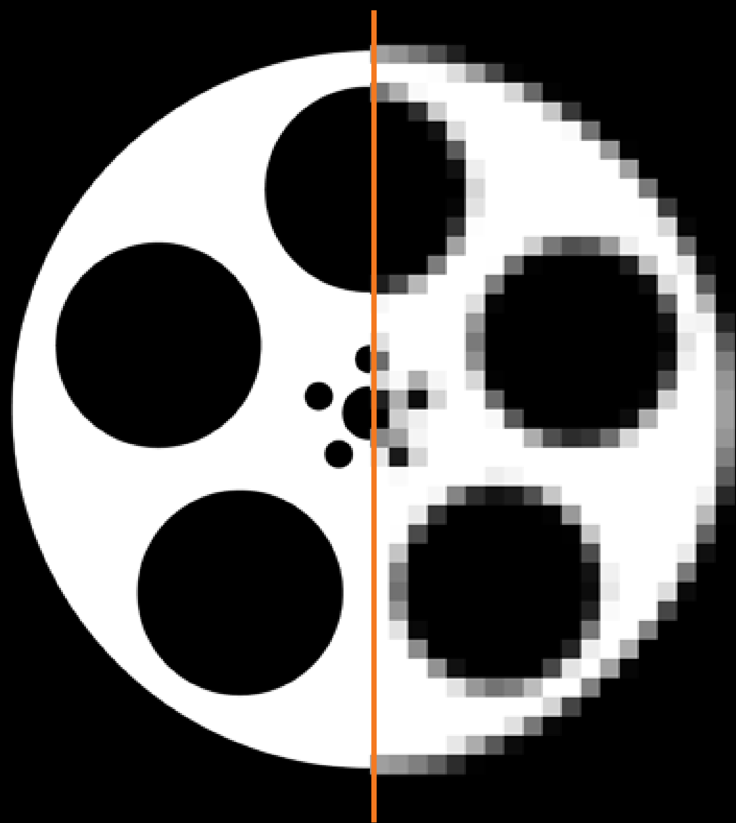

Digital Distribution Report

THE PERFORMANCE OF DOCUMENTARIES ON DIGITAL SERVICES IN CANADA

DOC
DOCUMENTARY ORGANIZATION OF CANADA
DOCUMENTARISTES DU CANADA

Digital Distribution Report

THE PERFORMANCE OF DOCUMENTARIES ON DIGITAL SERVICES IN CANADA

List of Acronyms

BDU
Broadcasting distribution undertaking

CBC
Canadian Broadcasting Corporation

CMF
Canada Media Fund, formerly the Canadian Television Fund

CMPA
Canadian Media Production Association,
formerly the Canadian Film and Television Production Association

CRTC
Canadian Radio-television and Telecommunications Commission

DOC
Documentary Organization of Canada

MBPS
Megabits per second

NFB
National Film Board

RODO
Rogers On Demand Online

SRC
Société Radio Canada

SVOD
Subscription video-on-demand

TVO
TV Ontario

VOD
Video-on-demand

Executive Summary

More Canadians are using digital platforms to access professionally produced video content.

Over the course of the last 5 years:

- Reported usage of video-on-demand among the French market rose from 7% to reach 17%, whereas reported usage in the English market increased by 6% to reach 15%.
- Reported usage of Internet video in the French market jumped from 26% to 29%, and reported usage in the English market also rose substantially, from 30% to 51%.
- Reported usage of mobile video in the English market increased from 2% to 9%, while reported usage in the French market climbed from 1% to 4%.

As part of an expansive audiovisual offer, documentaries are available on a wide range of services with differing results.

Between 2009 and 2011, documentary viewership rose on these services. Services with large accessible libraries are the most popular, namely the NFB and broadcaster portals. Less-accessible services yielded fewer total requested views such as Rogers on Demand Online (RODO).

- Over the course of one year, documentaries on History Television's portal had 1.5 million total requested views.
- Over the course of one year, NFB.ca had 2.5 million total requested documentary views worldwide, and 150,000 total requested documentary views on its mobile applications (iPhone, and iPad).
- On RODO, total documentary viewership exceeded 28,000 total requested views over a 10-month period.

Tracking viewership for the most popular titles over the course of a year indicates that individual titles do not reach high viewership.

- In Canada, the average viewership of a popular feature documentary on a broadcaster portal is 8,000 views over the course of a year.
- The top-viewed episode of a documentary series garners almost 60,000 views over the course of a year.
- The average viewership of the most popular English documentary titles on NFB.ca is 64,702 views (worldwide) over the course of a year and 37,226 views for French (worldwide).
- The average viewership of the top 5 English titles on the NFB's mobile applications is 12,556 views a year (worldwide) and 4,372 French (worldwide).

Because of difficulty in obtaining trackable data, it is impossible to provide the number of downloads of Canadian documentaries on iTunes. However, tracking the ranking of Canadian documentaries in the top 200 rankings allows for an assessment of their popularity. The frequent appearance of Canadian documentaries in the top 200 titles indicates that a limited library can attract viewers.

- On iTunes, Canadian documentary features occupied 10% of the spots in the top 200 documentary purchase rankings per week, during a 6-month period.
- On iTunes, at least one Canadian documentary television series appears in the top 200 television series purchase rankings per week, during a 6-month period.

Digital technology allows Canadians to watch professional content whenever and wherever they want, but the increased convenience has yet to yield the same viewership as television. The most popular documentaries on television garner a 900,000 “Average Minute Audience” in the English market, whereas television documentaries in the French market receive Average Minute Audiences of above 1 million.

There is much excitement and hype about digital distribution and the inherent possibilities it offers to connect audiences and content. Popular wisdom would have us believe that Canadian audiences expect content to be available on every channel and platform. The adage is “content anytime, anywhere”. However, the numbers show that audiences are still primarily turning to television in large numbers. What the numbers fail to show on the digital distribution side is that the business case to make content available has yet to emerge. And digital piracy further erodes the digital revenue streams.

Irrespective of the absent business case, producers, broadcasters and distributors are expected to enter this uncertain market. At this time, Internet service providers benefit from more traffic; technology companies increase their sales of digital media devices; and Canadians have greater access to content. On the other hand, content creators question whether digital distribution will yield anything more than greater exposure.

Introduction

What does Canada's ongoing digital revolution mean for its documentary sector? On the one hand, it presents many opportunities to filmmakers and viewers: ubiquitous access, instant international market reach, self-distribution, and a growing number of new platforms. On the other, it creates new challenges to broadcasters and distributors: piracy, tracking viewership, increased concentration of ownership, and audience fragmentation.

Canada's documentary sector wants to exploit digital distribution to reach new audiences by distributing its content across the nation and the world. Canada is a receptive digital market. It is one of the most digitally connected countries in the world, and our consumers are rapidly adopting digital video services. There is also government support: the Canada Media Fund's (CMF) mandate is to promote innovation and reach audiences. It appears that now is the time to dive right in.

Currently, there are no benchmarks or measures of success against which the documentary industry can judge its performance in the digital market. Without intelligence, the entire industry is blindly venturing into a radically different commercial setting. In order for producers, distributors, policymakers, and funders to achieve each of their respective ends, they need a basis of comparison.

The *Digital Distribution of Documentaries Report* is an environmental scan of Canada's documentary digital distribution services. It provides statistics regarding the performance of documentaries on some of Canada's most popular documentary platforms. An argument is advanced for the creation of benchmarks and indices that would allow the industry to experiment, embrace, and exploit the digital market in Canada.

Overview

The report is divided into six chapters: Digital Canada, Broadcaster Digital Services, National Film Board (NFB) Platforms, Rogers On Demand Online (RODO), iTunes and Trends in Documentary Distribution, followed by a conclusion. The Digital Canada section sets the stage by providing a brief introduction about our digital present: how many Canadians are connected, and how they consume content. A list of the digital business models and strategies is provided followed by a synopsis of the current communications environment, which examines the major players in Canada's digital video market.

The Digital Canada section sets the stage by providing a brief introduction about our digital present: how many Canadians are connected, and how they consume content. A list of the digital business models and strategies is provided, followed by a synopsis of the current communications environment, which examines the major players in Canada's digital video market.

The Broadcaster Digital Services section investigates how documentaries perform on online video portals and their mobile applications. This section examines the size of documentary libraries on each service, documentary viewership on the platforms by origin (Canadian vs. non-Canadian) and format, and the top five titles on each service.

NFB Platforms explores the performance of documentaries by Canada's most robust documentary distributor. The section probes the composition of its library and the popularity of different titles by segmenting data by device, format, language, and origin of viewers and viewership habits.

Rogers On Demand Online spotlights documentaries on TVeverywhere services through an examination of RODO. This section scans documentary viewership, the number of titles in the RODO library and top-performing titles and services on RODO.

The iTunes Store is the focus of the next section. Distilling insights from a 26-week log of iTunes' top 200 rankings, this section analyses the popularity and performance of feature films and television documentaries on this highly successful digital download service.

In Trends in Documentary Distribution, the report summarizes key insights garnered from the previous sections and presents an evaluation of the performance of documentaries in Canada.

The final section, Next Steps, outlines recommendations for further research and discusses the future of documentaries on digital platforms.

A list of definitions of commonly used terms in this report is compiled on pages 54 and 55.

Methodology

Unlike the television and theatrical market, the digital distribution sector lacks any standardized measurement agencies or standards. As a result, there is no centralized agency where one can collect data related to all of the digital distribution services. Instead, the Documentary Organization of Canada (DOC) requested data from individual services. Depending on the policy of the service, data may be easily obtained and segmented with ease (participating broadcasters and the NFB), or it may be placed under lock and key, never to be shared (iTunes).

Total requested views were chosen as a baseline for viewership because they indicate intention on the part of the user to watch the video. The number of documentary titles in the library was used to indicate how much selection was available to the user.

When data flowed less openly, as was the case with iTunes, the top 200 rankings were used as the primary data source for evaluating the performance of documentaries, because they indicate which content was purchased most frequently. For 26 weeks, DOC logged the top 200 rankings for documentary feature film purchases and the top 200 rankings for television series and episodes. For the first 15 weeks, DOC tracked the top 200 rankings for documentary feature film rentals until iTunes discontinued the publication of this information on their store.[1]

Because the disclosure of data is determined by the service, only the services that responded to requests and whose data fulfilled the report's specifications have been included.

The implications for our study are:

- It is not as exhaustive as planned; many services are not included (VOD, other broadcasters).
- It is not as rigorous as desired: some data is not comparable across services; and

1 As of August 2011, digital rentals were no longer available on iTunes.

- It lacks strong conclusions about digital downloads: the success of some services (particularly iTunes) are speculated upon in the absence of hard data.

Methodological issues by section

BROADCASTER DIGITAL SERVICES

At the outset of the project, DOC contacted all Canadian broadcasters who broadcast documentaries on their channels and appeared to stream them online. DOC requested data from 11 broadcasters/corporate groups/broadcaster services but only four returned data that could be used in the report. Four broadcasters agreed to to provide the requested data while others who didn't have any documentary content on their portals could not fulfill the data request.

Each participating broadcaster was requested to deliver the total requested views of documentaries on their platforms by origin (Canadian vs. non-Canadian), the number of documentaries in their libraries by origin for the 2009–10 and 2010–11 (as much as possible) broadcast-years, and the top five documentary titles of a single year. Given the absence of participating French-language portals, the data request did not contain segmentation by language.

As for mobile applications, most broadcasters had yet to launch, or their mobile applications did not have any documentaries in their libraries. Thus, no data was collected related to mobile applications.

NFB APPLICATIONS AND OTHER DOCUMENTARY PORTALS

The NFB provided ample data on the performance of documentaries on their platforms. DOC asked for total requested views, total documentary titles on their various platform libraries, and the top five rankings for both mobile and online platforms. Total requested views were segmented by format, language, origin of viewer, and platform. Total documentary titles were segmented by format, language, and platform. Top five rankings were segmented by origin of viewer (Canadian, non-Canadian, and total), format, and device (mobile and online).

Due to the unavailability of data from other sources, the documentary portals section focused solely on the NFB's range of services.

ROGERS ON DEMAND ONLINE

Rogers provided viewership statistics, top-performing titles, and the total number of documentaries in the library. It gave a ranked list of the top performing documentary services and top performing documentaries on its service but was unable to provide corresponding total requested views.

ITUNES

Apple Canada refused to share any data on the iTunes Store. As a result, we compiled our own findings as outlined in the methodology above.

VOD

VOD services are a partnership between pay-TV, specialty services, and broadcasting distribution undertakings (BDUs). In the original scope of the report, VOD services were to appear in their own section. Unfortunately, due to methodological issues and lack of data available from players in the VOD market, there was insufficient data to analyze the performance of documentaries on these services.

As a result of these methodological issues, the report focuses on services that are able to provide sufficient data, namely English-Canadian digital distribution services.

Measurement issues

There are still many measurements regarding the digital distribution of documentaries that were not collected in this report, for instance:

- total downloads of documentaries on digital download services.
- total revenue derived from documentaries on digital services;
- total ad revenue derived from documentaries on ad-supported services;
- total viewership of ad-supported services in French language markets;
- the number of documentaries on VOD services (transactional, ad-supported, and subscription);
- the total requested views of documentaries on VOD services; and
- the total viewership of documentaries on Netflix.

It is at the discretion of services to disclose this information; a large portion of it is proprietary. However, if the services shared data more openly, researchers could create more rigorous and standardized research about digital distribution. The resulting intelligence would greatly benefit all players of the sector.

Currently, there is no agency like BBM-Nielsen that captures the viewership of all of Canada's digital media properties. ComScore measures traffic on broadcaster video sites, but its categorizations of content are not conducive to analyzing traffic by genre. Nielsen has yet to move its online video measurement to Canada.

The CMF and the Canadian Radio-television and Telecommunications Commission (CRTC) are working on reporting mechanisms for Canadian digital media assets associated with broadcasters, but the reports will not include the foreign-owned services. These indices will serve as a foundation to start measuring the performance of documentaries on digital services.

Without comprehensive, uniform, and accessible data about Canada's digital services, any report on digital distribution will be unable to present conclusive remarks about the performance of the market.

1 Digital Canada

Canadians: new adopters and digitally connected

This section provides a brief introduction on our digital present: how many Canadians are connected, and how they consume content. A list of the digital business models and strategies is provided followed by a synopsis of the current communications environment, which examines the major players in Canada's digital video market.

Despite this country's vast territory, almost all Canadians have access to the infrastructure necessary to consume content on digital platforms. Almost 98% of Canadians are located within a 1.5 Mbps broadband footprint; 97% of Canadians are located in a 1.5 Mbps mobile broadband footprint.[2]

Canadians are quick adopters of new services and technology: 70% of Canadians subscribe to broadband with speeds of 1.5 Mbps, and 52% with speeds of 5 Mbps[3]; 20% of Canadians own a smartphone[4], and 6% of all Canadians own a tablet[5]; 69% of all Canadians are digital cable subscribers.[6]

In general, Anglophones spend more time online weekly than Francophones. In 2010, Anglophones spent 17.1 hours a week online on average, while Francophones spent only 12.7 hours online weekly.[7]

Over the last 5 years, Anglophones and Francophones have been consuming video on digital platforms more prevalently (figure 1.1). According to a survey of 12,000 Canadians aged 18-plus performed by Mediastats, Canadians report increased past monthly usage of VOD, Internet video, and mobile video. Anglophones consume Internet and mobile video more than Francophones, while Francophones reported more use of video-on-demand.

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2 CRTC, *2011 Communications Monitoring Report*, July 2011, p.i.

3 Ibid.

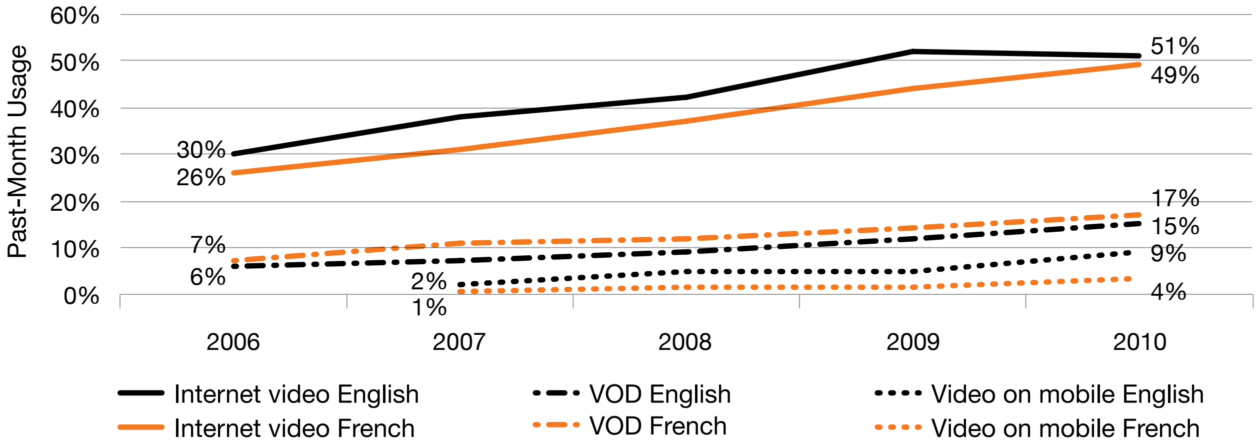
4 CBC News online, June 2, 2011, "One in five Canadians owns a smartphone: report." <http://www.cbc.ca/news/business/story/2011/06/02/technology-comscore-smartphone.html>.

5 Pulp and Paper Canada Online, "Tablet computers, eReaders have equal market share in Canada, for now," <http://www.pulpandpapercanada.com/issues/story.aspx?aid=1000434427>.

6 CRTC, 2011 Communications Monitoring Report, July 2011, p.93.

7 Ibid., p.100.

Figure 1.1 Adoption of digital platforms by language



Source: CRTC, *2011 Communications Monitoring Report*, p. 103, MTM 2010-2011 (Respondents: All 18+)

The reported consumption of online video has also increased over the past four years. In 2007, English viewers spent 2.1 hours per week watching online video and French viewers spent 1.3 hours. In 2010, English viewers watched 0.5 more hours and French viewers watched 0.2 more hours than in 2007.

In addition to watching online video, there is an increasing number of Canadians purchasing and watching television online. Since 2008, the purchase of professional video and online viewership has increased. In 2010, 9% of Anglophones reported purchasing a television episode on a digital download service in the past month, up from 2% in 2008. Meanwhile, 3% of Francophones reported using a digital download service, an increase of 2% since 2008.[8]

As for watching an entire 30- to 60-minute television program online, in 2010 47% of Anglophones reported watching television programs online in the last month, up from 38% in 2008. In 2010, 53% of Francophones reported performing this activity in the last month, a massive increase from 27% in 2008.[9]

Francophone online viewership and purchase of television content have almost doubled. Anglophones are adopting pay-to-download services more rapidly than Francophones.

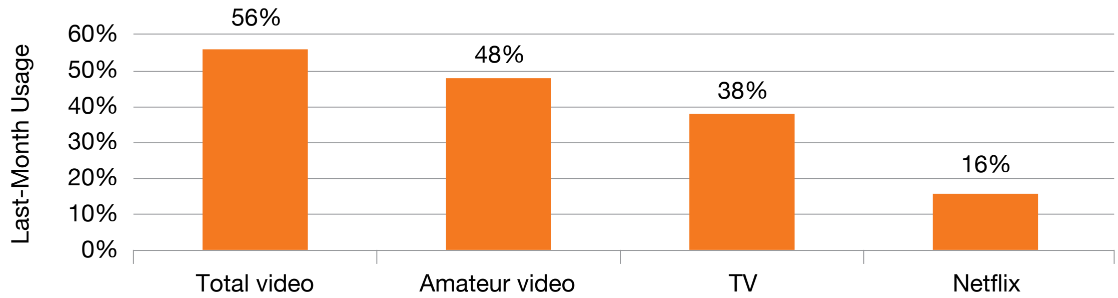
As for mobile video viewership, 27% of all smartphone users watch live TV or video online using their devices.[10] Tablet users watch video more frequently and in different forms. According to a survey performed by Mediastats, 56% of all tablet users reported watching video in the last month, and watched video in other formats to differing degrees (see figure 1.2).

8 CRTC, 2011 *Communications Monitoring Report*, July 2011, p.102, MTM 2010–2011 (Respondents: All 18+)

9 Ibid.

10 The Canadian Wireless Telecommunications Association, *2011 Cell Phone Consumer Attitudes Study*, p. 27.

Figure 1.2 Tablet video viewership: % of users by kinds of video



Source: Media Technology Monitor, Canada 3.0 digital conference presentation, May 2011

Clearly, the infrastructure is in place for Canadians to access the services; they are adopting new digital technologies and they increasingly consume content on these services. Canada is hooked up and actively embracing digital content distribution services. These favourable market conditions create opportunities for the documentary sector to distribute its content to all Canadians.

Digital distribution business models/strategies

BUSINESS MODELS

The digital marketplace is in the process of inventing itself. Generating revenue is difficult. Many strategies are being undertaken in this nascent stage of economic growth.

AD-SUPPORTED

Similar to traditional broadcast media, services deliver content to consumers for free in exchange for the viewership of advertisements. This business model is employed by broadcasters, content aggregators such as Yahoo and MSN, and online video portals such as Hulu.

DIGITAL DOWNLOAD

More akin to the DVD distribution market, consumers pay a fee to download the content as a rental or a purchase. Amazon, the iTunes Store, Zune Marketplace, Cineplex, transactional cable VOD services, console-based VOD services, and other online content portals use this model.

SUBSCRIPTION

Other services require users to pay a monthly fee to access their content libraries. Netflix, Hulu Plus, and cable-based subscription VOD services employ this business model.

FREEMIUM

The “freemium” model provides some assets of the service for free and charges consumers for other more exclusive content. Many mobile video applications employ this business model, as well as online video portals, such as SnagFilms. NFB.ca allows users to access 1,400 videos for free, but many other assets are set up on a download-to-own basis. The NFB also offers purchasable DVDs.

STRATEGIES

At first, digital distribution services approached content through a walled-garden model; they made content available only on their service and tried to direct as much traffic as possible to their portals. For example, TVO’s content is not distributed outside of its services or the websites of the production.

More recently, services have opted to syndicate their content to other exclusive online properties that fit their target audiences. It is easier to bring content to where users congregate than attempt to direct all traffic to their portals through licencing agreements. For instance:

- NFB distributes its content on YouTube, SnagFilms, and RODO in addition to its website;
- SnagFilms lets users embed the video contents on their websites, which includes links to purchase the content; and
- CBC has its content on Rogers On Demand Online, Hulu, and Netflix.

The syndicated content strategy is gaining popularity amongst broadcasters and distributors, but it has not entirely replaced the walled-garden strategy.

Changing landscape

Over the past 10 years, the consolidation of the Canadian media landscape has concentrated the majority of its broadcasting, cable, satellite, magazine, Internet, wireless and wireline phone assets into the hands of four companies: Rogers, Bell, Shaw, and Quebecor. All of these companies distribute (or plan to distribute) their content across mobile, online, and television platforms. These companies argue that their vertically integrated corporate structures are required to compete with the unregulated foreign digital distribution entrants such as Apple and Netflix.

Canada’s robust digital infrastructure, and its consumer reputation as early adopters and as one of the largest consumers of media in the world have enticed foreign companies to bring their services to Canada.

First launched in 2004, Apple’s iTunes Store Canada expanded its services in 2008 to include the distribution of film and television content. It is the most popular digital download service in the U.S. and Canada. Released in September 2010, Apple TV is a set-top box that enables consumers to access their iTunes library and Netflix and rent HD movies.

Netflix launched in Canada in October 2010. After 10 months, it had almost 1 million subscribers.[11] According to a recent report on Netflix and North American bandwidth consumption, Netflix's share of Canadian bandwidth is 13.5% of all evening Internet downstream traffic.[12]

Although Apple and Netflix are the major brands, there are many more foreign services that are vying for Canadian attention. Over the last 3 years, Microsoft's Zune Marketplace, the PlayStation Store, and Wii channels have sold digital downloads of films to Canadians. Sony's Qriocity and Best Buy's CinemaNow will launch in 2011. Unlike digital services affiliated with Canadian companies, none of these foreign players are regulated to contribute to the Canadian-content production environment.

The increased number of digital distribution services creates great opportunities for documentary media to expand the scope of its market. Assessing the performance of documentaries on digital platforms in Canada is of key importance.

Two major questions must be addressed. First, what can documentary producers expect from the digital marketplace? Second, how can Canadian documentary producers exploit the market given Canadian audiences' preference for foreign content, and the growing dominance of foreign digital distribution services in Canada?

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11 Netflix: 2nd Quarter Letter to Investors, <http://files.shareholder.com/downloads/NFLX/1346033219x0x485532/067c1c07-f779-40f8-a1fb-20096eeb9bbc/July%20Investor%20Letter%201130am.pdf>.

12 Sandvine, *Sandvine Global Internet Phenomena Spotlight – Netflix Rising*, May 2011, p. 4.

2 Broadcaster Digital Services

Canadian broadcasters use different channels to distribute documentaries digitally: subscription online video-on-demand services, online video portals, and mobile applications. This section provides an overview of the performance of documentaries on online video portals by comparing the number of documentaries in the content libraries, viewership statistics, and top five viewed documentaries. The mobile applications launched by broadcasters are also outlined.

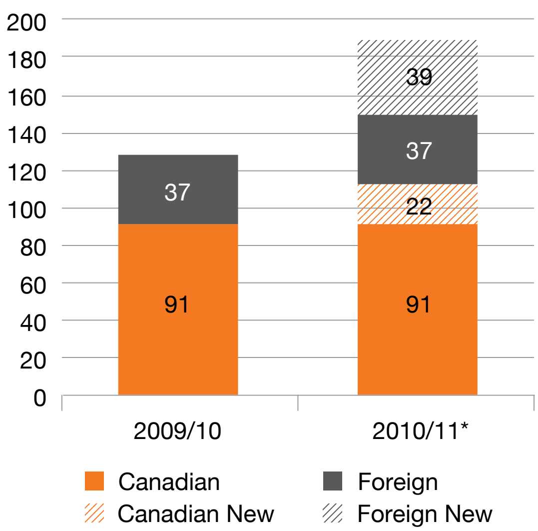
Online portals

DOCUMENTARY LIBRARY

Despite the absence of Canadian content regulations for online video portals, the majority of documentary content on these video portals is from Canada because broadcasters acquire the streaming rights when they commission programs from documentary producers.

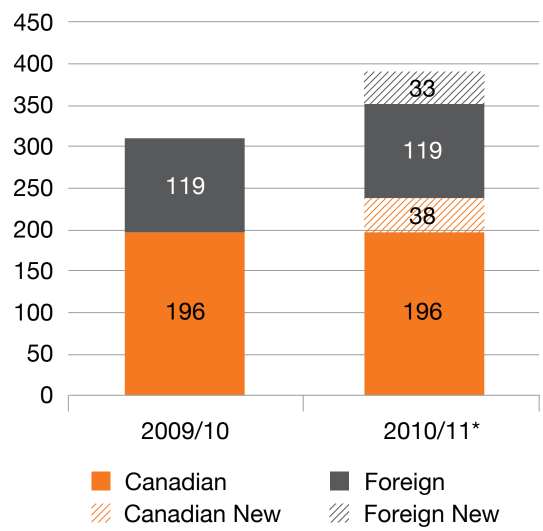
The number of non-Canadian documentary titles on broadcaster portals is increasing (see figures 2.1 to 2.4). In most cases, more non-Canadian documentary titles are added than Canadian. The number of non-Canadian documentary titles now outnumbers Canadian ones on some services (TVO and Knowledge Network).

Figure 2.1 CBC portal: documentaries in library



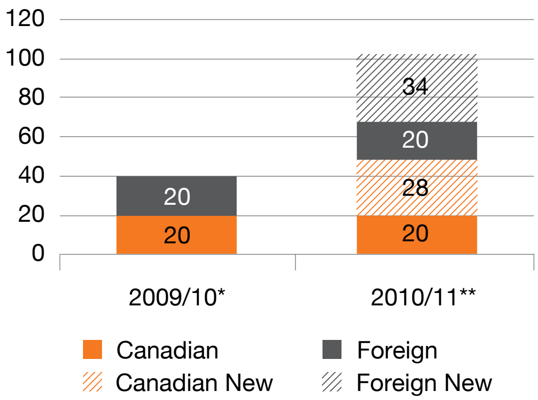
*Partial: September 2010–February 28, 2011
Source: CBC data request, March 2011

Figure 2.2 History Television portal: documentaries in library



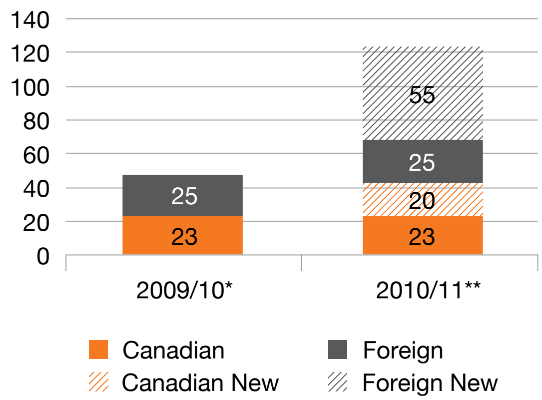
*Partial: September- 2010–February 28, 2011
Source: History Television data request, March 2011

Figure 2.3 Knowledge Network portal: documentaries in library



*January 2010 to August 2010
**September 2010 to February 28, 2011
Source: Knowledge Network data request, March 2011

Figure 2.4 TVO portal: documentaries in library



*Partial: August 2009 to March 2010
**April 2010 to February 2011
Source: TVO data request, March 2011

The libraries of these portals differ based on the programming of their affiliated broadcaster. The libraries of CBC, TVO, and Knowledge Network contain mainly one-offs and mini-series. History Television's library is mainly documentary series, but it does contain some features.

VIEWERSHIP

The Canadian broadcaster with the most popular online video portal is CTV. In 2010–11, its library received on average 11 million views a month.[13] In the 2009–10 broadcasting year, CTV announced 138.7 million views.[14] Many of those views were attributable to 2010 Olympic Games viewership. Previous research indicates that its documentary assets received about 900,000 views between September 2009 and June 2010,[15] which averages out to 90,000 views per month. Thus, documentary viewership would make up 1% of CTV's total viewership.

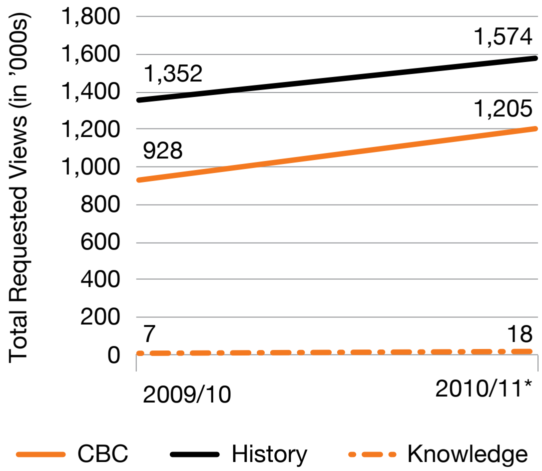
Data from the participating broadcasters indicates that documentary viewership is growing. Even though the broadcast year has yet to finish, the 2010–11 viewership of documentaries has surpassed those of 2009–10 (see figure 2.5). Annual documentary viewership on broadcaster online portals ranges from 18,000 to almost 1.6 million total requested views (see figure 2.5). Despite its relatively low total requested views number, documentary viewership is growing fastest on Knowledge Network (see figure 2.6).

13 Genius Marketing, January 3, 2011, "CTV Reports Record Online Video Usage," <http://www.geniusmarketinginc.com/?p=581>.

14 CTV News, June 10, 2010, "Canadian Digital Report Card: CTV.ca ends 2009/10 Broadcasting Season as Canada's #1 TV Portal", <http://www.ctv.ca/servlet/ArticleNews/corp/CTVShows/20100601/ctv_20100601/undefined>.

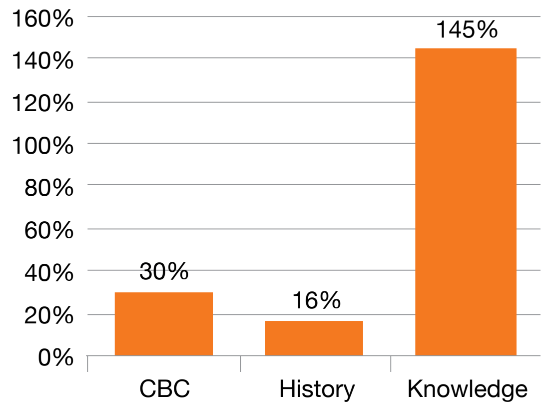
15 DOC, *Getting Real 4: An Economic Profile of the Canadian Documentary Production Industry*, March 2011, p.98. This represents the most recent data available on this subject

Figure 2.5 Total requested documentary video views, between 2009–10 and 2010–11



*September 2010 – February 28, 2011
Source: CBC, History, Knowledge data request, March 2011. TVO's data is not included in this table.

Figure 2.6 % Growth of documentary viewership between 2009–10 and 2010–11



*September 2010 – February 28, 2011
Source: CBC, History, Knowledge data request, March 2011. TVO's data is not included in this table.

The nature of the service of each associated broadcaster affects its viewership. CBC is mandated to be accessible to all Canadians. History Television is a specialty channel only available to cable subscribers. Knowledge Network and TVO are provincial educational broadcasters that are carried nationally by select satellite carriers, but not nationally through cable. The penetration levels of CBC and History are closer to each other, while TVO and Knowledge Network are limited to provincial coverage. Because of licence agreements with producers, all Canadian broadcasters block traffic from outside Canada, which substantially decreases traffic. Knowledge Network even restricts viewers outside of B.C. from viewing some content through geo-blocking.

VIEWERSHIP OF CANADIAN VS. NON-CANADIAN CONTENT

Like Canadian television, the most popular content on broadcaster video portals is American. Only two of the top 10 titles of CTV's web portal in 2010–11 are Canadian: *Flashpoint* and *Degrassi: The Next Generation*.[16]

As for the participating broadcasters, overall, Canadians watched more Canadian documentaries than non-Canadian ones. Yet, the viewership of non-Canadian content is growing faster than Canadian (see table 2.1). Alongside the increase of viewership of non-Canadian titles is a growing library of non-Canadian documentary titles.

16 Genius Marketing, January 3, 2011, "CTV Reports Record Online Video Usage," <http://www.geniusmarketinginc.com/?p=581>.

Table 2.1: Viewership of documentary titles on broadcaster video portals: Canadian Vs. Non-Canadian

	HISTORY			KNOWLEDGE NETWORK			TVO		
	2009-10	2010-11*	GROWTH	2009-10**	2010-11*	GROWTH	2009-10***	2010-11****	GROWTH
Canadian titles, total requested views (in ’000s)	1047.2	981.8	-6%	4.6	9.6	107%	15.7	24.0	53%
Canadian titles	196	234	19%	20	48	140%	23	43	87%
Non-Canadian titles, total requested views (in ’000s)	305	592	94%	2.8	8.6	209%	4.2	21.9	419%
Non-Canadian titles	119	152	28%	20	54	170%	25	80	220%

Source: History, Knowledge, TVO data request, March 2011. CBC could not break down data by origin and thus, its data is absent from this table.

* Partial: September 2010 to February 2011
** January 2010 to August 2010
*** Partial: August 2009 to March 2010
**** April 2010 to February 2011

TOP 5 DOCUMENTARIES

In general, documentary series outperform documentary features and miniseries. History Television’s library primarily comprises documentary series, and its total viewership is higher than CBC, Knowledge Network, and TVO combined.

SERIES

The majority of History Television’s top-performing documentary series programs is Canadian (see table 2.2). *Ice Pilots NWT* is the highest-viewed documentary asset on History Television, which is not surprising given that the show is also History’s top-performing television series. Thirty-three percent of all viewership in History’s video portal watched *Ice Pilots NWT*.

Table 2.2 History Television series and feature-docs, Canadian and foreign (Jan. 2010 to Jan. 2011), total series views

RANK	TITLE	ORIGIN	TOTAL REQUESTED VIEWS
1	*Ice Pilots NWT*	Canada	537,256
2	*Pawn Stars*	US	356,258
3	*Ice Road Truckers*	US/Canada	160,958
4	*Greatest Tank Battles*	Canada	142,715
5	*Ancients Behaving Badly*	Canada	139,516

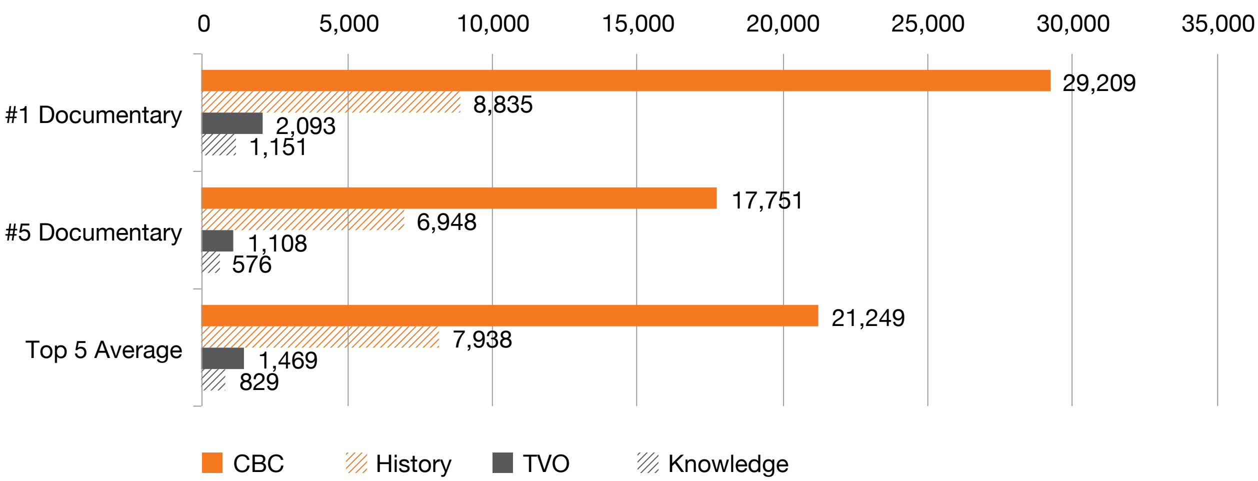
Source: Data request, History Television, August 2011

As for the top five episodes on History Television, they are *Ice Pilots NWT* episodes. Its highest-viewed episode had 59,457 views, and its lowest had 42,451.

ONE-OFFS/FEATURES AND MINI-SERIES

Every broadcaster has mini-series and one-offs/features in their libraries, which allows comparisons across the four services. The top five ranking titles in each format provide a more nuanced view of the performance of documentaries on online portals. If success is evaluated by the number of total requested views, documentaries on CBC's portal perform the best. The 1st and 5th-ranking titles surpass those of its competitors and the average viewership of its top five is also the highest (see figure 2.7).

Figure 2.7 Total requested views of top 5 one-off/mini-series documentaries



Source: CBC: 2009-10 broadcast year; History: Jan. 2010 to Jan. 2011; Knowledge: Jan. 2010 to Jan. 2011; TVO: April 2010 to Feb. 2011

Successful documentaries have a range of between 21,000 and 29,000 views. On average across the platforms, it appears that a documentary is successful if it is viewed 8,000 times in a year—hardly a strong figure.

As for the subject matter of the most popular documentaries in this category, it depends on the nature of service of the portal. The top five of History features are Remembrance Day specials as that is the most popular viewing period for the channel. As for more generalist services, such as the CBC, popular social issue documentaries dominate their top five. TVO's top five was populated primarily by mini-series and social issue docs. Many of these mini-series have strong companion sites that link to the videos on the broadcaster site. Knowledge Network's top five comprised local music and social issue documentaries.

Table 2.3 Top 5 feature documentaries on broadcaster portals

CBC

RANK	TITLE	ORIGIN	TOTAL REQUESTED VIEWS
1	*Food, Inc.*	US	29,209
2	*The Downside of High*	Canada	20,175
3	*Hyper Parents & Coddled Kids*	Canada	19,772
4	*The Volcano that Stopped the World*	UK	19,336
5	*The Strongmen*	Canada	17,751

Source: CBC: 2009–10 broadcast-year

HISTORY TELEVISION

RANK	TITLE	ORIGIN	TOTAL REQUESTED VIEWS
1	*1917: The Missing**	Canada	8,835
2	*Digging Up the Trenches, parts 1 and 2**	Canada	8,416
3	*Passchendaele: The Underground War, parts 1 and 2**	Canada	8,382
4	*Battle of the Somme: The True Story**	Canada	7,109
5	*The Lost Book of Nostrodamus*	US	6,948

* Part of History Television's "Days of Remembrance" programming
Source: History Television, Jan. 2010 to Jan. 2011

KNOWLEDGE NETWORK

RANK	TITLE	ORIGIN	TOTAL REQUESTED VIEWS
1	*Bloodied But Unbowed*	Canada	1,151
2	*Victorian Farm*	UK	972
3	*Journey to the Edge of the World*	UK	808
4	*Our First Voices*	Canada	639
5	*Autism: The Road Back*	Canada	576

Source: Knowledge Network, Jan. 2010 to Jan. 2011

TVO

RANK	TITLE	ORIGIN	TOTAL REQUESTED VIEWS
1	*The Magic of Reading* (Episode 1 of 4)	Canada	2,093
2	*Inside Disaster Haiti* (Part 1: Emergency)	Canada	1,587
3	*Paris 1919*	Canada	1,329
4	*Water on the Table*	Canada	1,227
5	*Inside Disaster Haiti* (Part 2: Response)	Canada	1,108

Source: TVO, April 2010 to Feb. 2011

The majority of content in the rankings is Canadian. There are some non-Canadian documentaries in the top five titles on Knowledge Network, History, and CBC. The most popular documentary on the CBC's web portal is an American documentary feature: *Food, Inc.*

Mobile

Almost every vertically integrated communications company has a mobile content strategy. Most wireless providers offer a service allowing mobile customers to purchase hours of live or on demand television. Only Videotron's service offers channels that broadcast documentary content.

Broadcasters have also launched mobile applications for Canadians to view content on their smartphones and tablet computers. CBC, CityTV, Global, Knowledge Network, and Tou.tv have launched iPad applications.

Canadians are very receptive to these applications. CityTV, CBC, and Global's applications have reached the top position of the top 200 rankings of free iPad applications. The Global TV iPad application has been particularly successful. Since its launch, it has been downloaded over 350,000 times and over one million shows have been viewed. Its users access the service almost twice daily. The users spend 47 minutes per session on average.[17]

Despite the rapid adoption of TV viewership on the iPad, there are very few applications that offer documentary content. Only Tou.tv's and Knowledge Network's applications have documentaries in their libraries.

Conclusion

The majority of the library is Canadian content, and thus, Canadian content is viewed more. As long as Canadian titles outnumber non-Canadian titles, their viewership will be higher. Given the growing library of non-Canadian titles on broadcaster portals, the dominance of Canadian documentary viewership may decline. The top five rankings indicate that popular non-Canadian documentaries are viewed as frequently as Canadian ones, and sometimes more.

The most successful documentary asset on a broadcaster portal has 540,000 requested views (when all of its episodes are totalled). Its highest rated episode has almost 60,000 total requested views. As for features, on average, they receive 8,000 views. The most successful receives about 30,000 total requested views.

17 Mediacaster, May 2, 2011, "Shaw Sees Online Video Viewership Grow with New Apps, Exclusive Content," <http://www.mediacastermagazine.com/news/shaw-sees-online-video-viewership-grow-with-new-apps-exclusive-content/1000409330/>.

3 National Film Board Platforms

The NFB is the largest distributor of documentaries on digital platforms in Canada. An assessment of the performance of documentaries on their properties provides insights regarding how documentaries can perform when they are placed centre stage on a platform. This section focuses on their online web portal and their applications by comparing the number of titles in the library, viewership by platform, and top five ranking statistics. It also gives a quick overview of its digital download service.

Library

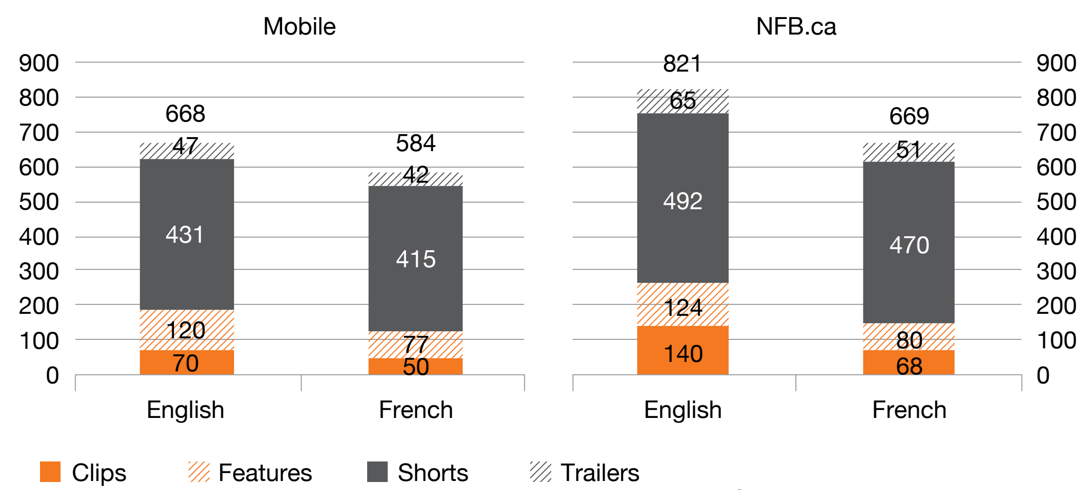
The NFB's library contains auteur animation, dramas, and documentaries. Its content is created in-house or as co-productions with Canadian producers. It distributes its content across its website NFB.ca, partner sites, and on mobile platforms. NFB.ca's documentary library has 1,490 titles on its web portal and 1,252 on its mobile devices. The content is available in French and English, and in 4 formats: clips, features, shorts, and trailers.

In 2007–08, the NFB began to populate its libraries. The majority of its content was added in 2008–09; the NFB added 580 documentaries to its portal that year. The NFB continues to increase the number of titles in its library in both languages. Since 2008–09, 436 English films have been added to the library as well as 356 French titles.

The formats can be somewhat arbitrary. Shorts can range between 6 and 55 minutes, while features are generally 44 minutes and over. Clips are either smaller portions of films that are not distributed for free on the platform or extra content about the films.

Currently, the majority of content on all platforms is English, and the most prevalent format in both languages is shorts (see figure 3.1).

Figure 3.1 Total Documentary Library:
NFB mobile applications vs. NFB.ca, by format and language



Source: NFB data request, March 2011

Viewership

The NFB uses multiple strategies to distribute its content and increase viewership. First, its services are not geo-blocked, but available to everyone around the world. The NFB also syndicates its content across different services: Dailymotion, Hulu, RODO, SnagFilms, and YouTube. Its content is also delivered over multiple platforms: iPhone (2009), iPad (2010), Android (2011), and PlayBook (2011).

Viewership over its syndicated services, web-portal, and mobile applications is increasing year after year. At the time of the writing of this report, 2010–11 total viewership was already at 9.31 million (Q1 to Q3); it is edging towards its viewership of 2009–10: 10.73 million views. The majority of its views came from its international partner sites (4.49 million). Canadian views account for 30% of total viewership, the rest being international. Mobile properties have the least amount of viewers (0.8 million). [18]

DOCUMENTARY VIEWERSHIP

Over the last two years, the total requested views on NFB.ca and mobile applications for documentaries totaled 5.5 million views. The majority of that viewership was on NFB.ca.

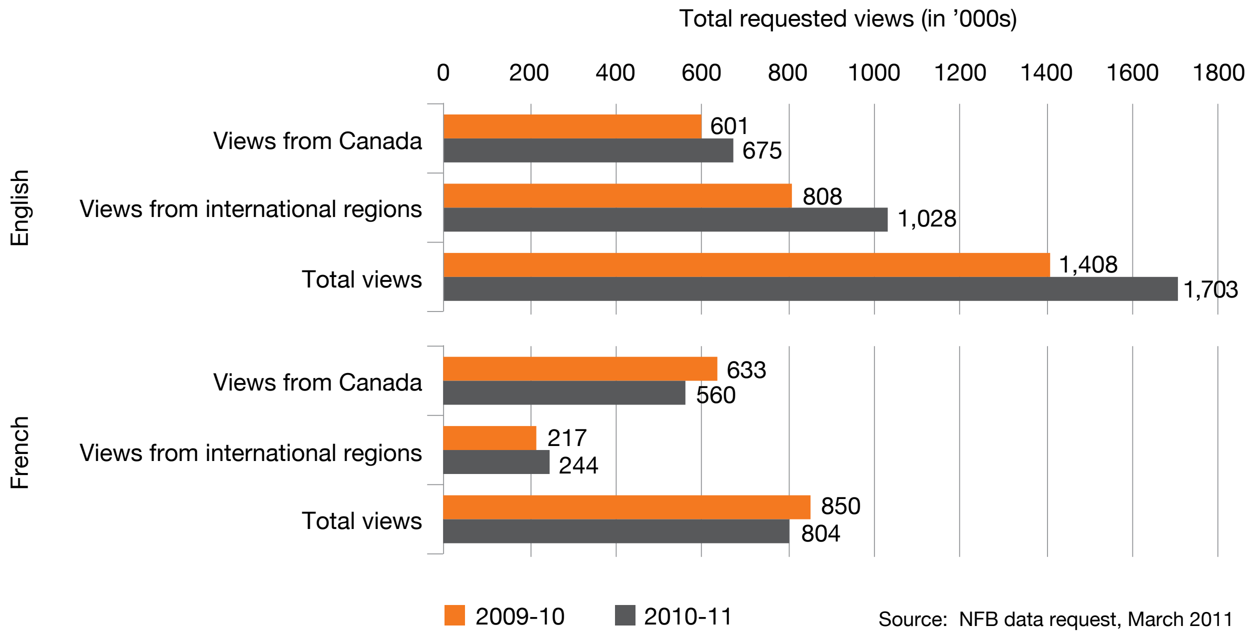
NFB.CA

Since the launch of NFB.ca in 2009, documentaries have been viewed 4.8 million times. Between 2009–10 and 2010–11, viewership has grown by 250,000 viewers. Much of its growth can be attributed to growing viewership from international audiences.

At first, the combined Canadian viewership of English and French titles surpassed international, but in 2010–11, the increase of international English viewership allowed it to surpass Canadian viewership (see figure 3.2). In 2010–11, falling French figures lowered the total Canadian viewership to below that of international spectators.

18 James Roberts, "NFB digital transformation," Canada 3.0 digital conference presentation, May 2, 2011.

Figure 3.2 NFB.ca: Total requested views by language and region



Source: NFB data request, March 2011

Both Canadian and international viewers preferred to watch shorts. In 2010–11, the viewership of shorts, trailers, and clips fell in Canada, but shorts remained the dominant format. Features also increased in viewership. Like Canadians, international viewers watched fewer trailers and clips, but shorts and features rose. The international viewership of shorts grew more than any other format.

- In 2010–11, Canadian viewership of shorts dropped from 831,000 to 817,000, while international viewership rose from 559,000 to 796,000 total requested views.
- In 2010–11, Canadian viewership of features increased from 230,000 to 290,000 total requested views, whereas international viewership increased from 281,000 to 360,000.
- In 2010–11, Canadian viewership of clips fell from 87,000 to 61,000 total requested views, while international viewership of clips dropped from 108,000 to 26,000.
- In 2010–11, Canadian viewership of trailers dropped from 88,000 to 67,000 total requested views, whereas international viewership fell from 77,000 to 70,000.[19]

MOBILE

The viewership of documentaries over mobile applications was smaller than viewership on NFB.ca. Over the last 2 years, the viewership of documentaries on mobile platforms totalled 720,000. The majority of those views were on the iPhone application, but the introduction of the iPad application may have caused platform migration. Android viewership has been excluded from these statistics because the device was only introduced in March 2011.

19 NFB data request; total requested documentary views for NFB.ca between 2009–10 and 2010–11.

Unlike NFB.ca, Canadian documentary viewers on mobile platforms outnumber international documentary viewers. Similar to NFB.ca, the majority of content viewed is English.

In 2010–11, Canadian documentary viewership has shrunk on the iPhone application, while international documentary viewership has grown slightly in both languages.

- Canadian English iPhone documentary viewership dropped from 154,474 to 136,124 total requested views, while international English iPhone documentary viewership increased from 57,982 to 58,539 views.
- Canadian French iPhone documentary viewership dropped from 72,639 to 65,096 total requested views, whereas international French iPhone documentary viewership rose from 16,040 to 18,389 views.[20]

In June 2010, the iPad was introduced to Canadian markets. The NFB launched its iPad application on the heels of the device's release. This had a clear impact on the popularity of documentary viewership on the iPhone application. In 2010–11, the iPhone application's documentary viewership dropped in Canada.

- Canadian English iPad documentary viewership totalled 60,472 requested views, while international English iPad documentary viewership was 46,134.
- Canadian French iPad documentary viewership totalled 24,564 requested views, whereas international French iPad documentary viewership totaled 8,684.[21]

Similar to the NFB.ca viewership, most people watch shorts and features on mobile devices.

In 2010–11, Canadian viewers watched less of every format of documentaries on the iPhone application, while international viewers watched more of almost every documentary format on the iPhone application, except clips and trailers.

- Canadian iPhone documentary viewership of shorts dropped from 147,779 to 131,258 total requested views, while international iPhone documentary viewership increased from 46,622 to 49,157.
- Canadian iPhone documentary viewership of features fell from 68,292 to 65,422 total requested views, whereas international iPhone documentary viewership grew from 24,110 to 26,448.
- Canadian iPhone documentary viewership of clips diminished from 4,022 to 2,058 total requested views, while international iPhone documentary viewership decreased from 1,191 to 467.
- Canadian iPhone documentary viewership of trailers decreased from 7,418 to 2,532 total requested views, whereas international iPhone documentary viewership fell from 2,113 to 860.[22]

In the first year, the NFB iPad application's (June 2010 to April 2011) viewership already totalled almost 140,000 views. The iPad viewers watch content according to the same preferences as iPhone applications viewers: they prefer shorts and features.

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20 NFB data request, total requested views for documentaries on iPhone application between 2009–10 and 2010–11.
21 NFB data request, total requested views for documentaries on iPad application between June 2010 and March 2011.
22 NFB data request, total requested views for documentaries on iPhone application between 2009–10 and 2010–11.

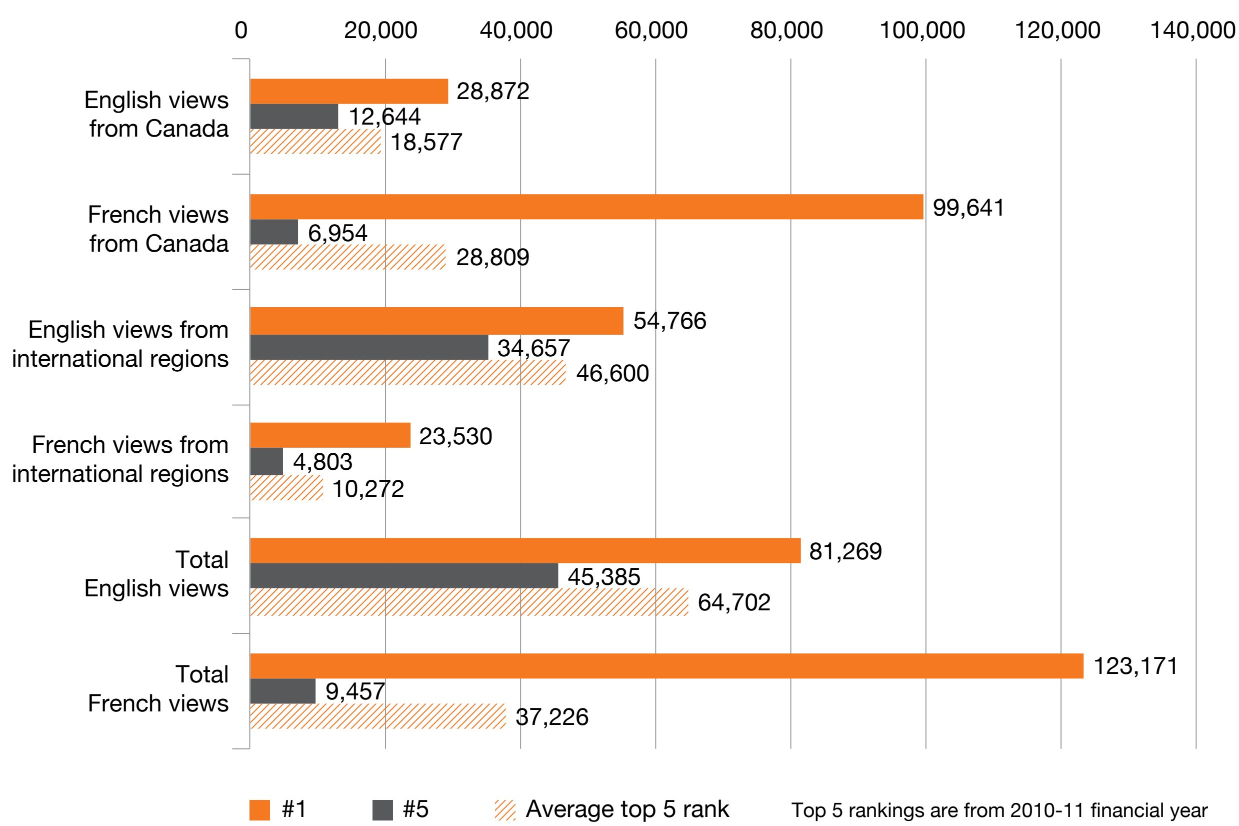
- Canadian iPad documentary viewership of shorts was 58,998 total requested views, while international iPad documentary viewership totalled 35,344.
- Canadian iPad documentary viewership of features was 25,214 total requested views, whereas international iPad documentary viewership totalled 18,774.
- Canadian iPad documentary viewership of clips was 271 requested views, while international iPad documentary viewership totalled 147.
- Canadian iPad documentary viewership of trailers was 575 requested views, whereas international iPad documentary viewership totalled 563.[23]

TOP FIVE DOCUMENTARIES

NFB.CA

Aggregate viewership demonstrates English titles are viewed more than French, but individually, it is a French title that has the highest viewership (see figure 3.3). Given the disparity between the highest- and lowest-ranking French titles of the top five, it is evident that the highest-ranking title is an outlier.

Figure 3.3 NFB.ca top 5 documentaries by region and language



Top 5 rankings are from 2010-11 financial year
Source: NFB data request, July 2011

23 NFB data request, total requested views for documentaries on iPad application between June 2010 and March 2011.

As for the top five English titles, the range between the highest and fifth-highest documentary titles is narrower, which implies that English titles have higher ratings overall. Similar to aggregate English viewership on NFB.ca, the top five English titles viewed by international audiences have higher ratings than the top ones viewed by Canadians. Interestingly, the highest-rated English documentary in Canada on NFB.ca has a similar rating to the highest-rated English documentary feature on broadcaster portals: 28,800, which is far below the highest-ranking series episode: 60,000.

The titles appearing in the top five rankings indicate that English viewers watched many of the same titles: four of the top five rankings were the same titles (see table 3.1).

Table 3.1 NFB.ca top five English titles, April 2010–March 2011

RANK	TOP 5 ENGLISH: CANADIAN VIEWERS	TOP 5 ENGLISH: INTERNATIONAL VIEWERS	TOP 5 ENGLISH: TOTAL VIEWERS
1	*Carts of Darkness*	*Sexy Inc.: Our Children Under Influence*	*Carts of Darkness*
2	*Sexy Inc.: Our Children Under Influence*	*Carts of Darkness*	*Sexy Inc.: Our Children Under Influence*
3	*RIP!: A Remix Manifesto (Chapter 1)*	*How to Build an Igloo*	*How to Build an Igloo*
4	*Railroaders*	*RIP!: A Remix Manifesto*	*RIP!: A Remix Manifesto (Chapter 1)*
5	*How to Build an Igloo*	*Hitman Hart: Wrestling with the Shadows*	*Hitman Hart: Wrestling with the Shadows*

Source: NFB data request, July 2011

On the other hand, international and Canadian French viewers were less similar: only two of the top five titles were the same (see table 3.2).

Table 3.2 NFB.ca top 5 French titles, April 2010–March 2011

RANK	TOP 5 FRENCH: CANADIAN VIEWERSHIP	TOP 5 FRENCH: INTERNATIONAL VIEWERSHIP	TOP 5 FRENCH: TOTAL VIEWERSHIP
1	*Un dimanche à 105 ans*	*Un dimanche à 105 ans*	*Un dimanche à 105 ans*
2	*Sexy Inc. : Nos enfants sous influence*	*Sexy Inc. : Nos enfants sous influence*	*Sexy Inc. : Nos enfants sous influence*
3	*Sacrée montagne — L'amitié*	*60 cycles*	*Sacrée montagne — L'amitié*
4	*Un homme de parole*	*RIP! : Remix manifesto*	*La bête lumineuse*
5	*La bête lumineuse*	*L'incroyable histoire des machines à pluie*	*Un homme de parole*

Source: NFB data request, July 2011

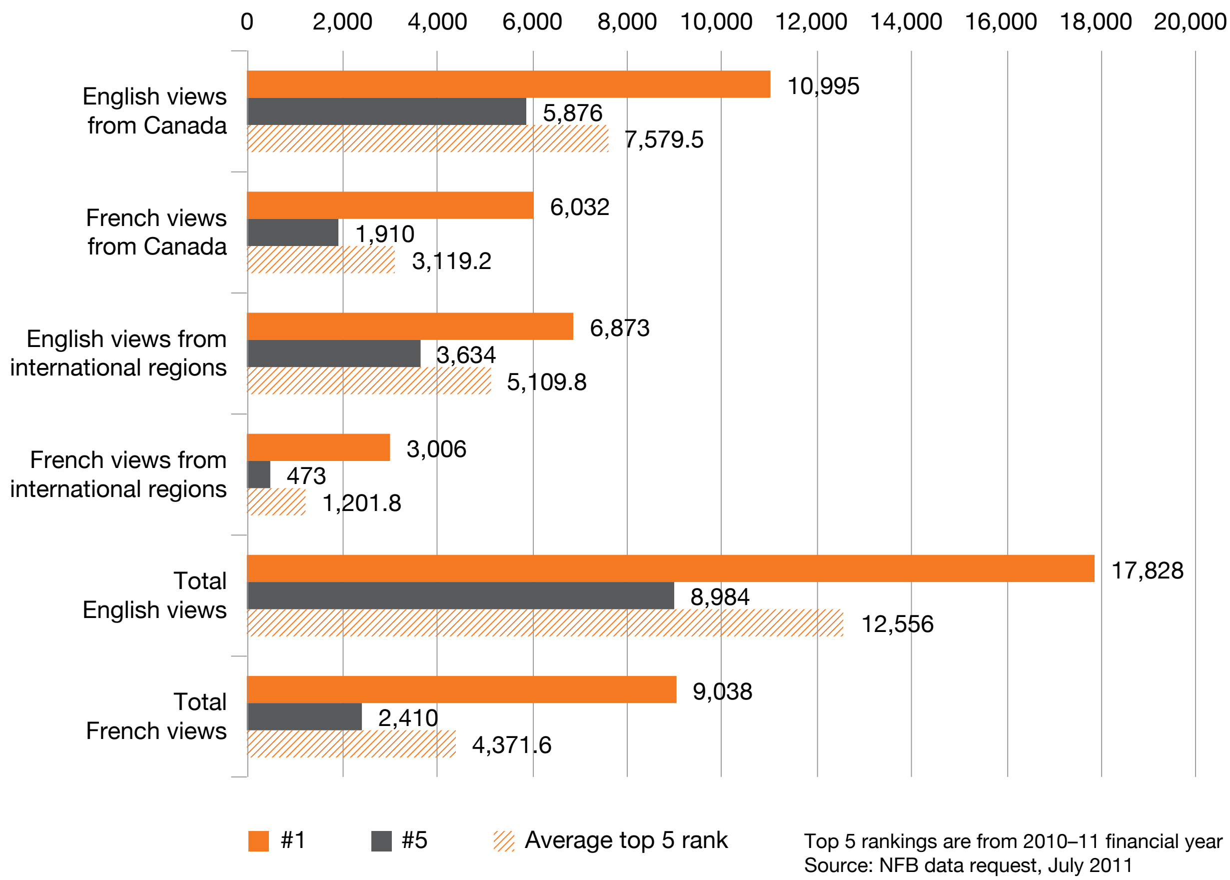
Some titles perform well in both linguistic markets, such as *Sexy Inc.: Our Children Under Influence.*

MOBILE

The top five documentary titles on mobile platforms follow the same trends as their aggregate viewership (see figure 3.4). The highest rated documentaries are English titles and Canadian viewers watch the most documentaries on mobile platforms. The top five titles viewed by international English viewers have views comparable to its aggregate viewership.

The most successful documentaries in Canada receive between 5,800 and 11,000 views in the English market, and between 1,900 and 6,000 views in the French market.

Figure 3.4 NFB mobile applications top 5 documentaries by region and language



Top 5 rankings are from 2010–11 financial year
Source: NFB data request, July 2011

As for the titles, they were almost the same as the ones that appeared on NFB.ca's top five lists. Three of the five top mobile English titles appeared in the NFB.ca's top five list (table 3.3).

Table 3.3 NFB mobile application's top 5 English titles, April 2010–March 2011

RANK	TOP 5 ENGLISH: CANADIAN VIEWERS	TOP 5 ENGLISH: INTERNATIONAL VIEWERS	TOP 5 ENGLISH: TOTAL VIEWERS
1	*Carts of Darkness*	*Carts of Darkness*	*Carts of Darkness*
2	*Sexy Inc.: Our Children Under Influence*	*Sexy inc.: Our Children Under Influence*	*Sexy inc.: Our Children Under Influence*
3	*Waiting for Fidel*	*Waiting for Fidel*	*Waiting for Fidel*
4	*The Defender*	*Hitman Hart: Wrestling with Shadows*	*Hitman Hart: Wrestling with Shadows*
5	*Hitman Hart: Wrestling with Shadows*	*How to Build an Igloo*	*How to Build an Igloo*

Source: NFB data request, July 2011

A similar trend is found in the top five French mobile titles: three of the five titles are the same.

Table 3.4 NFB mobile application's top 5 French titles, April 2010–March 2011

RANK	TOP 5 FRENCH: CANADIAN VIEWERS	TOP 5 FRENCH: INTERNATIONAL VIEWERS	TOP 5 FRENCH: TOTAL VIEWERS
1	*Sexy Inc. : Nos enfants sous influence*	*Sexy Inc. : Nos enfants sous influence*	*Sexy Inc. : Nos enfants sous influence*
2	*Un dimanche à 105 ans*	*Un dimanche à 105 ans*	*Un dimanche à 105 ans*
3	*Junior*	*Junior*	*Junior*
4	*Bacon, le film*	*La couleur de la beauté*	*La couleur de la beauté*
5	*Un homme de parole*	*Pour la suite du monde*	*Pour la suite du monde*

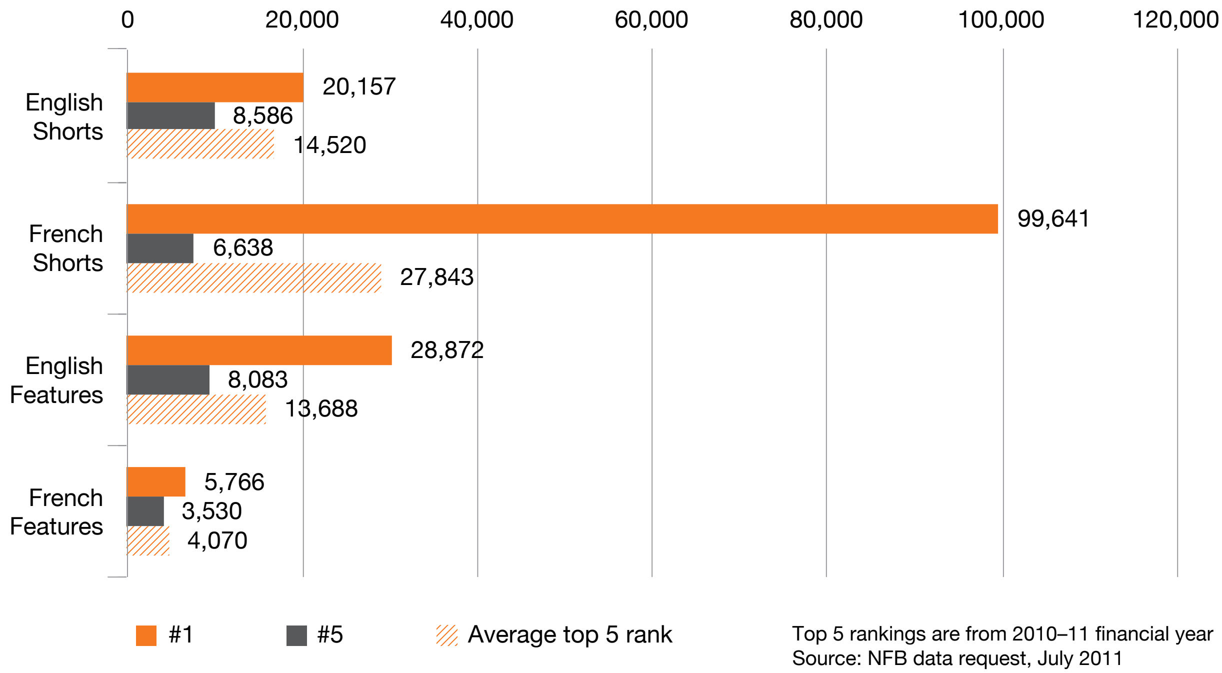
Source: NFB data request, July 2011

FORMAT

In the Canadian market, the highest-rated documentary title is a French short, and the highest-rated English title is a feature (see figure 3.5). Similar to the top five titles on NFB.ca, the French short's high rating appears to be an outlier. The other four range between 18,000 views and 6,600 views. French-Canadian viewers prefer shorts, and English Canadian viewers prefer to watch features.

The average length of the top five French shorts was 54 minutes, and 24.8 minutes for English, whereas the average length of the top five French features was 78.2 minutes, and 79.4 for English.

Figure 3.5 Top 5 documentaries, total requested Canadian views, by format and language



Top 5 rankings are from 2010–11 financial year
Source: NFB data request, July 2011

NFB DIGITAL DOWNLOADS

In addition to streaming content, the NFB also has a digital download service. The titles are available in standard and high definition. Prices range from $1.95 for a 10-minute short, *Médecins sans résidence*, to $14.95 for an entire feature film, *Life with Murder*. Some of the films are exclusively available as downloads, while others are available for streaming and download.

There are 444 titles available for download; 287 are documentaries. The majority of titles are English, and the most frequent format in the library is shorts.

- There are 145 English documentary titles: 88 shorts and 57 features.
- There are 142 French documentary titles: 112 shorts and 30 features.

Although there are some exclusive digital download documentaries that only allow users to stream the trailer of a title, most content is available for free streaming.

Conclusion

There are a few aggregate viewership trends on the NFB properties:

1. Viewers prefer to watch shorts;
2. There are more English viewers than French ones;
3. International viewers are quickly outnumbering Canadian ones.

As for individual titles, the highest-rated documentary almost surpasses 125,000 views. The most successful documentaries on the portal have a range between 41,000 and 85,000 total views (including international views). In the Canadian market, the most successful documentary had 28,800 views in the English market. On mobile applications, the highest viewed title was seen 17,828 times (including international views).

4 Rogers On Demand Online

In November 2009, Rogers launched the beta of its TVeverywhere service: Rogers On Demand Online (RODO). This section examines the documentary content available on this portal, its viewership, and its top-performing titles.

Library

Depending on their cable, phone, wireless, or Internet package, consumers can access a range of different content. Cable package subscribers have access to the most titles. Pay-TV subscribers can view exclusive content from such services as HBO, Movie Central, TMN, and Super Channel. In addition, web-exclusive content can be seen on Vuguru. The public can access free content, such as movies from the NFB.

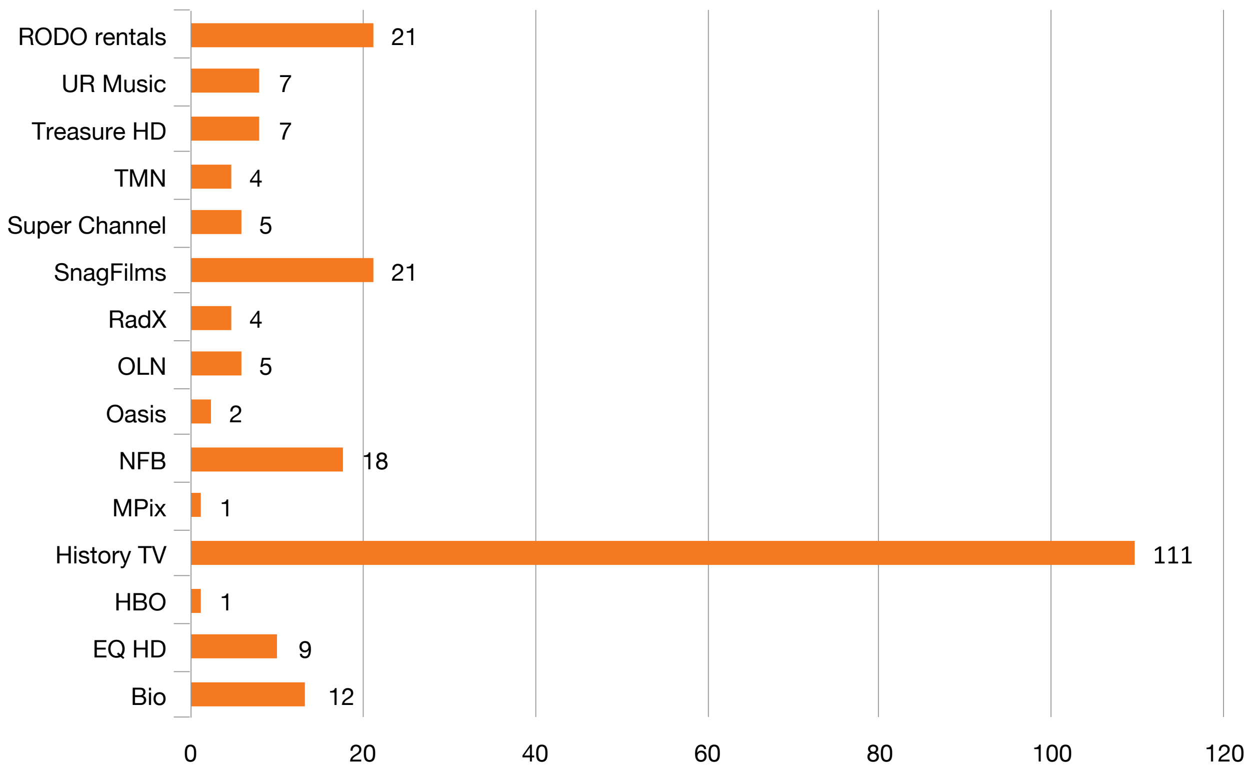
RODO's library contains 2,500 hours of programming drawn from various genres, including prime time, daytime and specialty TV, movies, sports and music videos. It has more than 60 programming and content partners.[24] Many offer documentary content.

RODO has a total of 228 documentary titles available in its library across 15 different "channels" (see figure 4.1). The mix comprises pay-TV channels, specialty cable services, documentary portals, and Rogers' digital rentals library.[25] History Television has the most documentaries, followed by RODO rentals, SnagFilms, and NFB.

24 "Rogers On Demand Online Pops with over 550 hours of New Programming From Crackle", <http://www.rogersondemand.com/about/pr/rogers_on_demand_online_pops_with_over_550_hours_of_new_programming_from_crackle>.

25 In September 2010, RODO launched its own digital download service where consumers can rent digital downloads.

Figure 4.1 RODO: Total documentary titles in library of each channel



Source: Rogers Communications Inc. data request, March 2011

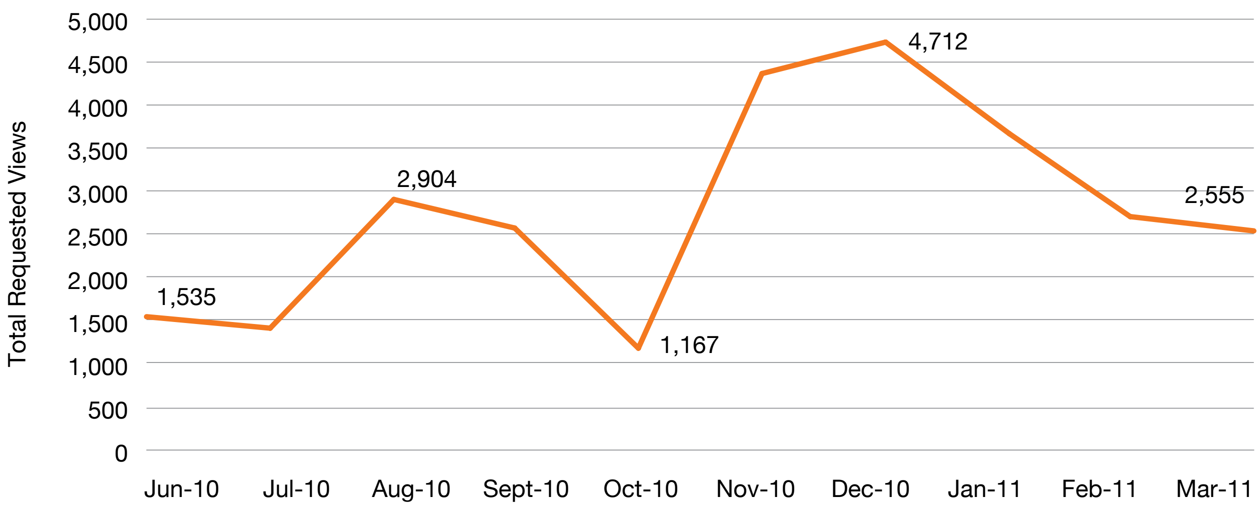
Viewership

Between June 2010 and March 2011, RODO's documentary assets were viewed 27,595 times. December 2010 had the most views, and October 2010 was the lowest (see figure 4.2). On average, documentaries receive 2,700 views a month on RODO.

PERFORMANCE OF DOCUMENTARIES

The highest ranking titles are all Canadian documentaries (see table 4.1). Five of the titles are not exclusive to RODO, but are streamed elsewhere on Internet video portals: *Ice Pilots, Hannah's Story*, *Royal Journey*, *Being Caribou*, and *Execution*. The majority of the top titles were films.

Figure 4.2 RODO: total requested documentary views by month



Source: Rogers Communications Inc. data request, March 2011

Table 4.1 Top-performing documentary assets on RODO

RANK	ASSET TITLE	CHANNEL	TYPE
1	*Earth from Above*	EqHD	film
2	*Royal Journey*	NFB	film
3	*Hubble's Canvas*	Oasis HD	TV show
4	*Being Caribou*	NFB	film
5	*Beyond Survival*	OLN	TV show
6	*Hannah's Story*	NFB	film
7	*Execution*	SnagFilms	film
8	*Ice Pilots NWT*	History Television	TV show

Source: Rogers Communications Inc. data request, March 2011

On RODO, NFB is the channel with the most documentary views, followed by Oasis HD and EqHD (see table 4.2).

Table 4.2 Top 5 channels services with most total requested views of documentaries in their libraries on RODO

RANK	CHANNEL
1	NFB
2	Oasis HD
3	Bio
4	Super Channel
5	EqHD

Source: Rogers Communications Inc. data request, March 2011

Conclusion

Similar to broadcaster online portals, RODO's documentary assets compete with a plethora of different offerings from online movie rentals, specialty and pay-TV services, and web-exclusive content. In the midst of these choices, viewers seeking documentaries appear to gravitate toward channels they recognize such as the NFB, and toward films.

Over the period of nine months, RODO's documentary viewership totalled 27,595 requested views. Its most successful titles are from the NFB library and High Fidelity's cable channels (Oasis and EqHD).

5 iTunes

In the U.S., the iTunes Store remains the dominant service for digital movie downloads with 64.5% of the market share.[26] In 2008, the iTunes Store Canada launched its digital download service for film and TV content. As the dominant service for digital downloads and rentals in Canada, the performance of documentaries on iTunes provides a good indication of how they perform in that part of the market. This section examines performance of documentaries through the library of television and feature film documentaries available on iTunes and their ranks in different top 200 rankings.

Library

iTunes sells both feature films and television series. Feature films are sold in either standard- or high-definition, whereas television series are sold in a complete set or by individual episode. The overwhelming majority of documentaries on iTunes are non-Canadian.

- Of the 725 documentary films available to download, only 33 are Canadian, or 4% of all documentary feature films.
- Of the 400 documentary television series available to download, only 13 are Canadian, or 3% of all documentary series.

There are very few Canadian documentaries on iTunes, likely because iTunes has exclusive agreements with certain distributors and broadcasters. In addition, there are more non-Canadian broadcasters and non-Canadian distributors that distribute through iTunes than Canadian ones.

There are fewer television documentary series than feature films, likely because broadcasters own the digital rights to most productions; it is their choice to distribute them on iTunes. Many documentaries begin as television one-offs and producers can choose to reversion them as longer feature films. Consequently, these one-offs versioned as features would appear in the feature film section, e.g., *Reel Injun*.

RANKINGS

Because iTunes does not release any data concerning the number of downloads or sales of content, the performance of documentaries has been assessed by analyzing the top 200 rankings that are posted on iTunes. The top 200 rankings list the best-selling assets on iTunes segmented by genre, format, and other categories. It is updated constantly. This report analyzes the top 200 feature film purchases and rentals, and the top 200 television series and episode rankings.

26 IHS iSuppli, February 7, 2011, “Apple iTunes Remains Dominant in U.S. Online Movies in 2010, Despite Competitors’ Inroads,” <http://www.isuppli.com/Media-Research/News/Pages/Apple-iTunes-Remains-Dominant-in-US-Online-Movies-in-2010-Despite-Competitors-Inroads.aspx>.

FEATURE FILM

iTunes has a page devoted to documentary film. On this page, it showcases documentaries according to their price (docs under $10), popularity (top HD docs), release (new and noteworthy), filmmaker (Ron Mann, Errol Morris) and subject matter (sports, counterculture).

Of the 33 Canadian feature documentaries, 16 appeared in the top 200 feature film documentaries purchase rankings very frequently. These titles appeared 77% of the time during the 26-week monitoring period (see table 5.1). The most popular subject matters are popular culture, sport, politics, music and the environment. Although most titles were released in the past 10 years, there were some older titles from the ’90s that appeared in the listings as well.

The most popular titles rarely dropped below the rank of 100, and almost always appeared in the top 200 rankings. Some titles with lower average rankings did climb very high in the ratings, higher than titles with a higher average rank.

Table 5.1 iTunes Store Canada, top ranking Canadian feature documentary films, purchase

TITLE	AVG RANK IN TOP 200	HIGHEST RANK	% OF TIME IN TOP 200	YEAR OF RELEASE
The Corporation	17	3	96%	2004
Rush: Beyond the Lighted Stage	20	4	96%	2010
Sharkwater	32	11	96%	2007
Petropolis: Aerial Perspectives on the Alberta Tar Sands	35	21	96%	2009
Manufacturing Consent: Noam Chomsky and the Media	45	25	100%	1992
Under the Sea 3D	49	29	96%	2009
Facing Ali	50	17	100%	2009
Souvenir of Canada	76	3	88%	2005
Reel Injun	84	8	100%	2009
Shake Hands With the Devil	96	1	100%	2007
Don’t You Forget About Me	97	75	88%	2009
Metal double pack	102	83	100%	2008
Hitman Hart: Wrestling With Shadows	130	8	100%	1998
Metal: A Headbanger’s Journey	148	18	100%	2006
Noam Chomsky: Rebel Without a Pause	151	88	81%	2003
Global Metal	168	111	77%	2008

Source: DOC, iTunes documentary log, October 2010–April 2011

As for feature film documentary rentals, 14 Canadian titles appeared in the top 200 rankings over 83% of the time in the 15-week monitoring period (see table 5.2).[27] The majority of these were the same as the top 200 purchase titles. In some cases, the title was rented as often as it was purchased (*Reel Injun*), and in other cases more (*Sharkwater*). In general, the average rankings of the titles were lower.

Table 5.2 iTunes Store Canada, top ranking Canadian feature documentary films, rental

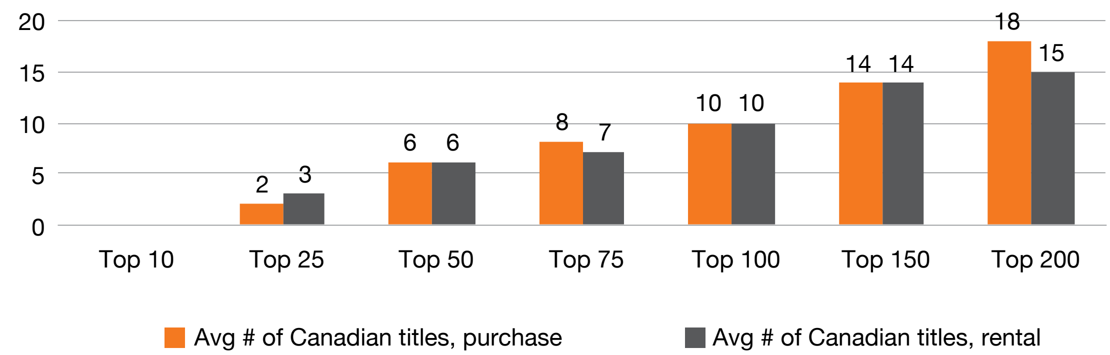
TITLE	AVERAGE RANK IN TOP 200	HIGHEST RANK	% OF TIME IN TOP 200
The Corporation	18	11	100%
Sharkwater	23	13	100%
Petropolis: Aerial Perspectives on the Alberta Tar Sands	25	16	100%
Manufacturing Consent: Noam Chomsky and the Media	32	27	100%
Under the Sea	34	28	100%
Reel Injun	51	5	100%
Shake Hands With the Devil	70	56	93%
Don't You Forget About Me	71	52	100%
Souvenir of Canada	78	6	93%
Hitman Hart: Wrestling with Shadows	98	62	100%
Noam Chomsky: Rebel Without a Pause	119	70	100%
Global Metal	135	91	80%
Noam Chomsky on the World: The Chomsky Sessions	137	96	87%
The Life and Death of Owen Hart	145	84	93%

Source: DOC, iTunes documentary log, October 2010–April 2011

Despite having such a small share of the feature film library, Canadian documentaries perform quite admirably. Canadian feature film documentaries always appear in the top 200 purchase and rental rankings. On average, some titles appeared as high as the top 25 (see figure 5.1).

27 The iTunes Store stopped listing the top 200 rentals after 15 weeks into the logging period.

Figure 5.1 iTunes Store Canada, average number of Canadian feature films in rankings, rental vs. purchase



Source: DOC, iTunes documentary log, October 2010–April 2011

In general, the majority of the top 200 purchase and rental rankings are populated by international feature films. The average share of Canadian documentaries in the top 200 purchase and rental rankings was 9% and 8%, respectively.

Although many documentaries on iTunes have been distributed for several years, many new titles were released on iTunes during the monitoring period. The performance of these titles indicates the life of a documentary on iTunes.

- *Rush: Beyond the Lighted Stage* reached as high as the 4th spot of the top 200 and has never dropped below the 100th place.
- *Know Your Mushrooms* and *Taqwacore* started off quite strong with ratings in the top 10, but quickly fell out of favour, falling into the lower top 200 and eventually disappearing.
- *Hugh Hefner: Playboy, Activist and Rebel* climbed to the top 10 and slowly lost popularity until settling in the middle rung of the top 200 rankings.

TELEVISION

Unlike feature film documentaries, iTunes does not curate a special page for television documentaries. Instead, they are grouped together with non-fiction, which includes a wide variety of content including late-night talk shows (*The Daily Show*) and magazine programs (*Top Gear*). Furthermore, iTunes does not have a top-200 rankings list for non-fiction, but only top purchased series and episodes.

Compared to all television series and episodes, documentary series do not appear as frequently as other genres. On average, only six documentary series appear in the top 200 television series rankings. When one considers that these programs are competing with every American program available on iTunes, an average share of 3% of the rankings is quite good. Sometimes documentaries even appear in the top 25.

On average, one Canadian documentary series appeared in the top 200 rankings every week. Given that 3% of all documentary series on iTunes are Canadian. This showing is quite impressive.

Nine of the 13 Canadian documentary series appeared in the top 200 rankings at least once. *The Nature of Things* (season 1) appeared the most frequently, while the other eight appeared only once or twice. *Nazi Hunters* and the *Nature of Things* were the only series to have individual episodes appear in the top 200 episode rankings (see table 5.3).

Table 5.3 iTunes Store Canada, Canadian television series appearing in the top 200

TITLE	AVERAGE RANKING	LOWEST RANKING	% OF TIMES IN TOP 200
The Nature of Things, season 1[28]	172	197	73%
Greatest Tank Battles	73	86	8%
Dive Detectives	18	18	4%
Ice Pilots NWT, season 2	22	22	4%
The Pig Farm	27	27	4%
Nazi Hunters	44	44	4%
William Shatner's Weird or What?	80	80	4%
Ice Pilots NWT, season 1	83	83	4%

Source: DOC, iTunes documentary log, October 2010–April 2011

As for individual documentary television episodes, they appeared 34% of the time in the top 200 rankings during the 26-week logging period. When documentary episodes did appear in the top 200 episodes, the majority of the content was non-Canadian or Canadian-American co-ventures. Canadian episodes appeared 8% of the time.

Conclusion

Despite their tiny library on iTunes, Canadian feature film and television documentary series are purchased frequently. Over half of the feature film documentary catalogue appears in the top 200 rankings each week, and there is almost always one Canadian documentary series in the top 200 television series rankings.

The titles that appear in the top 200 rankings are a mix of new and old releases. Canadian documentaries about popular culture icons and topical political issues usually dominated the top 200 rankings. In addition, box office hits populate the top spots of the rankings, such as *Under the Sea 3D*, *Sharkwater*, and *The Corporation*. As for television documentaries, the most popular titles are those that are immediately familiar to the Canadian public, such as *The Nature of Things*.

28 The first collection of *The Nature of Things* episodes on iTunes, not the first season on television.

6 Trends in Documentary Distribution

Documentary viewership

After surveying the performance of documentaries across different services, it appears that the genre does not receive very high viewership.

- The most viewed documentary title on broadcaster portals had 60,000 total requested views in one year.
- The most viewed title on NFB's portal had 125,000 requested views in one year.
- The most viewed title on NFB's mobile application had almost 18,000 requested views in one year.

When aggregated, the total views for documentary content depend on the particularities of the service. Those with national and international reach and strong brand power had the highest viewership. Those with limited reach and marketing had fewer total requested views.

Importantly, no other portal in the survey had viewership close to CTV's monthly figure of 11 million total requested views.

- Broadcaster online portals ranged between 18,000 and 1.5 million total requested views in one year.
- TVeverywhere services had almost 28,000 total requested views in one year.
- On the most successful documentary digital portal, the total requested views was 2.5 million in one year.
- On mobile platforms, NFB's iPhone application had 280,000 total requested views and its iPad application had 138,000 total requested views in a year.

Many amateur videos on YouTube have more total requested views in a matter of days than all of these portals combined. However, those are viral hits, which make up only 0.33% of YouTube's library.[29] The vast majority of YouTube videos never obtain 500 total requested views.[30]

Documentaries are not taking digital distribution by storm, but they are not collecting dust on the virtual shelves either.

29 Business Insider, May 20, 2009, "Half of YouTube Videos Get Fewer Than 500 Views," <http://www.businessinsider.com/chart-of-the-day-youtube-videos-by-views-2009-5>.

30 Ibid.

LIBRARIES AND VIEWERSHIP

The size and content of a non-fiction film library appears to impact the performance of documentaries. On ad-supported and freemium portals, the services with larger libraries perform better.

- NFB has the largest library of documentaries (1,409 titles). It has the highest viewership, with 2.5 million total requested views, and the most viewed title,s with 125,000 views (non-geo-blocked).
- History Television has the largest library of the broadcaster portals (386 titles), the highest viewership (1.5 million views), and the title with the second-highest number of total requested views: 60,000 (geo-blocked).

Viewership results are consistent with the characteristics of a given library's content. For example:

- The majority of NFB's library is shorts and English titles; these are the most-viewed segments on their services: 821 English titles, 1.7 million English views, and 962 shorts, with a total of 1.6 million views.
- When the majority of titles on Knowledge Network and TVO's services were Canadian, the majority of views were Canadian: 78% and 62% of all viewership respectively.
- When non-Canadian titles outnumbered Canadian titles, the viewership of non-Canadian titles rose: from 21% to 48% on TVO, and from 37% to 47% on Knowledge Network.

Like YouTube, a large library does not imply that all titles have equal viewership. Following the pattern of the long-tail distribution model, a very small percentage of titles in any library will have the majority of the portal's views.

- The top five titles on NFB.ca and on mobile applications comprises 8% and 9% of the total views of the portal.
- On History, the five titles with the highest viewership comprise 15% of the total requested views.

On iTunes, Canadian titles make up a very small share of the total library of feature film and television documentaries, but every week a number of Canadian titles appear in the top 200 rankings. iTunes limits its library to exclusive distributors, and, consequently, limits choice.

The success of the limited selection may be the result of its limited offering. By limiting the supply, it appears as if the same titles maintain success and sales. It is unclear whether more Canadian documentaries would result in more titles in the top 200 rankings. Would the increase in supply decrease the demand of the already popular titles? Only additional Canadian documentaries on iTunes could answer the question.

It appears that Canadian television documentaries do not fare as well as feature films. However, television documentaries are being compared to all TV series and episodes rather than just Canadian vs. non-Canadian documentary series. When one considers that fewer than 1% of all non-Canadian documentary series appeared in the top 200 rankings, the appearance of one Canadian documentary series (or 7.6% of the Canadian television documentary catalogue) almost every week in the top 200 rankings seems remarkable.

Furthermore, on RODO, the library of documentary content (228 titles) is comparable in size to CBC's and History Television, but its viewership (28,000 total requested views) is only marginally higher than Knowledge Network's portal (18,000 total requested views). The size of the library may not universally deliver success.

Formats

It is difficult to ascertain whether the length of a documentary impacts its success, but breaking it into separate parts does generate more views. Although the majority of NFB's views appear to be shorts, given the varied lengths of shorts on NFB.ca, one cannot draw many conclusions. The top five NFB shorts were in reality closer in length to half-hour documentaries.

As for episodic content, the top five viewed titles on broadcaster portals were five episodes of *Ice Pilots NWT*. The narrow range between the episodes indicates that the series maintains its viewership throughout a season on the portal. This is also the case with the top foreign series, *Pawn Stars*. Its episodes range between 9,000 and 11,000 views. Clearly, documentary series perform similarly on digital platforms as they do on television. Their episodic format keeps viewers engaged and willing to watch more. But we do not know whether viewers are migrating from television to the portal, and vice-versa.

This trend is further demonstrated on TVO's portal. In 2009–10, two of the top five videos were part of the same mini-series: *The Empire of the Word*. In 2010–11, two videos from the miniseries *Inside Disaster* appeared in the top 200.

Platforms

There is not enough data about the viewership of documentaries on mobile platforms to draw any firm conclusions, but a number of myths can be dispelled. Many argue that mobile video watchers prefer content that is short in length. On the NFB applications, the average length of the top five titles was 50 minutes for the English titles, and 55 minutes for the French ones. Clearly, mobile viewers do not discriminate against long-form content.

It appears that viewers watch the same content regardless of the context. Indeed, 60% of the top titles on NFB's mobile applications were the same as those on NFB.ca. The tastes of mobile viewers are remarkably similar to those watching online.

Yet, mobile viewers do prefer to watch content on larger mobile screens. The iPad was introduced in June 2010. On the NFB applications, iPhone viewership dropped during 2010–11 and iPad viewership rose. This could be the creation of a new viewer market, or it could be migration from one mobile platform to another (Apple users readily adopt newer Apple products).

A similar trend is demonstrated on broadcaster portals and on iTunes. The content that received high ratings on television and in the theatres also appears to be successful on online platforms. The most popular Canadian documentary series on History Television is *Ice Pilots NWT*; it also garners high ratings online. *The Corporation*, *Sharkwater*, and *Under the Sea 3D* are top-performing Canadian documentaries. These titles also rank in the top 200 purchase and rental rankings on iTunes.

These could be exceptions. Without further research into the performance of documentaries across different platforms, no concrete conclusions can be drawn.

Impact of business model and digital strategy

In Canada, NFB's documentary titles are viewed 2.5 million times in a year, but RODO's content is only viewed 28,000 times. Rogers has a higher budget for marketing and is part of a larger communications conglomerate. Why should NFB have higher viewership than it, and why should NFB's titles be the most popular titles on RODO? The answer lies in the business model and digital strategy.

Certain business models and digital strategies are more effective for distributing documentary content than others. The NFB distributes its content across five international syndication services. It is not geo-blocked. Its content is free. It has high viewership because it syndicates its content around the world. Its purpose is to distribute Canadian content to Canadians as well as showcase it to the world.

The bulk of RODO's content is only accessible via cable subscription. Outside of a library of digital downloads, non-subscribers can only access NFB titles. It's a closed portal whose primary goal is to provide a service to its members, not everyone on the Internet. It could be the case that the majority of documentary viewers visiting the portal prefer not to register for the service or pay for content.

Is there a business model or service that works exclusively for documentaries? It depends on the goal of the service. RODO wants to keep cable subscribers from cutting the cord; NFB wants to showcase Canadian content; broadcasters want to create a catch-up window for viewers and generate ad revenue; and Apple wants to sell content cheaply to encourage users to buy its technology.

It is clear that documentaries perform differently depending on the digital distribution services, business model, and strategy.

- When content is available for free (ad-supported or freemium-based), documentaries perform better on portals with large libraries and multiple platforms. Documentary series perform better than features.
- When content is distributed as a digital download, documentaries maintain high rates if the supply is limited to titles with a broad appeal and box office success. Documentary features perform better than documentary television series.
- When all three models are combined, viewers opt to watch what is available for free rather than subscribe or pay anything. Documentary features appear higher than television episodes in the rankings.

If success on each platform is relative to the business model being employed, documentaries perform better on some than others.

- In aggregate, documentary series can dominate ratings of ad-supported online portals dedicated to documentaries. The highest-rated episode has a maximum of 60,000 views.
- On digital download services, the existing supply of documentaries appears to be downloaded frequently. Without actual data about total sales volume, it is difficult to determine how well they are actually performing.
- On subscription VOD services, subscribers watch them sparingly. Online, documentaries are watched by non-subscribers who use a portal (RODO).

Benchmarks

There are some generalities that can be extracted from the diversity of data of the services. A number of benchmarks can be extracted from the data based on the top performers on each digital platform.

- On free online video portals, successful documentary features are viewed between 7,000 and 28,000 times in a year, depending on the linguistic market.
- On free online video portals, successful documentary series can garner up to 60,000 views per episode and 540,000 views for the entire season.
- On free mobile applications, successful documentaries are viewed between 2,000 and 12,000 times in a year, depending on the linguistic market.
- On digital download services, television documentary series that consistently appear in the lower end of top 200 rankings of all distributed television content are considered successful. Feature film documentaries that appear in the top 50 rankings of all documentary feature films are considered successful.

Although the numbers appear to be small and the indices of success very low, these ranges provide baselines to measure the performance of documentaries on digital distribution services in Canada.

Luckily, there are numerous developments that will allow for documentaries to surpass their current performance, or at least have an opportunity to populate the digital shelves. Many of Canada's major broadcasters have signed a terms-of-trade agreement with the CMPA that resolves digital rights ownership, which should impact the amount of content available.

Broadcasters and producers can now exploit documentaries on digital platforms with greater clarity and efficiency when ownership and revenue-sharing terms are no longer in dispute. If broadcasters commission documentaries, they will be able to exploit them as part of a multiplatform programming initiative. Meanwhile, producers have more control over the distribution of their films on digital download services.

7 Next Steps

This first look at the various digital distribution services is by no means comprehensive. Despite being the most data-intensive kind of media, it is very difficult to rigorously investigate the performance of digital video. Access to data defines the scope, detail, and comprehensiveness of this report. Because so many companies are unwilling or unable to share data about their services, it was truly impossible to create a comprehensive report on this market. Without more openness about the performance of digital distribution, reporting on this market will never reach the level of statistical rigour available for television.

However, this scan does offer some indices for evaluating documentaries in this market. It also points to missing measurements, unanswered questions, and possible avenues of new research.

Cross-platform pollination

This report approaches the performance of documentaries from the vantage point of the digital distribution service. Almost all of the content is made for many different platforms rather than exclusively for digital distribution. Underlying the success of many titles is their performance on television, in the DVD market, and in theatres. Even between digital services, such as web portal to mobile, there seems to be a connection. To fully understand how documentaries receive viewership on digital distribution platforms, its cross-platform pollination must be examined.

Many platforms are rooted in migrating viewers back to broadcast television. Most broadcasters created their online video portals as a catch-up service for their television programming and to prevent piracy. TVEverywhere services, such as RODO, are an active plan to maintain their cable subscription rate through offering bonus services. The viewership of one service may be the direct result of the popularity of another. CBC claims that the increased viewership to its Thursday-night documentary programming is a direct result of its online video portal. Is the converse true?

Indeed, the viewership patterns of documentaries on online video portals mimic those of broadcast television: Canadians watch more Canadian documentaries than non-Canadian documentaries.[31] There are obviously some connections.

More research must be performed on the multiple windows of documentaries in order to understand whether or not its entire release strategy impacts its success on digital platforms.

Marketing documentaries on digital platforms

This report indicates that there is a need for a documentary aggregator that can work to market the form across digital platforms. The Internet provides viewers thousands of video portals to view content on. While some services use a syndication strategy to deliver content to the most popular places, there is no single aggregator where all documentaries can be searched by topic, language, and other criteria.

31 DOC, *Getting Real Volume 4: An Economic Profile of the Canadian Documentary Production Industry*, March 2011, p. 51.

NFB's services offer a good template, but it is limited to its library. Documentary Guide (documentaryguide.com) attempts to create such as a service, but it lacks the promotion and media power of a crown corporation or a broadcaster/distributor. If an aggregator were created where all documentaries available across digital services were compiled, and if it were marketed effectively, the hyper-fragmentation of audiences could be reversed. Such a service could allow users to search for a topic on the Internet, and it could connect users to documentaries on that content. What's required is a coordinated effort of all the players to see the combined benefit of such an approach, implement the service, and market it effectively.

Like a physical store, digital distribution services merchandise their content on different pages, using well-conceived pricing methods and advertising. It is clear that the different strategies do impact the popularity of content as well as the brand recognition of the digital service (for instance, CBC and NFB are services with significant brand recognition at home and abroad).

iTunes makes a great effort to organize its content according to genre and different interest groups to appeal to consumers. On average, 63% of the Canadian films featured on the documentary page made it to the top 200 rankings.

As for ad-supported and freemium services, CBC and NFB have Twitter feeds that link daily news and moments in history to titles in their documentary libraries. These two services were top-performing documentary portals.

Distributors on iTunes use different pricing strategies to generate higher sales. Dropping the price of a video can cause it to appear in the top 200 rankings. Its appearance in the rankings then provides additional promotion.

More analysis of how content is merchandised, priced, and promoted will provide deeper insight into how documentaries perform on digital distribution services.

Structural impact of digital distribution

Many claim that documentaries take advantage of the niche-based organizational structure of the Internet, and digital distribution embeds them in this structure. However, documentary digital downloads mimic viewership patterns of the physical video-distribution and television-broadcasting markets. What attracts feature film viewership tends to be box office hits, documentaries about popular culture, and highly recognizable social and political subjects such as the environment or the views of Noam Chomsky. As for television viewership, the most popular TV shows are those that are being purchased.

The programming of digital services may not be a result of viewership demand, but simply anticipated viewership options. The repetition of the home video and television markets' consumption behaviour on digital platforms may be a direct result of having the same players in a new space. There are some demographic studies on digital media consumption that indicate certain age groups use digital video services as a primary platform.[32] Do digital services actually create a new kind of content consumer? Does the Internet shape their viewing habits? Without further study of the purchasing and viewing habits of digital consumers, these questions remain unanswered and the digital consumer remains unidentified.

32 Media Technology Monitor provides data on digital media consumption by age. The Canadian Wireless Telecommunications Association's *2011 Cell Phone Consumer Attitudes Study* also reported on consumption by age for mobile video on smartphones.

Same, same but different

Despite its reach and ubiquity across multiple platforms, the documentary digital distribution market is still in its infancy. Currently, it acts as a catch-up service and another shelf for titles. Although it is displacing DVD sales, and some people are "cutting the cord" instead of watching cable, it exists as a complimentary window for video titles.

Digital distribution may be a double-edged sword: it expands the potential audience for content, but that audience does not want to pay for the content. Although content providers may accept a larger audience for their work in exchange for distributing the work for free, there is no guarantee that the increased popularity of the content will translate into revenues.

Versioning content for different markets may be the best way to be successful in the freemium market. By creating different versions of the original content for various markets, content providers can provide shorter versions of the content for free, and then sell premium versions on digital distribution services.

Apple is the biggest player in the digital distribution market, and its business model is counter-productive to the health of the content industry. It distributes video content at low prices as a way to sell its technology. The iTunes store may offer a temporary solution to piracy, but it sets false price expectations for consumers.

Digital services are not the panacea for documentary distribution. They are simply another distribution service, and they are not inherently suited to documentaries. In the grand scheme of Internet viewership, documentaries attract a small share of viewers. Currently, television documentary viewership far outweighs online documentary viewership.

As a new-release window, digital services provide more exposure to documentary content than ever. This is the most important impact of digital distribution for documentary filmmakers: potential audiences exist for a wide range of content. However the anticipated flock of audiences is mitigated by a few factors. The actual free flow of content has yet to materialize. Furthermore, even if the content is available, it is not always easily found unless it is aggregated on the most popular services. Hopefully, the ongoing negotiations of terms-of-trade agreements will result in a freer flow of content onto digital platforms, making more documentary content available to Canadian audiences.

List of Definitions

Amateur video: Video created by non-professional content creators usually appearing on social networks and video-sharing sites, such as YouTube, and Facebook.

Assets: Content available on a service, an asset may be an entire series, or a single title.

Auteur: A production that is driven by the central vision or argument of the filmmaker.

Broadcasting distribution undertaking: Companies that distribute content through co-axial, broadband, or satellite signals, i.e., cable and satellite companies.

Canadian content: Content that is primarily created by Canadians, from Canadian perspectives and/or about Canadian subjects, and are mostly shot in Canada (many Canadian documentaries are about international themes, but are created by Canadians — thus, they have a Canadian perspective).

Digital download: A transaction where a user electronically pays for content and receives a digital copy that is made available to them for a specified time period.

Distributors: Companies that distribute films through theatrical, home-video, or digital outlets.

Documentary: A work of non-fiction that analyzes a subject matter in a creative and critical manner. For the purposes of this report, documentaries are primarily feature films, television shows, and auteur shorts.

Feature: A documentary that is 75 minutes or longer.

Geo-blocking: A system that prevents users in other territories from accessing content in order to maintain territorial rights agreements online, e.g. CBC geo-blocks American viewers, and NBC geo-blocks Canadian viewers.

Long-tail distribution strategy: A content distribution strategy that emphasizes the success of niche content on large aggregators. Hits and middle titles have the highest frequency of purchase/viewership, but the aggregate of the tail (rest of the titles) is considerably large. Online services have almost unlimited shelf space and, consequently, can offer more titles and serve different niches.

Mini-series: A documentary story told across multiple episodes, usually under six episodes with each episode approximately an hour in length.

Mobile application: A pre-loaded or downloaded computer program available on mobile devices that enables users to perform various tasks.

One-off: A single-episode documentary, usually an hour in length.

Pay-TV: A television service that relies exclusively on subscriber fees to create content. These services are distributed exclusively on BDUs.

Series: A documentary story told across multiple episodes, usually 13. Most episodes are over 30 minutes.

Requested view: Where the user chooses to view a video on a service.

Set-top box: An external device that connects to a television set enabling access to new features, e.g., digital cable subscribers use a set-top box to access VOD services.

Short: Shorts are films that are shorter than a feature, which is usually 75 minutes long. Television shorts are segments that are shorter than a half-hour.

Smartphone: A powerful wireless phone that allows users to connect to the Internet, run applications, and perform other tasks, e.g. BlackBerrys, iPhones, Windows Phones and Android enabled devices.

Specialty channels: Ad-supported television services that serve a particular programming niche, e.g., The Comedy Network, TSN, and YTV. These services are exclusively distributed on BDUs.

Streaming: A content delivery method that provides on demand viewership by downloading the content as the user watches it off the Internet.

Subscription video-on-demand (SVOD): A service where users pay a periodic fee to access a content library and select titles to view immediately. SVOD is available on cable, satellite, and online portals services.

Tablet: A computer operated through a touchscreen interface. Often, these devices are connected to mobile broadband services to access the Internet, e.g., Apple's iPad, Samsung's Galaxy Tab, and BlackBerry's PlayBook.

TVeverywhere: A content strategy where a subscriber pays for access to content on one service and receives access to the same content on other platforms.

Vertically integrated: A company that owns different parts of its value chain, e.g., Rogers owns broadcasting, wireless, Internet, and cable services.

Video-on-demand (VOD): A service where users can access a content library and select titles to view immediately. The service is available on cable, satellite, and online portals services.

Viewership: The total number of requested views.

Views: Whenever a video is played. Some services automate views when they are launched. Thus, a view is distinct from a requested view, where the user intentionally chooses a video.

Wireless: Cellular or mobile telephones.

Wireline: Plain old telephones.

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The Documentary Organization of Canada / l'Association des documentaristes du Canada (DOC) is the collective voice of independent documentary filmmakers across Canada. It is a member-driven organization dedicated to promoting, supporting and developing the art form of documentary filmmaking. As a national non-profit association it advocates on behalf of its members to foster an environment conducive to documentary production and strives to strengthen the sector within the broader fi lm production industry.

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Funding for this study was provided by Ontario Media Development Corporation. Any opinions, findings, conclusions or recommendations expressed in this material are those of the author and do not necessarily reflect the views of Ontario Media Development Corporation or the Government of Ontario. The Government of Ontario and its agencies are in no way bound by the recommendations contained in this document.

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