer’s and director’s outreach/impact budget line items.

THE STATE OF THE DOCUMENTARY FIELD:

2018 STUDY OF DOCUMENTARY PROFESSIONALS

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