



Credit: Moving Docs

DOCUMENTARY FILMS AUDIENCES IN EUROPE

FINDINGS FROM THE MOVING DOCS SURVEY

HUW D JONES
July 2020

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PROJECT TEAM

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<https://www.southampton.ac.uk/film/about/staff/hdj1e17.page>

Moving Docs

www.movingdocs.org

Moving Docs is a partnership founded for the pan European release of documentaries that ran from 2014-2019 and was supported by Creative Europe. It created innovative outreach strategies and provided opportunities for urban and rural European audiences to enjoy regular screenings of documentary films through a variety of platforms.



Moving Docs partners participating in the survey:

- CineDocs (Greece): <https://www.cinedoc.gr/>
- DocLounge (Sweden): <https://www.doclounge.se/>
- DocsBarcelona (Spain): <https://docsbarcelona.com/en/>
- IceDocs (Iceland): <https://icedocs.is/>
- Rise & Shine (Germany): <https://riseandshine-cinema.de/>

Additional partners contributing to the survey:

- Thessaloniki Film Festival
- Europa Cinemas
- Panteion University



European Documentary Network (EDN)

<http://edn.network/>

European Documentary Network is a global network for professionals working with documentary film and TV. EDN started in September 1996 as a documentary organisation for filmmakers, producers, production companies, distributors, associations, film institutions & boards, universities, festivals, broadcasters and film & television agencies.



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Dr Huw D Jones (University of Southampton, UK). July 2020.



Credit: Moving Docs

FOREWORD

In 2019, Moving Docs – a European partnership for the joint distribution of documentaries across Europe – ran an online survey of documentary audiences across Europe with the support of Creative Europe.

Written by Dr Huw D Jones (University of Southampton, UK) and published in July 2020, the survey aimed to find out who watches documentaries and where, what kind of impact do they have, and how can we encourage people to watch more documentaries?

The survey was carried out by Doc Lounge Sweden, Docs Barcelona Spain, IceDocs: Iceland Documentary Film Festival; Rise and Shine Cinema Berlin, and CineDoc Greece. Additional partners included the Thessaloniki Film Festival, Europa Cinemas and Panteion University.

Recent events across the world make the findings of the Moving Docs Survey especially relevant, as educating ourselves about important issues has become ever more critical.

We discover that ‘younger people are the most likely to be affected by the experience of watching documentaries, particularly in terms of changing their lifestyle, behaviour or being encouraged to take action.’ Furthermore, 97% of the survey respondents claim they have been affected by documentaries, regardless of their nationality, age, gender, place of residence, education levels, income groups and occupation. Over 60% say that a documentary has improved their understanding of the world or has changed their knowledge of an issue, while 50% say documentaries have encouraged them to find out about a particular issue.

If this is true, documentaries can become one of the most democratic, revolutionary and affordable tools with which to inform and educate young people across the world.

However, the report’s findings discover that young people are not watching documentaries as much as middle-aged and older people and suggests that we need to change the way we make and distribute documentaries, as 16-24-year olds are the least likely to watch this art form.



Credit: Moving Docs

This age group is six times more likely to watch fiction films in cinemas than documentaries, something that means that the type of documentaries shown in cinemas are putting young people off (nearly half of all respondents said they would watch more documentaries in cinemas if they concerned topics that interested them).

Finally, the report finds that VOD is the most popular platform for documentaries, followed by TV. Film festivals, cinemas and special event screenings are only the third, fourth and fifth most watched platforms.

In 2019, Moving Docs was coordinated by EDN and its screening partners were spread over 20 countries and 31 organisations including Against Gravity (Poland), Outlook Filmsales (Austria), Berlin Documentary Film Club, DOK.fest Munich, Rise and Shine Cinema (Germany), CineDoc (Greece), Dalton Distribution (Belgium), Demiurg (Slovenia), Doc/it (Italy), Doc Lounge (Denmark, Finland, Norway, Sweden), DocsBarcelona (Spain), Five Stars Film Distribution (Serbia), Lemosos International Documentary Festival (Cyprus), MakeDox (N. Macedonia), One World (Czech Republic), Restart (Croatia), Take One Action (Scotland), Media partners: ARTE GEIE, CineEuropa.

It is hoped that this report will help Moving Docs’ partners, documentary distributors and festival programmers learn more about their audiences and offer practical advice about how to better reach and engage more diverse ages and interest groups.

Moving Docs

KEY FINDINGS

In late 2019, Moving Docs ran an online survey of documentary film viewers within its network. The survey had almost 1,500 respondents. Most were women, aged 25-54, graduates, employed, earning over €20,000 per year, urban dwellers, and media professionals or education, social services or healthcare workers. A high proportion lived in Spain, Greece or Iceland. Though not representative of the entire European population, this convenience sample provides some key insights into the characteristics and behaviour of documentary film audiences within the Moving Docs network.

Who watches documentary films?

- Moving Docs Survey respondents are avid documentary film viewers – almost three-quarters said they watched six or more documentaries per year (three times more than the average EU citizen).
- 34-54-year olds were the most likely to regularly watch documentaries, while 16-24-year olds were the least likely.
- Respondents (particularly young people) still watch more fiction films than documentaries.

Where are documentaries viewed?

- Video-on-demand (VOD) is the most popular platform for watching documentary films, followed by TV – about half of respondents often stream or download six documentaries or more per year.
- Just under a third often watch documentaries at film festivals, while a fifth often do so in cinemas.
- Only one in ten often watch documentary films on DVD, the least popular platform.
- Place of residence, age and education are key factors in where respondents watch documentaries – e.g. older respondents were more likely to often watch documentaries in cinemas than young people.
- Respondents were three times more likely to watch fiction films in cinemas than documentaries – even higher for young people and non-graduates.

Why watch documentaries?

- The film's subject matter is by far the most important factor likely to influence whether respondents pay to

watch documentary films – 95% of respondents selected this option.

- Other key factors – selected by more than a third of respondents – were the film's director, its relevance to them personally, and the film's reviews, which were particularly key for young people.
- The least important factors were whether the documentary film had been recommended by friends/family, the cost of watching the film, the places and languages featured in the film, and whether the film is the latest release.
- Yet certain other factors can make a difference for particular titles – awards, trailer/poster and the film's look/sound were key to the appeal of *Honeyland* (2019), while topicality was key to *Push* (2019) and *Citizen Europe* (2019).
- Of the three films included in the survey, *Honeyland* was the most popular (63% said they watch this film in the cinema or on-demand), followed by *Push* (61%) and *Citizen Europe* (45%)
- None of these films particularly appealed to young people, non-graduates or non-urban dwellers – though a relatively high proportion of 16-24-year olds were interested in *Citizen Europe*, suggesting the film could be marketed to young people through emphasising its relevance and topicality.

What effect do documentaries have?

- Almost all respondents (97%) had been affected by the experience of watching documentaries in some way – with over three-quarters saying they had seen a documentary that had emotionally affected them.
- Seven out of ten had seen a documentary film that had improved their understanding of a particular issue, while six out of ten had seen one that had changed the way they think about certain issues.
- Over half of all respondents had seen a documentary that had encouraged them to find out about a particular issue, while a slightly smaller proportion had seen one which had encouraged them to talk to others about a particular issue.
- However, more proactive responses were less common – less than a quarter of respondents had seen a documentary which had encouraged them to change their lifestyle or behaviour or take action.

- Younger people were the most likely to be affected by the experience of watching documentaries, particularly in terms of encouraging them to change their lifestyle or behaviour or take action.
- Other social demographic factors (e.g. gender, education, income) had little or no influence on how respondents were affected by the experience of watching documentary films.
- Respondents who often watched documentaries in cinemas or festivals were more likely than those who only regularly watch documentaries on home platforms to say that they had learnt about a country, place or section of society or been encouraged to change their lifestyle or behaviour by the experience of watching documentaries.

Which documentaries have had the most impact?

- Three-quarters of respondents could name a documentary that had affected them in some way – most often emotionally
- Respondents named a huge diversity of documentary films (525 titles in total), suggesting that the way people respond to documentaries is very personal and difficult to predict.
- Yet some broad trends could be identified, e.g. most named a documentary produced in another European country in the last 10 years.
- The most frequently mentioned titles often focused on extraordinary individuals (e.g. *The Salt of the Earth*), the problems of modern societies (e.g. *The Swedish Theory of Love*), the exploitation of animals (e.g. *Earthlings*), the legacy of war or genocide (e.g. *The Act of Killing*), strong women (e.g. *In Search...*) or artists or musicians (e.g. *Searching for Sugarman*).
- Though many of the most frequently mentioned titles were major award winners, box office hits or the work of well-known auteurs, some had none of these characteristics but instead benefited from being promoted by Moving Docs or its partners (e.g. *Swedish Theory of Love*, *Push*, *In Search...*).
- There were almost 100 documentaries which respondents (often young people and non-graduates) said had encouraged them to change their lifestyle or behaviour – most dealt with exploitation of animals

or the human and environmental impact of food and consumerism in general (e.g. *Food, Inc.*).

- A few films (often local stories made by local filmmakers) had inspired respondents to become filmmakers themselves (e.g. *Mourning Rock*)

What would encourage more documentary viewing?

- Nearly half of all respondents said they would watch more documentaries in cinemas if there were more on topics that interested them – particularly for young people and non-graduates.
- Having more documentaries available in local cinemas and more information or publicity about the latest releases were also key factors – particularly for rural dwellers and young people.
- Cheaper cinema tickets were a key concern for unemployed/retired people.
- But most survey respondents did not think more special event screenings, more free time or more local cinema venues would necessarily encourage them to watch more documentaries in cinemas.

Conclusions / recommendations:

- Documentaries are needed now more than ever in order to help us navigate not only the post-Coronavirus world, but also all the other global challenges we face in the twenty-first century, from economic instability to climate change.
- Yet certain groups (e.g. young people, non-graduates and non-urban dwellers) are less likely to watch documentaries, even though they have the most to gain from this viewing experience.
- It is therefore important to ensure:
 - There are more documentaries on topics that interest 16-24-year olds and non-graduates;
 - There are more documentaries available in cinemas in suburbs, towns and villages; and
 - Young people have more information or publicity about the latest documentary film releases.
- Other strategies like staging more special event screenings are only likely to benefit groups (e.g. media professionals and urban dwellers) who already often watch documentaries in cinemas.

INTRODUCTION

Documentaries are one of the most powerful art-forms. Perhaps more than any other type of film, they can teach us about people and places, issues and events, ideas and aesthetics; they can transform our views, lifestyle and behaviour, and even inspire us to take action. As John Grierson, the founder of the British documentary movement, wrote: “documentary can achieve an intimacy of knowledge and effect impossible to the shimsham mechanics of the studio”.¹

But within today’s highly competitive media landscape, documentaries often struggle to reach an audience. While the number of documentary films released in Europe has more than doubled in recent years, from 182 in 2005 to 480 in 2015, their market share has never exceeded more than 1% of total cinema admissions in Europe, according to the MeCETES Film Database.² Total admissions for European documentary films have declined by a third, from 10 million in 2005 to 6.4 million in 2015. Admissions for “non-national” European documentary films – that is to say, a film produced in one European country but released in another – have almost halved, from 5.8 million to 2.9 million.

Of course, cinemas are not the only place to view documentaries. Television, DVD, film festivals and increasingly video-on-demand (VOD) services also provide a platform for documentary films. Netflix only started its expansion into Europe in 2012, yet by 2018 it already had 40 million European subscribers and is expected to reach 63 million by 2024.³ Yet because these non-theatrical platforms rarely publish their viewing figures, little is known about how often European audiences watch documentaries outside the cinema.

It is clear, then, if we want European documentaries to cross borders and reach new audiences all over Europe, we need a better understanding of their audiences:

- Who watches documentaries?
- Where do they watch documentaries?
- Why do they watch documentaries?
- What would encourage them to watch more documentaries – particularly in cinemas?

Perhaps more importantly, we need to look beyond simple viewing figures or box office income to explore the wider social and cultural impact that documentaries have on audiences. Only then can we truly appreciate the role this artform plays in contemporary Europe.

With these questions in mind, Moving Docs recently commissioned a survey of documentary film audiences in Europe. This report presents the findings of that survey. One of our key findings is that while young people (particularly aged 16-24) are the most likely to be profoundly affected by the experience of watching documentary films, they are also the group least likely to watch documentaries, particularly in cinemas. Young people often say they don’t have enough information about the latest documentary film releases, though many also feel there are not enough documentaries on topics that interest them, such as ones which encourage reflection on lifestyles or consumer behaviour.

With proper care and attention, documentary films can reach audiences. In 2018, documentaries represented only 1.2% of total admissions in France and 0.6% of the overall box office gross in the UK and Ireland.⁴ Yet in the same year (as noted in our focus on Europe Cinemas) they represented 5% of total admissions and 8% of the admissions for European films within Europa Cinema’s network of 1,232 cinemas in 751 cities and 43 countries.

It is hoped that the findings of the Moving Docs Survey will contribute to helping Moving Docs’ partners, documentary distributors and festival programmers learn more about their audiences, with a view to offering practical advice about how to better reach and engage more diverse ages and interest groups.

¹ John Grierson, ‘First Principles of Documentary (1932)’, in Catherine Fowler (ed.) *The European Cinema Reader* (London: Routledge), p.40.

² The MeCETES Film Database is a private database created by the author of this report for the MeCETES project. It combines data from various sources including the European Audiovisual Observatory’s LUMIERE Pro World database and the Internet Movie Database (IMDb).

³ Statista, ‘Netflix subscribers in Europe. <https://www.statista.com/statistics/713055/netflix-subscribers-in-europe/> [accessed 03/6/2020]

⁴ CNC, *Les synthèses du CNC n°6 Le marché du documentaire* (Paris, CNC: 2019), p.5; BFI, *Statistical Yearbook 2019* (London: BFI, 2019), p.46.

STUDY METHOD

Moving Docs initially aimed to target a representative sample of the entire European population (or at least a cross-section of European countries), from which broader generalisations about the consumption of documentary films in Europe could be made.

However, it soon became clear the cost of conducting such a survey was beyond our budget.⁵ Nevertheless, it was still possible to survey a ‘convenience sample’ of documentary film audiences in Europe through targeting people within Moving Docs’ own network – that is to say, those who attend screenings organised by Moving Docs’ partners or follow their social media channels or mailing lists. Though such a sample may not be representative of the European population as a whole, it could still produce some interesting insights into the characteristics and behaviour of documentary film audiences within the Moving Docs network. It could also “provide a springboard for future research and allow links to be forged with existing findings in an area”.⁶

Working with these more modest aims in mind, the Moving Docs Survey was created using Google Forms, a free yet highly advanced tool for producing and distributing online surveys.⁷ The questions themselves were based on existing film surveys, though tailored to meet the specific needs of Moving Docs and its partners, as well as the requirements of the EU’s General Data Protection Regulation and broader research ethics.⁸ The BFI’s *Opening Our Eyes* survey was particularly helpful in terms of thinking about the complex issue of how films ‘effect’ audiences.⁹ The survey design and analysis, for example, was guided by the suggestion that:

[T]he ‘significance’ of a film is not only something encoded in the film’s narrative, characters or style, but is produced by a transaction between film and spectator.

5 Pan-European surveys typically involve at least 1,000 randomly selected respondents per country. A 10-question survey would cost about €4500 per country or €22,500 for five countries. The initial fieldwork budget was only €5000, but even this amount was later withdrawn.

6 Alan Bryman, *Social Research Methods, 5th Edition* (Oxford: Oxford University Press, 2016), p.187

7 <http://bit.ly/movingdocs-survey>

8 See Project Team above for list of partners involved in the survey

9 BFI, *Opening Our Eyes: How Film Contributes to the Culture of the UK* (London: BFI, 2011).

*Films are, to an extent, what we bring to them, as well as what they dramatize and portray. They do not simply ‘influence’ behaviour, instead, they tend to stimulate or trigger what is already latent.*¹⁰

A ‘documentary film’ was defined as a film that: (a) provides a factual report on a particular subject; (b) usually last longer than 69 minutes; and (c) is made for cinema release (rather than television).¹¹ The survey was restricted to people aged 16 and over and resident within Europe (defined as the EU28 including the UK, candidate EU member states, and EFTA member states).

After being tested and refined, the English language version of the Moving Docs Survey was translated into six other languages (Catalan, German, Greek, Icelandic, Swedish, and Spanish), taking care not to lose any significant meaning in the translation process. These localised versions of the survey were then promoted by Moving Docs’ partners through their social media channels and newsletters.¹² They were also publicised by Europa Cinemas and the *Cineuropa* website.¹³

The survey ran from 1 November 2019 to 31 January 2020. The results of the seven surveys were then combined into a single database, which was then cleaned and coded, ready for analysis.¹⁴

The survey received 1,496 valid responses in total. A high number of responses were received from Greece, Spain and (relative to its small population) Iceland, but not so many from other European countries, partly because the funding to carry out and promote the survey was cancelled just before the survey was ready to be released. In comparison to the European population, the responses were skewed towards women, people aged 25-54,

10 *Ibid.*, p.65

11 This definition was adapted from the funding guidelines for a documentary feature-length film in the UK: <https://docsociety.org/bfi-doc/>

12 Barcelona Docs added additional questions to the Spanish and Catalan versions of the survey. The Greek team also conducted some face-to-face surveys with audiences attending its screenings.

13 See for example: Vladan Petkovic, “Moving Docs launches a survey on documentary audiences in Europe,” *Cineuropa*, 5 Dec 2019. <https://cineuropa.org/en/newsdetail/382191/> [Accessed 11/6/20].

14 The results of the survey were due to be presented at the Thessaloniki Documentary Film Festival on 13 March 2020, though this was cancelled due to the Coronavirus pandemic. Nevertheless, this allowed more time to analyse and write-up the survey results.

university graduates (especially those with post-graduate qualifications), employed, living in households earning over €20,000 per year, and urban dwellers (table 1). Perhaps understandably given the way the survey was distributed through the Moving Docs network, it also received a higher proportion of responses from people working in the media and creative industries than would be expected from a random sample of the European population, as well as a relatively high proportion of people working in education, healthcare and social services, which is why these occupations have been categorised as separate groups.¹⁵

We cannot say whether the survey responses are representative of the documentary film audience in Europe or even of those who attend Moving Docs events (presuming such populations could be defined). Yet it is still very revealing about the kinds of people who are interested enough in documentaries or the work of Moving Docs in general to be willing to complete a 10 to 20-minute survey on the topic.

¹⁵ It was decided not to weight the responses by age, gender or education, because no suitable sampling frame could be identified. Studies of online opt-in samples also suggest that in many instances, demographic weighting only minimally reduces bias, and in some cases actually makes bias worse. See for example: Andrew Mercer, Arnold Lau and Courtney Kennedy, 'For weighting online opt-in samples, what matters most?' *Pew Research Center: Methods*, 26 Jan 2018. <https://www.pewresearch.org/methods/2018/01/26/how-different-weighting-methods-work/> [Accessed 6/6/20].

Table 1. Survey respondents by social demographics.

		N.	%
Country	Greece	502	34%
	Spain	587	39%
	Iceland	145	10%
	Other European	262	18%
Gender	Female	928	63%
	Male	528	36%
	Other (e.g. non-binary)	8	1%
Age	16-24	153	10%
	25-34	358	24%
	35-44	384	26%
	45-54	327	22%
	55 or over	261	18%
Education	Non-graduate	337	23%
	Graduate (e.g. BA)	571	39%
	Post-graduate (e.g. MA or PhD)	550	38%
Residence	Urban (i.e. city)	1128	76%
	Non-urban (i.e. suburb, town, village)	355	24%
Employment	Full-time (>29hrs / week)	858	60%
	Part-time (0-29hrs / week)	198	14%
	Unemployed / retired	229	16%
	Student	149	10%
Income	<€10k	227	19%
	€10-20k	333	28%
	€20-30k	245	21%
	€30-50k	222	19%
	>€50k	144	12%
Occupation	Media, Arts, Entertainment ('Media')	614	45%
	Education, Healthcare, Social Services ('Education/care')	316	23%
	Other occupation ('Other')	439	32%

1. WHO WATCHES DOCUMENTARIES?

Moving Docs Survey respondents are avid documentary film viewers. Almost three-quarters (72%) said they 'often' watched documentaries (defined as six or more films per year) on any media platform (figure 1).

Middle-aged (35-54) respondents were significantly more likely to often watch documentaries than 16-24-year olds. Media professionals and full- and part-time workers were also more likely to often watch documentaries than all other professions and students respectively. However, there was no significant variation by gender, education, residence, income or nationality.

Moving Docs Survey respondents watch more documentary films than the average EU citizen.

According to the European Commission's *Current and Future Audiovisual Audiences* report, only around a quarter (23%) of EU citizens say they 'often' watch documentary films on any media platform.¹⁶ Yet the Moving Docs Survey does confirm the *Audiovisual Audience* report finding that middle-aged people in Europe are significantly more likely to watch documentary films than young people.

¹⁶ European Commission, *Current and Future Audiovisual Audience* (Brussels: European Commission, 2014), p.149.

While they are avid documentary viewers, **Moving Docs Survey respondents still watch more fiction films than documentaries.** Whereas 72% of respondents said they often watch documentaries, 92% said they often watched other types of film (e.g. drama).

Young people aged 16-24 were particularly likely to more often watch film fictions than documentaries (98% compared with 61%), as were students.

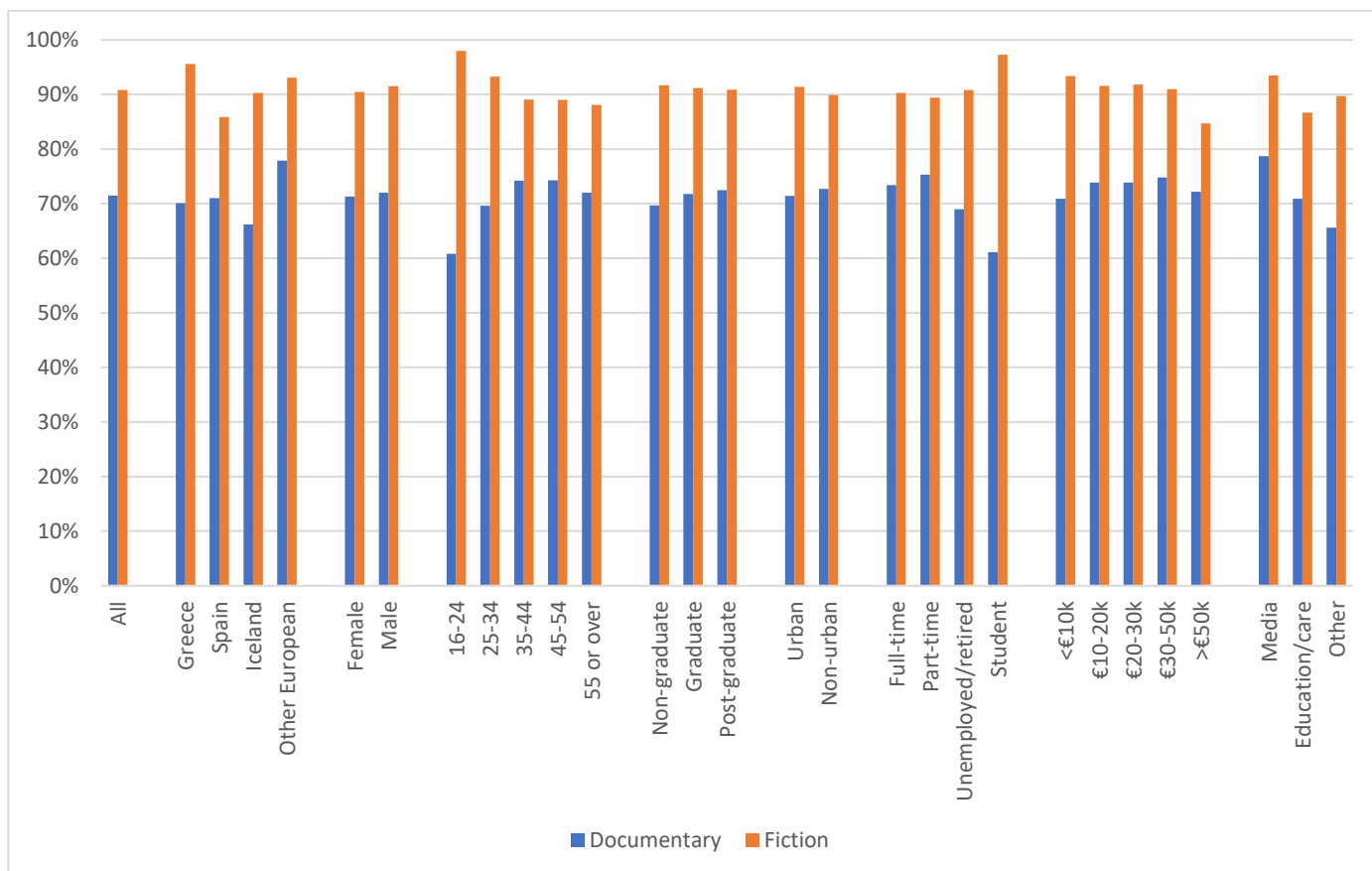


Figure 1. Percentage of respondents who often watch documentary and fiction films (i.e. 6 or more per year).

2. WHERE ARE DOCUMENTARIES VIEWED?

VOD was the most popular platform on which to watch documentaries (figure 2). About half (51%) of survey respondents said they often downloaded or streamed documentaries via on-demand services like Netflix.

Television was the second most popular platform for viewing documentary films. About two-fifths (41%) said they often watched documentaries on TV.

Film festivals, cinemas and special event screenings were the third, fourth and fifth most popular platforms on which to watch documentary films, respectively. Two to three respondents in ten (19%-30%) said they often watched documentaries on these non-domestic platforms.

DVD was the least popular platform for watching documentary films. Less than one in ten (9%) said they often watch documentaries on this platform.

Place of residence was a key factor in choice of platform.

Urban dwellers were significantly more likely than respondents living in suburbs, towns or villages to often watch documentaries in festivals and special event screenings, presumably because they have better access to these facilities. Conversely, non-urban dwellers were more likely to often watch documentaries on television, which may be the only platform available in some rural areas. This was also the case with watching fiction films.

Age and education were also key factors in where respondents watched documentary films. Older respondents were generally more likely to often watch documentaries on all platforms except video-on-demand, which was most popular with 35-44-year olds. Meanwhile, respondents with post-graduate degrees were significantly more likely than those with no university degree to often watch documentaries in cinemas, festivals and special event screenings.

However, age and education were less important factors in where respondents viewed other types of films. Older respondents and those with post-graduate qualifications were no more likely than younger respondents and those without university degrees to often watch fiction films in cinemas, festivals and special event screenings – though

older respondents were still significantly more likely than younger respondents to often watch fiction films on television and less likely to regularly view these types of films on VOD.

Gender and income had little effect on choice of platform – though men were more likely than women to often watch documentaries on DVD, and (rather counterintuitively) respondents earning over €50,000 per year were more likely than those earning less than €10,000 to often watch documentaries on TV.

Unsurprisingly, **media professionals were more likely than other professions to often watch documentaries on all platforms except television and DVD.** Icelanders were the least likely to watch documentaries in cinemas, festivals or special event screenings, presumably because the country has fewer such facilities,¹⁷ while Greeks were the least likely to often watch documentaries on VOD, which may be because the country has some of the worst broadband coverage in Europe.¹⁸

Respondents were three times more likely to watch fiction films in cinemas than documentaries (figure 3). This rose to four times amongst non-graduates and more than six times for 16-24-year olds. In other words, young people and non-graduates do watch films in cinemas, but not documentary films. This suggests there is something specific about the types of documentaries shown in cinemas or the venues which typically screen such films that discourages young people and non-graduates from watching documentaries in cinemas.

17 Wendy Mitchell, 'Fight underway to save Iceland's only arthouse cinema, Bíó Paradís', *ScreenDaily*, 2 Mar 2020.

<https://www.screendaily.com/news/fight-underway-to-save-icelands-only-arthouse-cinema-bio-paradis/5147766.article> [Accessed 12/06/20]

18 European Commission, 'The Digital Economy and Society Index (DESI)', *Digital Economy and Skills*, 11 Jun 2020. <https://ec.europa.eu/digital-single-market/en/desi> [Accessed 12/06/20]

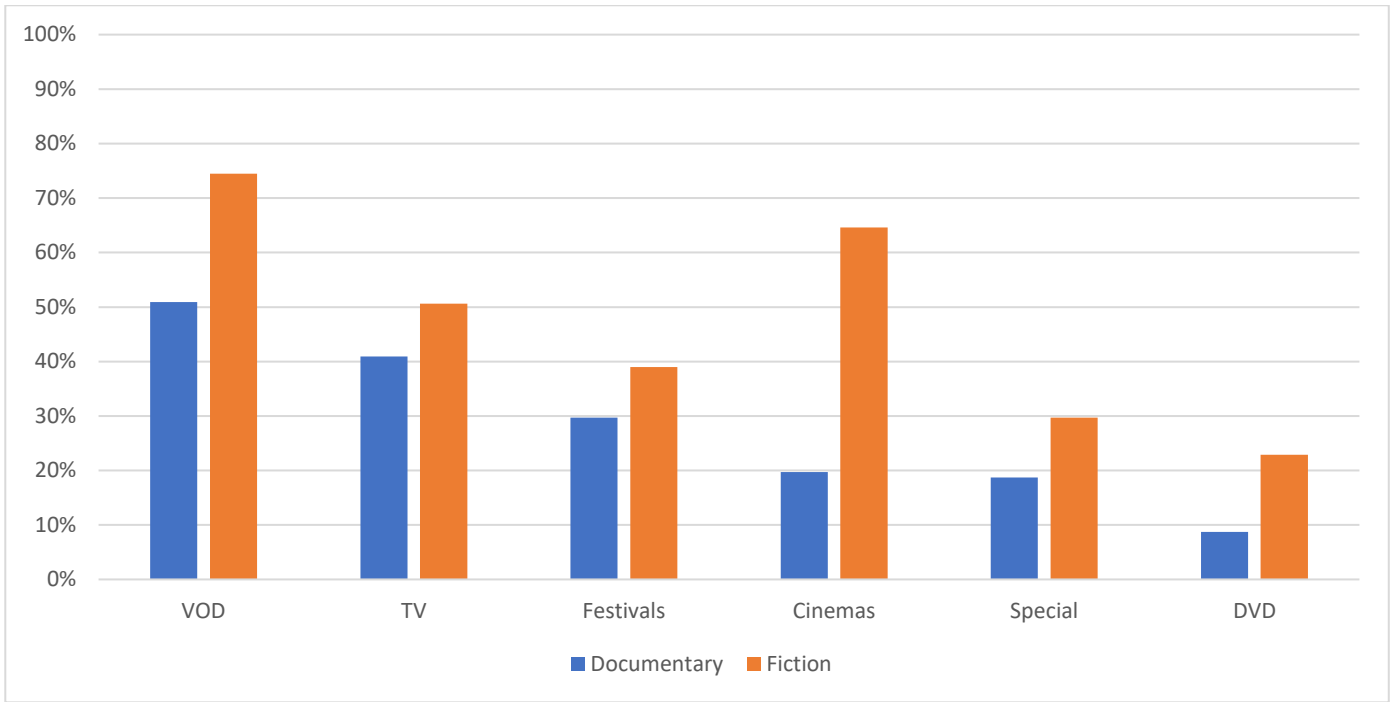


Figure 2. Percentage of respondents who often watch documentaries and fiction films by choice of platform.

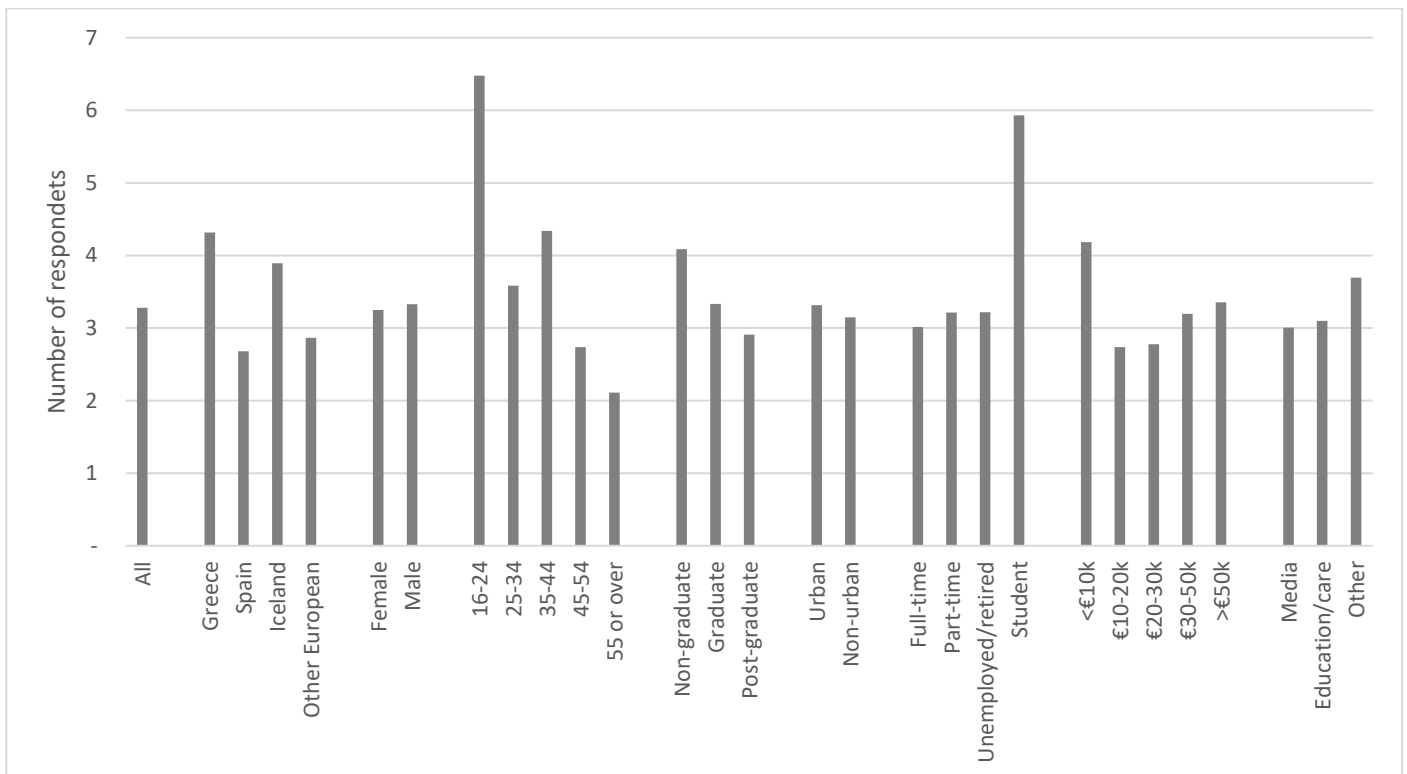


Figure 3. Respondents who often watch fiction films in cinemas compared with documentaries by social demographics.

3. WHY WATCH DOCUMENTARIES?

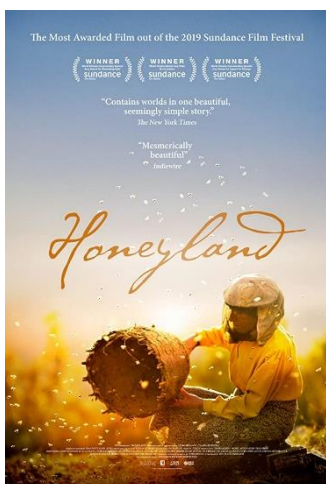
The film's subject matter was by far the most important factor likely to influence whether Moving Docs Survey respondents would pay to watch a documentary film in cinemas or on-demand. Almost all (95%) respondents selected this option (figure 4).

The other key factors – selected by more than a third of respondents – were the documentary film's director, its relevance to them personally, and the film's reviews. Relevance and reviews were particularly important for 16-24-year olds – one of the groups least likely to often watch documentary films, especially in cinemas.

The least important factors were whether the documentary film had been recommended by friends/family, the cost of watching the film, the places and languages featured in the film, and whether the film is the latest release. Each of these factors received less than a third of responses.

However, certain other factors can make a difference for particular documentary film titles. For example, respondents were shown the trailers, poster and synopsis for three recent documentary film releases:

- **Honeyland** (dirs. Kotevska & Stefanov, North Macedonia, 2019) – an observational documentary about the last female wild beekeeper in Europe, whose livelihood in the isolated mountains of Macedonia is threatened by the arrival of a nomadic family. The film won the World Cinema Grand Jury Prize: Documentary at the Sundance Film Festival and received very good reviews (e.g. an aggregate rating of 86% on Metacritic).



Honeyland (dirs. Kotevska & Stefanov, 2019) © Apolo Media, Trice Films

- **Push** (dir. Gertten, Sweden/Canada/UK, 2019) – an investigative documentary following UN Special Rapporteur Leilani Farha as she explores why city-living in places like Valparaíso, Toronto, Harlem and Notting Hill has become so expensive. The film won the Political Audience Award at CPN:DOX and received good reviews (e.g. 4 out of 5 in *The Guardian*).

Push (dir. Gertten, 2019) © WG Film



- **Citizen Europe** (dirs. Aristomenopoulou & Apostolidis, Greece/France/Ireland, 2019) – a documentary following five Erasmus participants across Europe against the backdrop of youth employment, the refugee crisis, and the rise of national populism. The documentary also features interviews with experts and former participants of the EU's Erasmus programme. The film was specially broadcast on ARTE on the eve of the EU elections and was shown at the Valletta Film Festival but received very little international media coverage.

In each case, the subject matter was still the key factor most likely to influence whether respondents would pay to watch any of these films. However, awards, trailer/poster and the film's look/sound were key factors in the appeal of *Honeyland*, while topicality was a key draw for both *Push* and *Citizen Europe*.

Citizen Europe (dirs. Aristomenopoulou & Apostolidis, 2019) © Anemon Productions, Seppia Films,

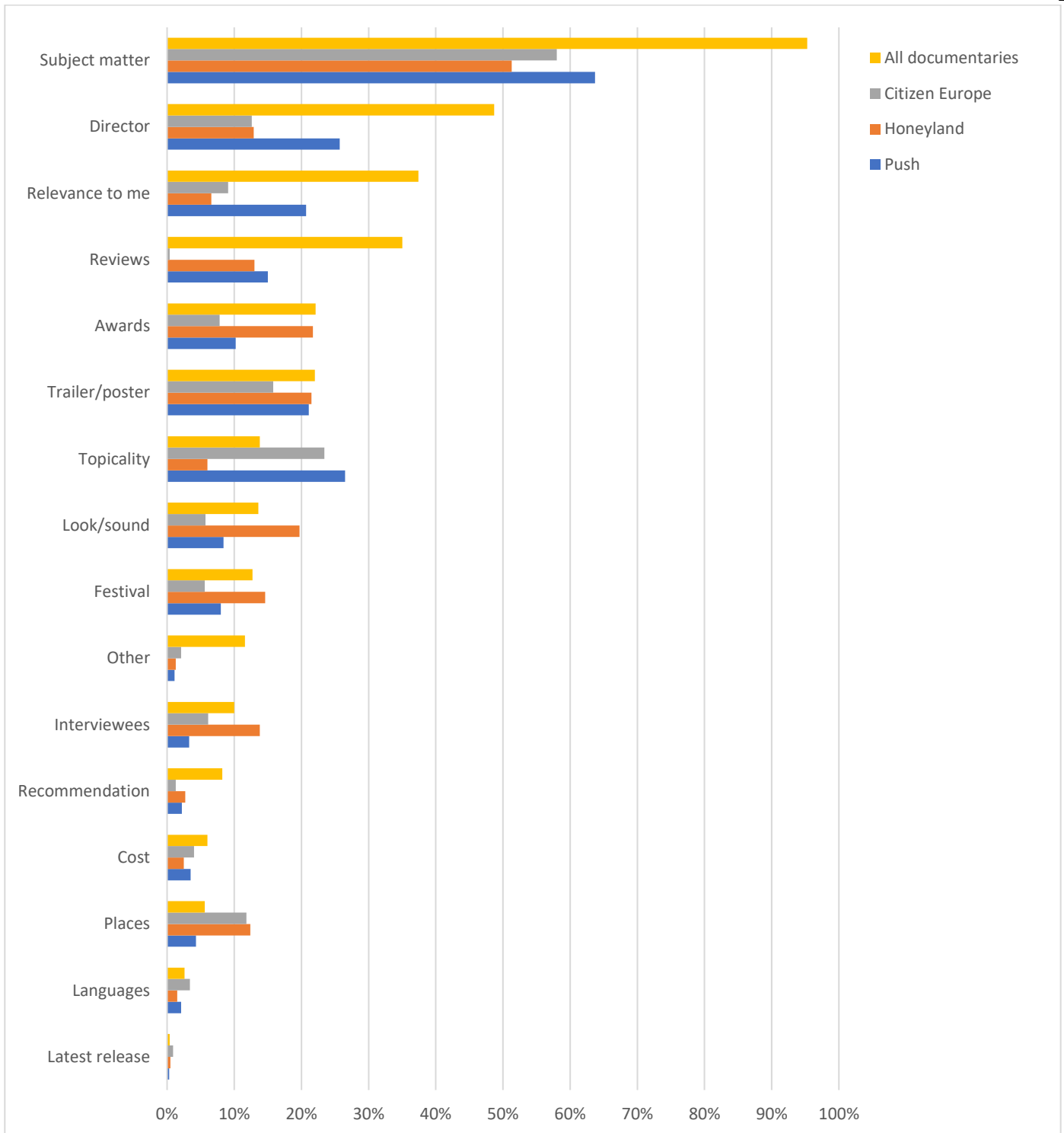


Figure 4. Factors which influence the decision of respondents to pay to watch documentary films in cinema or on-demand by film title.

Of the three films included in the survey, *Honeyland* was the most popular. 63% of respondents would watch this film in the cinema or on-demand, compared with 61% for *Push* and 45% for *Citizen Europe* (table 2).

Honeyland particularly appealed to Greek and Spanish respondents, those aged 45 and over, and media professionals or education, healthcare and social service professionals, who perhaps appreciated the film's

message of caring for people and the environment. The film was described by respondents as "a piece of art, touching, cinematographically excellent", though some felt it lacked a story ("It looks great, but... the story doesn't pop for me"). One respondent said she wouldn't watch the film because of her "phobia of bees".

Push particularly appealed to respondents from Spain, where the issue of affordable housing and property

speculation has become a major political issue in recent years,¹⁹ as well as women, perhaps due to its focus on a strong female campaigner for adequate housing. It also particularly appealed to education, healthcare and social service professionals whose work perhaps makes them more aware of housing problems. Some respondents explained they wouldn't watch the film because they were already "aware of the subject" or disliked the "negativity in which the theme is presented". Others felt the film was "too much talk [and] too little image".

Citizen Europe particularly appealed to women, those aged 55 and over and professions other than the media. It also particularly appealed to Greek respondents, who perhaps appreciated the fact the film was made by Greek filmmakers. Several middle-aged respondents said the film was more relevant to students and young people. As with *Push*, a few respondents said there was "too much talk/interviews [and] too little visuals". However, some older respondents (particularly educational professionals likely to be familiar with the Erasmus programme) said the film dealt with a topic "close to [their] heart" and was "very timely in a Europe that lacks humanitarian solidarity".

None of the three films particularly appealed to young people, non-graduates or non-urban dwellers – the groups least likely to often watch documentaries, especially in cinemas. However, a relatively high proportion of 16-24-year olds (52% compared with 45% overall) were interested in watching *Citizen Europe*. This suggests that with the right marketing campaign, emphasising the film's topicality and relevance to young people, *Citizen Europe* could attract a young audience.

19 Elena G. Sevilland and Jose Marcos, 'Spanish government planning measures against owners of empty homes', *El País*, 18 Sept 2018. https://english.elpais.com/elpais/2018/09/18/inenglish/1537258176_649049.html [Accessed 13/06/20]

Table 2. Respondents 'likely' or 'very likely' to pay to watch particular documentaries by social demographic (with statistically significant differences between social groups highlighted).

		<i>Honeyland</i>	<i>Push</i>	<i>Citizen Europe</i>
	All respondents	63%	61%	45%
Country	Greece (A)	67%^C	60%	52%^{C D}
	Spain (B)	65%^C	68%^{C D}	45%
	Iceland (C)	50%	50%	35%
	Other European (D)	59%	56%	37%
Gender	Female (A)	65%	64%^B	50%^B
	Male (B)	60%	55%	37%
Age	16-24 (A)	57%	53%	52%
	25-34 (B)	61%	63%	39%
	35-44 (C)	53%	60%	39%
	45-54 (D)	69%^C	60%	49%
	55 or over (E)	76%^{A B C}	64%	54%^{B C}
Education	Non-graduate (A)	58%	58%	46%
	Graduate (B)	66%	62%	47%
	Post-graduate (C)	63%	62%	44%
Residence	Urban (A)	64%	62%	47%
	Non-urban (B)	60%	57%	41%
Employment	Full-time (A)	63%	62%	46%
	Part-time (B)	64%	61%	38%
	Unemployed/retired (C)	67%	63%	52%
	Student (D)	57%	49%	46%
Income	<€10k (A)	65%	59%	46%
	€10-20k (B)	70%	63%	45%
	€20-30k (C)	63%	71%	46%
	€30-50k (D)	62%	66%	48%
	>€50k (E)	58%	55%	36%
Occupation	Media (A)	67%^C	58%	38%
	Education/care (B)	68%^C	70%^A	55%^A
	Other (C)	56%	63%	51%^A

4. WHAT IMPACT DO DOCUMENTARIES HAVE?

Almost all (97%) Moving Docs Survey respondents said they had been affected by documentaries in some way.

This was true across all nationalities, ages, genders, places of residence, education levels, income groups and occupations, testifying to the extraordinary impact documentaries can have on all our lives. For obvious reasons, those who often watched documentaries were the most likely to be affected by this viewing experience. But even amongst those who only occasionally or rarely watched documentaries, 93% said they had seen a documentary that had affected them in some way.

The most common way in which respondents had been affected by the experience of viewing documentaries was in terms of their emotions. Over three-quarters (77%) had seen a documentary film that had had a big emotional impact on them (figure 5).

Improving or even changing people's understanding of certain issues were the next most important ways in which respondents had been affected by the experience of watching documentaries. Seven out of ten had seen a documentary film that had improved their understanding of a particular issue, while six out of ten had seen one that had changed the way they think about certain issues.

Many respondents noted other ways in which their knowledge of the world had been improved by the experience of watching documentaries. Half of all respondents (50%) had seen a documentary film that had improved their understanding of a particular section of society. Similar proportions had seen one that had improved their understanding of a country or place (49%) or a person or event (46%).

Many respondents had also been inspired to do something after watching a documentary. Over half (54%) had

seen a documentary that had encouraged them to find out more about an issue, while a slightly smaller proportion (48%) had seen one which had encouraged them to talk to others about a particular issue.

However, more proactive responses were less common.

Only a quarter (25%) of respondents had seen a

documentary that had encouraged them to take action (e.g. join a campaign), while less than a fifth (19%) had seen one that had encouraged them to change their lifestyle or behaviour.

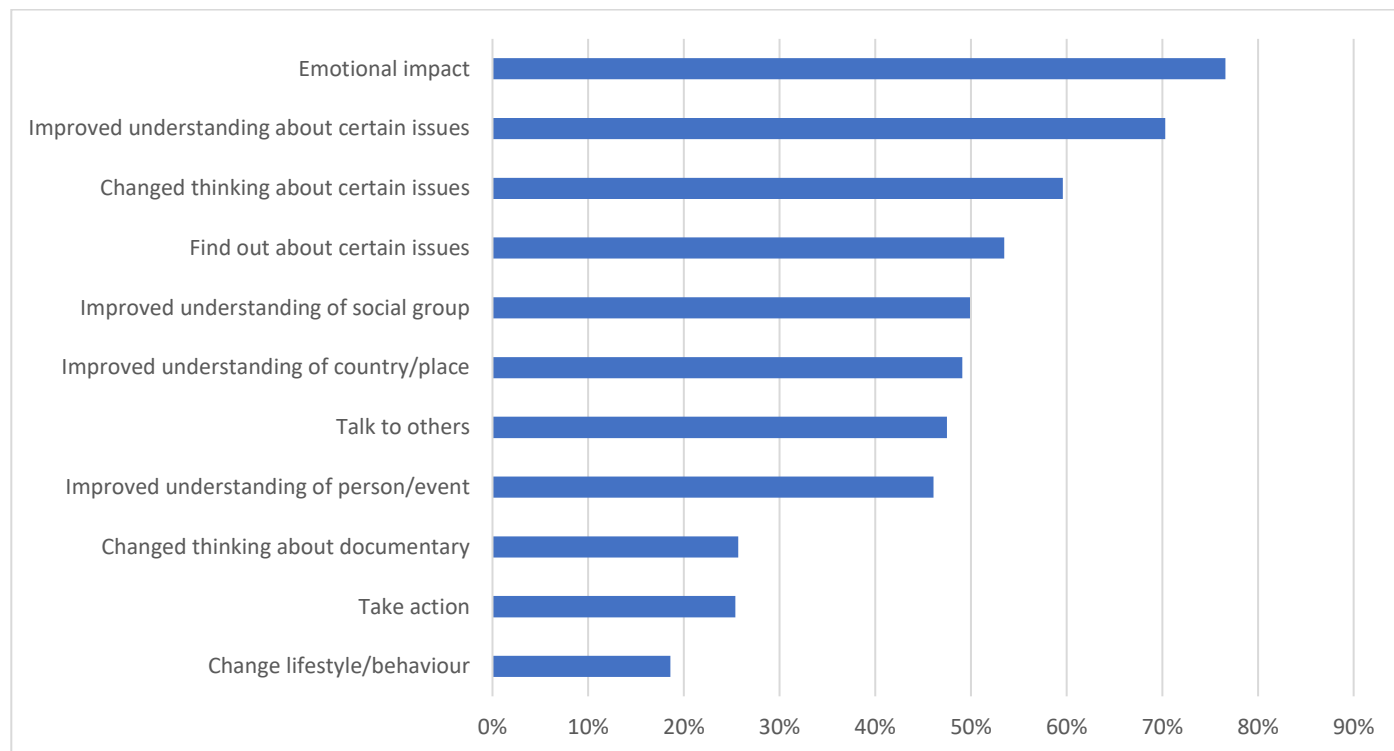


Figure 5. Percentage of respondents who have seen a documentary film that has affected them by type of impact.

Age was a key factor in how respondents were likely to be affected by the experience of watching documentary films. Younger respondents (especially aged 16-24) were significantly more likely than older respondents (especially aged 55 and over) to have seen a documentary film that had affected them across all the forms of impact included in the survey – with the exception of improving their understanding of a section of society or of a country or place (figure 6). Indeed, 16-24-year olds were twice as likely as respondents aged 55 or more to have seen a documentary film that had encouraged them to change their lifestyle or behaviour and three times more likely to have seen one that had encouraged them to take action (e.g. join a campaign). This could be because 16-24-year olds are in a period of their lives – between late adolescence and young adulthood – when people often define their own personal identity and value system.

Other key social demographic factors (e.g. nationality, gender, education, income, profession) had little or no

influence on how respondents were affected by the experience of watching documentary films. To be sure, Spanish respondents were more likely than other nationalities to have seen a documentary film which had emotionally affected them but were less likely to be affected by documentaries in any other way; media professionals were more likely than those working in other occupations to have seen a documentary that had affected them emotionally or encouraged them to take action; post-graduates were more likely than non-graduates to have seen a documentary film that had changed the way they think about documentaries or encouraged them to change their lifestyle or behaviour; and urban-dwellers were more likely than non-urban dwellers to have seen a documentary film that had encouraged them to talk to others about a particular issue. But unlike with age, these social demographic factors only influenced specific forms of impact, rather than all forms of impact in general.

The only other factor likely to influence how respondents were affected by the experience of watching documentaries was where they watched the documentary itself. Respondents who often watched documentaries in cinemas, festivals or special event screenings were more likely than those who only regularly watch documentaries on home platforms (e.g. VOD, TV, DVD) to say that they had learnt about a country, place or

section of society or been encouraged to change their lifestyle or behaviour by the experience of watching documentaries. This suggests that the immersive experience of watching documentaries on the big screen in the dark with strangers can leave a deeper impression on respondents than watching documentaries with family and friends in the home.

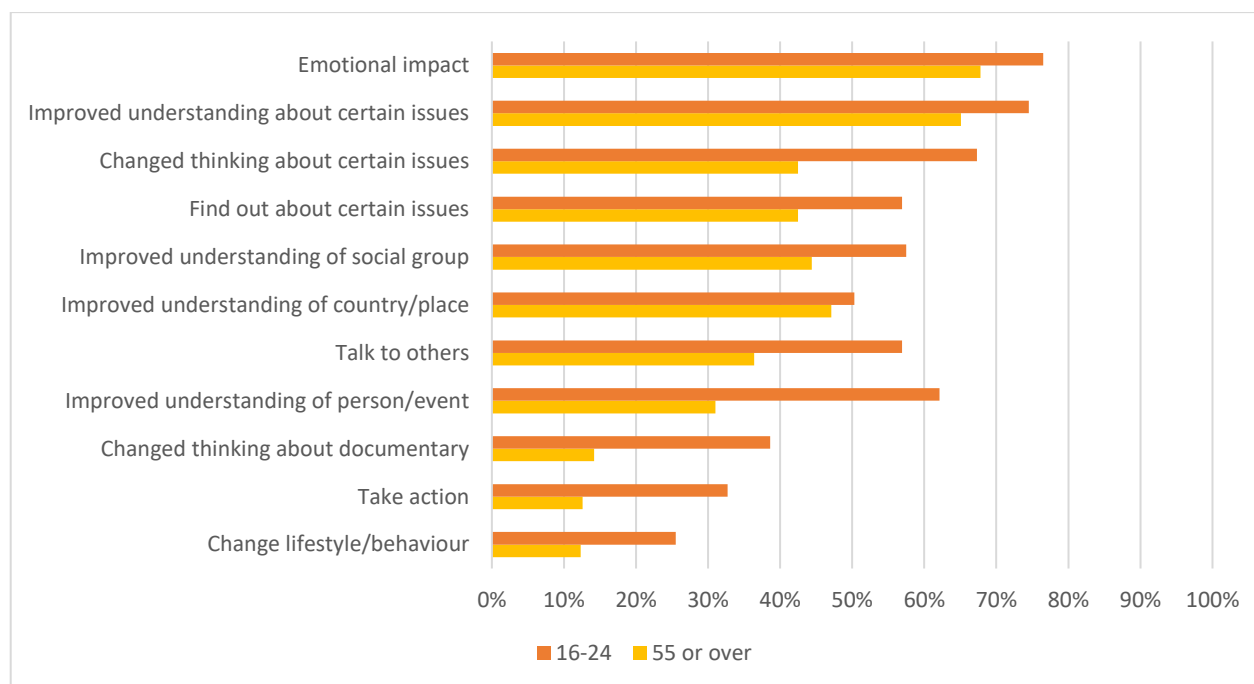


Figure 6. Percentage of respondents who have seen a documentary film that has affected them by selective age groups

5. WHICH DOCUMENTARIES HAVE HAD THE MOST IMPACT?

Three-quarters (75%) of Moving Docs Survey respondents could name a documentary that had affected them in some way. Post-graduates and media professionals were the most likely to name a documentary that had affected them (termed ‘impactful documentaries’), while non-graduates and those working in other occupations were the least likely. However, there was no variation by age: even though young people watch fewer documentaries than middle-aged and older people, they were just as likely to name a documentary that had affected them in some way. This may be because (as noted above) documentaries seem to leave a much deeper impression on young people.

Of those who named an impactful documentary film, over two thirds (68%) named one that had affected them emotionally. Compared with the general effect of documentaries (see above), far more respondents than

might be expected named a documentary film that had changed the way they think about documentaries as an artform (20% compared with 26%), while far fewer named one that had encouraged them to take action such as join a campaign (8% compared with 25%).

Young people and non-graduates were significantly more likely than older people and post-graduates respectively to name a documentary film that had encouraged them to change their lifestyle or behaviour. Young people were also more likely than older people to name one that had improved their understanding of a certain section of society or encouraged them to find out about particular issues. Meanwhile, men were significantly more likely to name a documentary that had changed the way they think about certain issues, the way they think about documentary films or their lifestyle or behaviour, while women were more likely to name one

that had improved their understanding of a country or place or encouraged them to talk to others.

Respondents named a huge diversity of documentary films – 525 individual titles in total. Almost three-quarters (71%) of the documentaries named received just one mention, while only eleven documentaries received 10 or more mentions.

This suggests that the way people respond to documentaries is very unique and personal. It is very difficult to predict which documentaries will affect audiences or how they will be affected. This is because – as explained in our study method above – “films are, to an extent, what we bring to them, as well as what they dramatize and portray,” and what each individual brings to a film will differ according to their own particular background and lived experiences.²⁰ Nevertheless, a few broad trends can be identified.

Seven out of every ten respondents (70%) named a documentary made in the last 10 years. Almost a third of respondents (32%) named one made in the last three years. This implies that the impact of documentaries does not stay with audiences very long.

Over half (52%) of respondents named a documentary which had been made in the English language (though may have been dubbed or subtitled into their own local language). But in another sense, the linguistic range of documentaries was actually quite diverse – representing 47 other languages, from Albanian to Ukrainian.

Almost half (46%) of respondents named a documentary from another European country. Documentaries produced in France and the UK were particularly popular, though a significant number also named films from Germany and Sweden, too.²¹ Of course, it must be remembered that Moving Docs Survey respondents are more likely to have been exposed to documentaries from other European countries through Moving Docs events. Yet the high proportion of non-national European documentaries named by respondents may also stem

from a genuine curiosity about other European countries or the places depicted by European filmmakers (since not all European films are necessarily about Europe itself). For example, respondents who named a non-national European documentary were significantly more likely to say the film had improved their understanding of another country or place (28% named this as an impact) than respondents who named one from their own country (19%), America (16%) or the rest of the world (22%).

The top 20 most frequently named documentaries provides some further clues about which documentary films were most likely to affect respondents (table 3). Amongst the key themes were films with a focus on:

- **The lives of extraordinary individuals** (1, 2, 4, 8, 9, 10, 13, 14, 16, 17, 20).
- **The problems of modern societies and political-economic systems** (3, 5, 6, 7, 11, 12, 15);
- **The exploitation of animals or the natural world** (8, 11, 12, 14, 15, 18);
- **The legacy of war, genocide or colonialism** (1, 4, 10, 15, 18, 19);
- **Strong women** (7, 8, 9, 13, 20); and/or
- **Artists or musicians** (2, 4, 13, 17).

Additionally, many of the top 20 are films that have won **major awards** (1, 2, 4, 6, 10, 12, 14, 15, 18, 19), were **box office hits** (2, 4, 6, 15) or were **made by well-known auteurs** (4, 6, 14, 15). Others had none of these characteristics but benefited from being **promoted by Moving Docs or its partners** (3, 7, 8, 9, 13, 16).

The next section examines in more detail the documentaries which received ten or more mentions, with the exception of *Push* (7) and *Honeyland* (8), which have already been discussed earlier in this report.

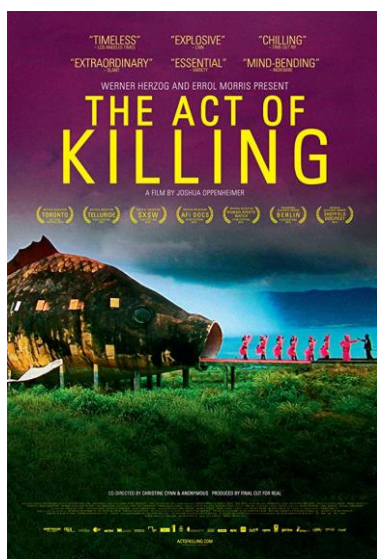
²⁰ BFI, *Opening Our Eyes*, p.65.

²¹ It is also worth noting that non-national European documentaries appealed to all age groups. By contrast, American documentaries were more likely to be named by younger respondent, while national documentaries tended to be named by older respondents.

Table 3. Most frequently mentioned impactful documentaries. Sources of additional data: IMDb, Metacritic, Lumiere

	Title	Year	Director(s)	Country(s)-of-origin	Awards	Meta-score	European admissions	Mentions
1	<i>The Act of Killing</i>	2012	Joshua Oppenheimer	GB/DK/NO	53 awards (1 Oscar nomination)	90	69,843	27
2	<i>Searching for Sugar Man</i>	2012	Malik Bendjelloul	SE/GB/FI	40 awards (1 Oscar)	79	798,772	27
3	<i>The Swedish Theory of Love</i>	2015	Erik Gandini	SE	-	-	34,800	17
4	<i>The Salt of the Earth</i>	2014	Juliano Ribeiro Salgado, Wim Wenders	FR/BR/IT	12 awards (1 Oscar nomination)	83	1,323,471	16
5	<i>Mourning Rock</i>	2000	Filippos Koutsaftis	GR	3 awards	-	122	14
6	<i>Bowling for Columbine</i>	2002	Michael Moore	US/CA/DE	40 awards (1 Oscar)	72	3,641,627	14
7	<i>Push</i>	2019	Fredrik Gertten	SE/CA/GB	1 award	-	10,743	13
8	<i>Honeyland</i>	2019	Tamara Kotevska, Ljubomir Stefanov	MK	32 awards (2 Oscars nominations)	86	10,194	13
9	<i>In Search...</i>	2018	Beryl Magoko	DE/BE/KE	-	-	-	13
10	<i>The Look of Silence</i>	2014	Joshua Oppenheimer	DE/ID/FI/NO/GB/ IL/FR/US/DE/NE	48 awards (1 Oscar nomination)	92	45,933	11
11	<i>Earthlings</i>	2005	Shaun Monson	US	-	-	-	11
12	<i>The Cove</i>	2009	Louie Psihoyos	US	38 awards (1 Oscar)	84	49,087	9
13	<i>Sonita</i>	2015	Rokhsareh Ghaemmaghami	DE/CH	19 awards	-	27,690	9
14	<i>Grizzly Man</i>	2005	Werner Herzog	US	21 awards	87	146,658	9
15	<i>Darwin's Nightmare</i>	2004	Hubert Sauper	AT/BE/FR/DE	16 awards (1 Oscar nominations)	84	633,489	9
16	<i>Dolphin Man</i>	2017	Lefteris Charitos	GR	-	-	26,040	9
17	<i>Petitot</i>	2018	Carles Bosch	ES	-	-	820	8
18	<i>The Pearl Button</i>	2015	Patricio Guzmán	FR/ES/CL/CH	11 awards	80	132,053	8
19	<i>Of Fathers and Sons</i>	2017	Talal Derki	DE/US/SY/LB/NL/QA	19 awards (1 Oscar)	70	13,048	8
20	<i>Amazona</i>	2015	Clare Weiskopf, Nicolas van Hemelryck	CO	-	-	3,646	8

The Act of Killing (2012) / *The Look of Silence* (2014)



The Act of Killing (dir. Oppenheimer, 2012). © Final Cut for Real, Spring Films

The Act of Killing explores the legacy of the Indonesian mass-killings of 1965-66. Director Joshua Oppenheimer invited former leaders of the anti-communist death squads – including the charismatic gangster Anwar Congo – to recreate their killings in the style of their favourite films:

bizarre performances that prompt the men to express doubts about their past crimes.

The Look of Silence is Oppenheimer's companion piece to *The Act of Killing*. It focuses on an anonymous middle-aged Indonesian optician, who confronts the men who murdered his brother in the 1965-66 mass-killings.

Both films were critically acclaimed. *The Act of Killing* won the 2013 European Film Award for Best Documentary and the BAFTA for best documentary. Both films also received Oscar nominations for the Best Documentary Feature. *The Act of Killing* had a Metascore of 90%, indicating

gangster, westerns and musicals. The result is a series of

‘universal acclaim’, while *The Look of Silence*’s score was 92%.²²

Yet neither film performed particularly well in cinemas at the time of their release. *The Act of Killing* sold less than 70,000 tickets in Europe, while *The Look of Silence* sold just under 46,000 tickets.²³ Nevertheless, both films may have since reached a wider audience due to good positioning on VOD. For example, *The Act of Killing* is currently available on 19 platforms across five European countries, while *The Look of Silence* is available on 24 platforms across six European countries.²⁴

27 respondents said *The Act of Killing* had affected them in some way. A further 11 named *The Look of Silence*. Both films particularly affected men, 25-34-year olds, post-graduates and media professionals.

The Act of Killing particularly affected respondents emotionally (20 out of 27 selected this impact), as well as their understanding of the issues (13) and the section of society (13) shown in the film. More strikingly, the film also changed how many respondents (13) think about documentary as an artform, confirming award-winning filmmaker Ruri Hamid’s view that the film “turns around what we think of as documentaries”.²⁵ *The Look of Silence* also affected respondents emotionally (8 out of 11) but had less impact on the way they think about documentaries (1), perhaps because it follows a more conventional ‘fly-on-the-wall’ format.

Oppenheimer claims *The Act of Killing* helped to “catalyse a transformation in how Indonesia understands its past”.²⁶ He hoped the film would also force the American and British governments to “acknowledge the crimes of the past, and our collective role in supporting and

participating in those crimes”.²⁷ Yet there is little evidence of either films triggering such a response from Moving Docs Survey respondents. *The Act of Killing* encouraged nine respondents to find out more about the issues shown in the film, but only one was encouraged to take action (e.g. join a campaign). The only additional comments came from a young Spanish woman who described *The Act of Killing* as “a ferocious documentary about the evil that inhabits human beings”.

²² A Metascore is a weighted average of review scores calculated by the Metacritic website: <https://www.metacritic.com/>

²³ All admission figures are from the European Audiovisual Observatory’s Lumiere database: <http://lumiere.obs.coe.int/web/search/>

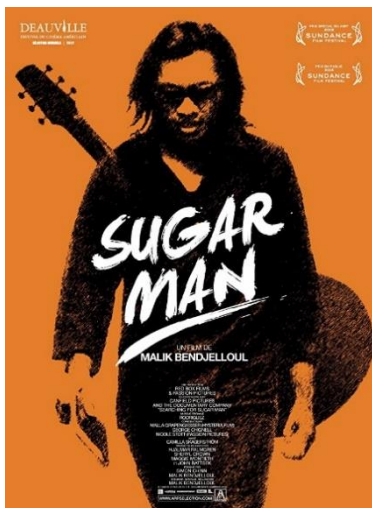
²⁴ Data from the European Audiovisual Observatory’s Lumiere VOD database: <http://lumierevod.obs.coe.int/>

²⁵ Ruri Hamid, “Ruri Hamid recommends...”, *BBC Fresh*, 29 Aug 2013. <https://www.youtube.com/watch?v=UVqfdMYxTfo> [Accessed 16/6/20].

²⁶ Joshua Oppenheimer, “‘Act of Killing’ Director Joshua Oppenheimer on how the Oscars gave the film ‘a second life’”, *Indie Wire*, 24 Feb 2014. <https://www.indiewire.com/2014/02/act-of-killing-director-joshua-oppenheimer-on-how-the-oscars-gave-the-film-a-second-life-29670/> [Accessed 15/6/20]

²⁷ Ibid.

Searching for Sugarman (2012)



Searching for Sugarman explores the extraordinary life-story of Sixto Rodriguez, a Detroit-based musician of Mexican heritage who achieved little commercial success in the US, but unbeknown to him was extremely popular amongst young

white liberals in South Africa in the 1970s, for whom he provided a soundtrack for the whites' anti-apartheid movement. Written and directed by the late Swedish filmmaker Malik Bendjelloul, the film focuses on two Cape Town fans who managed to track-down Rodriguez in the 1990s and bring him to South Africa for a revival tour. It also features interviews with Rodriguez's friends, family and record company.

Searching for Sugarman was critically acclaimed when it was released in 2012-13. The film won the Special Jury Prize and Audience Award for Best International Documentary at the 2012 Sundance Film Festival, before collecting both the BAFTA and Oscar for Best Documentary in early-2013. Its Metascore was 79%, indicating 'generally favourable reviews'.

The film was also commercially successful. It sold over 800,000 cinema tickets in Europe (performing particularly well in its native Sweden) and continues to be widely available on VOD (available on 24 platforms across 13 European territories).

27 respondents said *Searching for Sugarman* had affected them in some way. It made a particular impression on Spanish respondents, women, older respondents, graduates and urban dwellers.

15 out of the 27 respondents said the film had affected them emotionally, while 13 respondents said the film had improved their understanding of a particular person or event. 11 respondents said the film had encouraged them to find out more about a particular issue (presumably

reading more about Rodriguez's story or listening to his music).

Of course, *Searching for Sugarman* is not only a portrait of a musician. As *The Guardian's* Peter Bradshaw notes, the film provides "an interesting footnote to a species of secret or denied cultural history: the history of South Africa's white liberal classes, the fabric of whose lives may be overlooked by social historians".²⁸ However, only four of the 27 respondents said the film improved their understanding of a country or section of society.

It also triggered few proactive responses. Seven respondents said they talked to others about the film. Yet only one said the film encouraged them to take action, while no-one changed their lifestyle or behaviour after seeing the film. The only comment made about the documentary was that it was "very well made".

Searching for Sugarman was not the only musical biography to affect respondents. *Sonita* (dir. Ghaemmaghami, 2016), a portrait of Afghan rapper and activist Sonita Alizadeh, received nine mentions; *Amy* (dir. Kapadia, 2015), auteur filmmaker Asif Kapadia's archival documentary about the late British pop singer Amy Winehouse received four mentions; and *Joe Strummer: The Future is Unwritten* (dir. Temple 2007), about the English punk rocker and frontman of The Clash, received three mentions. In total, 19 musical biographies were named as impactful documentaries. With the exception of *Searching for Sugarman*, these were amongst the few films to be more popular with non-graduates than graduates.

²⁸ Peter Bradshaw, "Searching for Sugar Man – review," *The Guardian*, 26 Jul 2012. <https://www.theguardian.com/film/2012/jul/26/searching-for-sugar-man-review> [Accessed 16/6/20].

The Swedish Theory of Love (2015)



The Swedish Theory of Love (dir. Gandini, 2015). © Fasad, Indie Film

Written and directed by Italian-Swedish filmmaker Erik Gandini, *The Swedish Theory of Love* offers a critique of contemporary Sweden and its 'statist individualist' ideology. Through examples such as the rising number of Swedish women opting for single motherhood

through artificial insemination or the state officials who investigate the deaths of elderly Swedes that have gone unnoticed by their neighbours for years, the film argues that Sweden's obsession with independence and self-sufficiency has fostered a culture of loneliness and alienation. It concludes with an interview with the sociologist Zygmunt Bauman, who explains why human relationships based on inter-dependence are better than either dependent or independent relationships.

Unlike many of the impactful documentaries frequently mentioned by respondents, *The Swedish Theory of Love* was neither a critical nor commercial success when it was released in 2015-16. The film sold fewer than 36,000 cinema tickets in Europe and won no major awards. It also received fairly mediocre reviews (e.g. 2 out of 5 in *The Guardian*) from what little media coverage it did receive. The film's director, Erik Gandini, is not particularly well-known outside the documentary film circuit, despite having made four previous films.

However, the film did benefit from prominent coverage at the DocsBarcelona film festival in November 2016 and was later screened on the Spanish VOD site FilmIn, where it was listed as one of the "Best Documentaries of the

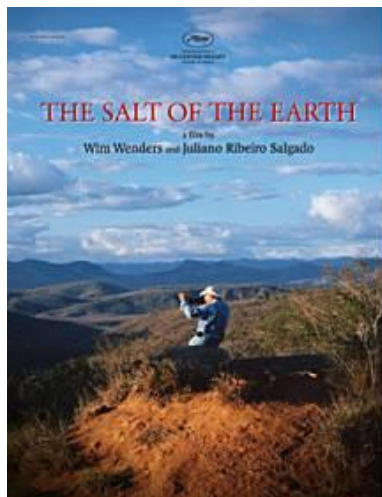
Decade". The film is currently available on eight VOD platforms across seven European territories.

17 respondents named *The Swedish Theory of Love* as a documentary which had affected them in some way. Testifying to the role of the DocsBarcelona festival and FilmIn website in developing an audience for the film, all the respondents came from Spain. Most were also women working in education, healthcare or social service professions, who perhaps have a professional interest in the film's sociological theme.

Nine of the 17 respondents said they had learned a lot about the country or place shown in the film. Indeed, *The Swedish Theory of Love* was one of the few documentaries where the film's effect on people's understanding of another country was greater than its emotional impact. Eight said the film had changed the way they think about certain issues, while eight also said the film encouraged them to talk to others about the issues shown in the film.

Although no respondents gave a fuller explanation of how the documentary had affected them, it is clear the film successfully challenged perceptions of both Sweden as the perfect society and the merits of living a totally independent and self-sufficient life. Given the film had not been widely circulated or viewed in Europe, it provides an interesting example of the way some films can – with the right support from festivals, distributors or platforms – still make a big impact on audiences that far exceeds their box office revenue. However, it is important to point out that only two respondents said the film encouraged them to change their lifestyle or behaviour – though this could be because they already lived inter-dependent lives and didn't feel the need to change. Interestingly, both respondents were men – which suggests that while most of the respondents who were affected by this film were women, it had the deepest impact on the behaviour of men.

The Salt of the Earth (2014)



The Salt of the Earth (dirs. Salgado & Wenders, 2014) © Decia Films

The Salt of the Earth is the twelfth feature-length documentary from the prolific German auteur Wim Wenders. Co-directed by Juliano Ribeiro Salgado, the film explores the life and work of Salgado's father, the Brazilian photographer Sebastião Salgado.

The film charts Salgado's journey, from his early career as an economist, through his photo-reportage of the Ethiopian famine, Yugoslavian civil war and Rwandan genocide, to his return to Brazil, his landmark photographs of the Serra Pelada gold mines, and his conservation work.

The film's appeal can partly be attributed to Wenders' own brand recognition as an auteur filmmaker. Having made his name as part of the New German Cinema generation of filmmakers in the 1970s, Wenders achieved international attention in the 1980s with the road movie *Paris, Texas* (1984), which won the Palme d'Or at Cannes, and the romantic fantasy *Wings of Desire* (1988), which earned him the prize for Best Director at the European Film Awards. In the 1990s he moved into making a series of critically and commercially successful documentaries, often focusing on the lives of artists (in the broadest sense of the word). In 2000, he received three Oscar nominations for the *Buena Vista Social Club* (1999), a documentary about Cuban musicians, and in 2011 he secured over 1.6 million admissions in Europe alone for *Pina* (2011), which focuses on the German dancer and choreographer Pina Bausch. *The Salt of the Earth* continued that run of success. The film received the Special Prize at the 2014 Cannes Film Festival, the Audience Award at the San Sebastian International Film Festival and the César Award for Best Documentary Film. Across Europe, it secured 1.2 million admissions across 28

territories, performing particularly well in Switzerland, Italy and France. It is currently still available on 58 VOD services within 15 European countries.

16 respondents said *The Salt of the Earth* had affected them in some way. Most were women, middle-aged, well-educated, and urban dwellers of middle-income. A significant proportion were also Greek.

12 of the 16 respondents said the documentary had affected them emotionally, while eight said it changed the way they thought about certain issues. In particular, the film gave respondents an insight into some of the most tragic events of recent history, but also offered a message of hope about humanity. "It made me see the ugly aspect of human behaviour without losing my love or my faith in the human race," wrote one young Greek woman. "It gave me hope that a man – not common – is enough to do something for over planet," echoed a middle-aged Greek man.

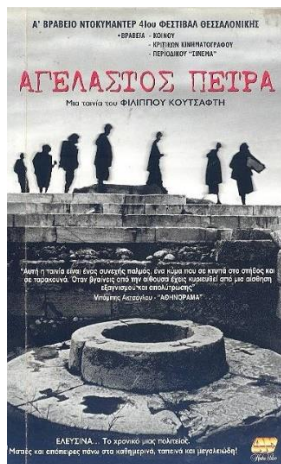
Eight respondents said the film encouraged them to find out more about the issues shown in the film. Yet the film didn't necessarily trigger any more proactive responses. For example, only five of the 16 respondents said the documentary encouraged them to take action (e.g. join a campaign) or change their lifestyle or behaviour.

The Salt of the Earth was not the only Wenders' film mentioned by respondents. Pina received four mentions, while *Pope Francis: A Man of His World* (2018) and *Lightening Over Water* (co-directed by Nicholas Ray, 1980) both received one mention each. Wenders was also not the only filmmaker to receive a high number of mentions across several films. Others included:

- Michael Moore (20 votes across seven films);
- Patricio Guzmán (19 votes across four films);
- Werner Herzog (18 votes across nine films); and
- Agnès Varda (10 votes across four films).

Aside from Moore, these auteur filmmakers typically appealed to very well-educated media professionals, while their films tended to affect people's emotions rather than their knowledge, lifestyle or behaviour.

Mourning Rock (2000)



Mourning Rock (dirs. Koutsaftis, 2000). © Greek Film Center, NET

Directed by the Greek filmmaker Filippos Koutsaftis, *Morning Rock* ('Agelastos Petra', 2000) is an observational documentary about Eleusis, a Greek town with a rich cultural history linked with ancient Greek mythology and classical antiquity that has become spoilt in recent times by industrialisation and urban development. Koutsaftis visited

the town over a decade, witnessing the private lives of the local people, as well as a series of public dramas, including industrial accidents, political demonstrations and the destruction of archaeological sites. His film offers a visually poetic and deeply moving mosaic of life in Eleusis through the years.

Morning Rock has received little attention outside Greece. After premiering at the Thessaloniki International Film Festival in November 2000, where it won the Audience Award, the Best Documentary Award and the Hellenic Association of Film Critics Award, the film was screened at a handful of international film festivals, including the Copenhagen International Documentary Festival and the Hanoi DocLab in Vietnam, but received little theatrical distribution.²⁹ According to the Lumiere database, the film has only sold 122 cinema tickets in Europe (all of them in Portugal), and is not formally available on any VOD platform. The film attracted little coverage from the international film press, though has generated extremely positive reviews online from a small band of fans. The film has an IMDb User Rating of 8.6 out of 10 and is described by one user as “perhaps the best documentary ever shot in the history of Greek cinematography”.³⁰

²⁹ IMDb, 'Mourning Rock', *Release Info*. https://www.imdb.com/title/tt0268898/releaseinfo?ref_=tt_dt_dt [Accessed 17/6/20].

³⁰ IMDb, 'Mourning Rock', *User Reviews*. https://www.imdb.com/title/tt0268898/reviews?ref_=tt_ov_rt [Accessed 17/6/20].

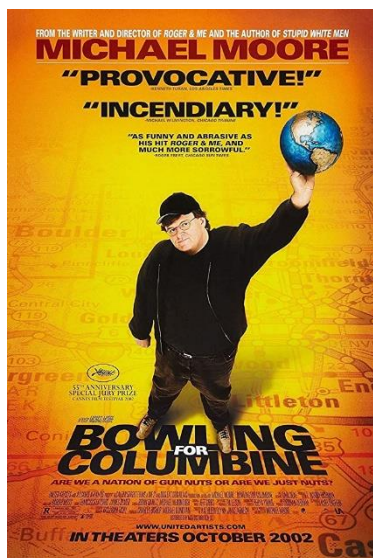
While it is little known internationally, *Mourning Rock* has clearly left a deep impression on Greek audiences. 14 respondents (all Greek, though one living in Germany) said the film had affected them in some way. Most were older, well-educated men living in urban areas.

Twelve of the 14 respondents said the film had affected them emotionally, while seven said it changed the way they think about certain issues. One middle-aged Greek male said the film “reminded me of my duty as a Greek to defend my ancient cultural heritage against all kinds of small-time companies and contractors”. However, only two of the 14 respondents said the film encouraged them to take action (e.g. join a campaign).

Mourning Rock was one of a handful of documentaries that left a particular impression on local or national audiences. *Petitot* (2018) – the story of a larger-than-life Barcelonan gypsy who promises to take his dying mother to see Catalan rumba performed by gypsy musicians at Barcelona’s grand opera house – was named as an impactful documentary by eight Spanish respondents, while *The Silence of Others* (2018) – which follows victims and survivors of Spain’s 40-year dictatorship under General Franco in their attempt to secure justice for past crimes – was mentioned by five Spanish respondents. In general, older respondents were significantly more likely to be affected by ‘national’ documentaries than younger respondents.

Morning Rock also stands out as a film which inspired respondents to become filmmakers themselves. One Greek teenager, for example, said the film “made me want to make documentaries myself about things that are happening around me, even next to my house”. Three other documentaries which inspired respondents to become filmmakers themselves were *Arraianos* (dir. Enciso, 2012), *Dearest Executioners* (dir. Patino, 1977) and *En construcción* ('Work In Progress', dir. Guerin, 2001). All were mentioned as ‘national’ documentaries, suggesting that budding filmmakers are perhaps more likely to be inspired by local stories and filmmakers.

Bowling for Columbine (2002)



Bowling for Columbine (dir. Moore, 2002) © United Artists, Alliance Atlantis, Salter Street Films, Dog Eat Dog Films

Bowling for Columbine follows American filmmaker Michael Moore as he explores the causes of the Columbine High School massacre in 1999 and other acts of gun violence in the US. With his signature combination of anger, provocation and

humour, Moore debunks conventional answers about the

negative impact of violent music or video games on young people to argue the roots of gun violence lie deeper in America's culture of fear and bigotry. He also confronts the powerful political and corporate interests fanning this culture for their own gain.

Bowling for Columbine is one of the most commercially successful documentaries of recent times. The film sold 3.5 million cinema tickets in Europe – including over one million in France and Germany respectively – and took over \$58 million globally on a budget of only \$4 million.³¹ It was also well-received by critics, with a Metascore of 72%. The film won a host of awards including the Oscar for Best Documentary Feature, the César Award for Best Foreign Film, and a special 55th Anniversary Prize at the Cannes Film Festival, where it received a 13-minute standing ovation. Yet it also courted controversy when Moore used his Oscar acceptance speech to criticise the Bush administration for the US-led invasion of Iraq.

Although already fairly well-known to documentary audiences through films and television shows like *Roger and Me* (1989) and *TV Nation* (1994-95), *Bowling for Columbine* introduced Michael Moore to a global, mainstream audience and paved the way for the even

more successful *Fahrenheit 9/11* (2004), which sold 8.8 million tickets in Europe. Almost 20 years after it was first released, *Bowling for Columbine* remains available on 22 VOD platforms across four European countries.

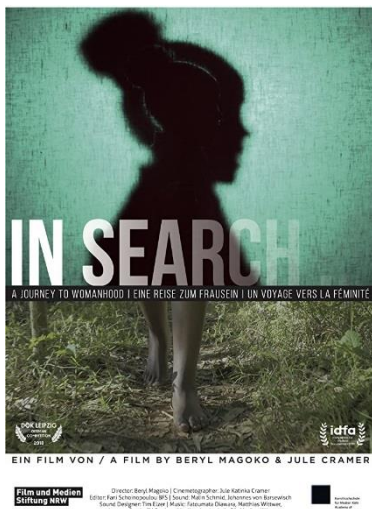
14 respondents named *Bowling for Columbine* as a documentary that had made a particular impact on them. A further six respondents name-checked other Michael Moore documentaries, including *Roger & Me*, *Fahrenheit 9/11*, *Sicko* (2007), *Capitalism: A Love Story* (2009), *Where To Invade Next* (2015), and *Fahrenheit 11/9* (2018), though *Bowling for Columbine* was the only documentary to be mentioned more than once. Those who named *Bowling for Columbine* as an impactful documentary tended to be male, middle-aged, well-educated, and (somewhat ironically given Moore's anti-capitalist ideology) higher earners. A significant proportion were also Spanish.

11 of the 14 respondents said *Bowling for Columbine* had affected them emotionally. Eight respondents said they had learned a lot about the country or place shown in the film, suggesting it offered revealing insights into American society. (Moore's other documentaries achieved a similar outcome, with one respondent saying that *Sicko* had provided an "insight into what it's like in other countries / how other countries think"). Yet only six respondents said the film changed the way they think about certain issues – though this may be because most respondents who mentioned the film already agreed with Moore's political outlook.

The film also triggered few proactive responses. Only three were encouraged to talk to others about the issues shown in the film, while none were prompted to either take action (e.g. join a campaign) or change their lifestyle or behaviour. Only one respondent offered any fuller explanation of how the film had affected them: a middle-aged Icelandic male graduate, who said that the film "showed me that it's important to dive deeply to understand [issues], and to examine the larger context".

³¹ Box Office Mojo, 'Bowling for Columbine'. <https://www.boxofficemojo.com/release/rl2336654849/> [Accessed 17/6/20].

In Search... (2018)



In Search... (Magoko, 2018) ©
Kunsthochschule für Medien Köln

In Search... A journey to womanhood (2018) is a documentary made by Beryl Magoko, a Kenyan filmmaker based in Germany who underwent Female Genital Mutilation (FGM) as a child and now faces the emotional dilemma of whether to undergo reconstructive surgery on her genitals. The

film – which Magoko made for her film diploma at the Academy for International Education in Bonn – features conversations between Magoko and other women who went through a similar experience. Magoko’s aim was to “encourage women who went through FGM to talk about it,” in order to “save many young girls from undergoing this barbaric act”.³²

In Search... had a very limited release. After premiering at the DOK Leipzig film festival in November 2018, it toured specialist documentary and human rights film festivals across the world, including the International Documentary Film Festival (IFDA) Amsterdam, Geneva International Film Festival and Forum on Human Rights, and the International Festival of Documentary Film Khoribga in Nigeria. It won several awards – including the Filmpreis Leipziger Ring Award at Dok Leipzig, the Best Student Film at IDFA Amsterdam, and the Néstor Almendros Award at the Human Rights Watch Film Festival in New York – and was shown as part of the DocsBarcelona festival in 2019, where it won the New Talent Award. However, the film appears to have had no general theatrical release and is available on few VOD platforms in Europe. Indeed, the only platform currently showing the film appears to be Spain’s FilmIn, which is

supported by Creative Europe and the Spanish government and Catalan department of culture.³³

13 respondents said *In Search...* had affected them in some way. All but two were women. Most were young, well-educated, and urban dwellers. All 13 respondents lived in Spain and completed the Catalan version of the Moving Docs Survey, which suggests they probably saw the film through the DocsBarcelona festival in 2019. As with *Swedish Theory of Love*, this is again testimony of the power of Moving Docs partners in terms of bringing small but powerful films to wider audiences.

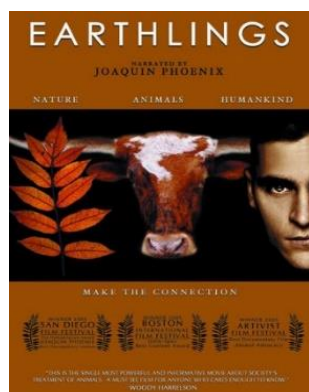
11 of the 13 respondents said they had been emotionally affected by the film. Eight respondents said they had learnt a lot about the issues shown in the film, while eight also said the film had improved their understanding of a person or event. However, only two respondents said the film had changed the way they think about certain issues, while just one said the film encouraged them to take action. No respondents offered any further explanation about how the film had affected them, though one did comment that they “really liked that there was the director and she spoke”, which may be a reference to the fact that Magoko appears in the film itself and tells the story from her own personal perspective. In other words, while *In Search...* may have raised public awareness about the issue of FGM, it did not necessarily encourage women in Europe to talk about this issue or join the campaign against it.

However, this is not always the case with documentaries featuring strong women. For example, 10 of the 13 respondents who named *Push* as a documentary that had affected them in some way and six of the 13 respondents who named *Honeyland* said these films had encouraged them to talk to others. Indeed, documentaries featuring strong women were significantly more likely to generate discussion than other types of documentaries.

³² Beryl Magoko, ‘Director’s Notes’, *In Search...*
<https://insearch.magoko.net/directors-note/> [Accessed 18/6/20]

³³ ‘Womanhood’, *FilmIn*. <https://www.filmin.es/pelicula/womanhood>
[Accessed 16/6/20].

Earthlings (2005)



Earthlings (dir. Monson, 2005) © Nation Earth

Directed by environmental activist Shaun Monson, *Earthlings* examines the exploitation of animals for pets, food, clothing, entertainment and scientific research. Using hidden camera footage from inside

pet stores, science labs, circuses, factory farms and

abattoirs, the film shows the mistreatment and slaughter of animals in horrifically graphic detail. It draws parallels between the human exploitation of other animals (termed 'speciesism') and racism, sexism and other forms of prejudice. The film – which is narrated by the American actor Joaquin Phoenix – is highly didactic and was even described as 'propaganda' by one IMDb user.³⁴

Like *The Swedish Theory of Love*, *Mourning Rock* and *In Search...*, *Earthlings* did not perform particularly well at the box office when it was released in 2005. Indeed, it appears to have been screened at only a handful of small film festivals, including the Artivist Film Festival, which champions the activist efforts of filmmakers in the areas of human rights, child advocacy, environmental preservation, and animal rights. Neither was it critically acclaimed. Though it picked up some festival prizes, such as the Best Documentary at Artivist and the Humanitarian Award at the San Diego Film Festival, it received barely any coverage in the mainstream press.

Nevertheless, the film seems to have built-up a word-of-mouth following online, partly because it is freely available to view via the film's official website and other VOD sites. The film has had 344,000 views on Vimeo.³⁵

11 respondents named *Earthlings* as a documentary that had affected them in some way. Most were women aged 25-34, well-educated, urban dwellers on low incomes.

Ten out of the 11 respondents said the film had affected them emotionally. Nine respondents said they had learnt

about issues shown in the film, while the same number also said the film had changed the way they think about certain issues. Yet perhaps most strikingly, nine out of eleven respondents said the film encouraged them to change their lifestyle or behaviour. One respondent, for example, described how she "stopped eating meat" after watching the film; another said it influenced her decision to become a vegan. Other respondents noted that the film "strengthened [their] compassion for all the creatures of the earth" or encouraged them to reflect on their "relationship with other animals overall". One respondent, for example, explained how the film helped her overcome "any doubts [she] had about the intelligence, empathy, love, and pain that animals feel". Yet there was little explicit mention of 'speciesism', the idea that it is morally wrong for humans to favour the interests of their species over other animal species.

Earthlings was one of 97 documentaries which encouraged respondents to change their lifestyle or behaviour. Many of these documentaries dealt with the exploitation of animals and the natural world or the human and environment impact of the food industry and consumerism more generally. *Food, Inc.* (dir. Kenner, 2008), which looks inside America's corporate controlled food industry, changed the behaviour of six respondents; *The Cove* (dir. Psihoyos, 2009), which analyses and questions dolphin hunting practices in Japan, changed the behaviour of four respondents; and *Cowspiracy: The Sustainability Secret* (dir. Andersen and Kuhn, 2014) changed the behaviour of two respondents. Meanwhile, one respondent said that he "doesn't drink soft drinks anymore" after watching *Super Size Me* (dir. Spurlock, 2004), in which Morgan Spurlock eats McDonald's fast food every day for a month, while another respondent said she "stopped shopping at certain clothing chains and now insist on reusing clothes" after watching *The True Cost* (dir. Morgan, 2005), a documentary exploring the impact of fast fashion on people and the planet. Crucially, such films were most likely to affect the behaviour of 16-24-year-olds and non-graduates – two of the groups least likely to watch documentary films.

³⁴ IMDb, 'Earthlings', *User Reviews*, https://www.imdb.com/title/tt0358456/reviews?ref_=ttexrv_sa_3. [Accessed 8/7/20].

³⁵ 'Earthlings', *Vimeo*. <https://vimeo.com/138586659>. [Accessed 18/6/20].

6. WHAT WOULD ENCOURAGE MORE DOCUMENTARY VIEWING?

The key factor likely to encourage Moving Docs Survey respondents to watch more documentaries in cinemas is **having more films on topics that interest them**, with almost half (48%) of respondents selecting this option (figure 7). Screening more documentaries on topics that interest them was a particular concern for 16-24-year olds (58%) and non-graduates (54%) – two of the groups least likely to often watch documentaries in cinemas.

Having more documentaries in local cinemas (46%) and ensuring there is more information or publicity about the latest documentary film releases (41%) were also key concerns – particularly for non-urban dwellers (another group less likely to view documentary films in cinemas) and young people, respectively.

Cheaper cinema tickets were identified as a key concern for unemployed/retired people. About two-fifths (42%) of this group said this would encourage them to watch more documentaries in cinemas.

Staging special event screenings (e.g. live Q&As with the film's directors) was a key issue for media professionals and urban dwellers, while having more free time was a concern for 35-54-year olds and full-time workers, who no doubt have the busiest personal and professional lives.

However, most survey respondents did not think more special event screenings, more free time or more local cinema venues would necessarily encourage them to watch more documentaries in cinemas. Generally, less than a third of respondents chose these options.

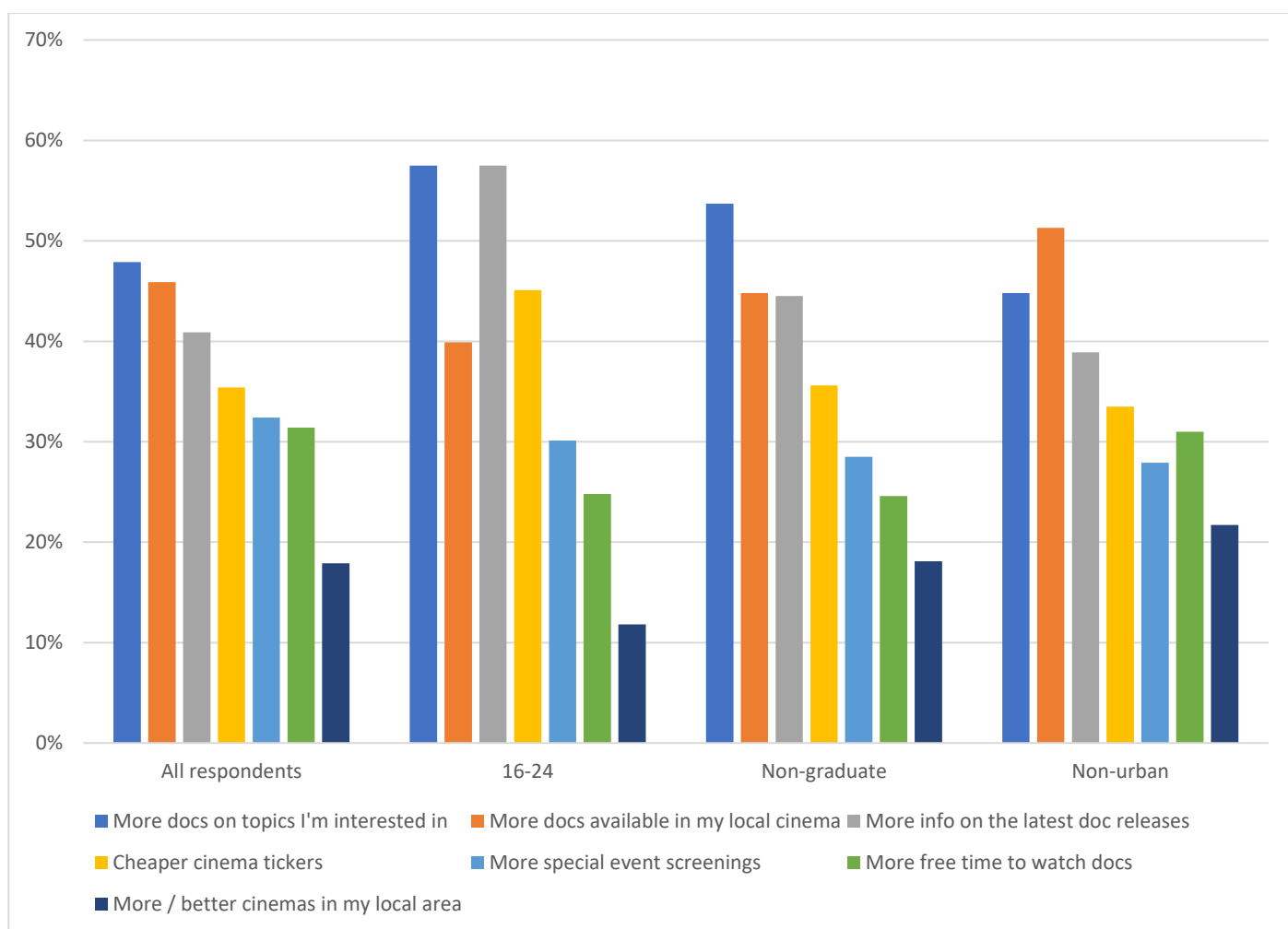


Figure 7. Factors which would encourage respondents to watch more documentaries in cinemas (with emphasis on those groups least likely to watch documentaries in cinemas).

CONCLUSION / RECOMMENDATIONS

As the final results of the Moving Docs Survey came in on 30 January 2020, the World Health Organisation declared the Coronavirus outbreak as a Public Health Emergency of International Concern. Six weeks later, countries across Europe began to go into lockdown, to halt the spread of COVID-19. Cinemas and film festivals – including the Thessaloniki Documentary Film Festival, where the results of the Moving Docs Survey were due to be presented – were closed.

At the time of writing, it is unclear what the documentary film sector will look like once Europe emerges from the Coronavirus pandemic. But one thing is certain: we need documentaries now more than ever.

As the findings of the Moving Docs Survey make clear, documentaries help us to understand complex issues. They encourage dialogue and can even inspire us to change our lifestyle and behaviour. Documentaries therefore have a key role in helping us navigate not only the post-Coronavirus world, but also all the other global challenges we face in the twenty-first century, from economic instability to climate change.

However, the survey findings also revealed that some groups are more likely to engage with documentaries than others. Young people often gained the most from the experience of watching documentary films but were less likely than older people to watch these types of film, particularly in cinemas. Rural dwellers and those without university degrees also watched fewer documentaries than the majority of respondents surveyed.

What can be done, then, to encourage these groups to watch more documentaries, particularly in cinemas, where the experience of watching documentary films often leaves the deepest impression on audiences? The survey results point to several key recommendations:

Firstly, ensure there are more documentaries on topics that interest 16-24-year olds and those without university degrees. While the survey didn't directly ask respondents which topics most interest them, these groups often mentioned documentaries that had affected their lifestyle or behaviour when asked to name a documentary that had affected them in some way. Often

these were films which focused on issues to do with food and consumerism. Music biographies were also particularly popular with non-graduates.

Secondly, ensure there are more documentaries available in cinemas in suburbs, towns and villages. Non-urban dwellers do have access to cinema screens, but they don't have access to the same range of films as their urban counterparts. More could be done to ensure those living outside major cities have access to the latest documentary film releases.

Finally, ensure young people (particularly 16-24-year olds) have more information or publicity about the latest documentary film releases. Again, the survey didn't ask how respondents find out about documentary films. Yet the results do suggest that young people are likely to respond to advertising that emphasises subject matter, reviews and the film's contemporary relevance. Emphasising these aspects of the film could be one way of ensuring they appeal to young people.

Other strategies like staging more special event screenings are only likely to benefit groups (e.g. media professionals and urban dwellers) who already often watch documentaries in cinemas. This is not to say things like live Q&As with directors are ineffectual, since they do serve an existing audience. But they are unlikely to attract new audiences to documentaries.

Clearly, more research needs to be done on documentary film audiences, particularly in terms of what topics interest young people and non-graduates and how these groups find out about the latest film releases. It would also be useful to survey a more representative sample of the European population in order to identify the characteristics and behaviour of those who rarely or never watch documentary films and make our findings generalisable to Europe as a whole.

Nevertheless, it is hoped these recommendations – along with the survey findings and analysis on which they are based – will provide Moving Docs' partners, documentary distributors and festival programmers with the first practical steps towards reaching and engaging more diverse ages and interest groups.

EUROPA CINEMAS FOCUS

Europa Cinemas is the first network of cinemas focused on European films. Today it has 1,232 cinemas (3,123 screens) in 751 cities and 43 countries. Our mission is to foster European films circulation and strengthen the diversity of the European audiovisual industry through the programming and communication efforts of our members.



Cinema Ideal, Portugal. Credit: Europa Cinemas

Despite the fact that our exhibitors are facing the challenges of today's audiovisual ecosystem transformation, market results show that the big screen remains central as a way of discovering films. This is true for documentaries as well. Europa Cinemas' members are using documentaries on the big screen as a means to attract, engage and diversify audiences.

Through the powerful messages they convey and their informational and pedagogical nature, documentaries are a great tool for audience development and community building. Throughout the year, on top of the regular programme, exhibitors screen documentaries weekly in thematic cycles dealing with social, political or artistic subjects. They also host festivals, programme premieres with directors and partner with local institutions in creating environments for debates.

The added value of including documentaries in a variety of different programmes, results in their being very well positioned. In the network cinemas, documentaries represented 5% of the total admissions and 8% of the European ones for 2018. This is very high compared to the

market figures.¹ This presence is heightened both by digitization, making it easier to program films for special screenings, and the need of exhibitors to bring their venues to life through socio-cultural events

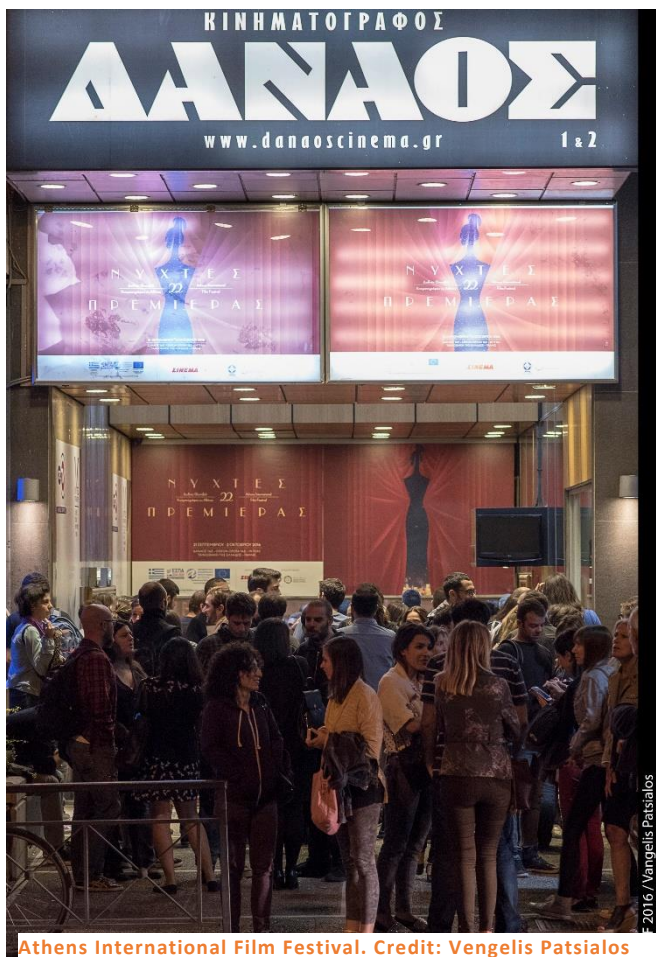
Among our network members, the following are good examples of cinemas who widely programme documentaries. *Ideal*, the last remaining art house cinema in downtown Lisbon, has programmed 27% of documentaries since its opening in 2014. Since 1995 the *Lichtspiel Kino* in Bamberg (Germany) has given considerable prominence to documentaries in its programming and today they represent over 40% of the cinema's yearly offer. In Spain, *Cinemes Girona* partners with Docs Barcelona to screen documentaries every week. And finally, there is also the *Bertha DocHouse* (based at Curzon Bloomsbury), UK's first cinema exclusively dedicated to documentaries seven days a week.

In 2018, there were many "national" successes in the Network, for which the work of our exhibitors was crucial. In Austria, 71% of the national admissions for the film *Waldheims Walzer* (Ruth Beckermann) were registered in Europa Cinemas member theatres, and both *Santiago, Italia* (Nanni Moretti) in Italy and *De Wilde Stad* (Mark Verkerk) in the Netherlands, also did very well with 83% and 45% respectively.

In Spain, while network cinemas represent 8% of the cinemas in the country, they accounted for 75% of the national admissions for *Maria by Callas*. These examples highlight the impact our member theaters can have on a film's career. In terms of general results for documentaries, our Spanish exhibitors had a market share of 3,5% for admissions and 2,8% for European film admissions in 2018.

In Greece, the most successful national title of 2018 was *1968* (Tassos Boulmetis). The film ranked ninth in the top

¹ In France, documentaries represented 1.2% in terms of admissions in the film market in 2018, according to the CNC publication *Le marché du documentaire*, June 2019. In the UK and the Republic of Ireland, documentaries represented 0.7% of the total Box-Office according to the *Statistical Yearbook 2018* (Film at Cinema) by the BFI.



Athens International Film Festival. Credit: Vangelis Patsialos

European films of the network by admissions, and domestically, it was 27th. For our 41 member theaters in Greece, documentaries represented 5,9% of their admissions and 4,9% of their European admissions.

Our member *Danaos cinema* (Athens) works closely with Moving Docs, organizing screenings of documentaries aimed at young audiences in partnership with CineDoc Greece. Thanks to this collaboration, Greece came in second position in terms of admissions in the network for the documentary *Over the limit* (Marta Prus).

In 2017 and in 2018 several documentaries travelled successfully beyond national borders: *Pope Francis: A Man of His Word* (Wim Wenders) attracted nearly 230,000 viewers in a dozen countries, *Maria by Callas* (Tom Volf) was distributed in approximately twenty countries and cumulated 220,000 admissions, while *Faces Villages* (Agnès Varda and JR) reached almost 300,000 admissions in the Network.

Faces Villages and *Maria by Callas* are good examples of films with long-term programming as both were screened in the network for almost two years. Distribution over time rhymes with extensive circulation as confirmed by *Maria by Callas* which was shown in 524

cinemas – this is almost half the entire Network! *Faces Villages* follows closely with 488 cinemas in 2018 and a total of 669 over the two years.

Amongst the documentaries found in the Moving Docs survey, there is Fredrik Gertten's documentary *Push*. The film was released in 13 countries throughout the cinemas of the network in 2019 and it reached 72% of its national admissions in our Swedish movie theatres².

These examples demonstrate that documentary is at the heart of the audience-focused approach implemented by our member theaters. Europa Cinemas theatres place audience demands and tastes at the core of their work and that is why they programme documentaries. The genre is needed today on the big screen because it not only facilitates dialogue and debate but helps reach stakeholders and target niche audiences. In conclusion, exhibitors of the network programme documentaries because they believe in their role of community builders as key cultural actors in Europe.

Irene Angel Echeverri (Europa Cinemas)



Cinema Girona, Barcelona. Credit: Europa Cinemas

² These results should be confirmed in our final statistics report.

APPENDIX: THE MOVING DOCS SURVEY