THE COST OF DOCS

2020

THE WHICKERS

Sheffield Doc|Fest

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INTRODUCTION

Welcome to the fourth edition of The Whickers Cost of Docs Survey, which looks specifically at the changing landscape for documentary makers in the UK and internationally.

In addition to our work in funding and supporting emerging talent around the world, we seek to be a champion for documentary makers and to amplify their voices in the industry as a whole. The initial aim, back in 2016, was to ensure that our main funding award of £80,000 was still the game-changing amount that we wanted it to be. Since then, we have added new questions on the impact of Brexit, COVID-19 and the future of virtual pitches. Our aim is to evaluate and confront the current challenges faced by filmmakers in these uncertain times.

Key questions:

- How far does The Whickers' top Funding Award of £80,000 go in today's market?
- What financial and political challenges face documentary filmmakers in 2020?
- How have things changed, year by year, since the first edition of the Cost of Docs Survey in 2016?

The survey was completed anonymously by 146 self-selecting documentary makers. Some questions allowed respondents to choose multiple options, whilst others were not applicable to all, therefore percentages may not always add up to 100%.

If quoting from this report, please credit The Whickers. Contact info@whickerawards.com for any queries or to request a copy of the three previous editions of the Cost of Docs report.

Compiled by Jane Ray and Emily Copley, with thanks to our survey partner, Sheffield Doc/Fest, for helping us to formulate questions and supporting the distribution.

KEY FINDINGS

The top key findings from this report are as follows:

- 45% of those surveyed say that COVID-19 had already had a massive negative impact on their ability to work and threatens their future as a documentary maker.
- Only 16% of documentary makers believe that they receive a fair wage for the time and effort they put into documentary production.
- Less than a quarter of documentary makers (21%) are able to pay themselves a wage for their work.
- More than half of respondents say that they finance their documentaries by freelancing on other projects. This is up year on year from 39% to 56% .
- There has been a corresponding five fold increase in the number of documentary makers who say it now takes them more than 5 years to complete their films.
- Costs are rising and this year only 18% say that they are making their documentary for less than £10,000. Last year that figure was 31% .
- More documentary makers are multi-skilling than in any previous year, with directors more likely to be their own cinematographers, producers or editors.

KEY FINDINGS (CONTINUED)

- There has been a big rise in the number of funders who expect full or partial rights ownership of the film in return, up from 1% to 15%.
- There has been a dramatic rise in the number of respondents applying for large amounts of funding, with nearly a third applying for grants or loans of between £50,000 and £100,000. The number last year was just 1 in 10.
- 94% of documentary makers now apply to funds, institutions and foundations for financial assistance. Three quarters are successful to some degree.
- There has been a 14% rise in films designed for the big screen, for theatrical release or for the international festival circuit.
- The average number of days to complete one funding application has risen year on year from 8 to 14 days.
- More than a third of documentary production has 'hobby' status in that 38% of costs are paid by the maker, 27% by the production company and 21% by a commissioner.
- Nearly a fifth of co-production deals don't work out.
- There has been a 5% drop in documentaries being made for online streaming services but a rise in documentariess being made for film or TV (14% and 11% respectively).

KEY FINDINGS (CONTINUED)

- The BBC is still the biggest broadcaster of the documentaries from our 2020 respondents. They are transmitting, for example, twice as many as its nearest rival, the British public service channel, Channel 4. The french public service cultural channel, ARTE transmit a third more of respondents' documentaries than Netflix.

- Since 2019 there has been an 18% increase in the number of documentaries that find a paying audience, with a 25% increase in the number respondents whose documentaries have been shown at film festivals.

- Brexit has proved to be an issue not solely for the British documentary maker. Although the majority say they have seen little difference so far, a surprising 12% of non-UK residents say that it has already made a much bigger difference to their careers than they had anticipated.

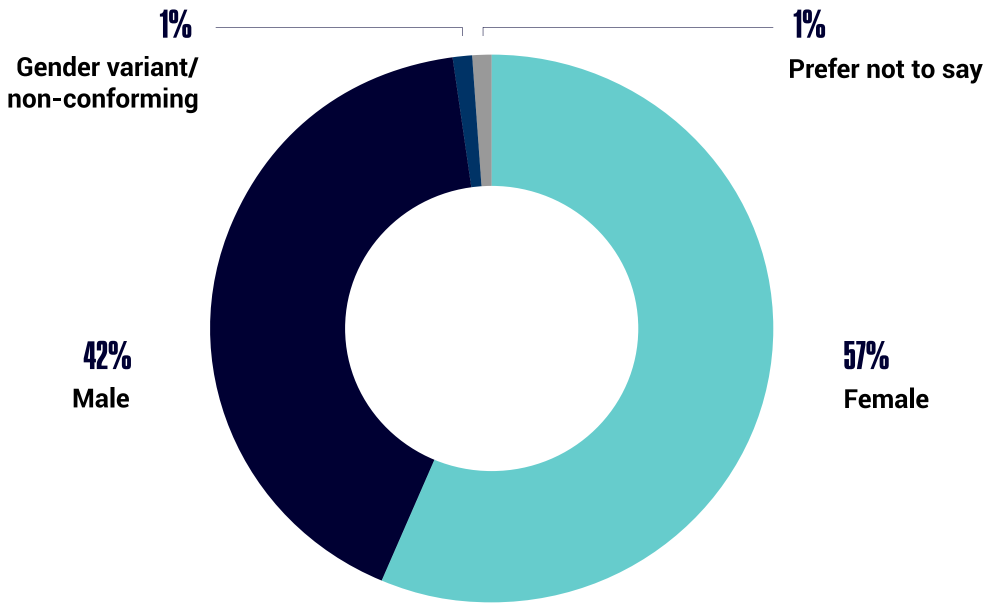
- The most commonly cited challenges were over rates of pay and feedback, lack of diversity and the toxic presence of exploitative practices around internships and corner cutting.

- The main three suggestions on how the industry could best be improved included an increase in access to funding, greater diversity behind and in front of the camera and more support for distribution and exhibition.

DIVERSITY & INCLUSION

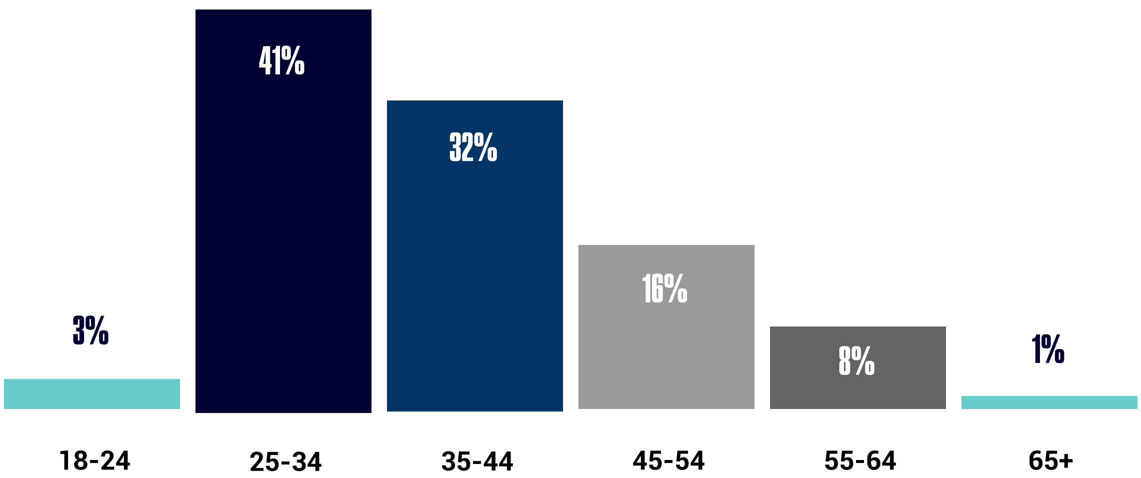
GENDER

The first few questions in this survey aimed to find out more about the respondents themselves - their ages, ethnicity and country of residence. **We asked respondents to identify their gender** - revealing that 57% of respondents identified as female, 42% as male, and 2% as gender variant/non-conforming. Although we cannot deduce that this is reflective of the gender make-up of the documentary industry as a whole, it is useful to keep in mind when digesting the forthcoming data. In 2019 we had a higher proportion of women complete the survey (63% of respondents). It is intriguing when compared with the answers on 'Professional Role' (page 10). This year, with more men taking part, there is also a significantly higher number self identifying as the 'director' (84% compared to 65%). The free comments fields imply that women are more likely to accept the organisational role of producer, and men are more likely to take on the 'top job', the one that carries the story and overall artistic vision for the documentary. However we have too little hard information to draw firm conclusions.



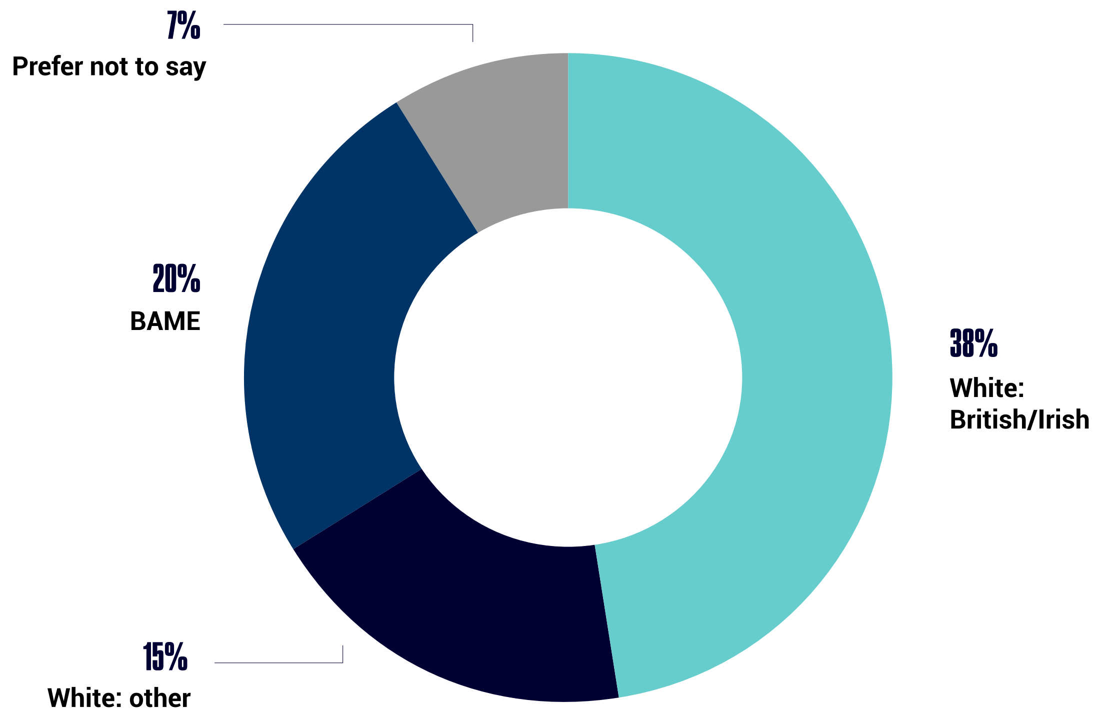
AGE

As in 2017 and 2019, **we asked respondents to identify their age** and each year our greatest proportion of respondents fell into the 25-34 age bracket (41%). This was followed by the 32% of respondents who fell into the 35-44 age bracket. Hence the majority of those who took this survey were in their mid-twenties to mid-forties. Fewer respondents fell into the 45-54 and 55-65 age brackets (16% and 8%), and even fewer into the 18-24 and 65+ brackets (3% and 1%). This year's figures on age are, give or take a percentage point, entirely consistent with the previous 2 years. It suggests that documentary production is a still a career choice for those in the late twenties to early thierties demographic. It should be noted however that the trend may be reflective of the Sheffield Doc/Fest mailing list, which attracts most of our respondents.



ETHNICITY - NEW QUESTION

This is a new question to identify the ethnicity of our respondents, so we do not yet have any comparative data. It should be noted that the relatively high figure for those identifying as Black Asian and Minority Ethnic (29%) is twice the UK average of 14% (UK gov.uk 2011 census). However, as one can see from the next question on residency, 56% of our respondents live outside of the UK.



COUNTRY OF RESIDENCE - NEW QUESTION

We also asked respondents for their country of residence. It is interesting that a UK based organisation with help of a UK based documentary festival attracts 10% more respondents from outside the UK. It may help us that English is recognised as the international language of the documentary industry and that the Whicker's profile has gained ground in China, Korea, Latin America and more recently the African continent. This year we had respondants from countries such as; Lebanon, Russia, Rwanda, Colombia, UAE, Myanmar and the Democratic Republic of Congo.

"THERE IS STILL A LACK OF AUTHENTIC DIVERSITY AND EQUAL OPPORTUNITY EVEN AFTER YEARS OF EQUAL OPPORTUNITY MONITORING."

ROLES & EXPERIENCE

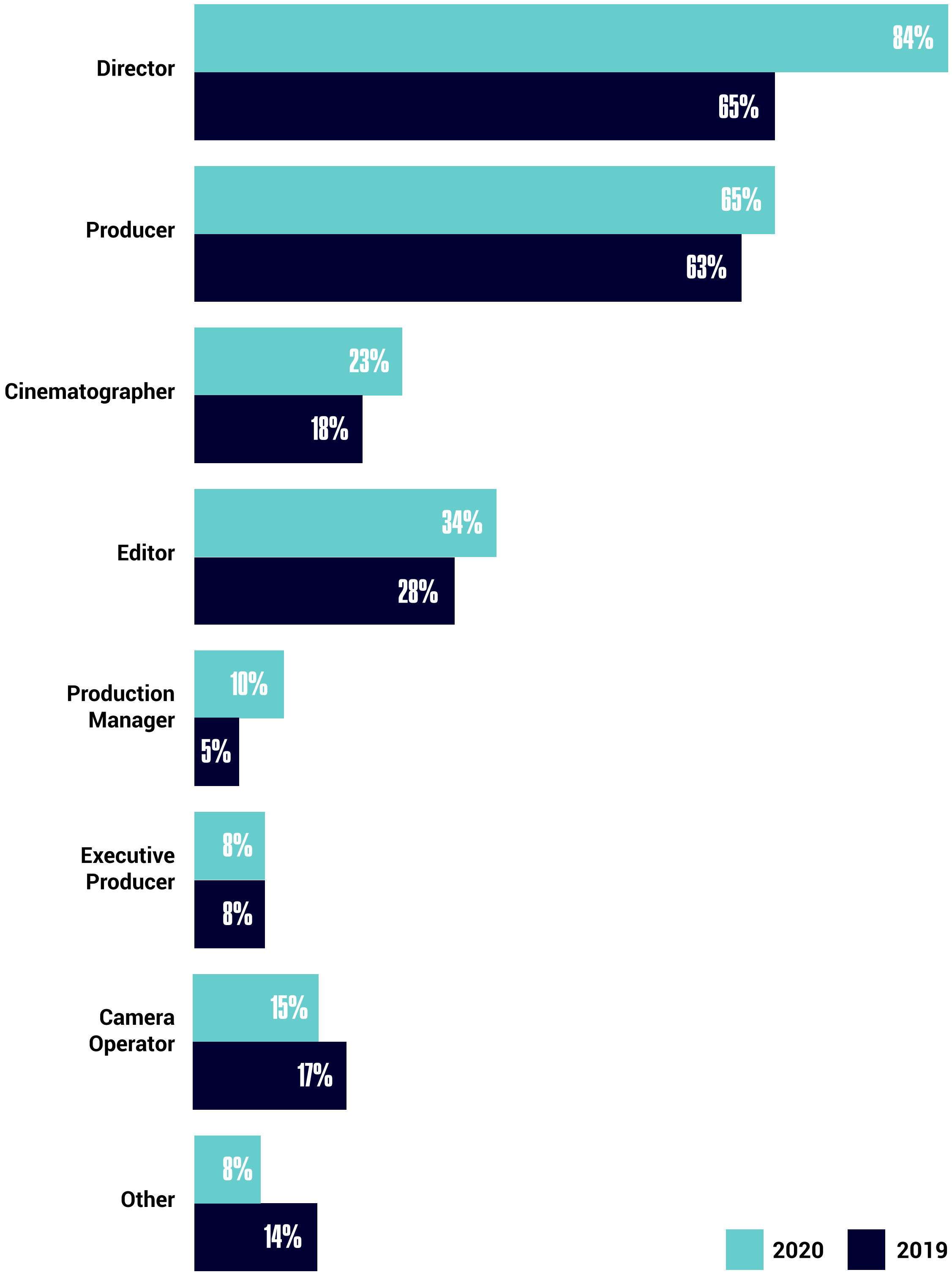
PROFESSIONAL ROLE

As in the previous year, when **we asked respondents what their professional roles were**, the majority of respondents in 2020 identified as Directors or Producers, at 84% and 65% respectively, compared to the 2019 results of 65% and 63%. The survey was also completed by Editors (34%), Cinematographers (23%), Camera Operators (15%), Executive Producers (8%) and Production Managers (10%). A further 8% of our 2020 respondents selected the 'Other' box, and identified themselves as Line Producers, Archive Producers, Presenters, and those working in the field of Distribution.

Year on year it is interesting to note a shift in balance between respondents describing themselves as 'Cinematographers' (or 'Directors of Photography') and 'Camera Operators.' This year, 8% more assigned themselves the role perceived to have more bearing on the overall look of the film rather the more junior/less artistically involved role of Camera Operator. Last year the differential was only 1%.

Respondents can select multiple answers for this question. A higher overall percentage therefore means that more respondents are multi-skilling. The overall total percentage last year was 218% whereas in 2020 it is 247%. This does not tell us if documentarians are needing to perform multiple roles due to lack of finance or choosing to perform multiple roles. Perhaps technical advances make roles such as editing more accessible. Read in conjunction with the 'Industry Insights' section on page 55, which implies that funding is more usually the determining factor.

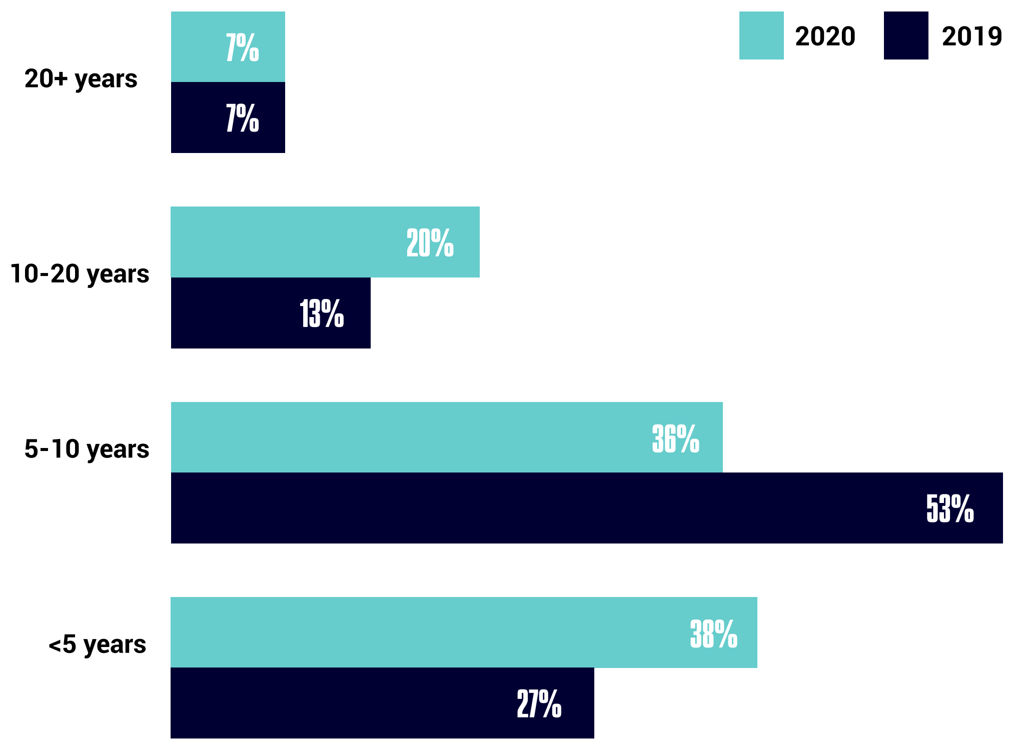
See next page for full data.


Director
84%
65%
Producer
65%
63%
Cinematographer
23%
18%
Editor
34%
28%
Production Manager
10%
5%
Executive Producer
8%
8%
Camera Operator
15%
17%
Other
8%
14%
2020
2019

EXPERIENCE

Considering the age of the majority of respondents, unsurprisingly, when **asked how many years they had worked in the documentary film industry**, over a third responded that they had worked for less than 5 years (38%), and a further 36% answered that they had worked in the industry between 5 and 10 years. 20% had been working in the industry between 10-20 years, while only 7% had worked in the documentary field for more than 20 years.

However, year on year, the number of those with 5-10 years experience has dropped significantly from 53% of the total to 36%, whilst the number of respondents with 10-20 years of experience has nearly doubled, moving up from 13% to 20%. The percentage of those with more than 20 years under their belts remains exactly the same at 7%. The results of the rest of the survey can therefore be read in light of the fact that we have more respondents with a lot of experience but also many more who have significantly less than in 2019.



TRAINING

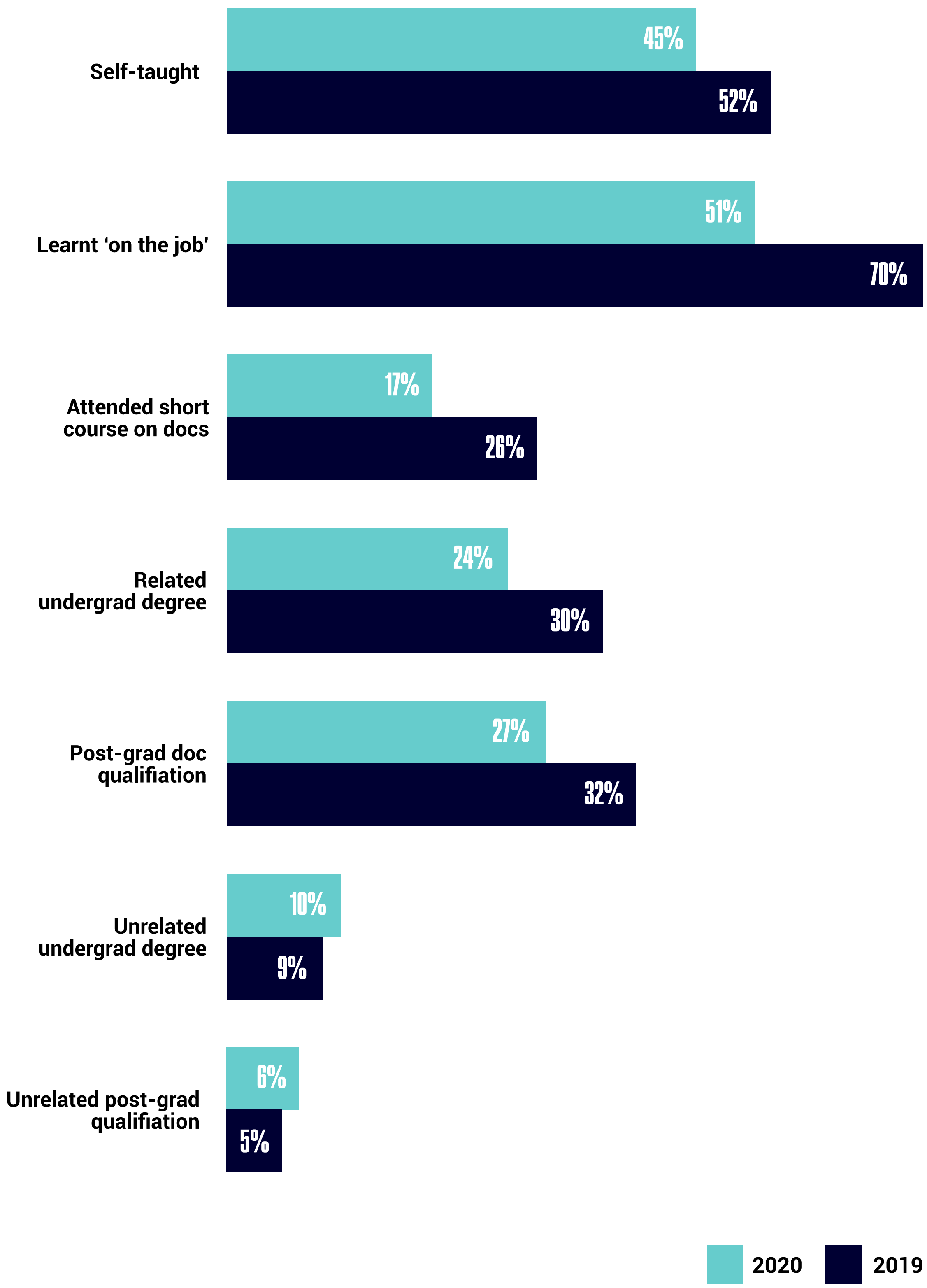
We also aimed to gauge the level of documentary skills training undertaken by our respondents. We discovered that half of respondents (51%) answered that they learnt their documentary skills 'on the job' and a substantial 45% considered themselves to be 'self taught'. 24% of respondents had completed a related undergraduate degree, 17% had attended a short course on documentary - and just over a quarter of all respondents had obtained a postgraduate documentary qualification (27%).

Year on year there is a marked trend away from formal tuition. There has been a 19% drop this year in the number of respondents who are claiming that they are 'learning on the job'. This downward trend appears in all categories of training. Some might observe that this is a tangible sign of de-skilling and exploitation. It would mean that emerging documentary talent learning on the job can only become as skilled as their mentors 'least worst habits'. However others applaud the increased accessibility of free online training videos and say that the industry is now more open to those who could never afford college fees.

This year's respondents showed a great variety of college training, from Javeriana University in Bogotá to an Indian documentary maker learning through an online Sundance course. Answers that showed up on multiple occassions include; OTOXO, Columbia New York, UCL, ULA, NTFS and Goldsmiths

It should be noted that respondents could choose more than one answer, so that those who went to college might also consider themselves to be 'learning on the job'.

See next page for full data.


Self-taught
45%
52%
Learnt 'on the job'
51%
70%
Attended short course on docs
17%
26%
Related undergrad degree
24%
30%
Post-grad doc qualifiation
27%
32%
Unrelated undergrad degree
10%
9%
Unrelated post-grad qualifiation
6%
5%
2020
2019

WHY DO YOU MAKE DOCUMENTARIES?

Having established the background and training of our respondents, **we sought to learn more about why exactly our respondents made documentaries** - in just seven words or less. The responses fell largely into five main camps, with much overlap between them: passion for storytelling; self-expression; search for truth; curiosity; and social justice.

Curiosity

“I am nosy but shy.”

“Immediate empathy fuels critical curiosity.”

“I am fascinated by the world.”

Social Justice/Impact

“To give a platform to voices otherwise unheard.”

“To make young people of colour more visible in the world.”

“Because it's the best way to evoke change and impact.”

“To share stories from Africa from an African POV.”

Self Expression/Art

“To be able to grasp at the things that go by.”

“Reality has more poetry than fantasy.”

“It makes me feel my life is meaningful.“

“To manipulate reality to convey a feeling”

Truth & Understanding

“Telling society truths it should hear.”

“To complicate the idea of truth.”

“Because the world needs it.”

Passion for Storytelling

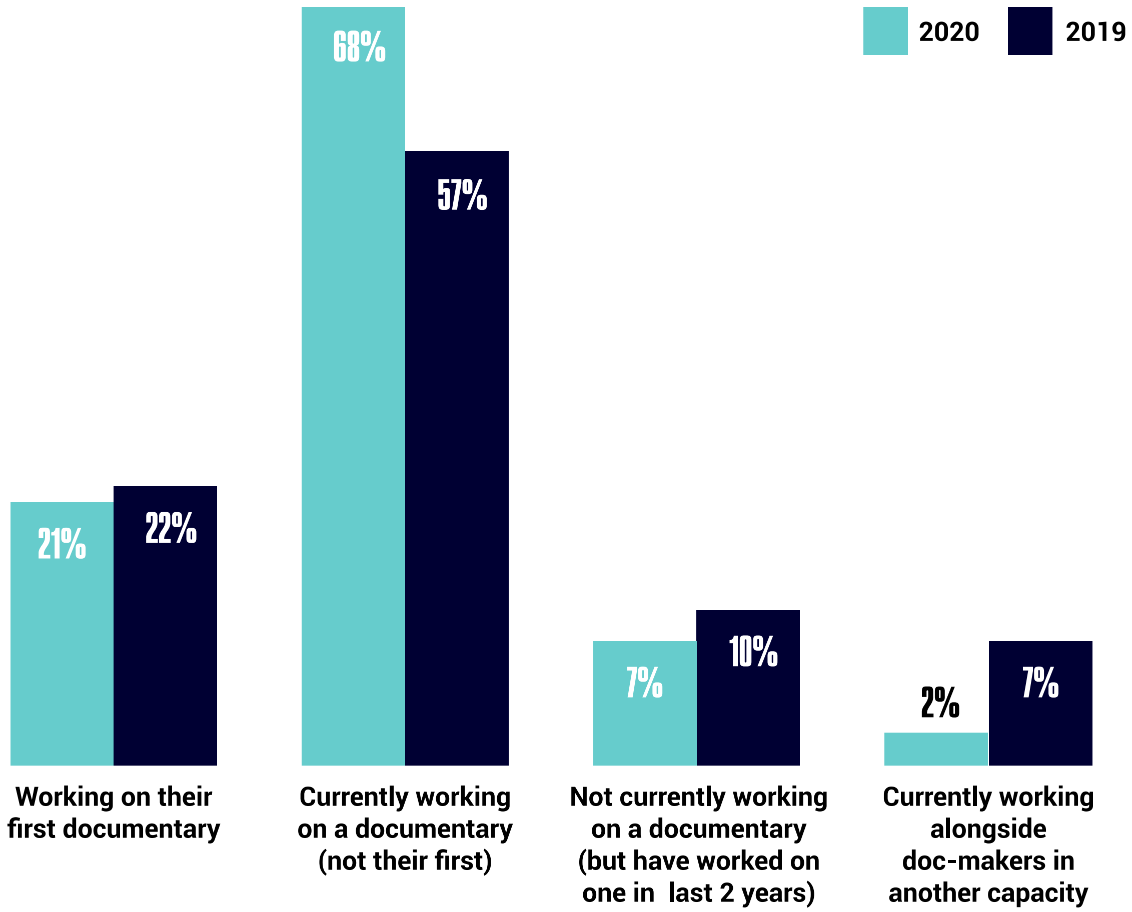
“The fastest bridge of humanity is storytelling.”

“The life I was born to lead.”

“It's my life.”

ARE YOU CURRENTLY WORKING ON A DOCUMENTARY?

We asked respondents if they were currently making a documentary or had made one in the last two years. A significant 89% of respondents answered that they were currently working on a documentary or had worked on one in the last two years; while 68% answered that they were currently working on a documentary which was not their first. 21% of respondents were working on their very first documentary film at the time of completing this year's Cost of Docs survey. The increase year on year in those currently working on a documentary that is not their first is up 11% from 57% to 68%, which fits with page 12 showing that this year's cohort are more experienced than last year's. Overall the figures show that this survey is reaching a majority (93%) who are actively engaged at the front end of documentary practice.



"I HAVE HAD TO CARRY OUT MULTIPLE SMALL FILMING JOBS AT WEEKENDS TO GET BY, EVEN THOUGH THE FILM IS FULLY FINANCED BY BROADCASTERS."

FINANCE & FUNDING

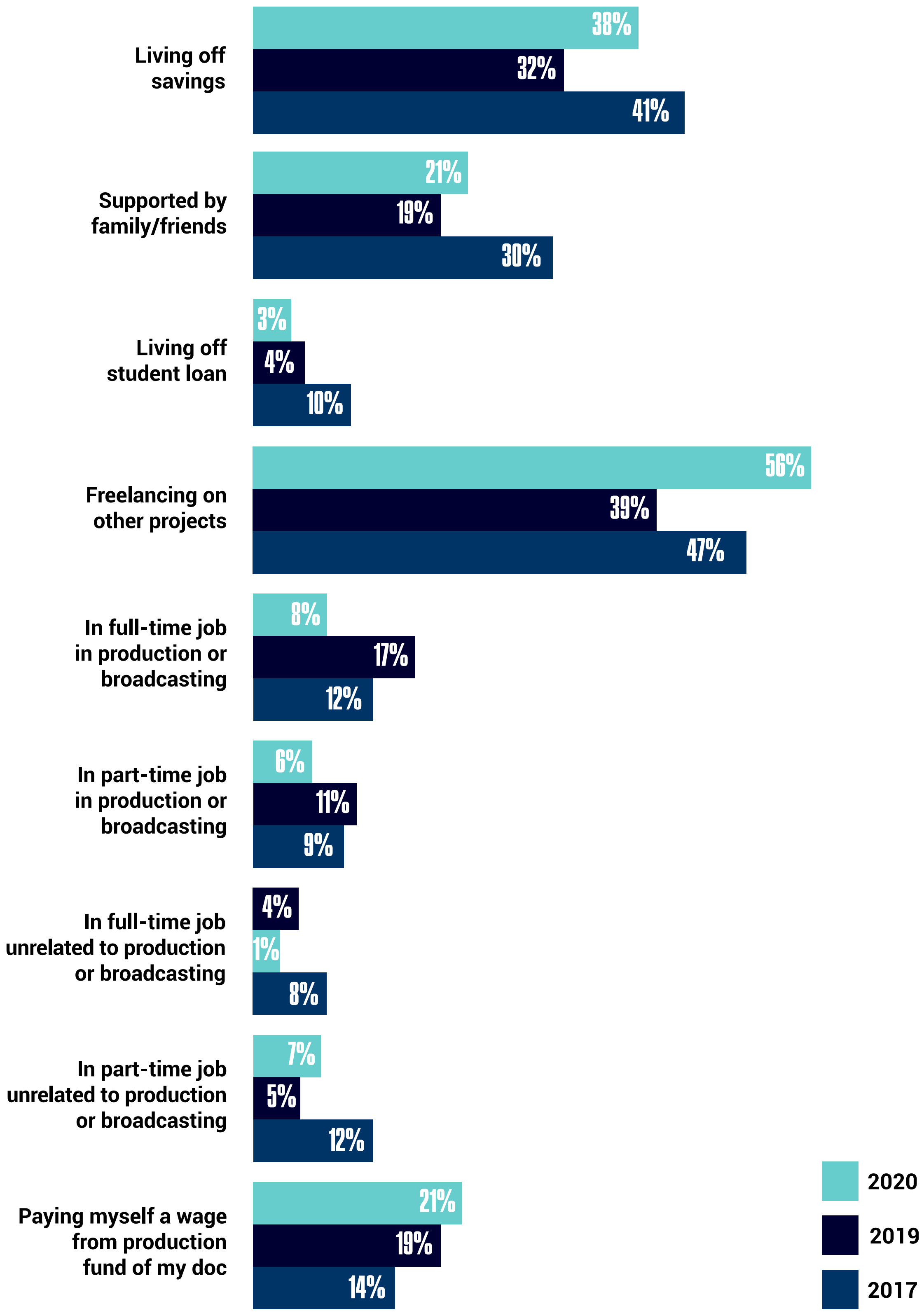
FINANCIAL SUPPORT

We aimed to determine the financial situation of the 89% of resondents who were actively involved in documentary making. Respondents were invited to tick all options that applied to their case, highlighting that the two most common responses were again that respondents had survived by freelancing on other projects (56%) and were living off their savings (38%). Just as our previous Cost of Docs survey reports demonstrated, it remains clear in 2020 that documentary filmmakers are not able to make a healthy living from their work but often rely on savings, financial support from friends or family, or working multiple (and often non-documentary related) jobs.

This is a core question. It aims to tell us if it is feasible in today's market to survive financially as a independent documentary maker without a substantial private income. Last year, it was gratifying to see that the numbers living off savings had dropped 9% from 41% to 32% but this year they had climbed up again to 38%. Likewise the number dependent on financial support from family and friends has dropped hugely from 30% to 19% but risen again slightly this year to 21%.

In better news, there has been a 5% rise in those able to pay themselves a wage from their production fund. This has gone up from 16% to 21%. It may reflect the 7% rise this year of respondents who had between 10 and 20 years worth of experience (see page 12). There has also been a drop in those living off a student loan. This figure has dropped from 10% in 2017 to 3% this year. It may be linked to the ongoing drop in the number of respondents doing degrees (see page 14 on 'Training').

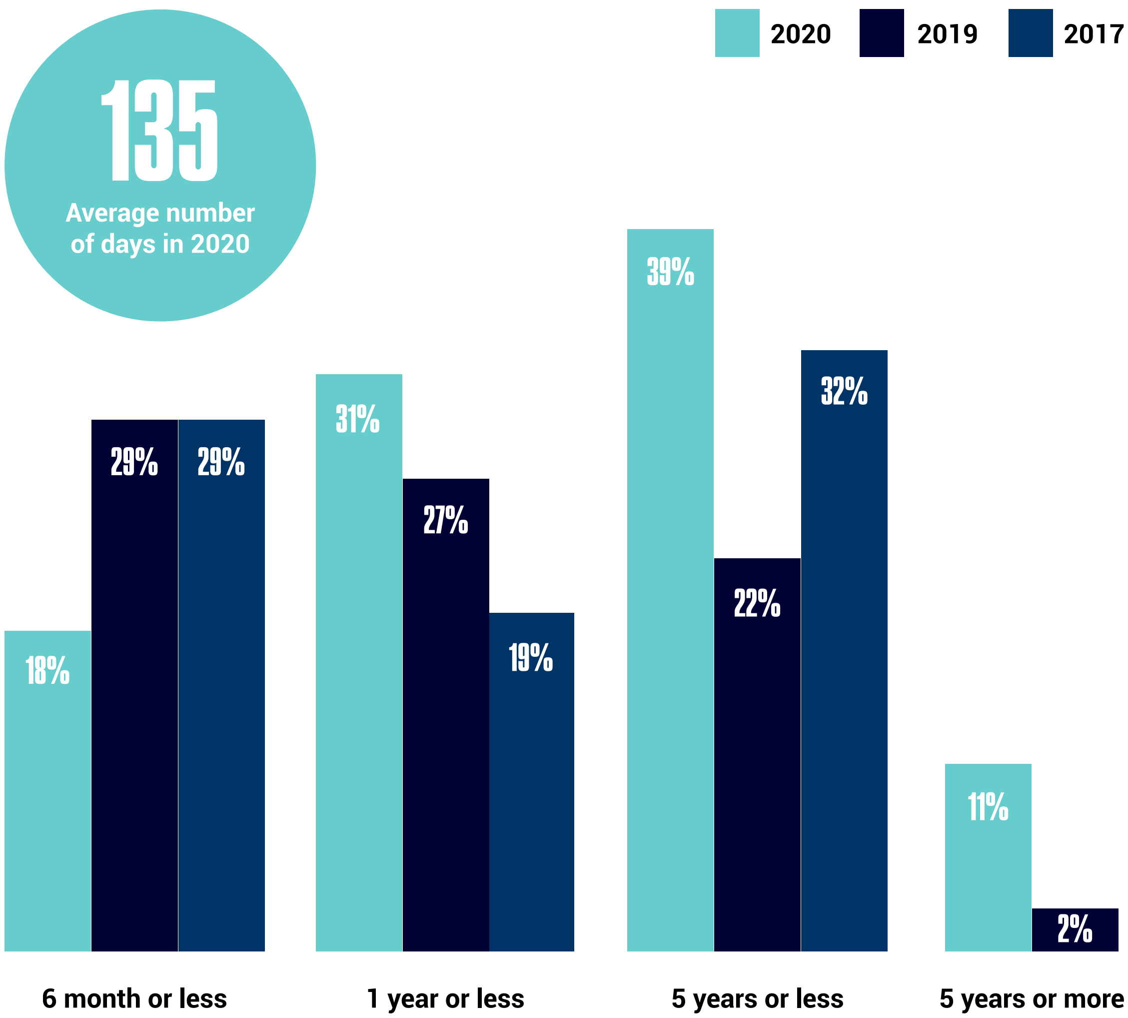
The biggest rise has been in the number of respondents who keep themselves afloat by freelancing on other projects. This has gone up 17% year on year to 56%. Perhaps this ties in with the rise of multi-skilling and appears to suggest that even in these stringent COVID-19 times of uncertainty, there is other media work around. In the free text field for other ways of paying for documentary production one put "getting into debt". See next page for full data.


Living off savings
38%
32%
41%
Supported by family/friends
21%
19%
30%
Living off student loan
3%
4%
10%
Freelancing on other projects
56%
39%
47%
In full-time job in production or broadcasting
8%
17%
12%
In part-time job in production or broadcasting
6%
11%
9%
In full-time job unrelated to production or broadcasting
4%
1%
8%
In part-time job unrelated to production or broadcasting
7%
5%
12%
Paying myself a wage from production fund of my doc
21%
19%
14%
2020
2019
2017

TIME TAKEN TO COMPLETE A DOCUMENTARY

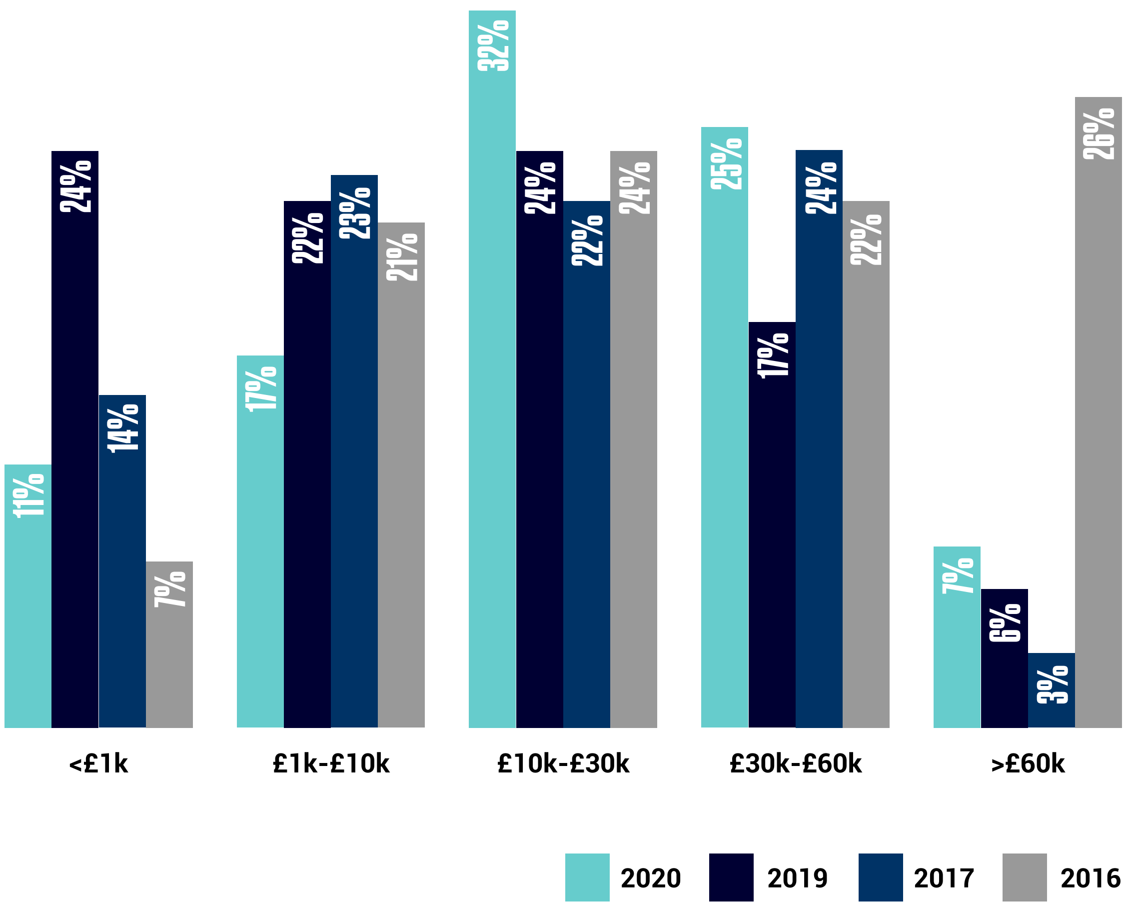
Next, **we wanted to know how long it took respondents to complete their last documentary**. The average number of days was 135 but the range is huge. It spans from a single day to 800 days. This was similar to last year's range of 7 to 950 days.

This may be reflective of rising costs and the increase we saw earlier in the survey of those paying for their documentaries by freelancing on other projects. It also ties in the the big leap in those taking more than 5 years to finish one documentary which is fivefold from 2% to 11%. This continuation demonstrates that on the whole, documentary films remain a substantial time (and cost) investment, often with little return.



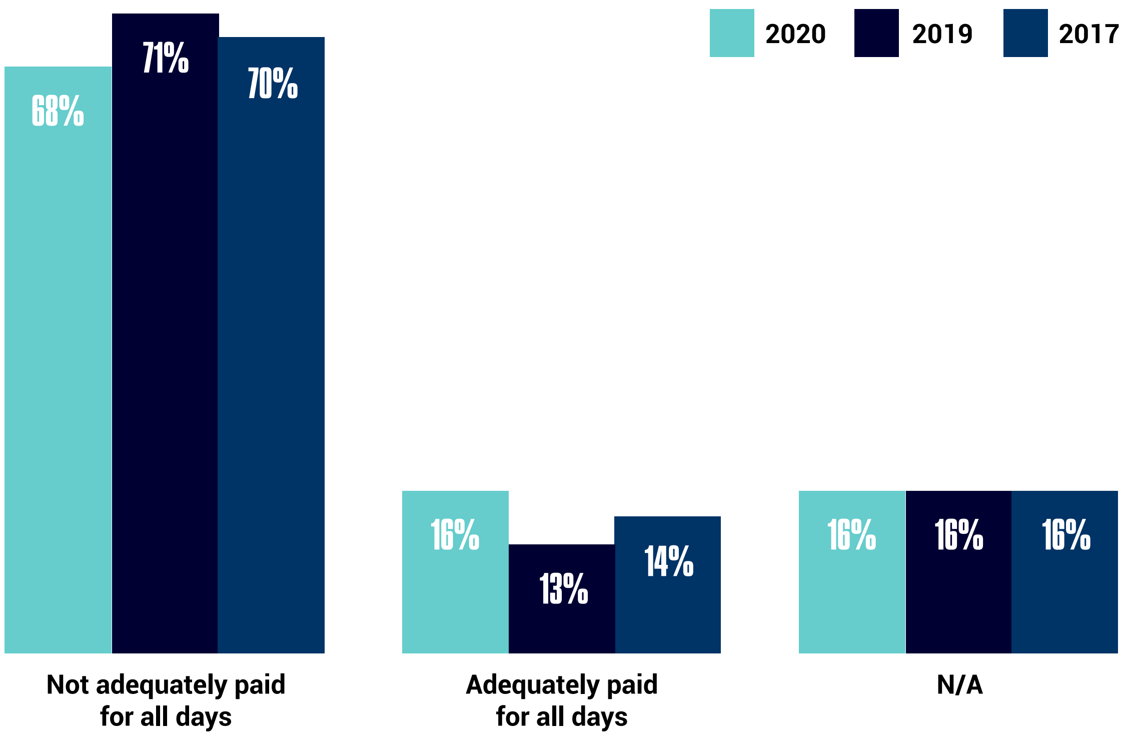
COST OF TIME TAKEN

Another way to look at the outlay and return involved in creating a documentary was to ask respondents to **estimate how much their time would have cost if they were paid for every day dedicated to working on their documentary**. The responses did not differ too wildly from those in our 2017 report, with an even spread between the financial brackets of 'less than £1,000', '£1,000-£10,000', '£10,000-£30,000' and '£30,000-£60,000'. However, at each end of the scale there are major differences between 2019 and 2016. Taken in tandem with the response to the previous question about the length of time taken, this suggests that documentary makers may have lowered their expectations. In other words, compared to 2016 there are very few nowadays who believe that they would have earned more than £60,000 for their time (7% as opposed to 26% in 2016).



PERCEIVED AND ACTUAL RENUMERATION FOR DOCUMENTARY WORK

The following question aimed to gauge whether or not respondents felt they had been adequately paid for all of the days that they had spent working on their most recent documentary film. This question is of course subjective, and relies heavily on respondents having a solid idea of their professional market worth, but it is also a helpful indication of the gap between the wages that documentary filmmakers are actually receiving, and the wages that they believe that they are owed for their time and expertise. This year's results demonstrate that respondents still feel that they are not being appropriately paid for the work that they are doing. Only 16% of respondents felt that they had been paid appropriately and fully on their last project, compared to 13% in 2019 and 14% in 2017. This shows a tiny cause for optimism, although it is not clear if this is optimism born of a marginal increase in renumeration or a lowering of expectation.



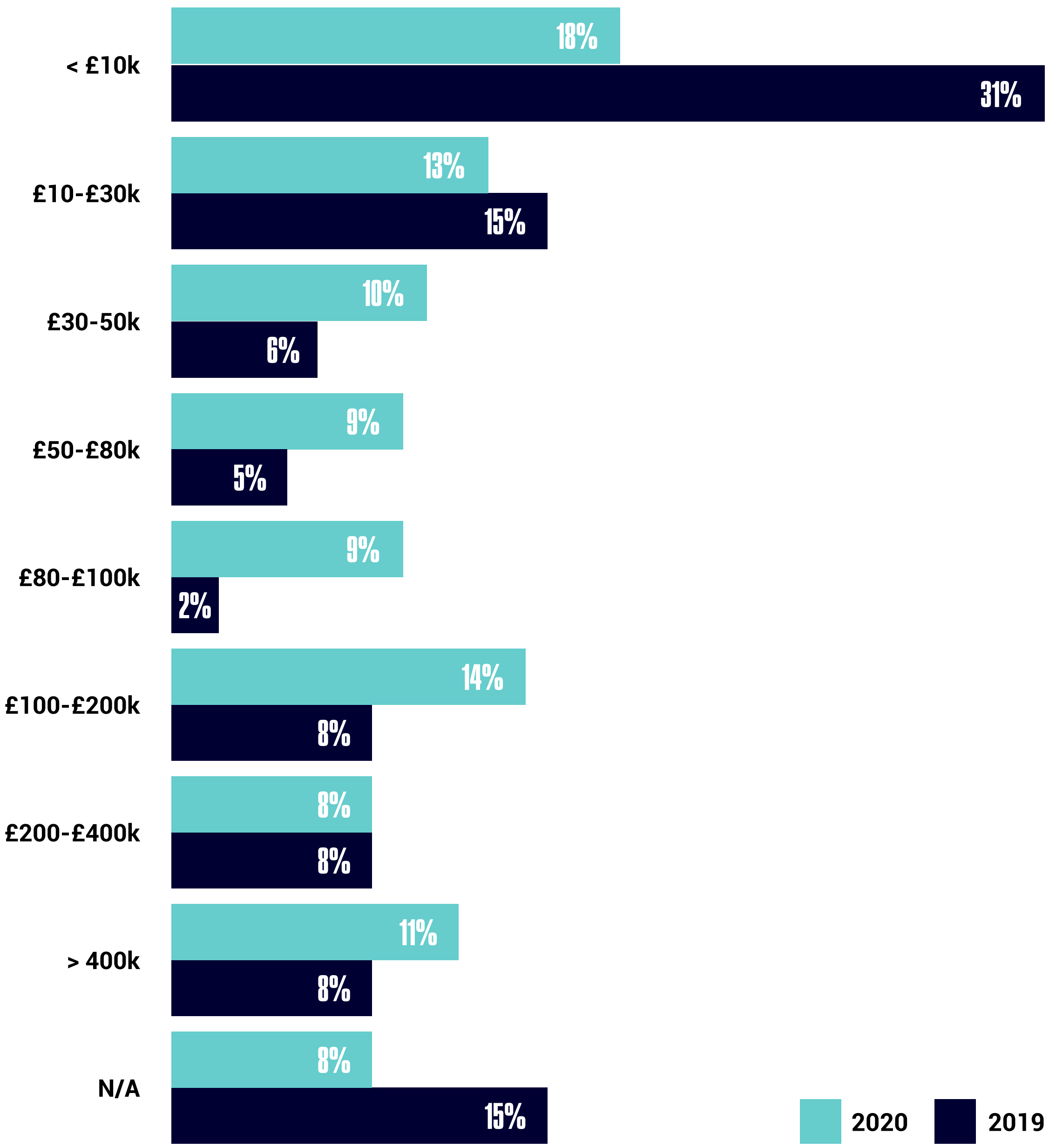
WHAT PERCENTAGE OF YOUR TIME WERE YOU PAID FOR ON YOUR LAST DOCUMENTARY?

For a slightly different angle, **we asked respondents to estimate what percentage of their time they felt they had actually been paid for on their previous documentary project**. Answers ranged from 0% to 100%, with an average answer that respondents felt that they had been properly paid for just 33% of their time. This is a decrease of 2% from last year's figure of 35%.

THE COST OF MAKING A DOCUMENTARY

Our next set of questions aimed to find out if documentaries are costing more to make than last year, and if so what factors are driving those costs. A good indication of increased cost is the **size of the prospective budget.** This year it is clear that budgets have increased. At the lower end of the scale, 18% of respondents said they were making their documentary for less than £10k. Last year that figure was a third higher at 31%.

As we have already seen that directors' wages have barely increased, the big cost rises must be elsewhere. This is explored further on page 34. However, another factor in the increase in budgets, that we have seen on page 12, is that we have a more experienced set of respondents this year.



FINANCING A DOCUMENTARY FILM

To get a better sense of **what proportion of our respondents had applied for funding for their documentary film, and to which funds they had applied**, we provided respondents with an extensive list of documentary grant-givers. We added to lists in previous surveys to be more inclusive of newly-emerged and smaller funds. The global lockdown has also been given as a reason that some popular funds like those of the Tribeca Film Institute have moved from free entry to invitation only. A comprehensive list compiled with further information on funds is available HERE.

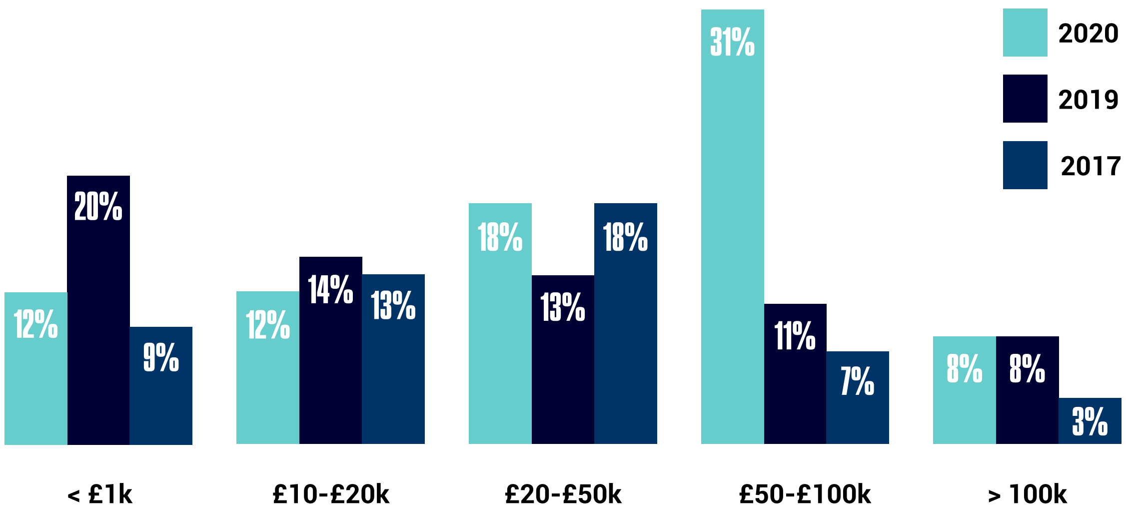
- 38% A BROADCASTER
- 29% SUNDANCE DOC FUND
- 27% DOC SOCIETY
- 27% PRIVATE INVESTOR
- 25% TRIBECA FILM INSTITUTE
- 23% THE WHICKERS
- 23% CATAPULT FILM FUND
- 17% CHICKEN & EGG ACCELERATOR LAB
- 16% CINEREACH
- 15% IDFA BERTHA FUND
- 12% INTERNATIONAL DOCUMENTARY ASSOCIATION (IDA)
- 13% JUSTFILMS/FORD FOUNDATION
- 11% CREATIVE EUROPE MEDIA
- 10% THE FLEDGLING FUND
- 8% WELLCOME INSTITUTE PUBLIC ENGAGEMENT FUND
- 7% THE FILMMAKER FUND
- 7% ONE WORLD MEDIA PRODUCTION FUND
- 6% NEVER APPLIED FOR FUNDING
- 5% DEREK FREESE DOCUMENTARY FUND

The results from the 2020 respondents did not differ greatly from those of our 2019 respondents - with filmmakers still largely seeking funding from international documentary grant-giving organisations such as Sundance, Tribeca and Doc Society. The amount of respondents who had never applied for funding dropped a staggering amount from last year (36%) to only 6% in 2020, showing that funding organisations are now the 'go to' financier for 94% of respondents.

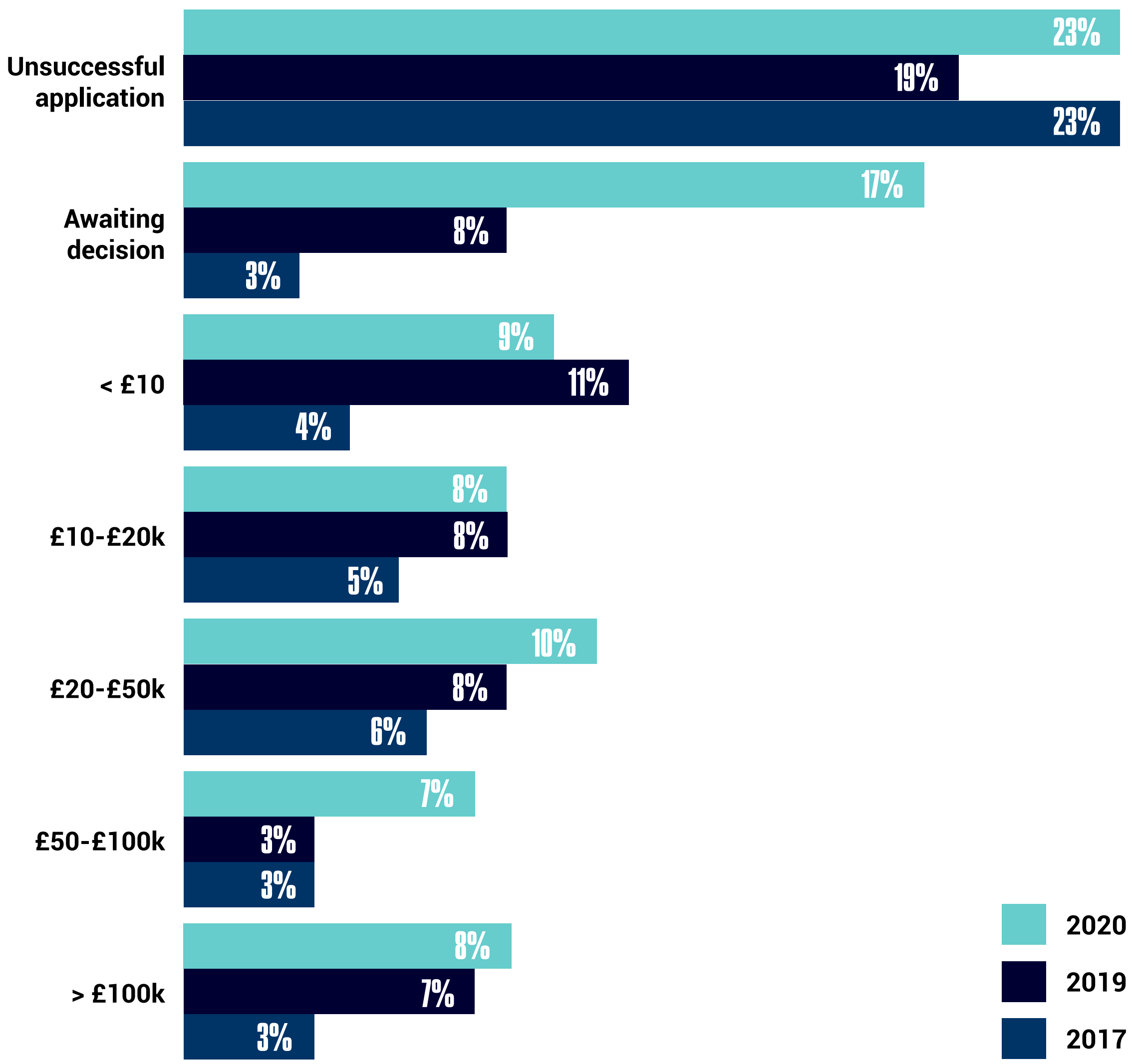
Other popular funds included The Guardian, Fork Films, Impact Partners, Open Society Foundation, Arts Council, Scottish Documentary Institute, Hot Docs Crosscurrent Fund, Purin Pictures, Girls in Film and ITVS, as well as national public funds and the cultural ministries of local governments.

AMOUNT OF FUNDING APPLIED FOR VS. AMOUND RECEIVED

For those respondents who answered that they had previously applied for funding for their documentary from an external source, we asked them, on average, how much they had applied for. A significantly greater number applied for £50,000-£100,000 of funding (31% compared to 11% in 2019) and much less for below £1,000 (12% compared to 20% in 2019). The graph below details the differences in the amount requested by filmmakers in their funding applications between 2017 and 2020.



The logical follow-up question then asked respondents how much funding they had received, if any. The graph below highlights the difference between what respondents received in funding for their documentaries in 2017, 2019 and 2020. The amount of unsuccessful applications increased from 19% in 2019 back up to 23% in 2020, with the most significant difference being an increase of 9% of those awaiting decision. Both figures could be contributed to the recent COVID-19 pandemic causing unexpected problems and delays. Anecdotally, respondents have been saying that the 9% increase in those waiting results appears to relate to staffing issues arising from the global lockdown.

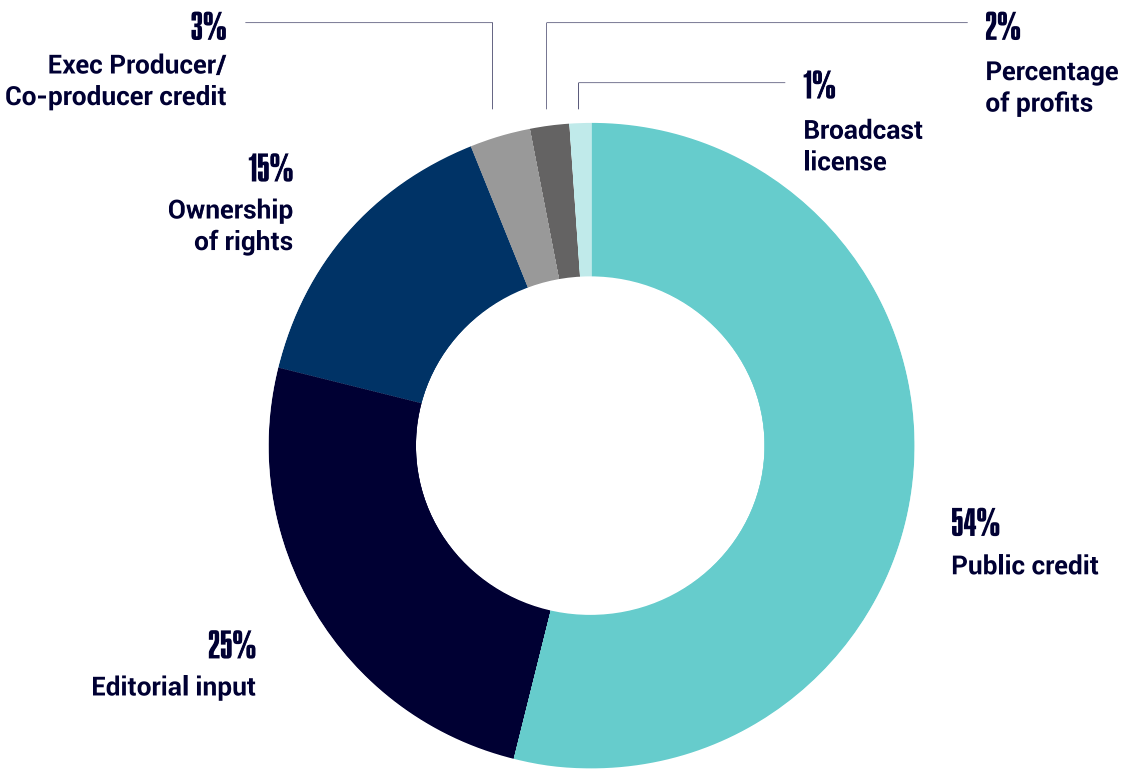


"WHILE FUNDERS WOULD LIKE TO HELP, THEY DO NOT HAVE THE TIME, SO IT IS HARD TO FIND REALLY HELPFUL CRITICAL FEEDBACK."

EXPECTATIONS OF FUNDERS

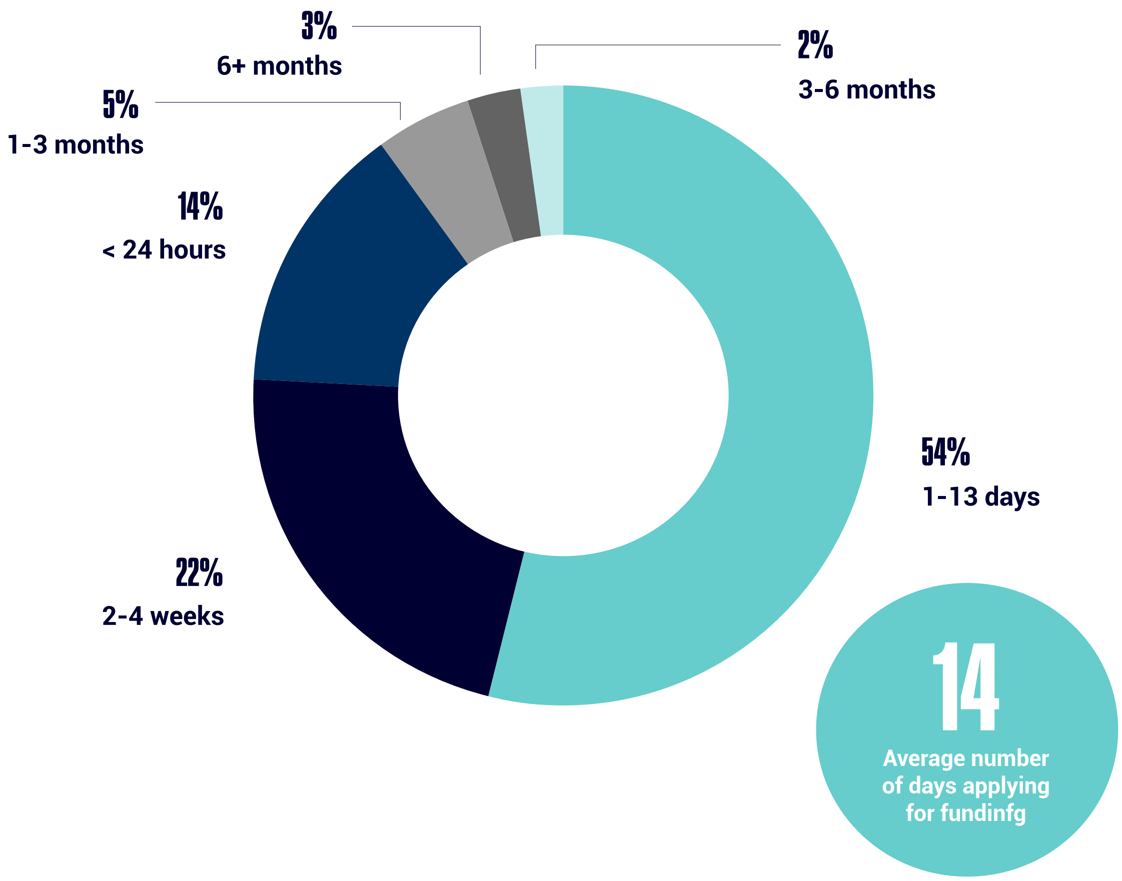
For those who had previously been awarded funding for their documentaries, we wanted to ascertain the expectations of their funders. The results were unsurprising, with 54% of respondents who had received funding answering that the funder expected to be publicly credited for their support, with 24% expecting editorial input throughout the filmmaking process. 15% of our respondents had received financing from a funder who expected full or partial ownership of the rights for the film, in comparison to just 1% in 2019. Only 1% (the same as in 2019) demanded the broadcast license for the film in question. Only 1% explicitly stated that the funding was in fact a loan that would need to be repaid.

In next year's survey it would be good to look more deeply into how much documentary makers are being paid and by whom in return for all rights in perpetuity.



APPLYING FOR FUNDING

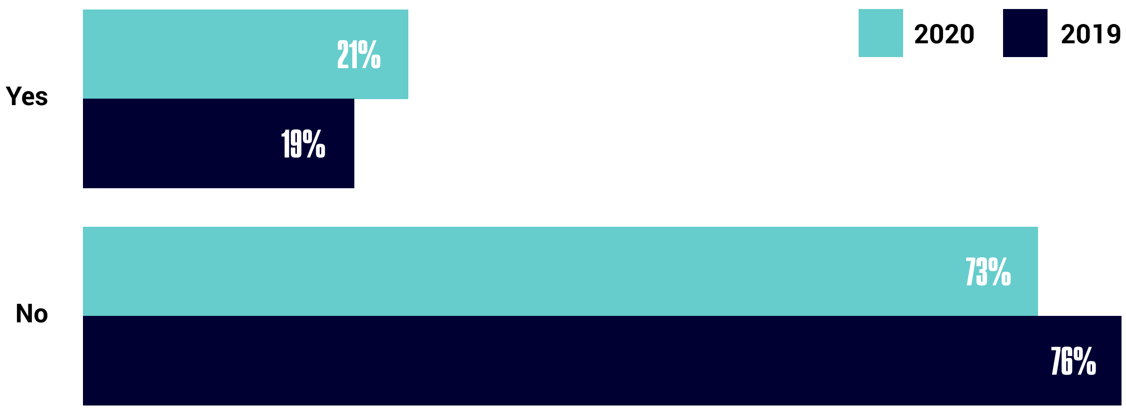
Given that we have already shown that around a quarter of funding applications fail, **we sought to discover how much time is invested in each application form**. Responses varied from 3 hours to a whole year but the average time taken has almost doubled since the 2019 survey, from 8 days to 14. The average increase in time spent could be driven by the increase in those applying for the larger funds whose processes tend to require more hard evidence of fiscal responsibility (see page 26). It is worth noting that two respondents answered that is had taken them “two years” and “over 5 years” to complete an application. We decided to exclude this as anomalous data when working out the final average. It would have skewed the average to a wholly unlikely 37 days, but mention it just in case we are doing disservice to a pair of remarkably diligent applicants. In the free text field one respondent simply stated application forms take “too long”.



CROWDFUNDING

Last year saw the introduction of a new question to the Cost of Docs survey, on the impact of crowdfunding. **We asked respondents whether or not they had used a crowdfunding platform to raise funds for their previous projects**. The results were surprising and this year shows only a minimal change. Only 21% of respondents had ever used a crowdfunding site in an attempt to raise finance for their documentary film, while the vast majority - 73% of respondents - had never tried this method to raise funds. Of these 21% who had previously tried crowdfunding to source funds, respondents answered that on average they had managed to raise approximately 21% of their total budget for the documentary in this way.

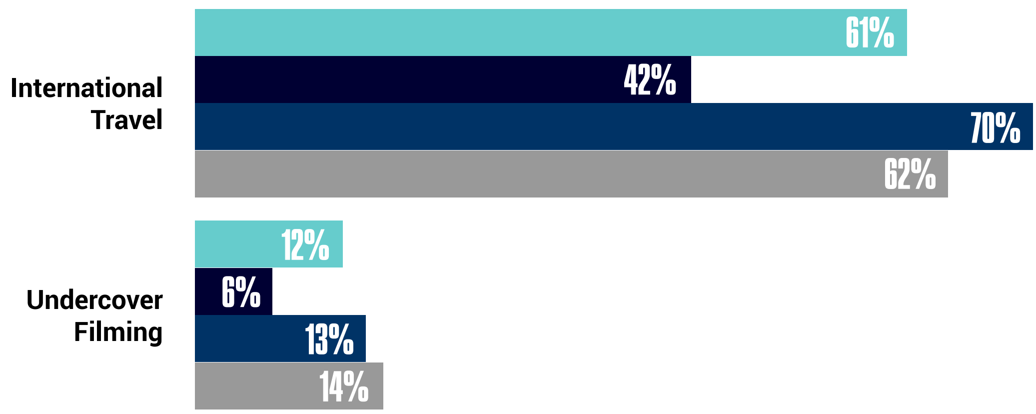
It is generally accepted that crowdfunding is a democratic but also very time consuming way to source funds, and nearly a third of those who had tried crowdfunding said they received no financial benefit. Only one respondent said they got 100% of their required funding in this way.

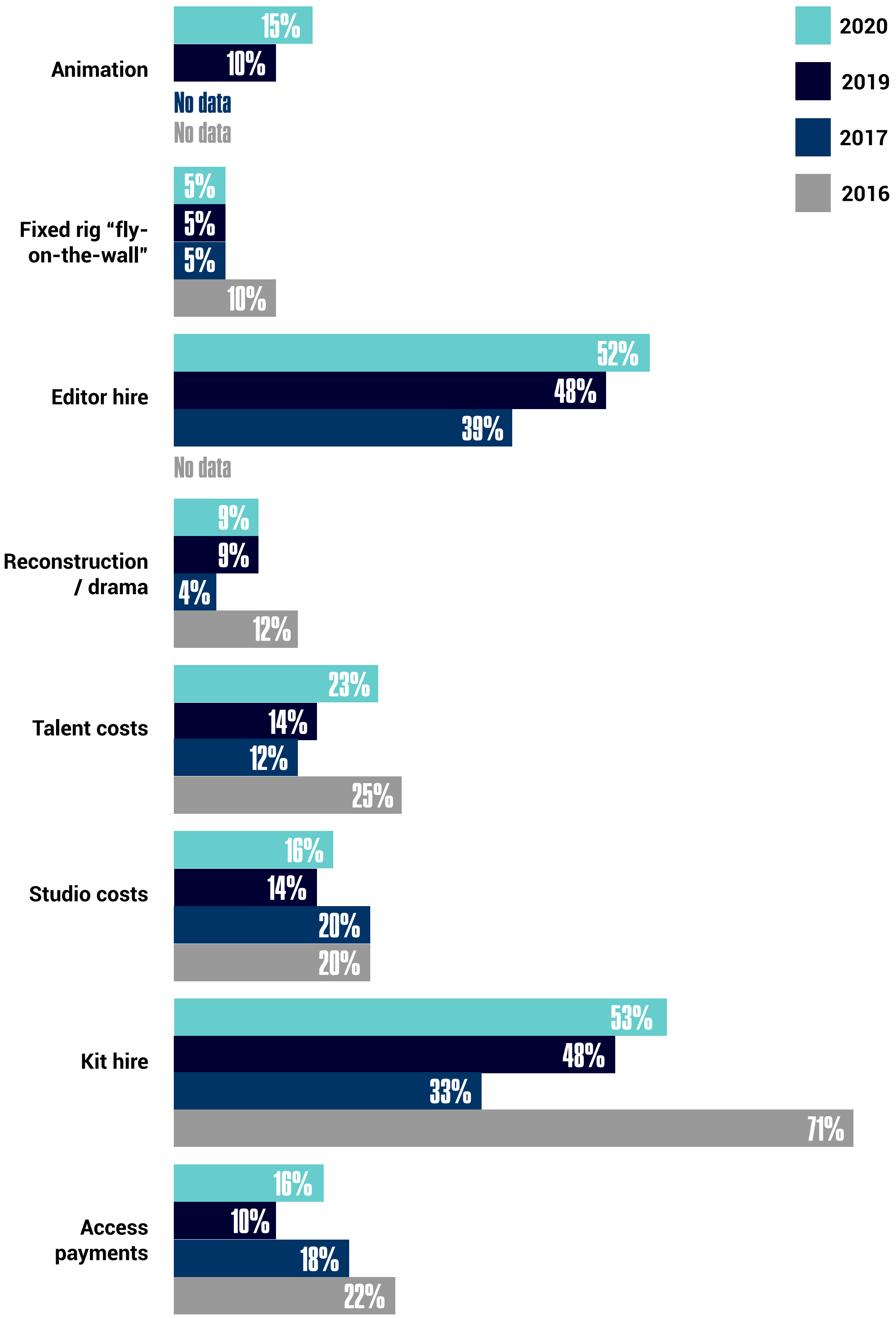


FACTORS AFFECTING COST

Since our first Cost of Docs survey in 2016, **we have followed the rise and fall of the most significant spending areas for documentary production**. Most costs have been pretty static across the last four years, but there are exceptions. Animation has seen a 5% rise year on year, international travel has taken a 18% leap after a three year decline and editor costs continue to rise. It is thought that this might relate to the leap in documentaries being made for theatrical release, where the technical standards for a big-screen showing are more demanding.

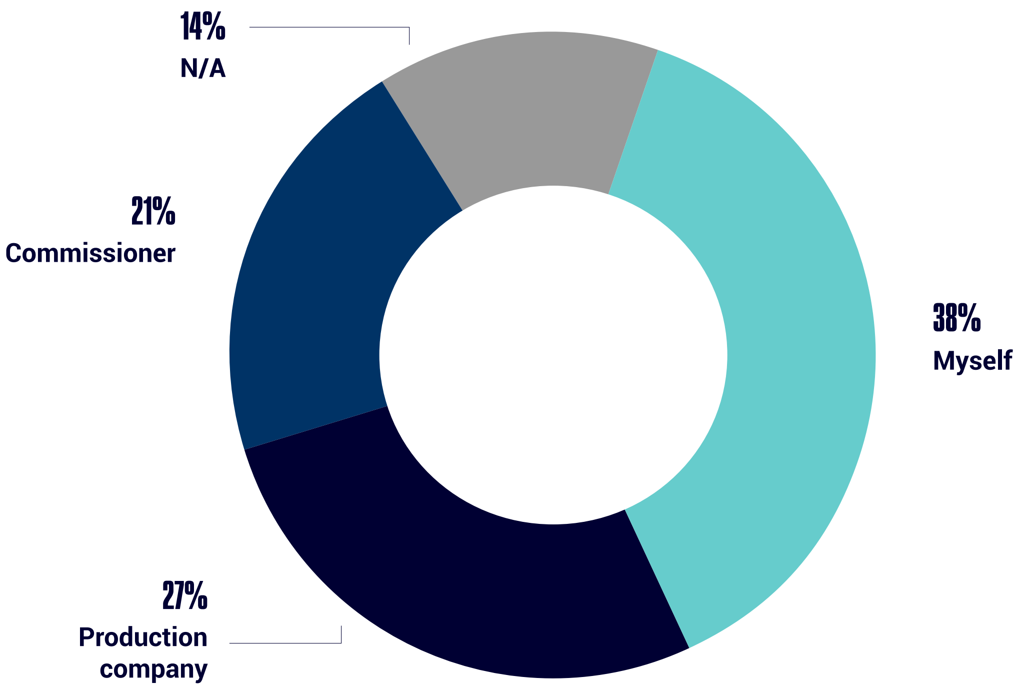
One area that seemed to be a new trend in 2016 was fixed rig ‘fly-on-the-wall' documentary, but the numbers dropped by 50% from 2016 to 2017 and have remained consistently low ever since. Another area that surprised us is in the small but significant 4% rise in kit hire after a 3 year drop, where it was assumed that digital technology and miniturisation was enabling small production houses to purchase kit rather than needing to hire it. This is backed up by responses on page 38 where several respondents said that they had sold their camera equipment to pay for shooting days. One area that has remained consistent year on year is the number of documentary makers using reconstruction. For the second year in a row, this figure stays at 9%. We realise, however, that we have not distinguished between historical reconstruction using actors and the recreation of key scenes with contributors that were missed due to a contraction in the number of shooting days. This will be specified in next year's survey.





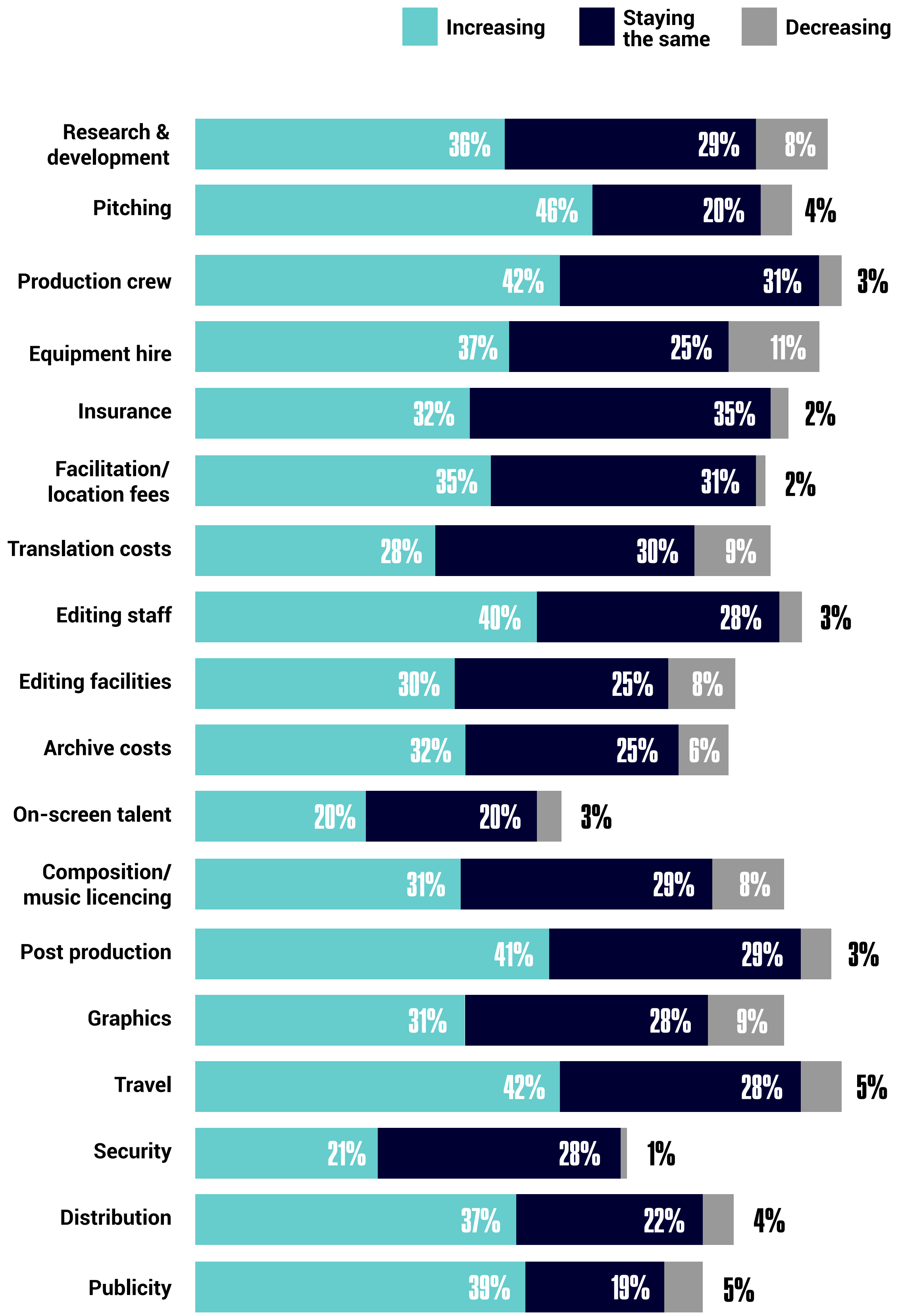
2020
2019
2017
2016
Animation
15%
10%
No data
No data
Fixed rig "fly-on-the-wall"
5%
5%
5%
10%
Editor hire
52%
48%
39%
No data
Reconstruction / drama
9%
9%
4%
12%
Talent costs
23%
14%
12%
25%
Studio costs
16%
14%
20%
20%
Kit hire
53%
48%
33%
71%
Access payments
16%
10%
18%
22%

Next, **we asked resondents who had paid for the majority of elements in the previous section**. A resounding 38% of respondants answered that they had paid for the most significant spending areas for documentary production themselves, with only 27% being paid by production companies and 21% by commissioners.



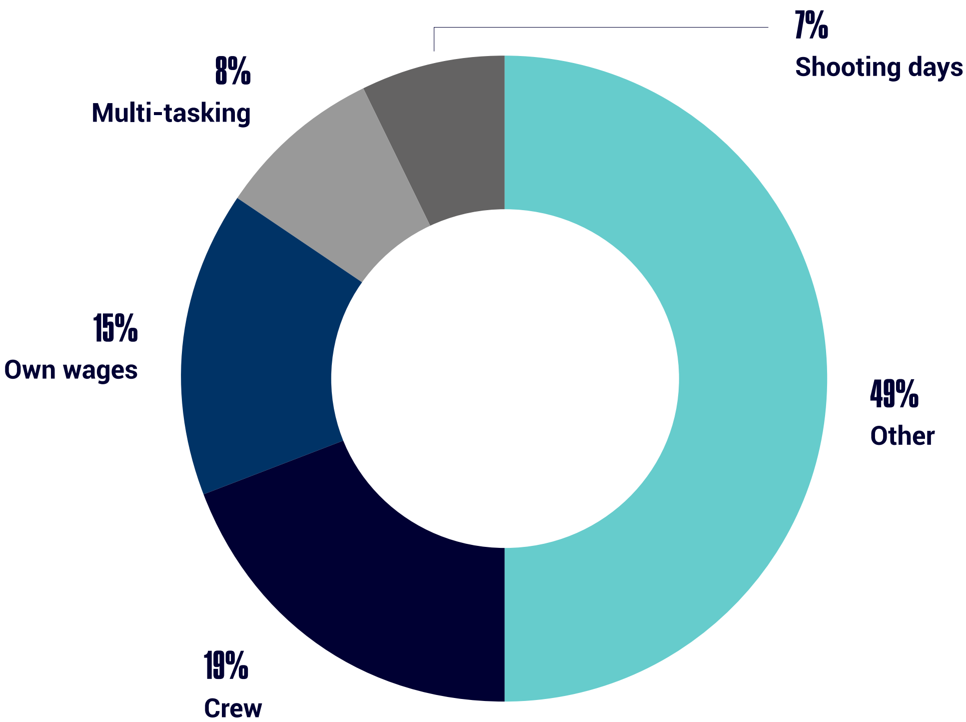
INCREASING & DECREASING EXPENSES

We also asked respondants to estimate which budget items cost them more year on year, which stayed the same and which were cheaper. There were only three items in the cheaper category. They were insurance, translation and security. These imply that production teams may be taking more risk upon themselves. Of the vast majority of increased prices, the biggest leaps in expenditure were for pitching, crew costs, distribution, travel, editing and publicity. The net result is that the cost of documentary production continues to climb.


Increasing
Staying the same
Decreasing
Research & development
36%
29%
8%
Pitching
46%
20%
4%
Production crew
42%
31%
3%
Equipment hire
37%
25%
11%
Insurance
32%
35%
2%
Facilitation/ location fees
35%
31%
2%
Translation costs
28%
30%
9%
Editing staff
40%
28%
3%
Editing facilities
30%
25%
8%
Archive costs
32%
25%
6%
On-screen talent
20%
20%
3%
Composition/ music licencing
31%
29%
8%
Post production
41%
29%
3%
Graphics
31%
28%
9%
Travel
42%
28%
5%
Security
21%
28%
1%
Distribution
37%
22%
4%
Publicity
39%
19%
5%

COST CUTTING

We wanted to find out which elements, if any, they had cut back on in order to reduce costs in the making of their documentaries. The most common response at 19% related to the filmmaking crew. Either they had reduced the number of crew members, cut crew wages or sourced local crews for cheaper prices. A close second at 15% was the reduction of their own wages, often forgoing a personal salary entirely. 8% claimed that they has cut costs by multi-tasking and taking on multiple roles ie. self-shooting and editing. Often respondents also did their own publicity, colour grading, motion graphics and distribution. The fourth largest area where respondents were cutting back was on the number of shooting days (7%).



Other areas of cost cutting mentioned were; international travel/ accommodation, pre-production research and development, music licensing, archive, animation, insurance and quality of life (including food, socialising, housing).

The quotes below detail what respondents have had to cut back on in order to reduce costs. These verbatim quotes are representative of the four key areas; crew, shooting days, travel, personal comforts:

“More often than not staff wages which really upsets me.”

“Paying ourselves. On one film I cut back on having an additional sound operator and just used the camera op, which I regretted afterwards.”

“I have cut back on crew size. I also do my own publicity and editing to save money.”

“I normally do whatever work I can by myself in order not to exploit anybody else.”

“Cut back on equipment. Second camera often desirable for doc shoots but can’t afford to rent one”

“I did not pay myself. I also paid for a lower travel insurance premium for our equipment. It would not have covered the full cost of equipment replacement for my camera or if something happened to my cinematographer or his equipment.”

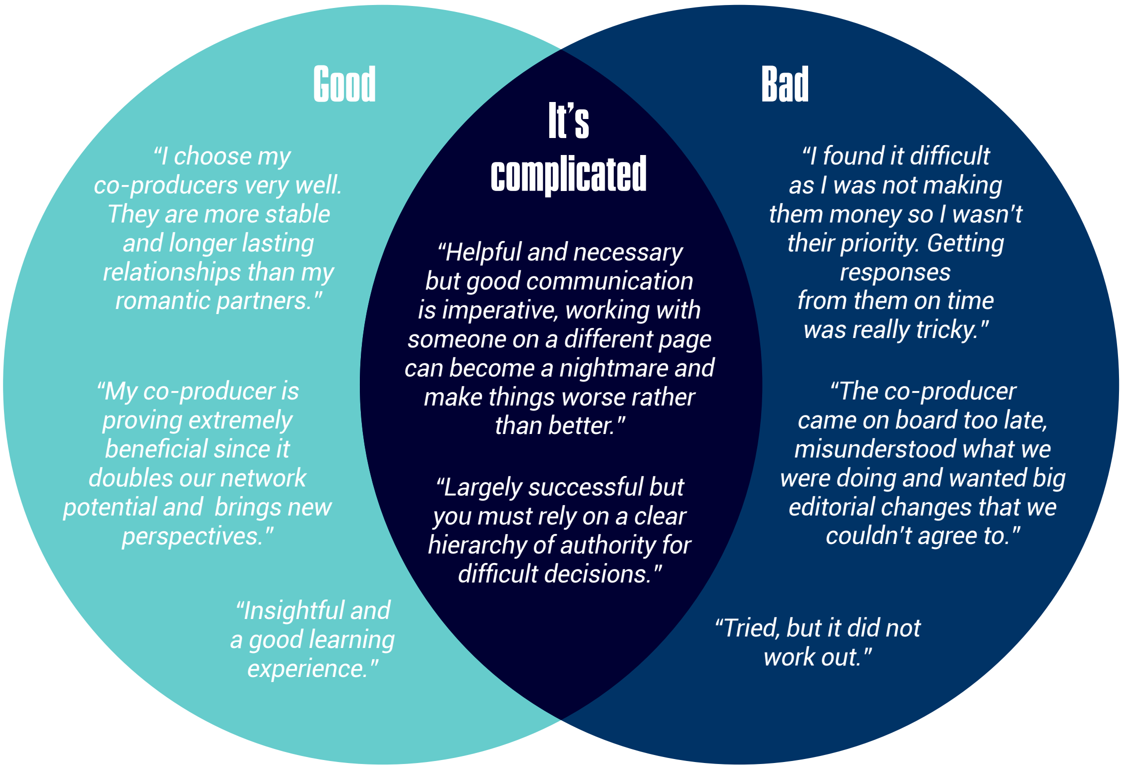
“Cut back on number of production days, travel, amount of stock footage, and do editing myself.”

“I cut back on clothing, food and moved into a really cheap (and horrible) apartment. I also reduced socialising with friends to once a month.”

“Life, all frills. All holidays.”

CO-PRODUCERS - NEW QUESTION

New documentary makers are often encouraged by commissioners and mentors to team up with more experienced co-producers who will provide them with ready finance, credibility and market access in return for a share of any profit and, usually, editorial input. Having multiple co-producers on one documentary is common, but **how workable and beneficial are relationships with co-producers**?



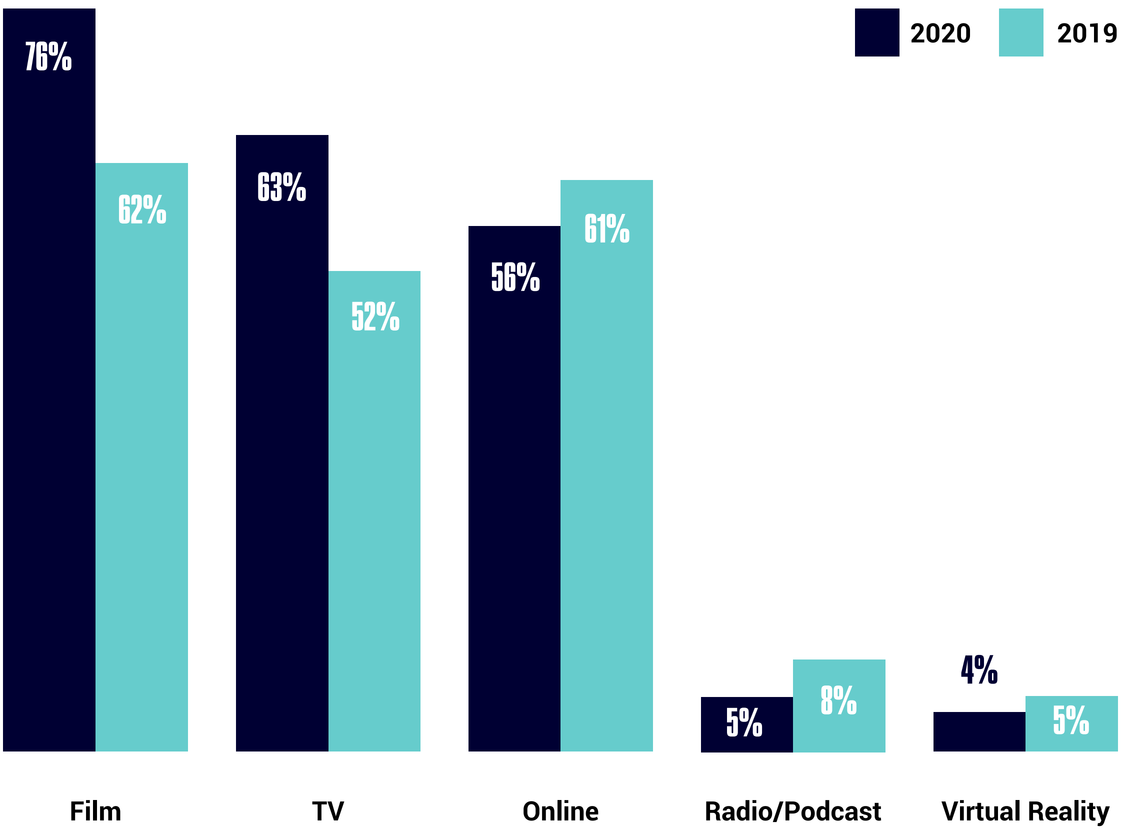
Just under half of our respondents (46%) had had co-production experience. Of those, the overwhelming majority had had a mixed experience similar to the ones detailed above. Only eight respondents had found the relationship to be entirely negative. However, that is nearly a fifth of all co-production deals in this survey.

"TO MAKE A DOCUMENTARY IS THE EASY PART, GETTING IT SEEN IS MUCH MORE DIFFICULT THAN I FIRST THOUGHT!"

THE MARKET

DOCUMENTARY MEDIUM

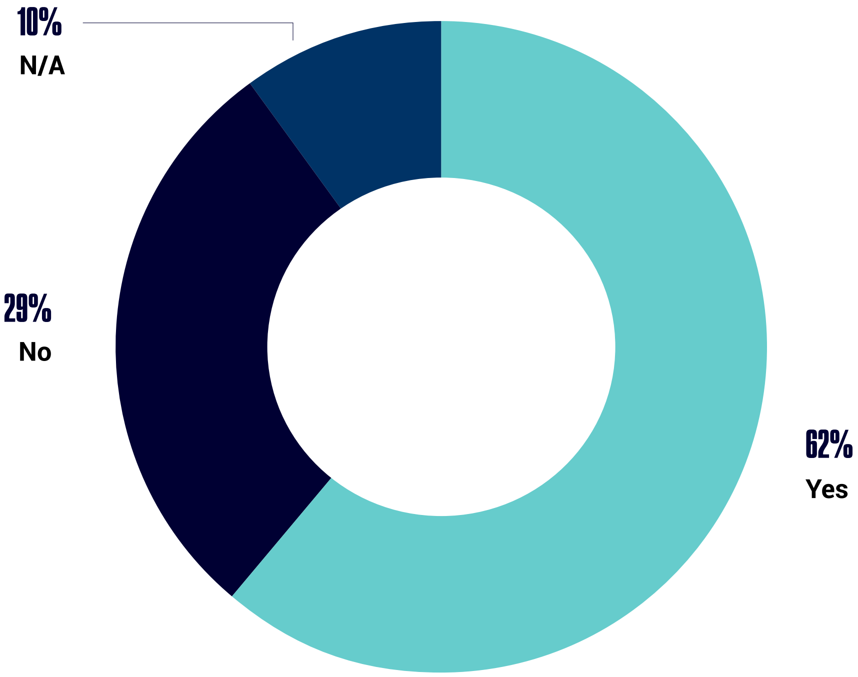
As in previous surveys, **we asked respondents for which market they usually made documentaries**. 76% responded that they worked on film documentaries. These are usually 70 to 90 minute films designed primarily to be viewed on a cinema screen. Film has seen a 14% increase on last year. The numbers making documentaries designed primarily for TV screens has also risen year on year by 11%. In contrast, online streaming, podcasts and virtual reality, in other words the big three new technologies for documentay, have shown a drop of 5%. Amid the current explosion of live streaming channels this was not expected.



HAS YOUR DOCUMENTARY BEEN BROADCAST?

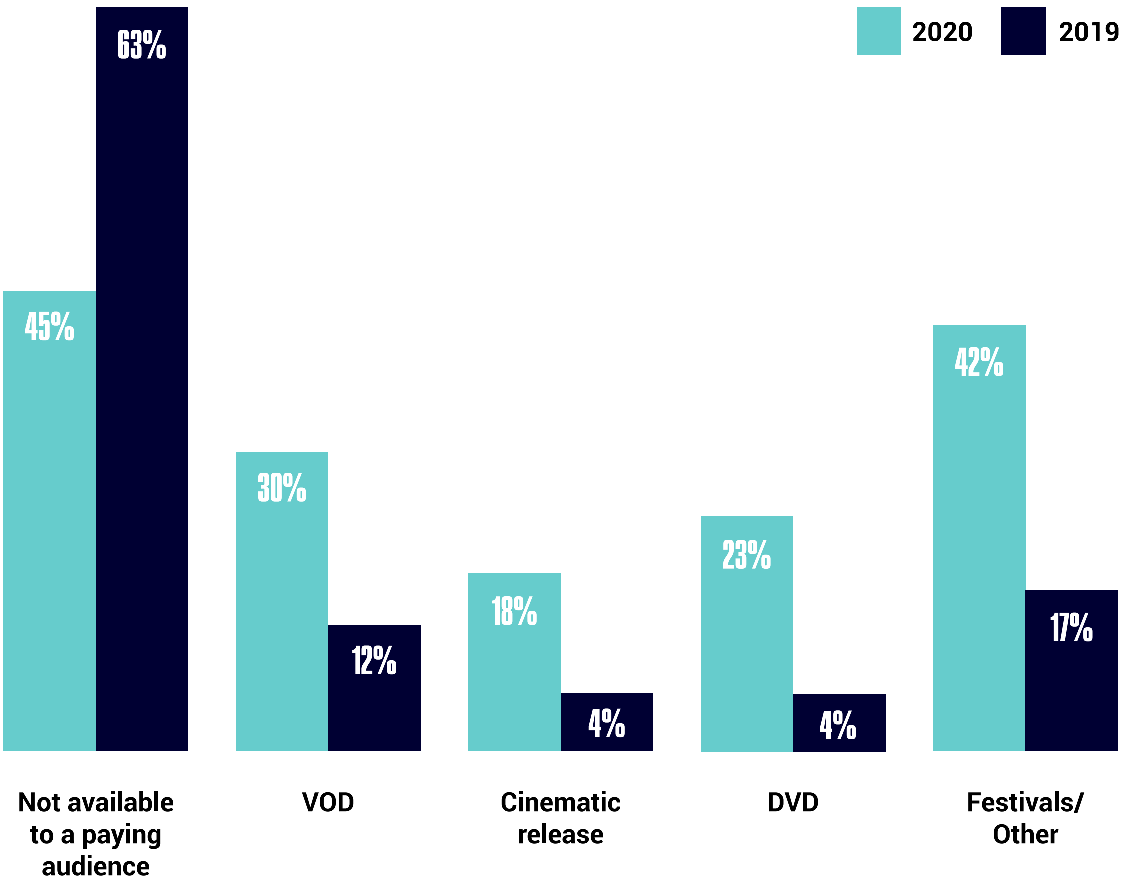
Our next question **asked whether respondents had ever worked on a documentary that had been broadcast**. 29% answered no (36% in 2019), while a majority of 62% answered that yes (46% in 2019), they had made docs that had been broadcast - on channels including BBC1, BBC2, Channel 4, Channel 5, Al Jazeera, Sky, RTE, NPO, PBS America, Canal+ and National Geographic. These figures show a positive increase in the amount of respondents finding a television audience for their documentaries.

The top three broadcasters, in terms of the number of specific mentions in answer to this question were UK based public service broadcasters BBC and Channel 4 with 26 and 13 mentions respectively and ARTE, the European free to air cultural broadcaster with 9 mentions. Netflix was mentioned 6 times and Al Jazeera 3. One person specifically mentioned the BBC Four international film documentary strand, Storyville.



HAS YOUR DOCUMENTARY FOUND AN AUDIENCE?

The follow-up question asked respondents whether a documentary that they had worked on had been shown to a paying audience. 45% responded that no, their documentary had not been shown to a paying audience, a significant drop from 63% in 2019. 42% responded that their documentary had screened at film festivals, a 25% increase from 2019. 30% of respondents had worked on a documentary that was subsequently made available on a video on demand platform and 23% on DVD/Bluray, while just 18% had worked on a documentary that had received a cinematic release. All in all, this is a significant improvement on last year's figures, suggesting that the majority (yet still only 45%) of our respondents in 2020 were able to find a paying audience for their latest documentary.



PITCHING

HOW HELPFUL ARE PUBLIC PITCHES?

Another new question included in our 2019 Cost of Docs survey focused on the value of public pitches and forums. This year, 60% answered that they had never participated in a public pitch at a festival market or forum (61% in 2019) - while 36% answered that they had (33% in 2019). The experience of those who attended pitches fell roughly into three groups: those for whom participating in a public pitch made all the difference to their project; those who did not get concrete funding but who may have received marginal benefits from the pitch and those who felt that public pitches were a waste of time. Below is a selection of quotes in descending order, beginning with those who are pro-pitches and ending with those who are not:

"This lead to the funding of my first short doc."

"Sheffield Meet Market allowed us to meet Doc Society who funded our project."

"No funding received, but audience reaction shaped development of the film."

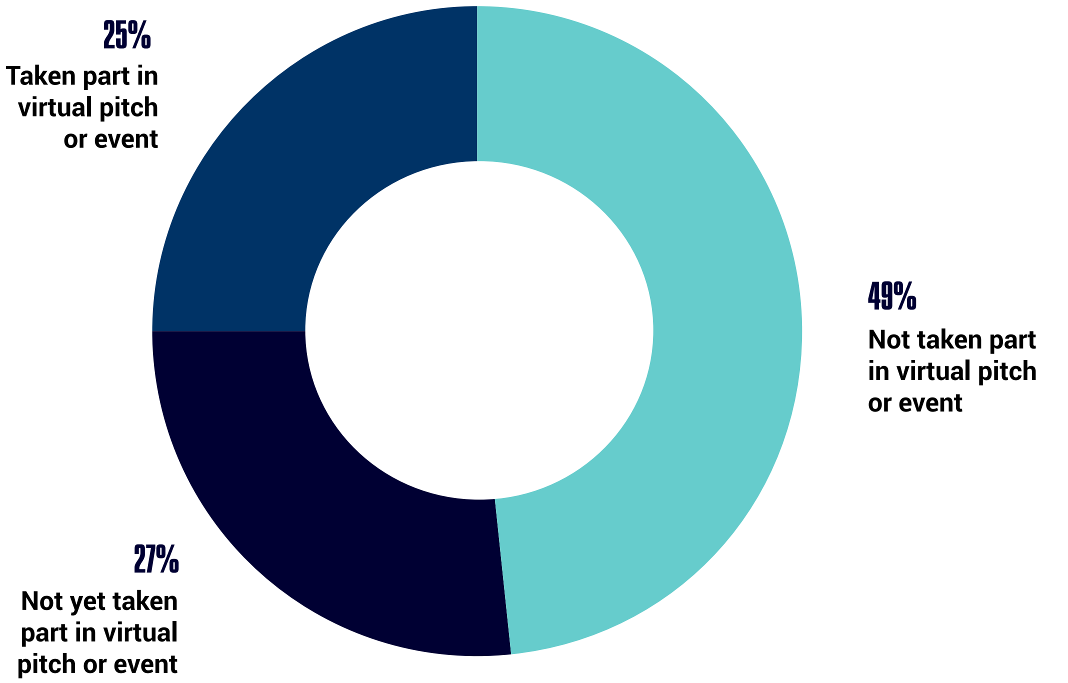
"It helped me find a producer willing to help me raise funds. Also it gave me a better idea what broadcasters are willing to put money into."

"It was a big investment of our time but the funds offered during the pitch never came in from the funders."

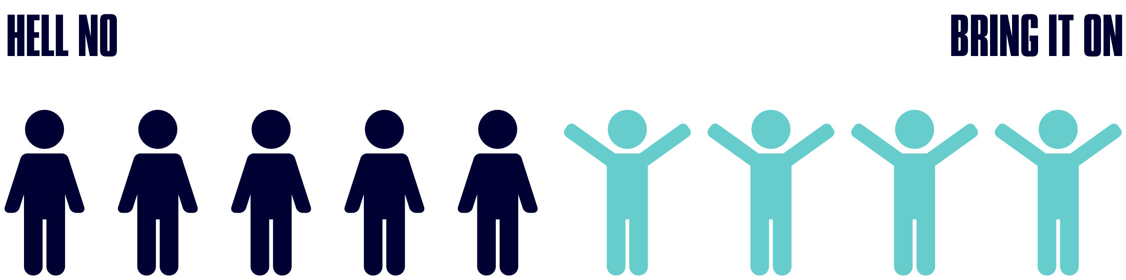
"Spending time pitching and applying for grants is waste of time. It tends to be only for a few elite, highly experienced filmmakers or non-filmmakers who are extremely gifted at writing."

VIRTUAL PITCHES & EVENTS - NEW QUESTION

New to the 2020 survey and in light of the COVID-19 pandemic, many pitching forums and workshops have already been hosted in a virtual space, with many more following suit. **We asked our respondents if they have taken part in any virtual pitches or events.**



We also asked and how likely, on a scale of 1-10 they were to recommend a move towards virtual pitching forums and events in the future.



Since 30th April 2020, the closing date for survey submissions, there have been many more exclusively online festivals including the International Documentary Film Festival Amsterdam (IDFA) and Hot Docs Canadian International Documentary Festival. We feel that events themselves have also improved as the technology has had to develop by necessity. It will be interesting to compare this year's responses with next years' after 14 months of living with a global pandemic. Here are a selection of verbatim comments representative of our respondents' feelings on virtual pitching and events, from positive (light blue) to negative (dark blue):

"I spent much of last year travelling to publicise a couple of films and I felt very uncomfortable from an environmental perspective. Having done an online Q&A for a film last week, I feel very strongly that the industry needs to change. I loved the Q&A and it felt more intimate than one in the cinema."

"I am usually unable to attend live events because they are most of them are London based and too expensive to go to. I am benefitting greatly from more online access as someone working in the regions."

"I think it is an excellent response to this crisis. Cinema must continue and adapt."

"It felt quite efficient but we lack the feelings of interaction because we cannot meet and exchange with the judges in person. However, it seems to be a solution for this special situation."

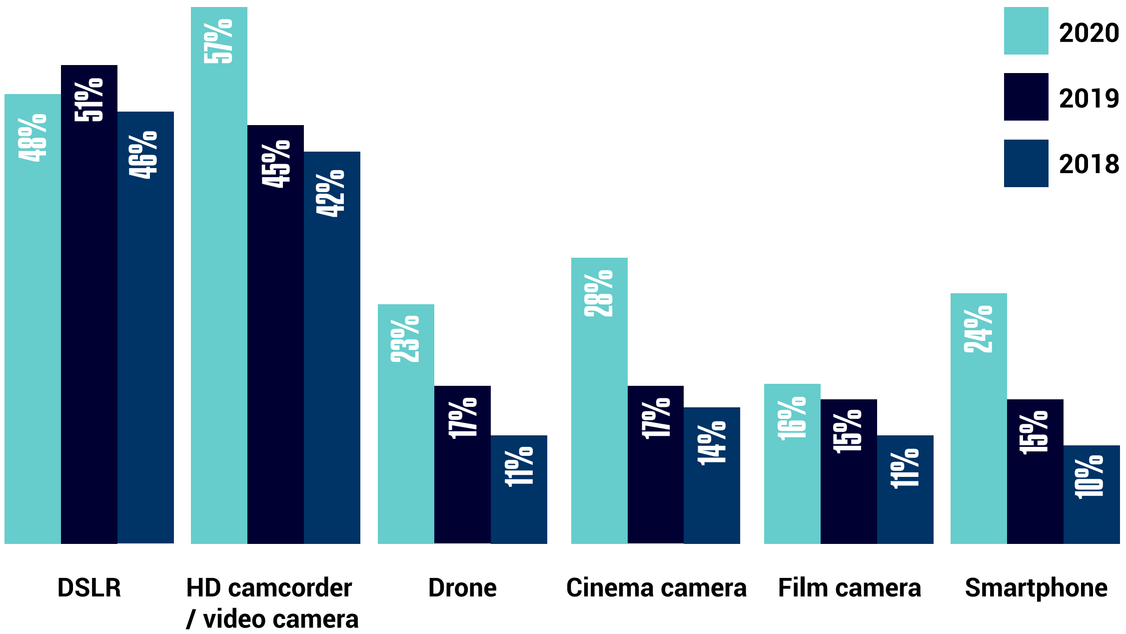
"I'm hesitating to now apply for a pitch forum that has moved to a virtual space and includes a application fee now."

"IF THERE WERE MORE VIRTUAL PITCHING FORUMS IT WOULD LESSEN THE COST OF HAVING TO TRAVEL, AND LESSEN ALL OF OUR CARBON FOOTPRINTS."

EQUIPMENT

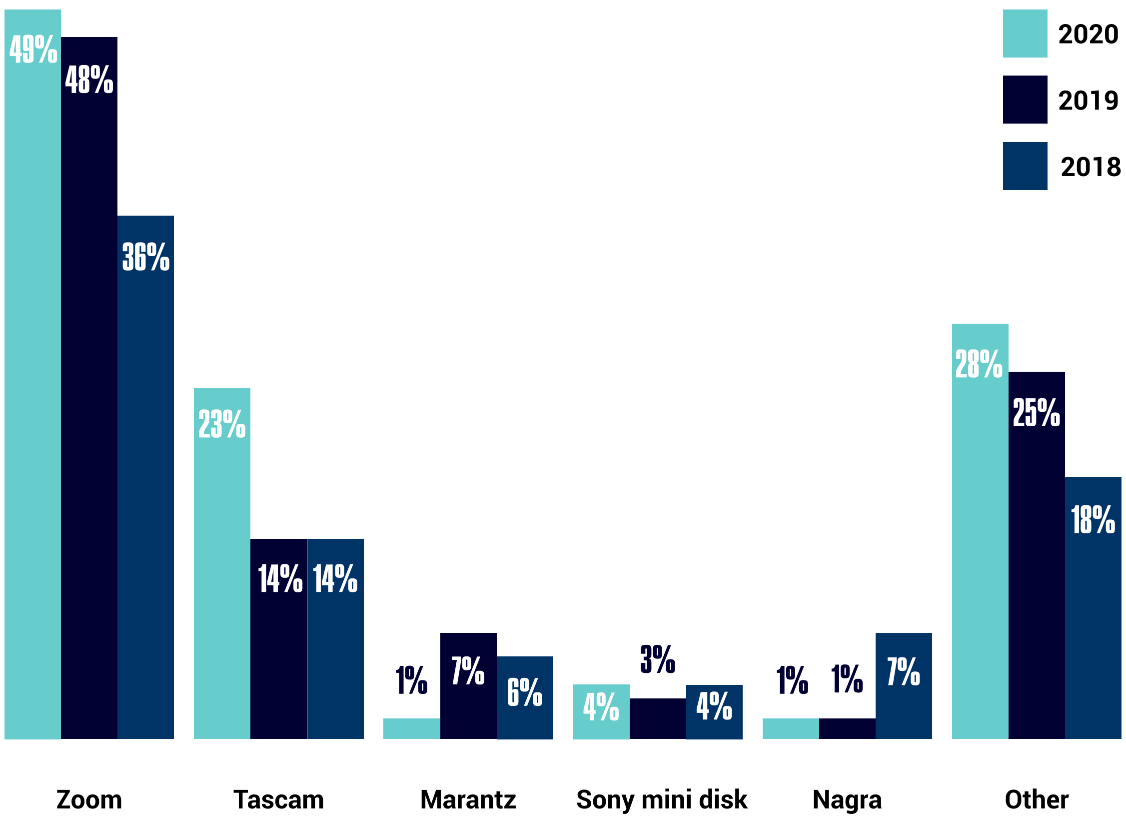
CAMERAS

As in previous years, the Cost of Docs survey provides a good opportunity to find out more about the most popular equipment used by documentary filmmakers. **First we asked respondents to tell us what their go-to camera was**. This year, the camera of choice is the HD camcorder/High quality video camera, compared to the DSLR in both 2018 and 2019. The results of this question also demonstrated a significant increase in the use of drones, smartphones and cinema cameras since 2019, whereas there was only a marginal increase in the use of film cameras year on year. Some of these findings may correlate to the increase in documentaries being made for theatrical release, which require high quality footage for the big screen and also the higher technical specification that broadcasters are tending to require. The rise in the use of smartphones is also interesting and could suggest that filmmakers are looking for cheaper alternatives. As smartphone technology continues to develop, it will be interesting to see whether this trend continues to rise year on year.



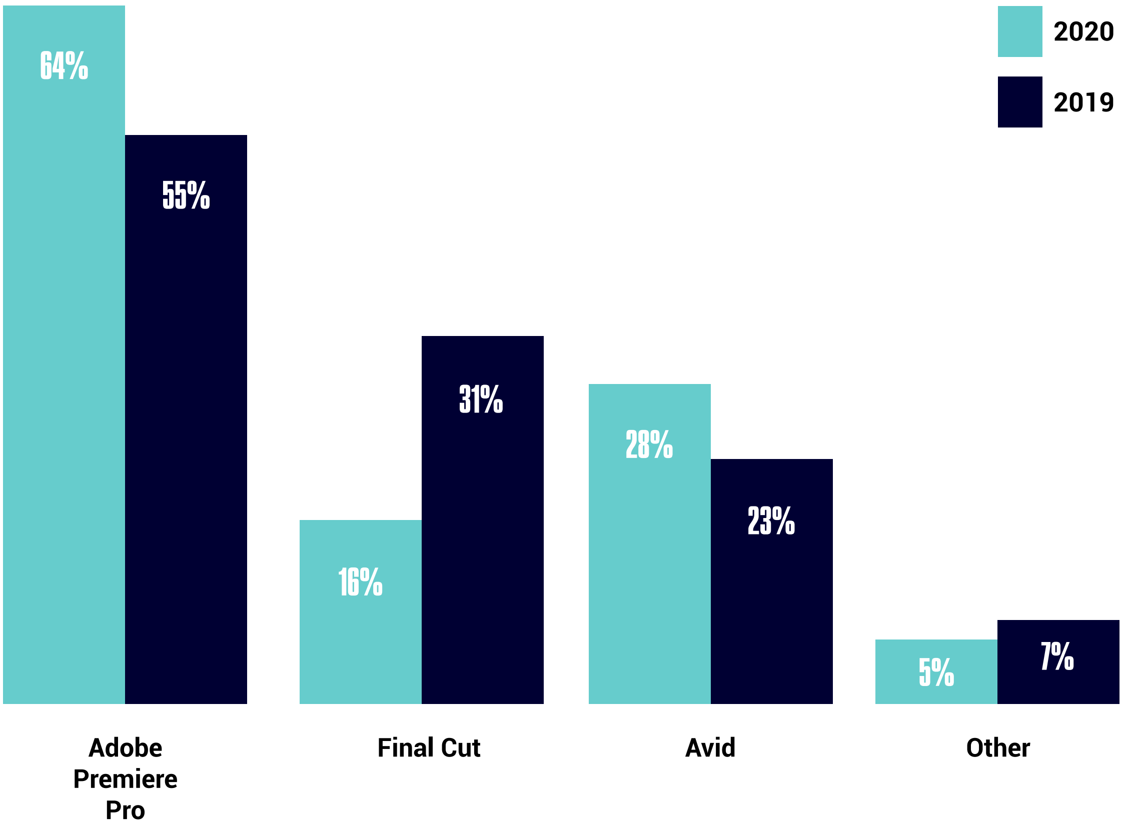
AUDIO

In addition to the most popular cameras used by documentary filmmakers in the production of their work, **we were also interested to know more about the preferred audio equipment that is being used to record sound**. The most popular choice is the small and portable Zoom mic, used this year by almost half of all respondents (49%). The 4 track H4N costs under £200, while cheaper models include the H1. As in previous years, the second choice for respondents was the Tascam, which has leaped in popularity by 9% this year. Price may be a factor. It typically retails for around £80 in the UK. The Marantz, Nagra and Sony Mini Disk Recorders were again the least frequently used. The high-priced Nagra, retailing at roughly £800 and the Marantz proved the least affordable choices for respondents. Of the others, Sound Devices, an American company who launced in 1998, features highly.



EDITING SOFTWARE

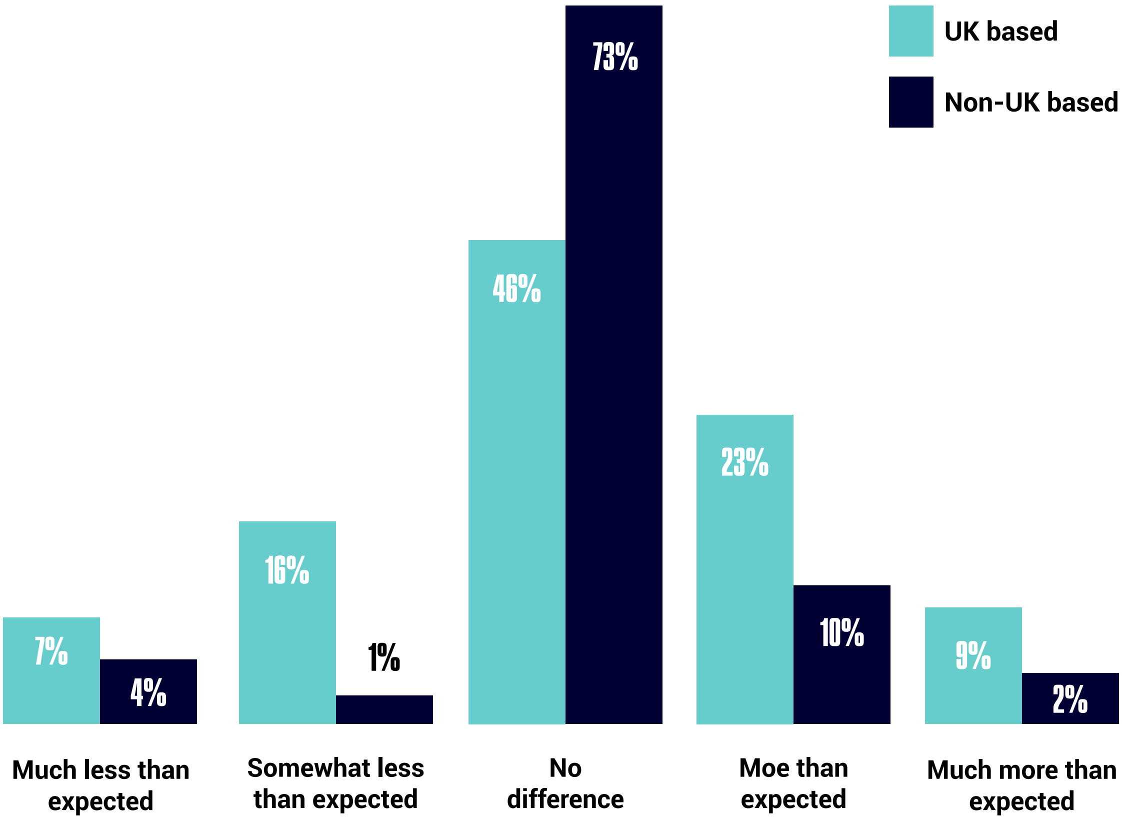
Finally, **we asked respondants to select which editing software they used on their most recent documentary film**. For the second year running, the results put Adobe Premiere Pro in the clear lead as the most popular choice, with 64% of respondents selecting this option. An increase of almost 10% since 2019. The second most popular choice for editing software, with 28% of respondents selecting this option, was Avid. This year we saw a decrease in the use of Final Cut, from 31% in 2019 to 16% in 2020. Of the others, we had numerous respondants opting for Da Vinci Resolve and iMovie.



BREXIT

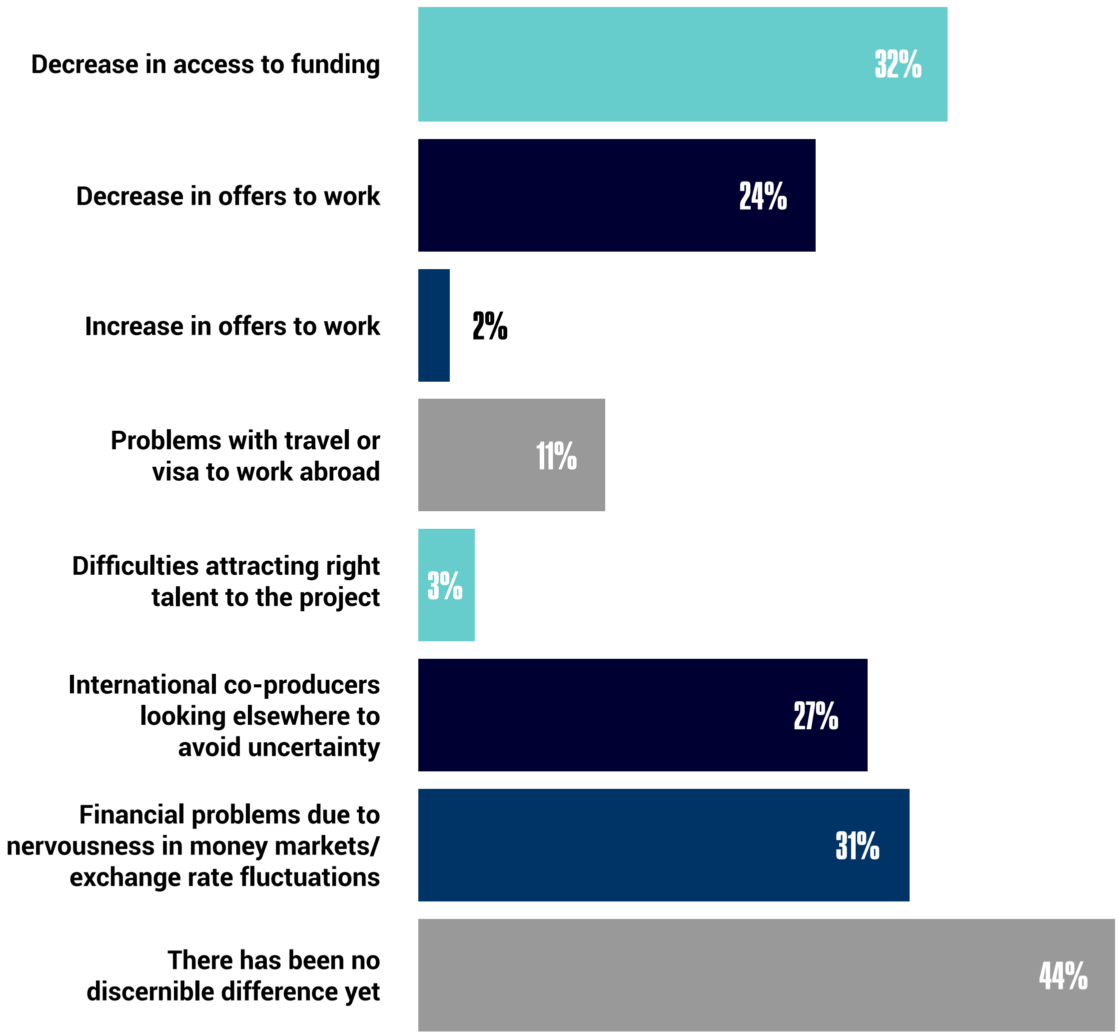
IMPACT OF BREXIT

This question asked respondents to comment on how Brexit has impacted their careers as documentary makers in the previous 12 months, since the last survey. 46% of UK based resondents thought that Brexit had made no difference, so far, to their careers. Unsurprisingly, 73% of non UK documentary makers cannot see any difference yet to their careers but a suprising 12% said that it had made more, or much more, of an impact than they had anticipated. 23% of UK based respondants claimed that it has impacted them more than they expected, in comparison to just 10% outside of the UK.



THE EFFECTS OF BREXIT

Next, we looked to find out what specific areas of documentary filmmaking have been effected by the impact of Brexit. Just under half of respondents (44%) answered that there has been no discernible difference yet. The major areas effected so far are financial. 32% commented that there has been a decrease in access to funding and 31% have encountered financial problems due to nervousness in money markets/exchange rate fluctuations. Another area of concern (27%) is that international co-producers are looking elsewhere to avoid uncertainty. It will be interesting to see next year's results, after the transition period is over.



Below are a selection of indicative verbatim responses about the impact of Brexit on UK-based respondents. Negative responses are in dark blue and slightly more positive resposes are in light blue.

“Made a film in Brazil during the initial crisis. Costs went up 80% due to exchange rates.”

“We could not apply to the MEDIA Europe fund.”

“The axing of Creative Europe funding has had an enormous negative impact on Doc/Fest 2020.”

“I am British and work with a British team, yet decided to set up our production company in Germany rather than UK, which was not originally the plan.”

“It’s a total shitshow.”

“Hard to find work in 2018 but better now, until corona at least.”

“Makes no difference.”

Non UK documentary makers were also concerned about the impact on conversion rates but others were wildly optimistic.

“Well, I’m a UK citizen living in France, so it screws with my legal status since I’m no longer a European citizen.”

“It has negatively impacted the conversion rate of a GBP grant I’ve received”

“Sales agents are still willing to work with us :-) and distributors still willing to show the film in the theatres.”.

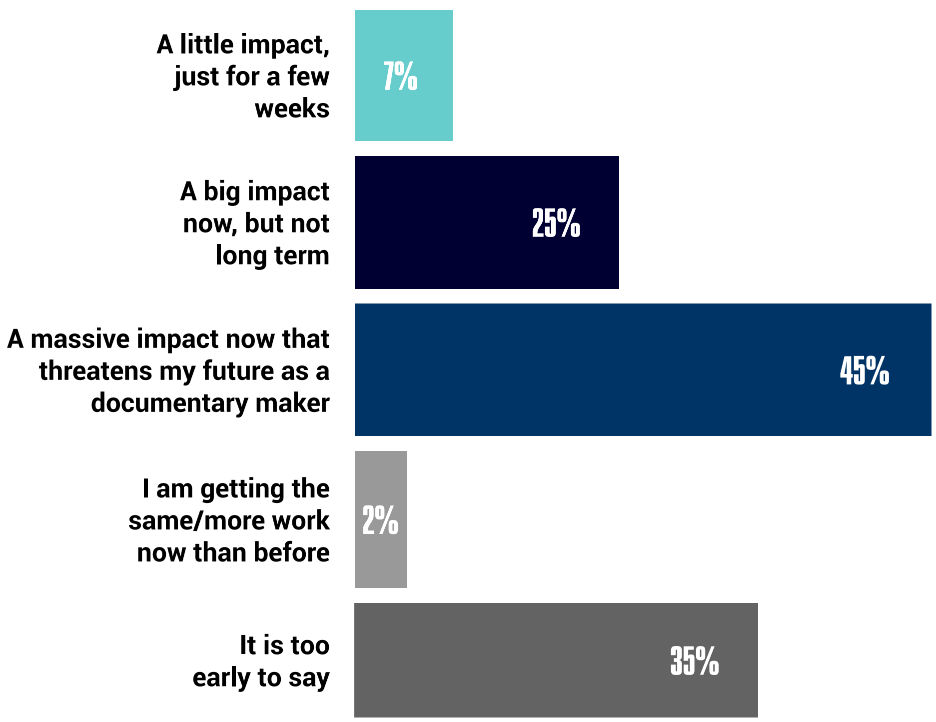
“You’ll be back.”

COVID-19 – NEW QUESTIONS

IMPACT OF COVID-19

New to this year's survey, we introduced questions concerning the impact of the global pandemic on documentary filmmaking. It should be noted that responses were gathered in Spring 2020, when the situation looked more hopeful of being short term.

First, we asked what impact, if any, COVID-19 is having/will have on our respondants' ability to continue as a documentary maker. A resounding 45% said that the pandemic had already had a massive impact that threatens their future as a documentary maker. 25% answered that it had had a big impact, but did not forsee it being a long-term threat. Only 2% of respondents said that they were unaffected, whereas 35% said it was too early to say.



Below are a number of responses we received in two categories; negative (dark blue) and positive (light blue). Although we did receive a few optimistic verbatim responses, the scale was tilted heavily towards a resounding concern for the future of documentary filmmaking:

"All my jobs have been cancelled until the end of the year and I don't know how I'm going to keep afloat."

"Inability to travel or film outside, one project on the US election already cancelled, two others put on hold indefinitely."

"All worked stopped overnight for me and many, many of my colleagues and none of us know when we will work (earn) again. Serious concerns."

"I have seen the festival tour of my film totally cancelled and all of my paying clients for the next 5 months have cancelled, leaving me with no income."

"I fear I will have to say no due to the lockdown rules and that they will not ask again."

"I think I'll still get jobs fine even though remote."

"Animation is keeping us afloat as a business."

"Maybe with inovation and creativity we can make the film from home."

"I'm looking for stories that can be told in ways that don't involve being physically close to another human being."

"I can imagine finding new ways and formats to communicate relevant issues even in these times."

"Just had an email from Korea this morning asking me to help them with a film about the Corona Virus in the UK as a field producer."

FORECASTED LOSS OF EARNING DUE TO COVID-19

This question asked respondents to comment on what they envisaged their forcasted loss of earnings would look like due to the impact of COVID-19. As it was a free text question, we received a figures ranging from £5,000 to $100,000, percentages and comments. It is worth remembering again that these responses were gathered at the end of April 2020, when the situation looked more likely to be resolved by Autumn. Even so, the vast majority of responses were very negative. Below is a snapshot.

“DUE TO COVID-19, I MAY FIND THAT I HAVE TO RETRAIN AND GO INTO A DIFFERENT CAREER ALTOGETHER.”

INDUSTRY INSIGHTS

INSIGHTS INTO RECENT CHANGES IN THE DOCUMENTARY INDUSTRY

As in previous years, we provided free text space toward the end of the survey to encourage respondents to give their views and ideas on their industry. Although this material does not lend itself to statistical analysis it is an opportunity to gain a flavour of what documentarians are privately thinking in different cultures and nationalities across the globe. Given the global pandemic it is unsurprising that the dominant tone of these comments, compared to last year, is **negative** (below). In some cases details have been omitted to prevent identification.

"It becomes harder as you get older. Physically and because of other responsibilities eg family, relationships etc."

"I have noticed the rise of Netflix who are scooping up the talent and courting editors such as myself."

"Getting your film seen is becoming the hardest part in my experience. Making the film is less of a challenge, but actually getting eyes on it is the most confusing and challenging part, and it often feels like pot-luck that it should be accepted into a festival or onto an online platform. It is the side of the industry that I dislike the most and, as it always tends to be in life, who you know rather than what you know tends to be a key factor of success."

"The decrease of money spent on research and no budget for fact-checking is problematic. Also, that translations must be done by the filmmakers who are not professional translators."

“Broadcasters are expecting a huge amount of work and quality of filmmaking for minuscule budgets. I was commissioned £1000 to make a 4-minute film for BBC Three shooting in Ireland, including travel, kit hire and insurance. It’s impossible to pay yourself anything and you end up paying some of your own expenses.”

“People remain cagey about rates of pay. I have worked on well-funded documentary series where two people doing the same job get paid very different salaries. There should be more awareness and transparency about this issue.”

“Salaries have stayed the same for 10 years, but housing prices, especially in London, have gone up.”

“Planning and scripting (where possible) is hugely significant in reducing spend and overheads. Shooting from the hip/obsdoc style can be massively time consuming, ridiculously difficult in post and detrimental to a project without prior consideration.”

“We had to hire students as cinematographers and this has affected the visual level of the footage.”

“As a woman working in a docco company run by middle-aged upper-class white men, I was contemplating suicide on a regular basis as a result of the working environment. I was belittled and made to feel incomptent on an almost daily basis and drastically underpaid for the entire duration oy my employment. I was working 18 hour days, 6 days a week for £120/day. When I eventually got sick and had to take 6 weeks off work, they fired me for an invented reason as they couldn’t afford to keep me on, then used a pitch I had written (which they had told me was useless) to obtain £800k of funding for their next film.”

Of the **positive** insights (below), multiple respondents commented on the decreasing cost of equipment and editing software, making the overall quality of productions better and more accessible. A small number of respondents mentioned that they were able to persevere with a support network of close friends and colleagues, who helped them with morale and "budgetary constraints". Below is an overview of positive insights.

"I haven't been working in the industry long but I feel there is a good opportunity nowadays to create something of high production value and on a tiny budget. We have so many great tools at our disposal, not just camera equipment but also pre and post production tools that streamline the process. Creating a doc alone or almost alone seems to be much easier nowadays."

"Camera kit and editing equipment costs have certainly gone down and quality improved. More editors have suites at home."

"Fortunately I have several people who believed in the film so they donated the majority of production funds."

"Sometimes I get tired but I always find a way to keep going with the story."

MAIN CHALLENGES FACED BY DOCUMENTARY FILMMAKERS

Following on from the persistent thread that has run through this report so far, when **asked about the main challenges they faced as documentary filmmakers working today,** an unsurprising majority of respondents agreed that their most significant challenge was financial (84%). This figure has increased by a significant 28% since last year. The second greatest challenge respondents identified was finding an audience for their films (19%), while a few respondents also brought up diversity, lack of distribution networks and access to resources and support.

Similar to last year, a small number of respondents mentioned that the cautiousness of commissioners had been a problem for them, while a few others mentioned their own lack of momentum and morale. Common reasons attributed to this was the lack of recovery time due to financial pressures, the loneliness of the job and the consistency of finding quality work. Below are three common insights.

"Financial security is the number one challenge. Making a financially sustainable living as a documentary-maker is a huge challenge for me and, to be honest, would be the reason I left the industry. I'm not a money-driven person and I have no desire to be rich, but at the moment I struggle to see how I would afford to own a home or even raise a family on the money I currently make."

"Finding an audience. This is something I am spending more time targeting now. It seems it doesn't really matter how good your doc is (sometimes) you really do need to market it correctly and get it in front of the right eyeballs otherwise it can fade away without a significant audience seeing it."

"There are gatekeepers and executive producers that make it really difficult to do things with freedom. A lot of film funds come with huge amounts of restrictive caveats. The model used most seems to be 'make the film - then get your money back after' which is so risky and limits the type of filmmakers we hear from as an audience."

HOW CAN WE IMPROVE THE DOCUMENTARY INDUSTRY?

Following on from the challenging aspects of documentary filmmaking, **we asked respondents to provide suggestions on how the industry could best be improved**. In line with the previous question, 61% of respondents suggested that the greatest improvement would be an increase in funds and access to funding opportunities. Of those, a common thread was an increase in funding and support for projects in development. There was greater unanimity when it came to the diversity of funding opportunities and support for under-represented storytellers from developing countries. There was also a focus on the application process, with many commenting that there needs to be more feedback and transparency over how funds are being awarded. The application process was said to be "too long", with a need to be streamlined and made easier.

When it came to diversity behind and in front of the camera, respondents believed that there should be greater support, training and mentorship for first-time filmmakers, women (especially those of an older age), those from marginalised communities (LGBTQ+ and BAME) and developing countries. There was also a call for broadcasters and commissioners to take bigger and more creative risks to diversify their slates. It is worth mentioning that two of our respondents also commented that they felt that diversity in the industry had "swung too far in the opposite direction" and that there were consequential "representational issues".

Respondents wanted to see more support with distribution and exhibition, commenting that more documentaries should be shown in cinemas. One respondent said: "We invest everything we have, our time, our money, our careers in films and then we are still faced with barriers once the film is done. We need help getting them out there." In line with this point, numerous respondents also wanted to see cheaper access to film festivals and markets.

We saw a call for more protection of crew members and freelancers within the Film and TV industry. Numerous respondents wanted more transparency on rates and fees across the board, with BECTU guidelines to be adhered to as a matter of course. There was a wish for reduced working hours on set and a need for job security. At this point it is worth reminding ourselves that this data was collected in Spring 2020, when the COVID-19 pandemic was less restrictive and more hopeful of being short term. There were mentions of a need for cheaper kit hire, more open source archive sources or flexible rates for archive, and for more collaboration between platforms and content providers. One respondent wanted "solidarity" and a "new EDN" (European Documentary Network), suggesting that the newly formed Documentary Association of Europe (DAE) was a good alternative network of support.

Last and certainly not least, respondents called for wider industry recognition of the documentary genre and better government support for the industry. One respondent commented that we needed "more acceptance that documentary is important for our democracies".

Below is an illustrative range of responses.

"Job security for filmmakers, clearer funding opportunities and more development funds."

"Recognition that directors and producers are being under-funded and can't survive on documentaries."

"A more smooth funding process, response times for interested funders can be so long and lagging that we cannot plan future segments of the film and this puts the whole crew in a state of instability"

"Festivals should revise there monetization; money should not come from film submissions."

"More money for pre-production, more women in the industry and better insurance for the filmmakers."

"Transparency across the board. From the festival selection process to distribution costs to how anyone makes a living. Also, I wish the whole film industry worked together better."

"More diversity in storytelling."

CONCLUSION

We at the Whickers believe that documentary is essential for an engaged, free society. It brings empathy and understanding to a global audience in a way that news coverage alone cannot.

As such, this Cinderella industry must not be allowed to become a hobby for the idle rich, or those backed by investors with a self serving ‘truth’ to promote. This year’s survey shows that the existence of documentary is still precarious and underfunded with less than a quarter or documentarians able to pay themselves a wage for their work. We can see a massive shift towards institutions and charities like ours being sourced for funding but also a stealthy rise in the ownership expectations of such ‘angels of mercy’. Meanwhile there are signs of a ‘new realism’ with more respondents recognising that they will not make a living from passion and dedication alone.

As one respondent says, everyone needs a “side hustle” to survive and that the tougher the challenge, the more sweet the reward. We will continue to track this pain and these rewards and, from the cosy warmth of the Whicker ‘home office’, we salute those engaged in the endeavour.

JR & EC / 30.11.2020

MALE DOMINATED

NEED MORE FUNDING FOR DEVELOPING COUNTRIES

!

I AM PROUD TO BE A PART OF THE DOCUMENTARY COMMUNITY, TRUE STORIES FEEL MORE VALUABLE EVERY DAY

I STRUGGLE WITH SUPPORT FOR EARLY STAGE DEVELOPMENT

NEPOTISM

WOULD BE GREAT TO HAVE MORE DIVERSE VOICES REPRESENTED

!

FESTIVAL ELITISM

!!!!!

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