#

TELEFILM CANADA

An Overview of Audiences for

Canadian Documentaries

Prepared for the Documentary Policy Advisory Group

April 18, 2005

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1. INTRODUCTION

The following report provides an overview of Canadian audiences for Canadian documentaries by type (one-off, series) and for the major markets of theatrical, television, and non-theatrical.[1] The analysis provided in this report is part of a larger review being undertaken by the Canadian Television Fund (CTF), Telefilm Canada and the National Film Board of Canada on the state of documentary production in Canada.

1.1. Background to the Study

In April, 2004, the National Film Board and Telefilm Canada held a Documentary Policy Summit to discuss issues regarding the financing and funding of, and policy framework for documentary production in Canada. On June 16, 2004, Telefilm, the NFB and the Canadian Television Fund convened a follow-up meeting in Banff, inviting representatives of producer organizations (APFTQ, CFTPA, DOC, Observatoire du documentaire), broadcasters (CBC, CAB), and other funding organizations (Canada Council for the Arts, Association of Provincial Funders, Canadian Heritage, OMDC, SODEC) to discuss the preliminary findings of a study commissioned for the Documentary Organization of Canada (DOC) entitled *Getting Real 2*. These representatives make up the Documentary Policy Advisory Group that is overseeing the studies underway.

1.2. Methodology and Limitations

The portrait of television viewing to Canadian documentaries contained in this report relied on several data sources. First, the CBC's Research Department provided trended data for this report. While a small amount of data was acquired by Statistics Canada, however, for the most part, this data was not as relevant as those of the CBC. CBC data is based on an eight-week sample of the 2003-2004 broadcast season. All figures are expressed as hours/viewer/week, calculated using Nielsen Data. CBC's data was ideal for this report, as their Research Department has been utilizing genre coding for many years, whereas recent BBM genre coding has only been implemented since September 2003.

Second, recent data for this report was provided by the Canadian Television Fund. Data was based on a sample: the first 26 weeks of the 2003-2004 broadcast season. The tuning represents all viewers aged two years or more covering all of Canada. Due to limitations in the data, no digital services were represented, however all conventional networks and analogue services were surveyed, which represents well over 95 percent of all viewing.

Share figures represent total television viewing hours (average minute audience X program duration). Program performance was reported in AMA, or average minute audience units, as per the industry standard. The data derives from the BBM national meter service and the new country of origin/genre coding system. Because this coding has only been implemented since September 2003, any prior data could not be applied (thus the use of CBC research).

[1] The non-theatrical market includes the following: schools, universities and colleges, libraries, health institutions, and community associations.

All box office figures for theatrically released documentaries come from Telefilm Canada's data warehouse. Since January of 2001, Telefilm has been receiving weekly box office reports on a per title basis for all films screened in Canada supplied by the Motion Picture Theatre Associations of Canada (MPTAC) and stores these reports in a data warehouse. Each report contains box office information on almost all films featured in Canada every week. Telefilm Canada adds the coding to differentiate documentaries from fiction films and compiles the reports and retrieves the information using Cognos® software.

The most challenging aspect of this study was to examine how usage and consumption of Canadian documentaries by the non-theatrical sector could be measured. This sector as defined by the Canadian Independent Film and Video Fund includes the following markets: schools, universities and colleges, libraries, health institutions, community associations, business and industry. In the last decade, it has greatly evolved and expanded, crossing many areas and becoming multi-tiered so that it can be defined both in terms of the market and the product. Because of its scope and diversity, it makes measurement a challenge.

For the purposes of this study, as the NFB plays an important role in the non-theatrical sector, it was decided to focus on the markets for which some measurement was possible. Therefore, data is provided in the form of sales to the institutional market which is being tracked by the NFB on an annual basis. This provides an indicator of the opportunities for consumption of Canadian documentaries.

Attempts were also made to develop a methodology by which usage of Canadian documentaries in schools could be better measured. A written questionnaire was prepared to estimate number of viewers per screening. The small sample of the questionnaire resulted in a an incomplete picture of audience trends of this market and it is expected that the development of better tools to measure audiences to the non-theatrical market will be a priority in the future as this market continues to grow.

2. REACHING AUDIENCES

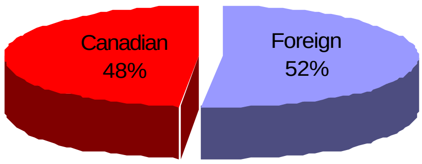
2.1. On Canadian Television

2.1.1 Overall Television Landscape

During the first 26 weeks of the 2003-2004 broadcast year (September 1, 2003 to February 28, 2004), Canadians accumulated over 14 billion viewing hours. This means that 14 billion hours of television viewing were *consumed* during this period; 4.5 billion hours for French-language programming and over 9 billion hours for English. Figure 1 shows that 49 percent of viewing hours went to Canadian programs while 51 percent of tuning went to foreign-produced programs.

Figure 1

Share of All TV Hours Tuned (First 26 weeks of 2003-2004 broadcast year)



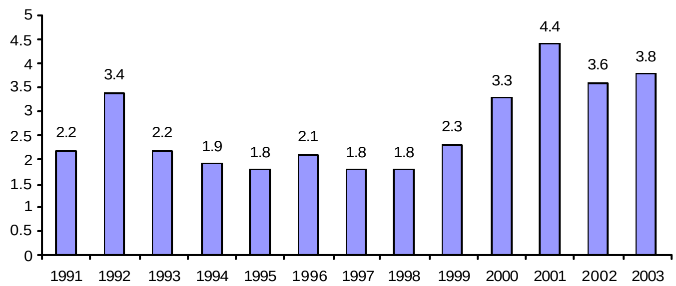
Source: BBM National Meter Service

2.1.2 Viewing Trends for Canadian Documentaries[2]

Statistics Canada compiles an annual television audience report. Applying BBM fall sweeps numbers and coding the programs for genres, Statistics Canada is usually about a year behind all other. Moreover, their data only applies four weeks (sweeps weeks) out of an entire year. During this measurement period, television networks tend to broadcast the highest ratings draws; documentary programming is usually given lower priority and aired at alternative times throughout the year. This results in a significant under- representation of documentary programming.

Figure 2

Canadian Documentaries' Share of All Canadian Viewing



Source: Statistics Canada

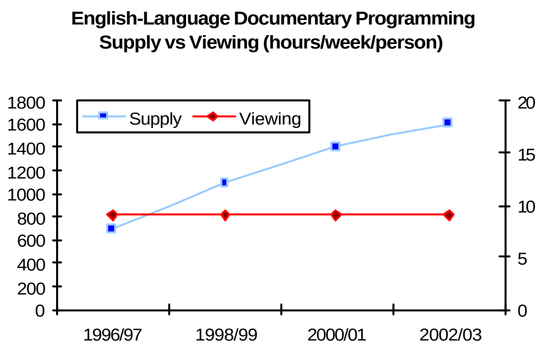
[2] Based on Statistics Canada and CBC Research.

The most recently released profile of Canadian documentaries, *Getting Real*, applied this data up until the 2002 season. Recently, Statistics Canada released a limited set of data for the 2003 season. Figure 2 (previous page) details the updated share of documentary programming over the last decade or so.

Since 1999 there has been a steady rise of interest in documentary programming on television, peaking during 2001. This possibly could reflect the renewed interest in informational and contextual programming following the September 11th terrorist attacks. Since 2001, interest in documentary programming fell somewhat, but did not indicate any signficant sign of waning.

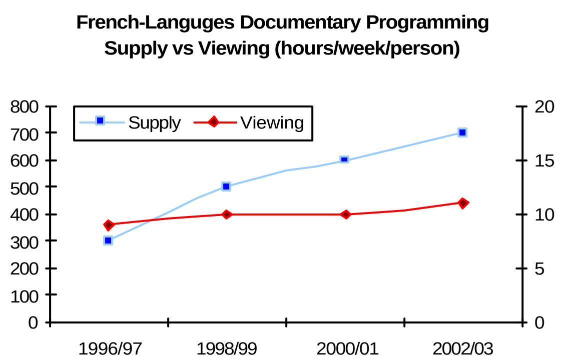
However, this Statistics Canada data, as previously mentioned, only covers four weeks during the fall. It was also just released (almost two years after the fact). CBC has provided a more reliable source of data that covers eight weeks of programming (larger sample) and is randomly chosen through the year (more representative). The following analysis utilise this CBC-provided data starting with Figure 3 below.

Figure 3



The English-language market has seen a steady increase in documentary programming on television, largely the result of new specialty services introduced in the past. In spite of a 129% increase in availability (from 700 to 1600 hours per week per person), the actual consumption of documentary programming did not grow between 1996 and 2003. Figure 3 shows that viewing remained steady at nine hours per week per viewer.

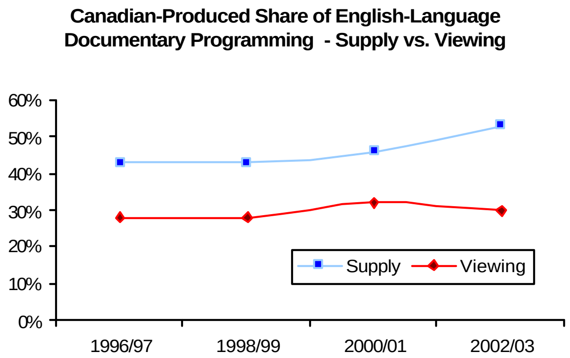
Figure 4



The French-language market revealed a similar, though less dramatic, trend (Figure 4, previous page). Supply increased steadily between 1996 and 2003, more than doubling during the period. Viewing trends did not keep pace, growing only at the rate of 22 percent or from 9 to 11 hours per week per person as is demonstrated in Figure 4.

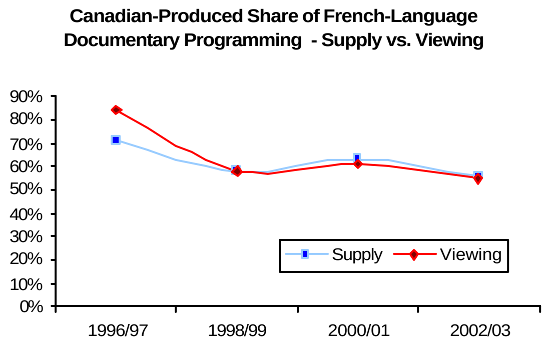
As can be seen in Figure 5, in 1996-1997, Canadian-made French-language documentaries enjoyed a market share of 71 percent among broadcast documentaries, while Canadian documentaries overall accounted for 84 percent of all documentary viewing. However, the following year, supply and viewing both dropped substantially, ceding share to foreign productions. This trend continued until 2003.

Figure 5



Source: CBC Research

Figure 6



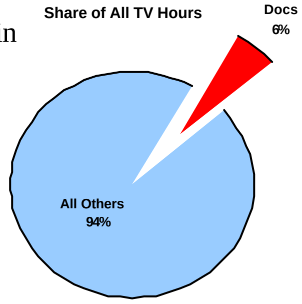
Source: CBC Research

2.1.3 Performance of Canadian Documentaries in 2003-2004[3]

Overall

Documentaries hold a relatively small share of the viewing pie overall in Canada, accounting for 784 million – or six percent – of viewing hours in 2003-2004. (Figure 7)

Figure 7

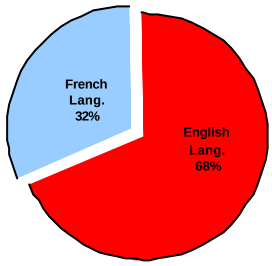


The Two Language Markets

Of the 784 million hours tuned to documentary programming, 68 percent (533 million hours) can be attributed to English-language documentary programming with 32 percent (251 million hours) to French-language documentaries (Figure 8). The two language markets show similar levels of television documentary consumption.

English television documentaries represent about five percent of the English-language market while French-language documentaries account for six percent of the French market, averaging out to six percent overall.

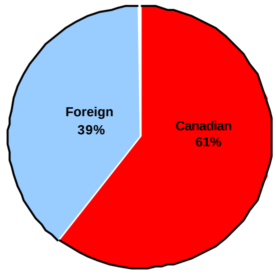
Figure 8



Country of Origin of Documentary Programming

Overall, Canadians may watch slightly more foreign-produced programming, but they actually prefer home-grown documentaries to foreign ones. More than two-thirds of all tuning to documentary programming is to indigenous products. Foreign- produced documentaries accounted for 39 percent of all tuning. French-language viewers are more avid consumers of Canadian-made productions, accounting for more than 70 percent of Canadian documentary viewing, compared to 56 per cent in English. (Figure 9)

Figure 9



Source: BBM National Meter, Sept 2003-Feb 2004

[3] *BBM National Meter data provided by the CTF.*

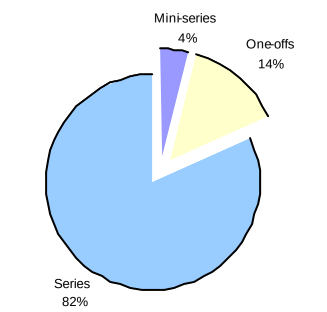
Performance of Different Types of Documentaries

Documentaries come in more than one form. Some are on-going series that play from season to season, such as *The Sea Hunters* or *Disaster Detectives*. There are also mini-series- type documentaries, such as CBC's *Human Cargo* that consist of more than one episode, but are not intended to continue beyond a set amount of episodes. All other documentaries are single productions, otherwise known as 'one-offs' that consist of only one complete episode, such as *City of Ruins* also on the CBC.

Because of their sheer volume, on-going series carry the bulk of viewed television hours to documentaries. As is shown in Figure 10, the series category represents 82 percent of all viewing for Canadian documentary programming. One-off documentaries account for 14 percent and mini-series only account for 4 percent.

Figure 10

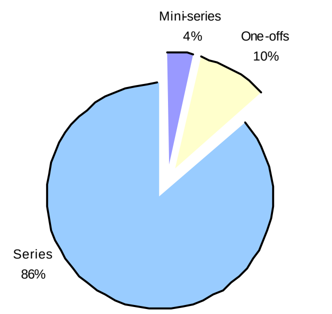
Sub-Format Share of All Viewing to Canadian Documentary Programming



The distribution of sub-formats among viewing is due in no small part to the *availability* of programming. As seen in figure 11, the series sub-format accounts for 86 percent of all available television documentary programming. In figure 12, we note that one-offs account for 10 percent of available programming and mini-series represent 4 percent.

Figure 11

Sub-Format Share of All Available Canadian Documentary Programming

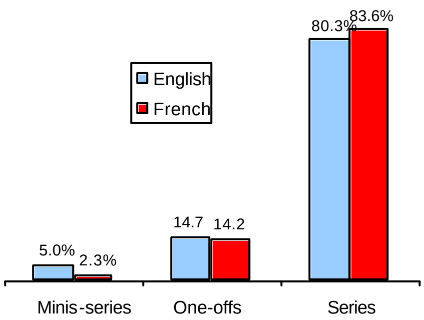


Overall, the on-going series category under-performs slightly, achieving an 82 percent share of viewing with 86 percent of the available programming. One-offs showed a slightly above- average efficiency and mini-series balance perfectly between 'supply and demand.

Broken down by language, the distributions are remarkably similar. The English- language documentary programming over represents slightly in the miniseries and one-off categories where as the French-language documentaries over-represent somewhat in the series category. (Figure 12)

Figure 12

Sub-Format Share of TV Viewing by Language



Overall, this data indicates a relative balance between 'supply' and 'consumption' of documentary programming by sub-format. In other words, Canadians appear to find the various documentary sub-formats equally appealing.

Although the series sub-format holds the majority of the *cumulative* viewing hours, on a single airing basis, one-off type programming has proven to attract much larger *single-viewing* audience groups then an individual episode of any series would.

Notable Programs

The BBM/Nielsen designation for 'documentary' encompasses programs such as the news magazine *W5* and even the very successful *Star Académie*. In Figures 13 and 14, we note that only documentaries as defined by the CTF were considered for this analysis. The most successful French-language documentary was also the most successful documentary overall in Canada. TVA's *Celine Dion: 1 fille & 4 types* recorded an impressive 1.5 million viewers (average minute audience). (Figures 13 and 14) Close behind it (and also on TVA), *Wilfred Le Bouthillier,* ranked second with an average minute audience of 842,100.

In Figure 14, we observe that the American-produced *Born Rich*, enjoyed first place as the most successful English-language documentary of the first 26 weeks of the 2003-2004 season. It aired on CTV, attracting a sizeable audience of 1.3 million viewers (average minute audience). Second place went to the CBC production *City in Ruins,* which attracted an average audience of 964,500. (Figure 14) This Canadian production was intended as a complimentary piece to the exceptionally successful mini-series, *Shattered City*, about the famous Halifax explosion during WWI.

Figure 13

French-Language Doc Programming - Sept 2003 to Feb 2004

Program	Network	Country of Origin	Ind.2+ AMA (000)
Céline Dion: 1 fille & 4 types	TVA	Canada	1545.1
Wilfred Le Bouthillier	TVA	Canada	842.1
7 mensonges de George Bush	TVA	Other	805.5
À hauteur d'homme	SRC	Canada	762.6
SP: Marc Dupré	TVA	Canada	650.4
SP: M-Chantal Toupin	TQS	Canada	641.0
Don Juan - en coulisses	TVA	Canada	634.9
Top 10: Arts martiaux	TVA	Other	431.0
Filière canadienne, La	TVA	Canada	379.1
Chantez-nous l'amour les gars	TVA	Canada	352.3

Figure 14

English-Language Doc Programming - Sept 2003 to Feb 2004

Program	Network	Country of Origin	Ind.2+ AMA (000)
Born Rich	CTV	Foreign	1,263.1
City Of Ruins	CBC	Canada	964.5
Behind The Lens - Prime Suspecte IV, Pt. 2	CBC	Canada	791.4
Documentaries	CTV	Canada	733.6
Asteroid! The Doomsday Rock	CBC	Canada	727.3
Canadian Experience: Talking Canadian	CBC	Canada	718.9
Sex,Drugs,Middle Age	CBC	Canada	691.9
Men Of The Deeps	CTV	Canada	642.3
Behind The Lens - Human Cargo	CBC	Canada	605.3
How To Be A Prince	CBC	Foreign	587.9

Some programs that are assembled like a series can also be viewed as a collection of independent documentaries. One of the best examples of this is CBC's *Life and Times*. Although this program is technically a series, each episode can be examined separately and analysed. For example, the first 26 weeks of the 2003-2004 season had about 21 airings of this program. The number one performer (based on average minute audience) was the story on former Prime Minister Jean Chretien. It had an audience of 557,400 viewers.The performance of these programs depends not just on the marquee value of the subject's name, but also on scheduling and production among many other things. Figure 15 illustrates the ranking of CBC's *Life and Times*.

Figure 15

Program	Channel	Start	End	AMA (000)
Life and Times Jean Chretien	CBC	20:00:00	22:00:00	557.4
Life and Times Alex Trebek	CBC	19:00:00	20:00:00	463.3
Life and Times Randy Bachman	CBC	19:00:00	20:00:00	419.6
Life and Times Wayne & Shuster	CBC	19:00:00	20:00:00	398.3
Life and Times Sarah McLachlan	CBC	19:00:00	20:00:00	389.9
Life and Times Steve Smith	CBC	19:00:00	20:00:00	325.5
Life and Times Paul Anka	CBC	19:00:00	20:00:00	312.2
Life and Times Carl Brewer	CBC	19:00:00	20:00:00	310.8
Life and Times Trudeau	CBC	20:00:00	22:00:00	301.2
Life and Times Mel Lastman	CBC	19:00:00	20:00:00	289.0
Life and Times Jean Pare	CBC	19:00:00	20:00:00	285.3
Life and Times Elizabeth Manley	CBC	19:00:00	20:00:00	278.0
Life and Times Jacques Parizeau	CBC	19:00:00	20:00:00	251.9
Life and Times Rich Little	CBC	17:00:00	18:00:00	229.3
Life and Times Nellie Cournoryea	CBC	19:00:00	20:00:00	214.8
Life and Times Lee Cohen	CBC	19:00:00	20:00:00	211.7
Life and Times Arthur Erikson	CBC	19:00:00	20:00:00	211.5
Life and Times Bill Reid	CBC	19:00:00	20:00:00	192.6
Life and Times Oscar Peterson	CBC	19:00:00	20:00:00	176.8
Life and Times Joni Mitchel	CBC	19:00:00	20:00:00	175.7
Life and Times Christopher Plummer	CBC	19:00:00	20:00:00	174.7
Life and Times Joni Mitchell	CBC	19:00:00	20:00:00	158.0

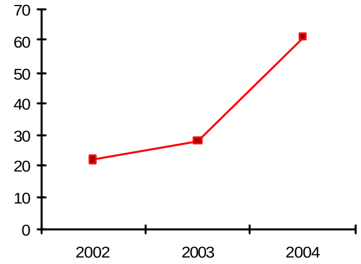
Some of the programs in Figure 15 were repeated from previous seasons, such as the Pierre Trudeau episode. Despite this, the *Life and Times* ranking should by no means be interpreted as a national political compass especially considering that Alex Trebek, a game show host, received a higher audience then many notable politicians.

2.2 AT THE BOX OFFICE

2.2.1. Performance of Feature-Length Documentaries: 2002-2004

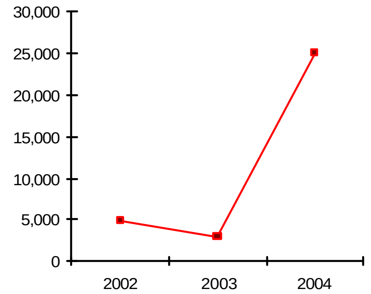
One hundred and eleven documentaries have graced Canada's cinema screens since 2002. More feature documentaries played on big screens in Canada in 2004 than in the previous two years combined. In 2002, documentaries represented only six percent of all films exhibited, growing to 15 percent in 2004. Aggregated over three years, documentaries represented eight percent of all films exhibited in Canada. (see figure 16)

Figure 16
Number of Documentary Films Released



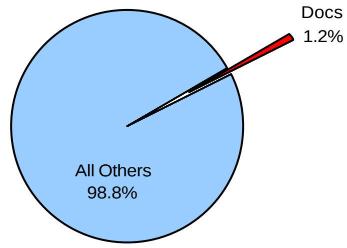
Box office also grew considerably for documentaries from 2002 to 2004. In 2002, documentary films took in $4.7 million or less than one percent of the market's overall take, and dropped even lower in 2003. 2004 saw a substantial reverse in the trend, shooting to a total take of $25 million: an incredible 428% growth. (see figure 17)

Figure 17
Documentary Box Office ($000s)



In 2002, documentaries accounted for less than a percent of the total feature film market. In 2004, documentary films grew to 1.2 percent of the overall box office in Canada. This represents over $25 million. (see figure 18)

Figure 18
Share of Total Box Office, 2004



As can be seen in Figure 19, the 'shelf life' of documentaries is also growing steadily. In 2002, the average documentary had a three-week theatrical run. This grew to an average eight -week run in 2004. Fiction films suffered a reverse trend.

Figure 19
Average Feature Film Shelf Life (in weeks)

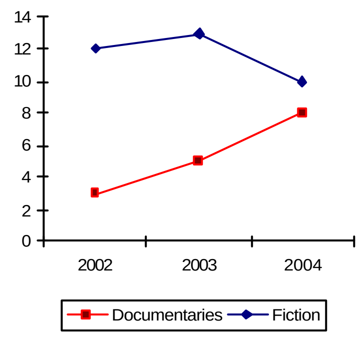
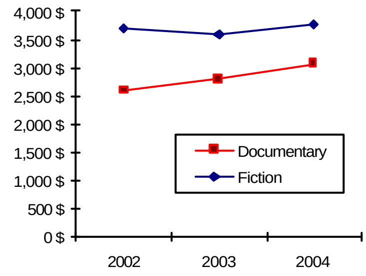


Figure 20

Average Box Office Per Screen



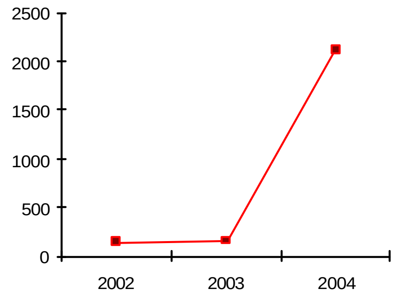
Fiction films are released on an average of over 60 screens per film. Documentaries do not normally exceed an average of five screens per film. The exposure for documentaries is trending slightly upwards, and despite the small scale of their releases, their average box office per screen is on par with fiction films. (Figure 20)

Canadian Documentaries

As is shown in Figure 21, following from the overall performance of documentary films at the box office, Canadian productions had an extremely lucrative year in 2004, pulling in well over $ 2 million. This is a far cry from the mere $145,000 they brought in two years earlier.

Figure 21

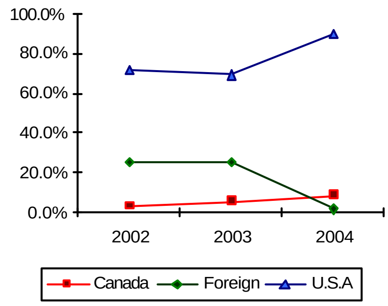
Canadian Documentary Box Office ($000s)



The Canadian share of the documentary market similarly showed strong growth. As is demonstrated in Figure 22, the Canadian share of the documentary market grew from three percent to more than eight percent between 2002 and 2004. This was not as steep as the growth in actual dollars, as the market itself grew substantially in 2004.

Figure 22

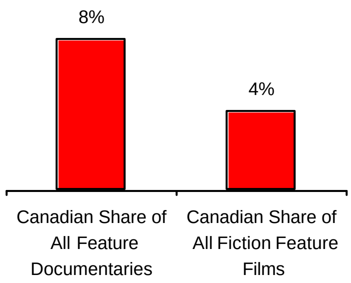
Canadian Share of Total Documentary Box Office



As is shown in figure 23, Canadian documentaries are so successful they actually perform better than fiction films in their respective genre class. Canadian-produced documentaries account for eight percent of the total documentary box office in 2004, whereas Canadian fiction films only account for about four percent of the overall fiction market.

Figure 23

Canadian Share By Genre -2004



2.2.2. Spotlight on 2004

2004 saw a significant rise in box office for feature documentaries, beginning with Michael Moore's popular and controversial release *Fahrenheit 9/11.* Largely considered to be the best performing documentary of all time, *Fahrenheit 9/11* generated produced box office normally associated with feature fiction. By the end of 2004, it had raked in over 18 million dollars in Canada alone. This film was so big that it alone accounted for 40 percent of all Canadian dollars spent on feature documentaries (on the big screen) in 2004. Michael Moore's *Bowling for Columbine*, despite being released two years previously, still managed to make $5 million from big screens in 2004. It earned the highest and second highest documentary box office in the last three years (and probably historically as well).

Super Size Me was another precedent setting documentary released last year, pulling in over $2 million dollars at the box office, and ranking as the second most popular documentary in Canada.

Canada had its own hit documentaries in 2004, breaking records at home. The award-winning film *The Corporation* performed extremely well, taking in $1.5 million. It ranked as the number one Canadian documentary, and the second most successful Canadian English-language film overall (after *Resident Evil: Apocalypse*).

Other Canadian documentaries were also notable. The French-language *Ce qu'il reste de nous* was the second highest grossing documentary last year. It finished the year with over $300,000 in box office receipts and was still in theatres after 39 weeks. *The Take* was the only other documentary last year with any substantial box office results, however it did not break 100,000 dollars.

Figure 24

Top 20 Documentaries in Canada 2004

Rank	Title	French B.O.	English B.O.	Total B.O.	Country of Origin	Released in
1	FAHRENHEIT 9/11	$2,046,451	$16,196,538	$18,242,989	USA	2004
2	BOWLING FOR COLUMBINE	$414,936	$4,829,936	$5,244,872	USA	2002
3	SUPER SIZE ME	$148,326	$1,916,150	$2,064,476	USA	2004
4	THE CORPORATION	$138,838	$1,372,893	$1,511,731	Canada	2004
5	NASCAR:THE IMAX EXPERIENCE/LSF	$48,253	$1,177,372	$1,225,625	USA	2004
6	LE PEUPLE MIGRATEUR	$1,157,521	$25,730	$1,183,251	France	2002
7	CE QU'IL RESTE DE NOUS	$272,694	$35,821	$308,515	Quebec	2004
8	THE FOG OF WAR	$25,621	$246,168	$271,789	USA	2004
9	FESTIVAL EXPRESS	$0	$196,287	$196,287	UK-Netherlands	2004
10	CONTROL ROOM	$0	$191,693	$191,693	USA	2004
11	METALLICA: SOME KIND OF...	$30,827	$152,206	$183,033	USA	2004
12	THE STORY OF THE WEEPING CAMEL	$0	$109,325	$109,325	Germany-Mongolia	2004
13	11'09"01	$70,212	$31,610	$101,822	UK-France	2003
14	RIDING GIANTS	$0	$95,656	$95,656	USA-France	2004
15	THE TAKE	$11,356	$79,754	$91,110	Canada	2004
16	STEP INTO LIQUID	$0	$76,475	$76,475	USA	2003
17	TIBET: CRY OF THE SNOW LION	$0	$68,574	$68,574	USA	2004
18	ARBRES	$58,191	$0	$58,191	France-Swizerland	2004
19	ROGER TOUPIN, EPICIER VARIETE	$50,123	$0	$50,123	Quebec	2003
20	RIVERS AND TIDES	$0	$33,107	$33,107	Germany	2003

Note: The $0 amounts that appear under the English- or French-language box office columns is explained by the fact that the film was not released in that language-market.

2.2.3 At Selected Festivals and Other Venues

In the report *Getting Real, Volume 2, 2004*, it was noted that the movie success of documentaries in 2003 had spilled over into the signature film festivals. The Report noted that the 2004 edition of the Sundance Festival had, for the first time in its history, opened up with the screening of a documentary.

Festival audience attendance for documentaries, both Canadian and international, continued to be strong in 2004. Figure 25 captures a partial picture of audience attendance at screenings of documentaries for the Vancouver International Film Festival (VIFF), Toronto's Hot Docs Festival and Rencontres internationals du documentarire canadien et interntationaux de Montreal (RIDM) Festivals typically play a key role in helping to raise the profile of a film with audiences. It should be noted that the Film Circuit[4] provides another venue for the screening of Canadian documentaries to Canadians as is shown in Figure 25.

Figure 25

Attendance at Selected Festivals
2004

Festival	Canadian Documentaries		International Documentaries		Total	
	Screenings	Audiences	Screenings	Audiences	Screenings	Audiences
VIFF	17	8,058	74	34,568	91	42,626
Hot Docs	35	15,000	70	22,000	105	37,000
RIDM	n/a	n/a	n/a	n/a	n/a	11,000
Film Circuit	90	n/a	179	n/a	279	n/a
Total	52	23,058	144	56,568	475	90,626
Average audiences per screening*		443.4		392.8		406.3

**only reflects items with full data*

[4] The Film Circuit is a division of the Toronto International Film Festivals Group is an association of film groups that screen films in over 170 communities throughout Canada.

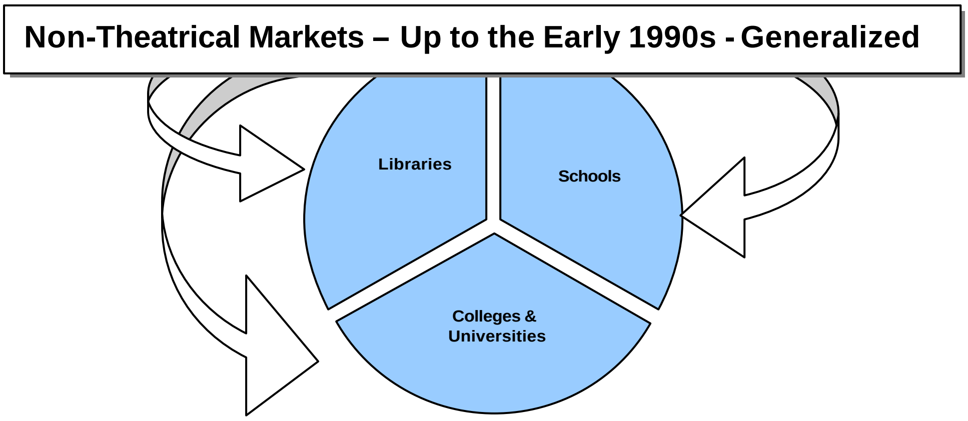
2.3 <u>In the Non-Theatrical Sector</u>

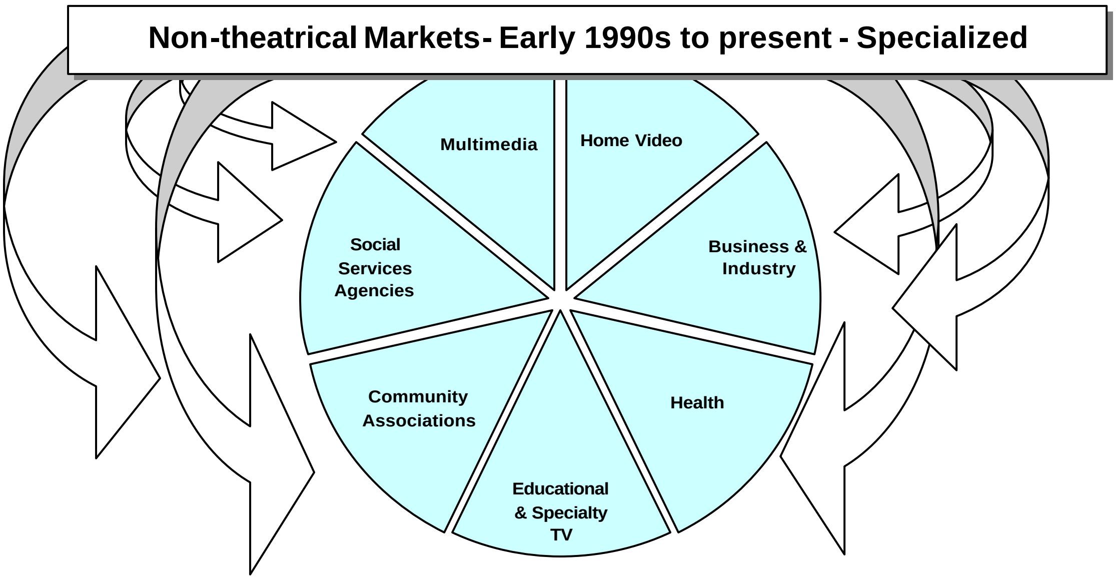
2.3.1. The Diversity and Reach of the Non-Theatrical Sector

The non-theatrical sector includes the following markets: schools, universities and colleges, libraries, health institutions, community associations, business and industry. Canadian audiences are being reached in educational institutions, the workplace and the home.

According to the Canadian Independent Film and Video Fund, this market has been in expansion since the early 1990s to include educational and specialty television, and home video. In the late 1990s, this market expanded to include new media. In 1996-1997, for which data is available, total production budgets totaled approximately $224 million.

The following charts illustrate the diversity and reach of the non-theatrical sector*.





**For demonstration only, pie charts are not numerically representative*

According to the Canadian Independent Film and Video Fund, every non-theatrical product will be distributed in at least one of these three markets:

Education And Library Markets

Schools	Universities & Colleges	Libraries
There are 688 school boards and 15,405 schools across Canada. Clients for the products sold to schools include students and teachers. Revenues from sales of Canadian educational materials (schools, colleges and universities) in 1995 were: $5,987,858. Usage: each video bought has a life of five years. Each video is seen by 30 to 50 people on average, per week. Over the course of its life, each video will be seen by 12,000 students and teachers.	There are 220 colleges and universities in Canada. Clients for the products are students and teachers. Example: In 1994-95, Centennial College in Toronto recorded 14,883 loans of videotapes; Georgian College in Barrie recorded 12,536 loans of videotapes; Conestoga College near Stratford recorded 18,345 loans. Usage: each screening of a video includes an average of 20 people.	There are 3,000 libraries in Canada The general public constitutes the client base of public libraries. Example of library holdings: The Toronto Metropolitan Reference Library has an audiovisual collection of 20,000 titles On average, each rental of a video involves 1.2 screenings with an average of 11 people per screening.

2.3.2. Audiences Reached by the National Film Board (NFB)

Libraries

Based on the data published in the National Film Board's annual reports, it is possible to estimate the number of loans and rentals of Canadian documentary films and videocassettes done by the NFB, or through its network of library partners (totaling 49 in 2003-2004). It should be noted that each library partner offers its community a selection of NFB titles that correspond to its mandate and limitations (storage space); the selection of NFB titles therefore varies from one library to the next. As well, each library manages its collection according to its own system, which means that the circulation of titles on a yearly basis is only an estimate (each library keeps circulation statistics based on its own fiscal year and based on its own loan or rental system).

Figure 26 shows the number of loans and rentals for the past five years. This number includes all the NFB productions available in these libraries or at the NFB, regardless of their year of production or genre. Over the past five years, there were more than 1 million loans and rentals.

Figure 26
NFB
Films or Videocassettes
Loans and Rentals

	1999-2000	2000-2001	2001-2002	2002-2003	2003-2004	Total
Total	203,723	213,632	223,042	227,749	211,331	1,079,477
Documentaries (estimate)	183,351	192,269	200,738	204,974	190,198	971,529

Sources : NFB Annual reports

Approximately 90% per cent of these were for documentaries. Based on this percentage, the accumulated total for the reference period is over 970,000 loans and rentals of Canadian documentaries distributed by the NFB.

The Educational Milieu

Figure 27
Films and Video Cassettes Sold by NFB

	1999-2000	2000-2001	2001-2002	2002-2003	2003-2004	Total
Total	89,714	94,522	97,154	76,291	76,394	434,075
Documentaries (estimate)	80,743	85,070	87,439	68,662	68,755	390,669

Sources : NFB Annual reports

Figure 27 shows the number of films and videocassettes sold to the educational milieu. The films and videocassettes sold have two main uses: i) individual consultation by students and teachers, and ii) classroom use or other forms of group viewing. The decrease in units sold from 2001-2002 is explained by the following factors: the enormous success of the film, *The Rocket*; changes in the NFB's pricing policies for the institutional sector; and the fact that while the NFB's revenues from the educational market have remained stable, schools have not had an increase in their acquisition budgets and have, therefore reduced the number of units purchased.

In order to arrive at a better understanding of the scope of viewing undertaken in schools, colleges and universities, by attempting to measure the average number of students and teachers that view Canadian documentaries, a questionnaire was prepared and sent to 25 learning institutions throughout Canada that represent regular clients of the NFB. They were asked to identify the total number of NFB documentaries that they each have, and to establish the average number of times these documentaries are loaned or taken out on a yearly basis. As well, participants were asked to break down these loans according to individual or group viewing, and, in the second case, estimate the average number of people that are part of the viewing groups.

The goal was to establish a general formula to estimate the average number of viewers reached yearly for each film or videocassette sold in the educational milieu. This research was inconclusive as the results obtained were too limited and fragmented to establish a valid and representative formula. The learning institutions contacted, for example, do not track the numbers viewing for classroom purposes.

In light of the importance of this market in the use of Canadian documentaries, the need to undertake a comprehensive study to better understand the consumption and use of Canadian documentaries in the educational milieu should be a priority.

Community Outreach Screenings

In order to forge lasting and interesting ties with different stakeholders, groups, community organizations, the NFB offers outreach development by screening recent releases from its collection, often accompanied by discussions with the filmmaker. These are either one-time or can be recurrent regional events across the country. Furthermore, the NFB's Montreal Centre and the NFB's Mediatheque in Toronto are key spaces for screenings of documentaries in the cinemas of both centers. The number of audiences reached are provided in Figure 28.

Figure 28

Community Outreach for Documentaries 2004-2005

	Screenings	Audiences
Outreach Screenings	532	66,075
NFB Montreal Centre	n/a	20,334
NFB Mediateque-Toronto	n/a	18,347
Total		104,756

Sources : NFB

3. SUMMARY OBSERVATIONS

There are a number of summary observations that can be drawn from the research undertaken in this report, which speak to the appeal of Canadian documentaries for Canadian audiences.

On Canadian Television

Our analysis of the Canadian television shows that despite a steady growth in the supply of documentary programming on television, largely as a result of new specialty services introduced in the past, actual consumption of documentary programming for both language markets did not grow between 1996 and 2003. This may in fact be explained by the larger transformations taking place on Canadian television, such as fragmentation of television viewing and the impact of new technologies such as personal video recorders on the habits of audiences. There is no doubt that Canadian television is a big place with a constant stream of programming 24 hours a day, on hundreds of individual signals.

At the same time, our analysis shows that while Canadians may watch slightly more foreign-produced television programming as a whole, *they actually prefer home-grown documentaries to foreign ones. More than two-thirds of all tuning to documentary programming is to indigenous products*. In terms of type of documentary, the majority of documentary programming aired on Canadian television is in the form of on-going series, which unsurprisingly also represented the bulk of the viewing. However, this does not indicate a preference for this sub-format, as the analysis shows the availability of each sub-format balances almost identically with the consumption. This indicates a balanced interest in all documentary sub-formats as per their performance on television.

At the Box Office

Our analysis of the performance of feature-length Canadian documentaries shows that 2004 saw a significant rise in box office, both foreign and Canadian. In fact, more feature documentaries were played on big screens in Canada in 2004 than in the previous two years combined.

Largely considered to be the best performing documentary of all time, *Fahrenheit 9/11* produced a box office normally associated with feature fiction. The award-winning film *The Corporation* performed extremely well, ranking as the number one Canadian documentary and the second most successful Canadian English-language film overall.

There is little doubt that since 2002, there continues to be increased movie theatre attendance for documentary films. Worth noting is that despite the small scale of their releases, their average box office per screen is on par with fiction films. In 2004, Canadian documentaries performed better than Canadian fiction films as a genre when compared to foreign competition. Box office performance is significant in that a successful theatrical release has proven time and again to be extremely valuable for exhibitors, distributors and producers alike. Growing festival attendance for feature documentaries is another indicator although less significant of the interest by audiences for documentary films.

In the Non-Theatrical Sector

The range and diversity of the audiences reached in the non-theatrical sector make measurement of usage and consumption of Canadian documentaries a challenge. This is illustrated by the changes that have taken place in the last 10 years in the expanding definition of the non-theatrical sector. What is clear is that many and diverse audiences are being reached at home, in the workplace and in the educational milieu. As dramatic changes continue to take place in the ways in which Canadians consume audiovisual products, it will be important to look upon these products including Canadian documentaries as a medium that can appeal to many different and specialized audiences on a long-term horizon.