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Imbalances in On-Demand Documentary Offerings. The Case of a Small Media Market: Belgium

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In the digital age, transnational audiovisual flows have grown exponentially, bringing the discussion on the imbalance in global media flows back into focus. In an attempt to address a gap in flows research, the current article focuses on a genre that has received limited attention, namely documentary. Although documentary is a genre that can go beyond commercial and entertainment goals, it is still prone to the same imbalance in distribution, mainly driven by commercial interests. To this end, the present article conducts a flow study on the video-on-demand documentary offerings in Belgium. The available titles are analyzed based on (1) country of origin, (2) language, and (3) filming locations. Results indicate a continued dominance of productions from the "global North," particularly on international platforms active in Belgium. Although Belgian documentary is underrepresented, and primarily on offer by local platforms, there is evidence of a geo-linguistic market.

Keywords: documentary, audiovisual flow, media flow, flow studies, Belgium, video-on-demand, small media market

The debates on the imbalance of global communication flows, started in the 1970s within the UNESCO framework, are still given close attention to this day (Hepp, 2015). Having been discussed by a series of schools of thought, research on media flows has taken new shapes throughout time, developing together with changes in national markets and political systems, regional trade agreements, and new production ecosystems, as well as novel distribution platforms and consumption patterns (Chalaby, 2016; Hesmondhalgh, 2013; Winseck, 2011). Globalization and digitalization are the main factors that need to be taken into consideration for an updated account of media flow studies, which are still primarily focused on power imbalance and commercial interests.

In the context of intensified over-the-top (OTT) content delivery, it is important to consider, and try to assess, the influence online distribution has on the offering of audiovisual media products, as well as the many ways in which this has disrupted the global media industry. Studies estimate that by 2020, online viewing will account for more than 30% of all video consumption (Arthofer, Hardarson, Kon, Lee, & Rose,

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2016), and while some local players have joined the online market, there is still a clear domination of global players, particularly U.S.-owned companies (Arthofer et al., 2016).

The aim of the present article is not only to conduct a flow study that reflects on these new trends, but also to shift the focus on a genre that has been given limited attention within the field of flow studies: documentary. Despite its distinctiveness, media production and distribution studies, including flows research, often neglect documentary or discuss it as part of the amalgam of "audiovisual" productions. In addition, existing research mainly consists of empirical studies in large English-speaking countries (Bullert, 1997; Nash & Corner, 2016; Zoellner, 2009), with a limited focus on documentaries in small regions or countries (Haase, 2016; Patino, 2014). To this end, the study aims to identify the ways in which digitalization has shaped the discussion on transnational flows within the framework of a small media market: Belgium. Moreover, how does this apply to the documentary genre?

The first part of the article traces the development of flow studies throughout time and will discuss documentary as a particularly interesting genre within the general theory of global media and communication flows. The second part draws up an inventory of available video-on-demand (VOD) platforms available in Belgium and aimed at the Belgian audience—either through geographical confines, such as geo-blocking, or through cultural means, such as language and specific content. These platforms include the online libraries of Belgian broadcasters, international platforms, and other locally based VOD platforms. The third part of the article analyzes the titles on these platforms by looking at (1) the country of origin, (2) the language, and (3) the filming locations. The article concludes with a discussion on the share of locally produced documentaries on local versus international digital platforms compared to imported content, as well as an account of the countries of origin for the latter. The findings are contextualized through a closer look at the platforms themselves, as well as the specifics of the Belgian market.

Media Flows Theory

Although the international debate on the "free flow of information" and the imbalances in the global arena have fundamentally evolved since the UNESCO debates in the 1970s, flows theory has never lost its relevance in the discussion on the global trade of media and communication products. Furthermore, it has been suggested that the New World Information and Communication Order (NWICO) debate, calling for a balanced transnational flow, has recently been revived in academic circles (Hafez, 2011), as well as in UNESCO's policy on the promotion of cultural diversity (Hepp, 2015).

Initiated by the reaction of countries in the "developing South" against the so-called "one-way flow" of communication from the "global North," represented by Western powers, research into media flows is discussed by various schools of thought. Political economy, cultural studies, and economic analysis set the foundations of theoretical and empirical investigation into the transnational distribution and consumption of media content. In more recent years, they have been joined and complemented by research in media economics, international communication, cultural globalization, and media innovation. At the onset, critical political economists (Schiller, 1971; Smythe, 1981) frame the unequal flow of global communication through concepts such as media and cultural imperialism, discussed within the broader framework of dependency

(Biltereyst & Meers, 2000), cultural hegemony, and an imbalance of power driven by commercial interests (Hamelink, 1983; Mattelart, 1979).

In the 1980s, the "two-way flows" thesis gains traction, pointing at signs of resistance from the "global South" against the hegemony through new transnational networks referred to as "counterflows" or "contra-flows" (Thussu, 2007). The cultural studies thesis, however, gives more weight to media consumption and audience reception (Liebes & Katz, 1990) and considers emerging theoretical paradigms such as postmodernism and postcolonialism (Sinclair, Jacka, & Cunningham, 2002). In the 1980s the focus falls on audience reception studies, mainly conducted on popular U.S. television programs (see Ang, 2005; Liebes & Katz, 1990). The results point toward the existence of critical audiences that filter the content through their own values and cultural background. Also during the late 1980s, the economic analysis school examine media flows through the working of the global media trade, thus focusing on global linguistic markets (Wildman & Siwek, 1988), the interaction of demand-side market size and the "cultural discount" factor (Hoskins & Mirus, 1988), and a country's domestic television infrastructure and its influence on the supply-side market size (Waterman, 1988). Economic models thus focus on the importance of a large and strong domestic media market, in the process of global export, especially in the case of large, wealthy countries such as those in the "global North."

Moving forward into the 1990s, the discussion on global media flows takes on a more complex nature. Global flows become multilayered, and media distribution and consumption become heavily disrupted by technological advancements and new developments in the world economy. In this context, cultural globalization is given rising attention, as it is believed to support processes of modernization (Hafez, 2011, p. 97) and increasing diversity, which goes against the trends of cultural homogenization, or Americanization, discussed at the onset of the media flows theories. New concepts such as "glocalization" (Robertson, 1995), "localization" (Straubhaar & Duarte, 2005), and "hybridity" (Garcia Canclini, 1995) are used to investigate new media flows, focusing on the key role played by local and regional cultures in adapting foreign content to appeal more to domestic audiences. According to scholars, these create "heterogeneous disjunctures" (Appadurai, 1996) that transform global transnational flows into a complex and highly interesting field of study. Similarly, Straubhaar's (2007) notion of "cultural proximity" highlights the significance of local markets even more, pointing toward the development of geo-cultural or geo-linguistic markets as regions with a shared cultural, linguistic, and historical heritage that function as coherent mediascapes (Hesmondhalgh, 2013; Straubhaar, 2007).

Although these new trends point toward a certain levelling in global media distribution, scholars warn against rendering the discussion obsolete, as there are still clear imbalances in transnational media flows (Hafez, 2011). Audiences may prefer domestic content over foreign, but the financial imbalance and difficulties in media production are still evident throughout the world. Thus, competing with a global media giant remains a challenge, especially when the U.S. has been adopted by large parts of global audiences as a "second culture" (Gitlin, 2003) due to its ubiquity and familiarity. Therefore, although the cultural imperialism thesis has received substantial criticism over the years, the imperialistic character of media (Fuchs, 2010) is still highly relevant in researching shifts in global capitalism. However, flows studies need to develop a new way to analyze the new hybrid and localized media products as both evidence of transnational commercialization, but also expressions of audience autonomy (Artz, 2017, p. 100), especially in a global media system where transnational collaborations have visibly intensified (Robinson, 2017).

Flows research on small regions or countries is limited. However, small media markets, such as Belgium, make for interesting case studies due to their marginal language reach, specific policies, and market and production practices (see Lowe & Nissen, 2011; Puppis, 2009; Trappel, 2014). Small media markets can be particularly interesting for transnational media flows, as they do not benefit from a profitable "home-market effect" (Linder, 1961), which limits their potential for export. Small regions are also more likely to impose protective measures for the promotion of domestic content (Trappel, 2014), which may influence the volume of imports, but also that of local production. Moreover, small regions that share a language with a larger neighboring media market may see a strong effect of the geo-linguistic market that affects both the production and distribution of media products.

Focus on Documentary

Documentary films and series have particular characteristics that set them apart from other audiovisual products, such as feature films and drama, in form, production, and distribution practices, as well as audiences (Corner, 1996; Hardie, 2008; McLane, 2012; Nash, Hight, & Summerhayes, 2014; Nichols, 2017).

An important feature of documentary is that budgets for the genre are generally strained. Especially in Europe, documentaries are primarily financed by and distributed through public service institutions such as film funds and public broadcasting companies (Sørensen, 2012; Zoellner, 2009, p. 504). Without a doubt, other audiovisual genres, such as fiction film and television programs, also receive public support (see Murschetz, Teichmann, & Karmasin, 2018). However, documentary professionals in Europe claim to struggle particularly hard to finance and monetize their works in an increasingly commercially oriented media landscape (Macnab, 2015). Doyle (2013, pp. 95, 168) links documentary to the concept of "merit goods" to illustrate that certain media products lack commercial value and are underproduced by the free market, which further points to the precarious sustainability of documentary production. Various studies show that European documentaries are remarkably dependent on public broadcasting (Debrett, 2007; Livémont, Donders, & Pauwels, 2017; Sørensen, 2014; Vinuela, 2018; Zoellner, 2009), which has also become increasingly under pressure. Recent trends of deregulation in many European countries, the rising political strains on public broadcasters, the decrease in public broadcasting license fees, and the convergence between public and commercial television (Armstrong & Weeds, 2007, p. 119; Elstein, Cox, Donoghue, Graham, & Metzger, 2004)—especially on generalist channels (Farchy & Ranaivoson, 2011)—put the already precarious production and distribution strategies of documentaries under higher pressure (Sørensen, 2012, pp. 730–731).

The uncertainties concerning funding and distribution possibilities in the fast-changing media landscape only add to these tensions. Nevertheless, some authors (e.g., Armstrong & Weeds, 2007) claim that digitalization and internationalization may provide new favorable circumstances for "merit good" productions, as new players have entered the documentary scene, by distributing and even investing in documentary production. Netflix is a clear example of this trend, as it has made feature-length documentary a core pillar of its service, both in order to demonstrate its dedication to quality cinema and to distinguish its catalog from the usual television programming (Sharma, 2016, p. 143). This new transnational, digital context brings a decrease in production and distribution costs, better audience targeting, and Long Tail business models that can support niche content (Anderson, 2006). Although these claims are opposed by many authors (e.g., Doyle, 2016; Lobato, 2009; Sørensen, 2012; Syvertsen, 2003), opportunities and challenges present themselves in an increasingly internationalized, digitalized, and less public-service-driven media landscape. These developments make the present day an even more interesting time to include documentary in the study of transnational media flows.

But what do we talk about when we talk about "documentary"? As the genre has experienced a great expansion in time, partly due to the advent of television, with various documentary formats and styles having been developed throughout the years (Beattie, 2004; Kilborn & Izod, 1997; Nichols, 2017), different types of audiovisual content are currently defined as "documentary." As a consequence, there are multiple debates within academia and the professional field about the genre's definition (see Corner, 2002). Although the aim of this article is not to contribute to this discussion, we consider a series of defining elements of the documentary genre to guide our analysis. We keep in mind that "documentaries are about real people" (Nichols, 2017, p. 6), that they "are about reality; they're about something that actually happened" (Nichols, 2017, p. 5), and that they primarily depend on a natural setting (Corner, 2002, pp. 263–264), as opposed to reality TV or docu-drama, which require predefined stages and/or highly scripted stories (Hill, 2007; Kilborn, 2003). Finally, documentaries are not "surveillance footage and informational or how-to films (...), conveying information in a straightforward, often didactic manner" (Nichols, 2017, p. 105).

Unlike the elements that are essential to the success of fiction works, the topic of a documentary is of key importance to its success and, thus, its distribution and consumption (Hardie, 2008). To this end, the biography of a national political or cultural figure will have fewer chances to cross national borders, the same way a topic of global interest and recognition, such as travel or nature documentaries, will appeal to a much wider global audience (Fürsich, 2003). By increasing its global investment in original content (Lambrechts, 2018), Netflix stands out in the VOD market as a powerful disruptor, ensuring exclusive rights on works it buys directly from productions companies. Through its investments Netflix also contributes to the increasing commercialization of the genre, as the majority of the titles in its catalog deal with global topics, both easy to market on a global scale and often based on some pre-existing awareness by audiences (Sharma, 2016, p. 148).

Methodology

Although flows research has a long-lasting tradition, a systematic methodology for flow studies has never been formulated (see Iordache, Van Audenhove, & Loisen, forthcoming). However, two main types of empirical studies have been identified: one that is more descriptive but comprehensive in terms of coverage of countries, and one that takes a more analytical approach and typically covers only a limited sample or even individual countries, trying to identify causal relations between the factors identified in the investigation of flows (Oh, 2001, p. 33).

The present study takes a microlevel approach to flows studies and employs a case study on the documentary offerings in Belgium. The "Belgian media market" is particularly interesting, as it is divided into two main media markets,[1] each with their own regional government and language. The Dutch-speaking part of Belgium (i.e., Flanders and Brussels, where Flemings are a minority) has a multiplayer market, with a strong public broadcaster (VRT). Although small, the Flemish media market is rather strong, as there is high demand and supply for domestic content, particularly Flemish drama (Dhoest, 2011, p. 15). Despite its cultural proximity to the Netherlands, the region is not dependent on its larger neighbor (Biltereyst, 1992, p. 537), with which it also shares the Dutch (Flemish) language. The French-speaking part of Belgium (Wallonia and Brussels) is somewhat smaller and also has one public broadcaster (RTBF) and a series of commercial channels. Wallonia is located in the linguistic sphere of influence of a major media player, France, which has led to increased competition with French media companies and a higher dependency on French audiovisual content. Compared to Flanders, Wallonia has developed a weaker domestic market and is less competitive in the area (Lits, 2012).

Developments in media distribution and consumption make research in the field of flow studies even more problematic. In the context of increasing digitalization, new tools and methods need to be applied for data gathering, as well as data analysis and visualization. To this end, the present article combines traditional methods of flows research with new (digital) tools in an attempt to adapt to new means of online content delivery. As on-demand catalogs are interactive, curated databases of content, data gathering has become more complex (Lobato, 2018). For this article, we analyze the catalogs of 17 VOD platforms in Belgium for entries on documentary film. The primary criteria for choosing the platform is for it (1) to have documentaries on offer, (2) to be made available to the Belgian audience, and (3) to be aimed at the Belgian audience through a regional (Flemish and/or Walloon/Brussels) or national catalog. Thus, our sample consists of: (1) 12 local on-demand/catch-up platforms of national broadcasters or VOD services of digital cable providers, available through a Belgian IP address, (2) and five international platforms, which are geo-blocked services with a dedicated library for Belgium. It also needs to be mentioned that the platforms themselves are quite different in terms of ownership and funding, target audience, and business and delivery models—including catch-up TV, subscription video-on-demand (SVOD), and transaction video-on-demand (TVOD) (see Table 1 for more details). Due to this mix, a number of them are (partly) subsidized, either through public broadcasting companies, such as VRT NU and RTBF Auvio, or regional funding, such as Dalton (Flemish government) or UniversCiné (Creative Europe and Fédération Wallonie-Bruxelles). With regard to typology, the chosen platforms can be categorized as: content aggregator/cable operator, broadcaster/publisher, or commissioner/publisher. The categorization reflects the blurring lines between content production, delivery, and aggregation, particularly by distribution platforms that now promote themselves through their original/exclusive content, such as Netflix and Amazon Prime.

[1] There is also a minority German-speaking community in Belgium, but its media market is underdeveloped.

Table 1. VOD Platforms.

	Platform	Content aggregator/ cable operator	Broadcaster/ publisher	Commissioner/ publisher	Private	(Partly) subsidized	TVOD	SVOD	Catch-up TV	Target audience: French community	Target audience : Flemish community
Local	VOO	✓			✓		✓			✓	
	Proximus	✓			✓		✓			✓	✓
	Stievie		✓		✓				✓		✓
	Yelo Play	✓			✓			✓		✓*	✓
	Vier		✓		✓				✓		✓
	VRT NU		✓			✓			✓		✓
	VTM		✓		✓				✓		✓
	DVDPost	✓			✓		✓			✓	✓
	Dalton	✓				✓		✓			✓
	Be TV	✓			✓			✓		✓	
	RTBF Auvio		✓			✓			✓	✓	
	UniversCiné	✓				✓	✓			✓	✓
International	Amazon Prime			✓	✓		✓			✓	✓
	YouTube			✓	✓		✓			✓	✓
	Google Play	✓			✓		✓			✓	✓
	iTunes	✓			✓		✓			✓	✓
	Netflix			✓	✓			✓		✓	✓

***** Telenet is a Flemish-based operator that is primarily present in Flanders (and parts of Brussels) but is currently in the process of expanding to Wallonia (Source: https://press.telenet.be/)*

The data were gathered using an online web-scraping program and manually on platforms where the scraping tool could not be used. The aim was to compile all the documentary titles available on these platforms on a regular day of the week. For this research, the data were gathered on March 2, 2018.[2] For certain local platforms, we obtained the full list of titles for the requested date directly from the platform. In addition to the catalog list, we also required information regarding each title. For increased consistency, we aimed to compile this information from the same source. We chose the Internet Movie Database (IMDb) website as the primary source for the additional data, as it provides the required information on genre, language, country of origin, production company, and year of release for a large number of titles. When the title was not available on IMDb, we obtained the information from the platforms themselves or other online sources, such as film databases, the websites of distributors and production companies, press releases, trailers, etc.

Regardless of the aforementioned difficulties in defining documentary works and distinguishing them from other types of fiction and nonfiction content, we have collected every title cataloged under the documentary genre by the platforms themselves. However, in our attempt to maintain a certain consistency within the titles analyzed, we considered some of the components of documentary as defined earlier. To this end, we decided to exclude a number of titles from our analysis, such as docu-dramas, sports and adventure

[2] The database can be made available by the authors upon request.

films, tutorials, and reality-TV formats that we found to be heavily "scripted," but had been cataloged by the platforms as documentaries. Alongside these, we also left out recordings of live music or sports events. This selection process led to the exclusion of 484 titles that we considered did not belong to the documentary genre, leaving a total of 3,545 unique titles for the analysis. Taking into consideration that some of the titles were present on more than one platform, the total number of records analyzed in the study is 4,417. For the present analysis, each individual title is considered as a single record, regardless of whether it was made up of one (film) or more parts (diptych, series).

The main purpose of the analysis is to conduct a distribution flow study, thus identifying the country of origin of each documentary. This is determined by the information provided on IMDb or by the country of origin of the film's production company. Language and filming locations are other significant indicators in the analysis. Additional information gathered, such as the year of release and the platform on which it was available, is used in the analysis to contextualize the findings. The analysis is completed with data on documentary production and distribution, with particular attention to the specifics of a small media market.

Main Findings

Contextual Factors

The findings of the present study need to be contextualized for the specifics of the Belgian case. As previously mentioned, Belgium is a small media market (Puppis, 2009), characterized by a limited number of players, a small audience, and low advertising potential, as well as limited export possibilities, not least due to its language divide. At the same time, however, we must also take into account Belgium's position as a Western European country with a relatively high GDP and its flourishing domestic production sector, especially in Flanders (Wauters & Raats, 2018). In terms of VOD penetration, Belgium is currently above the European average; revenues from on-demand services are expected to continue a steady growth, especially in the SVOD segment (Statista, 2018).

A first interesting finding was that four out of the five top platforms—with more than 200 titles each—are international (Figure 1) and owned by U.S.-based media giants Google (YouTube and Google Play), Netflix, and Apple (iTunes). Moreover, out of the total number of records (4,417), almost half (2,028) are found in the iTunes library. Interestingly, the second largest documentary offering is found on the local OTT platform UniversCiné, a Belgian-EU subsidized platform that offers independent films, with websites in both French and Dutch. In comparison, the wide majority of remaining local platforms had a very limited online documentary offerings.

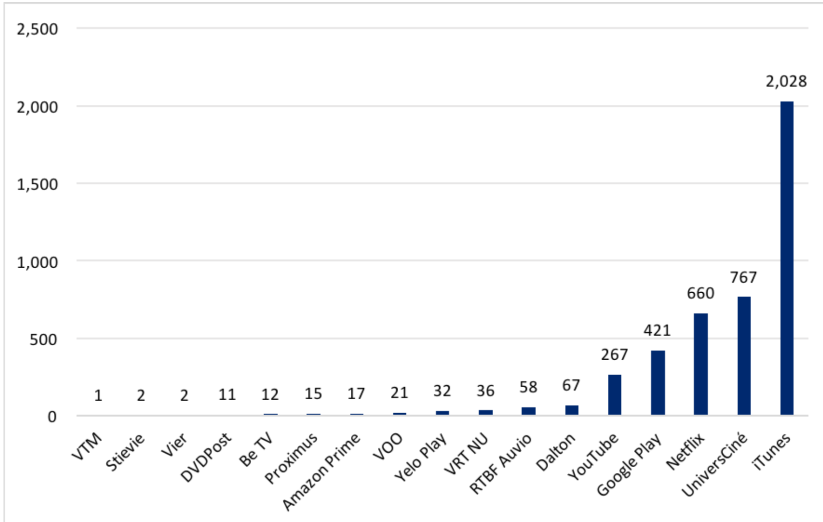

Figure 1. Total number of unique titles on each platform.

With regard to the year of release (Figure 2), the calculation was conducted for 99% of records. Our findings show that 15% of the documentaries were available on more than one platform. Moreover, it is primarily recent productions that overlap.

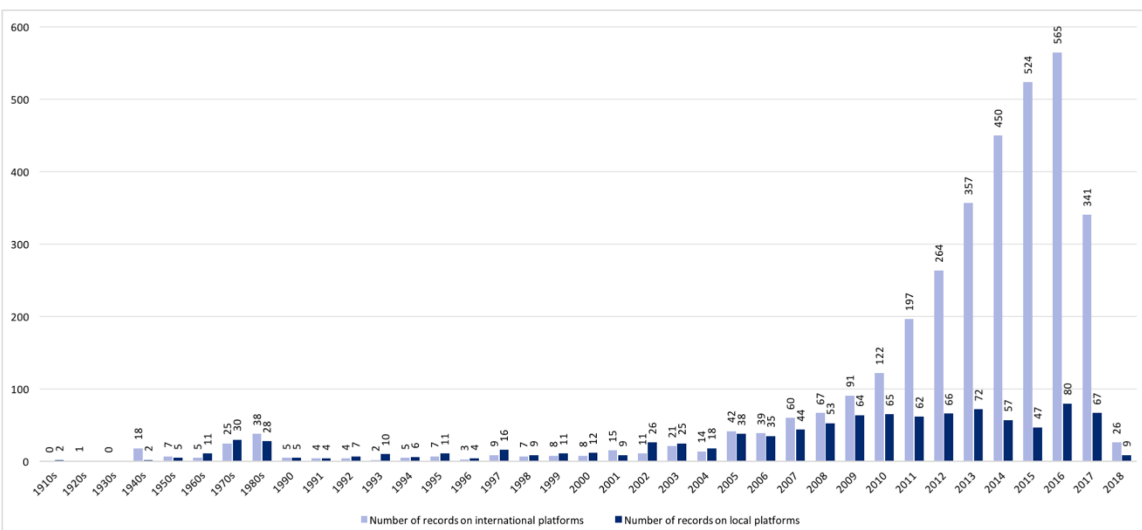

Figure 2. Year of release.

This can also be observed when looking at the 10 films that are available on most platforms (Table 2), nine of which were released in the last five years. When considering the titles themselves, they are all big-budget, well-known documentaries: seven of them received nominations or awards at large international film festivals, while the remaining three deal with global topics such as wildlife and music celebrities.

This confirms research that opposes the Long Tail theory, pointing out that although there is a clear lengthening of the tail, consumers' appetite for hits continues to grow, following the "superstar phenomenon" (Rosen, 1981), where individual best-sellers become even more popular (Elberse & Oberholzer-Gee, 2006). The theory claims there is increasingly more niche content available as more platforms aim to reach wider audiences. However, this does not seem to be the case, as our data demonstrate that platforms make use of documentary titles to compete for audiences. Our findings also show that the more recent productions are more present on international platforms, while titles found on local platforms cover a more balanced time span, including older productions alongside more recent ones. However, although the Long Tail theory was linked to the emergence of so-called "infinite-inventory" retailers (Goel, Broder, Gabrilovich, & Pang, 2010, p. 201), we need to point out that the majority of our platforms have rather limited catalogs, particularly the local ones.

Table 2. Documentaries Available on Most Platforms.

	Original Title	Production country or countries	Release Year	Spoken language(s)	Available on # international platforms	Available on # local platforms
1.	*Visages Villages*	France	2017	French	3	4
2.	*Fuocoammare*	Italy, France	2016	Italian, French	3	3
3.	*Swagger*	France	2016	French	3	3
4.	*Trophy*	UK, Namibia, South Africa, Zimbabwe, U.S.	2017	English	3	3
5.	*20,000 Days on Earth*	UK	2014	English	4	1
6.	*African Safari*	Belgium, France	2013	English	3	2
7.	*Berlin*	UK, U.S.	2007	English	3	2
8.	*Cobain: Montage of Heck*	U.S.	2015	English	4	1
9.	*Dernières Nouvelles du Cosmos*	France	2016	French	3	2
10.	*I Am Not Your Negro*	Switzerland, France, Belgium, U.S.	2016	English, French	3	2

Country of Origin

The analysis on the country-of-origin parameter was conducted on 97.5% of records, for which the information was available to us. This number includes all countries involved in a production, either as a single production country or involved in a coproduction. Our findings show that the top six consists exclusively of Western countries (Figure 3). There are visibly more U.S. and UK productions present on the international platforms, but local platforms contain more Belgian productions, as well as a significantly high number of French productions. Research conducted in 2016 by the European Audiovisual Observatory (EAO) for film on over-the-top VOD platforms in Europe produced results along the same lines, as it points to a share of approximately 60% U.S. productions, while films produced in Europe reached only 20/25%, on SVOD and TVOD respectively (EAO, 2016).

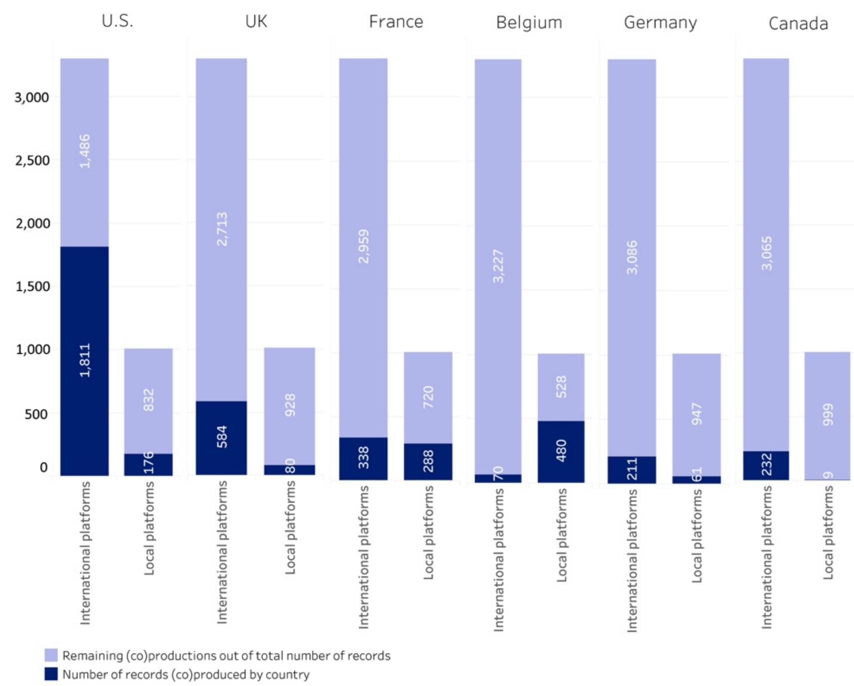

Figure 3. Number of records by production country—international vs. local platforms.

For a more in-depth understanding of the analysis of country of origin, we separate the documentaries produced by a single country from the ones that are the result of coproductions. We have this information for 4,305 records (97.5% of our dataset). Out of these records, 74% (3,206) were single country productions, and 26% (1,099) were coproductions. The percentage is in line with general European data, according to which coproductions account for approximately 24% of overall film production volume in Europe from 2010–2015 (EAO, 2017).

Documentaries produced by one country originated in 62 different countries (Figure 4). The top five countries of origin are, again, exclusively Western countries, with the U.S. leading by almost three times the number of titles produced by the second country. Although the diversity of countries is very wide, two-thirds of these have only contributed fewer than 10 records to the on-demand catalogs we have consulted, and more than half have contributed fewer than three. According to an EAO study on the production of feature films between 2007 and 2016 (including both fiction and documentary), the top five producing European countries are the UK, France, Germany, Spain, and Italy (EAO, 2017). Although some of these are also present in our top 10, it's important to highlight our rankings of Belgium and France as the third and fourth production countries, as well as the presence of the Netherlands and Switzerland in the top 10, pointing to the importance of local and regional markets.

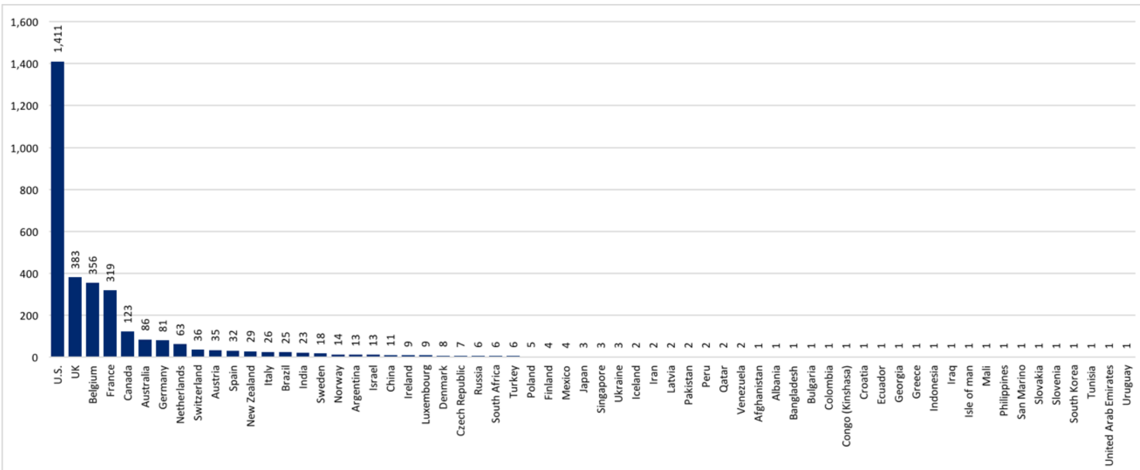

Figure 4. Single production countries.

A closer look at the iTunes catalog shows less diversity in single country of origin when compared to the titles on all other platforms (Figure 5). While over half the titles on iTunes originated in the U.S., followed by the UK, the numbers on the remaining platforms lower the share of U.S. productions, pushing Belgium to third and France to fourth place. Meanwhile, the iTunes library only carries 12 Belgian productions. Although this is comparable to the absolute numbers on some local platforms, it only represents 0.80% of the Belgian iTunes library. Another EAO study found a similar situation for film in the Belgian iTunes library the year before, as 50% of the titles on offer were U.S. productions, 30% originated in the EU 28, and only 2% were national productions (2016, p. 29).

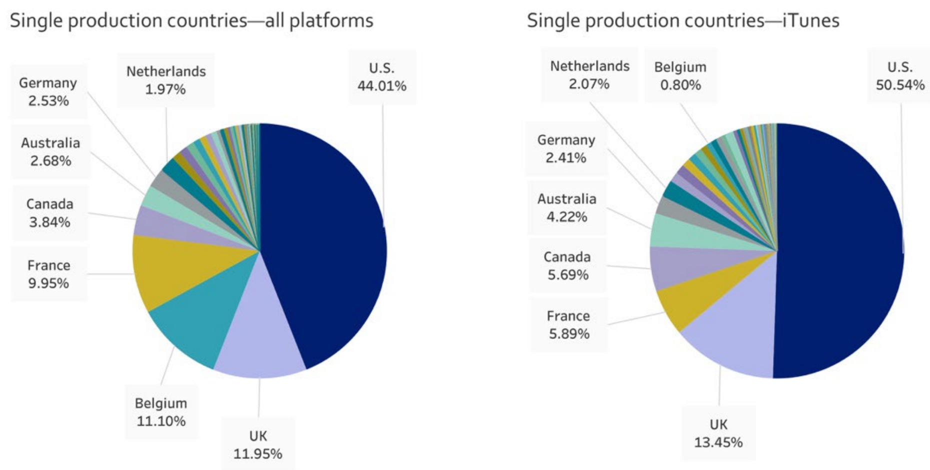

Figure 5. Single production country of origin—all other platforms vs. iTunes catalog.

Fewer titles are the result of coproductions (26%), but the diversity in countries involved is much higher, with 140 different countries, compared with 62 for single country productions. Although the majority of the top 25 coproducing countries (Figure 6) are primarily from the "global North," the diversity is much wider, including also countries from Asia, South America, and one from Africa. However, the top 10 countries are very similar to the countries discussed prior, with some differences. The top four production countries remain the same, with slight changes in ranking, while the U.S. continues to be in the lead, with a significant advantage over the country in second place, which is France.

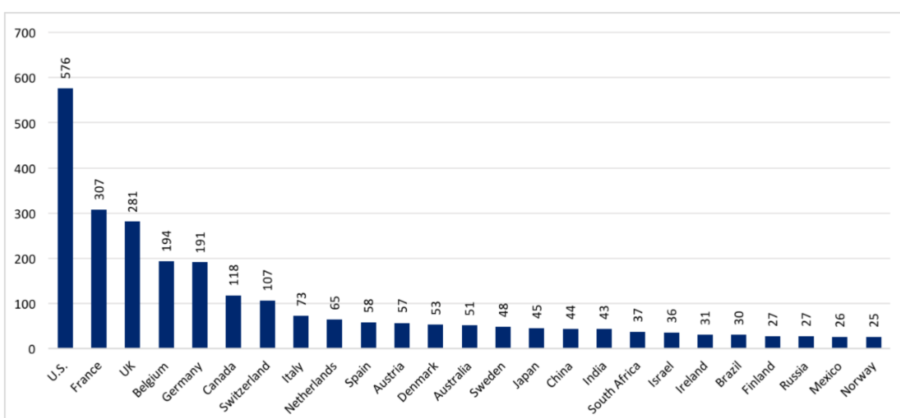

Figure 6. Top 25 countries involved in coproductions.

Unfortunately, our quantitative analysis does not take into consideration the weight of each coproduction country, which may skew the results by placing minority production countries at the same level of importance as the majority countries. A more in-depth analysis should be conducted as follow-up, and should rank the countries based on their financial contribution to each production, for a more accurate picture of the coproduction market. This may point to interesting findings, especially with regard to small media markets and former colonies that share a language with strong media markets, such as the UK and France. Research in other genres (see Bondebjerg et al., 2017) has shown that certain regional and linguistic affinities play an important role in such transnational collaborations, as do tax incentives available in some markets (Baltruschat, 2002). A recent EAO study already found Belgium to be one of the top minority coproducing partners in Europe in global film collaborations (2017, p. 27) and the leading country for interactions in minority coproductions with European producers, "underscoring the country's specialization in minority co-production (due to its size, shooting infrastructure, languages and, most importantly, subsidies and fiscal incentives)" (EAO, 2017, p. 39).

Language

To complement the findings on the country of origin, we consider it important to also analyze the different languages in which the documentaries are available, taking into account that some productions combine more than one language, but also that the audio on some might not be the original, as some productions have been dubbed in the local language, in the case of French. This parameter was calculated for 97% of the titles, and 118 different languages were identified. The main finding is that for 72.9% of the documentaries analyzed, at least one of the languages was English. The second most popular language is French, but this is present in only 20.16% of the titles, while the third most popular language, German, is already down to 5.6% of all titles, followed closely by Spanish, with 5.32%, and Dutch, with 4.11%. The only non-Western language in the top six is Arabic, present in 2.43% of the documentaries studied.

When looking at the most popular languages on the different platforms (Figure 7), we found that English is overwhelmingly present on international platforms, while local platforms show more documentaries in French than in English.

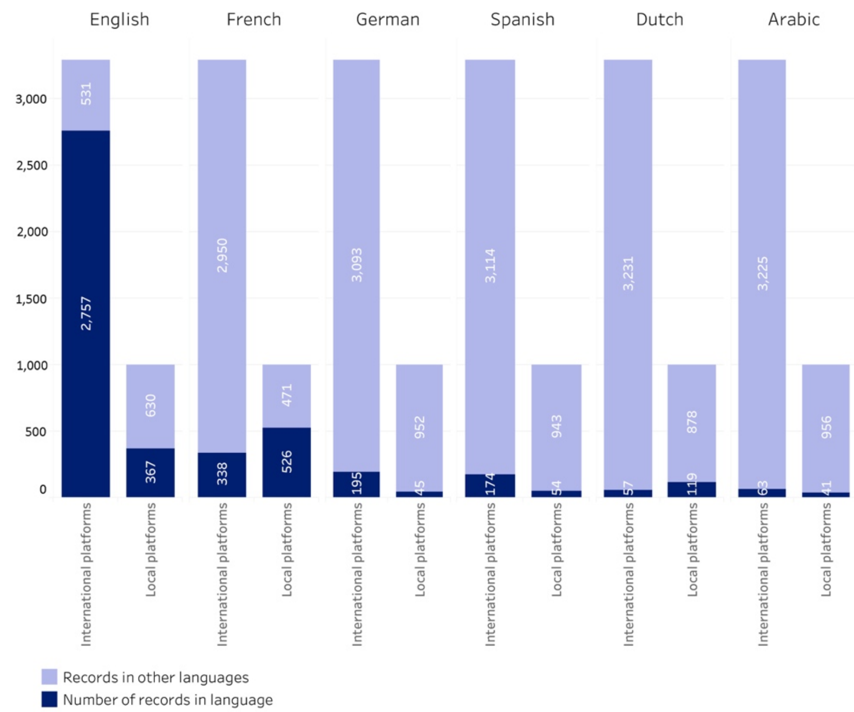

Figure 7. Number of records by language—international vs. local platforms.

Filming Location

Regional indicators are used in literature to account for the success of local productions over foreign imports (see Biltereyst, 1991). Filming locations are increasingly connected to the cultural specificity of a production, among other elements, and thus included in domestic or regional public funding schemes for film, including documentary. A number of European "cultural tests" encourage the location of a story in a certain area as part of point-based systems of eligibility. This is also the case with regional funding schemes available in Belgium for Flanders (Screen Flanders, 2018), Wallonia (Décret 23-02-2017, 2017), and the Brussels region (Screen Brussels, 2018). Particularly in the case of documentary, diversity may not only be reflected in the country of origin and language of content, but also in the filming locations, as these may be linked to the topic of the documentary. As previously discussed, the topic is one of the elements that sets documentaries apart from other audiovisual productions.

In the context of the present article, it is interesting to determine whether the filming locations correspond with the findings in country of origin or whether they presented a wider diversity. Although the analysis of this parameter was limited by the lower number of records for which we were able to gather information on filming locations, namely 51%, the findings are still interesting.

We identify 163 different countries (Figure 8).

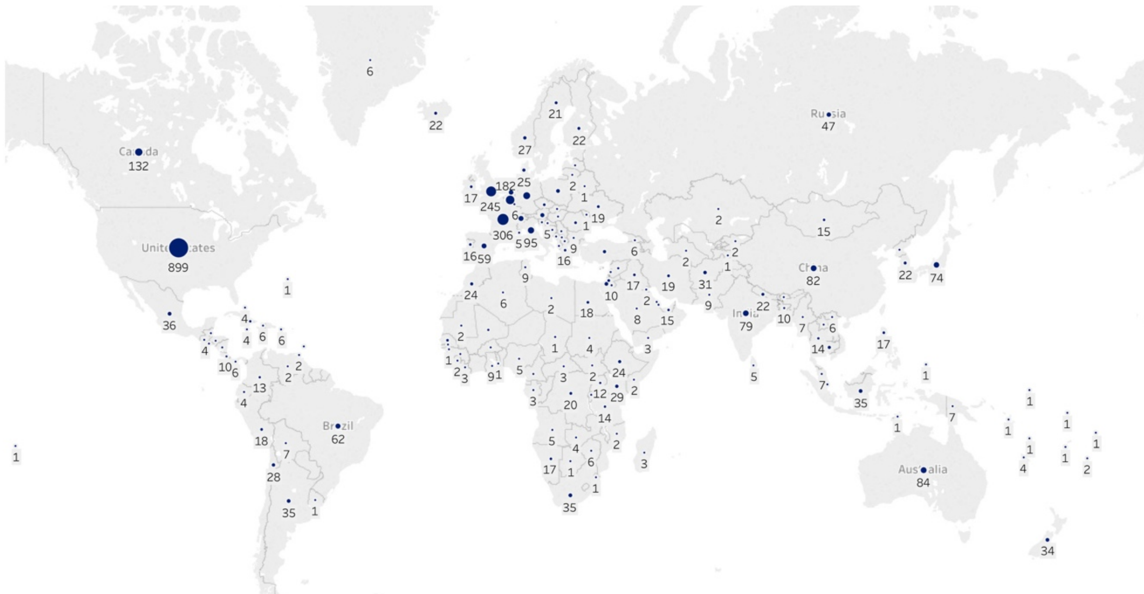

Figure 8. Filming locations.

The diversity is much wider than in the case of country of origin, as more countries all over the world are represented, including countries that were absent from the countries of production list. However, the top six filming locations correspond to the top six production countries (Figure 9).

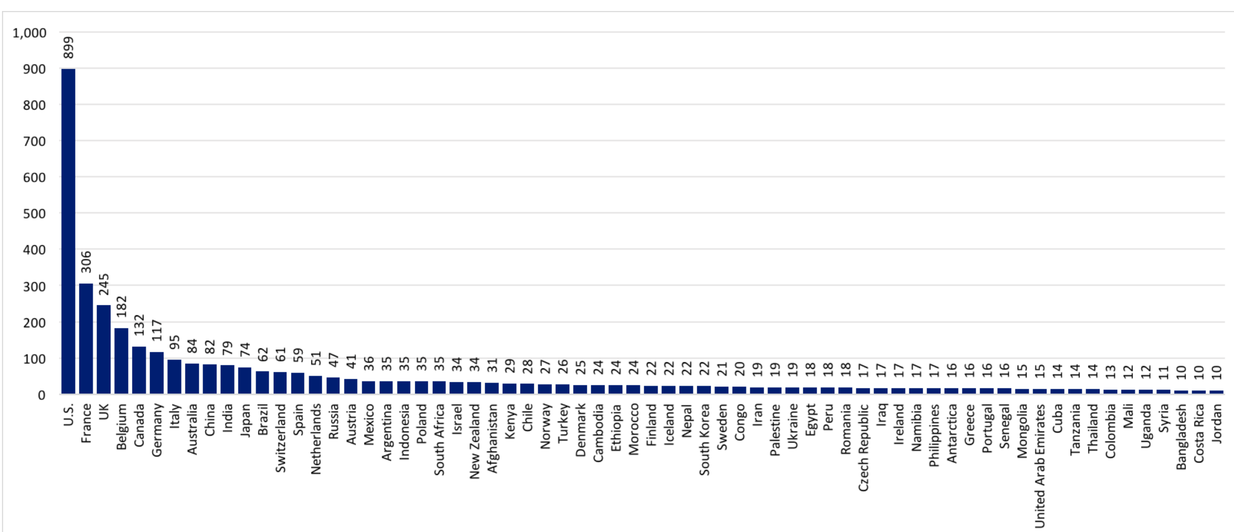

Figure 9. Top filming locations.

Discussion

We believe our findings to be in line with the key elements discussed in flows research. To contextualize the analysis, we first need to take a look at the *platforms* themselves. As previously mentioned, all the international platforms with a specific catalog for Belgium are private, U.S.-owned, media tech giants. Although exact numbers for VOD market share are difficult to come by, YouTube, Netflix, and Amazon Prime have particularly been in the spotlight lately as rapidly expanding platforms that owe their success to the impressive financial capital they have access to (Sandvine, 2018). By definition, these platforms rely on the distribution of content through advanced technology. Their business models are supported by investments in innovation and global expansion (Statista, 2018), which places them at the heart of the contemporary transnational media flows discussion. When looking at the local platforms, less than half are linked to a broadcaster, and a third are (partly) subsidized. It is also interesting to mention that different local platforms target audiences from the different regions of Belgium, either through language (VOD platforms only in French or Dutch) or content itself. The international platforms, however, target the entire Belgian territory through one catalog, available in the different local languages, and often also in English.

The main thread of the findings points to a continued dominance of Western productions, primarily originating from the U.S. and seconded by the UK. This follows the lines of the long-lasting debate rooted in cultural imperialism scholarship and can thus be attributed to a series of trends and realities of the global media system. Even as it went beyond a purely ideological explanation that saw powerful Western countries in general, and the U.S. in particular, attempting to "conquer" or "(re)colonize" territories in the "developing South" through a form of soft power, the cultural imperialism thesis is still referred to in discussing global imbalances in the cultural domain. Most often, realities of commercial imbalance and power struggles rooted in the "new imperialism" of media and communication (Fuchs, 2010, p. 56) continue to describe the global mediascape through increased concentration and transnationalization. This becomes obvious in the case of our documentary study first of all when focusing on the *size of the offering*, as four of the top five platforms belong to the usual suspects: U.S.-owned transnational tech giants Apple, Netflix, and Google. In comparison, available local platforms, although much more numerous, have astonishingly poorer libraries—half of them showing 20 documentaries or fewer, as opposed to the enormous iTunes library, which accounts for over 2,000 titles, almost half our entire dataset.

The imbalance is not only made obvious by the wide gap in the size of the catalogs, but also by the core indicator of *country of origin*. The data shows a clear overall domination of Western productions, with a strong lead by the U.S., followed by the UK. A very interesting finding is, however, the difference in country of origin when comparing documentaries offered by international platforms versus the ones on local platforms. This points to the importance that authors like Straubhaar (2007) have assigned local and regional markets, as audiences do seem to prefer content that they can relate to culturally and historically, with Belgium ranking third and fourth in the respective counts for single country productions and coproductions. This aspect is even more important for the documentary genre where, as previously mentioned, the topic is of central interest to the audience. Also due to the topic, the country of origin becomes more easily recognizable in a documentary, compared to the majority of fiction genres.

The importance of the geo-linguistic market effect is demonstrated by the strong presence of neighboring media giant France, especially in coproductions. Not only is France one of the top producing markets in Europe, but it is also an important source of media content for the French-speaking community of Belgium. Interestingly, though, the case is not the same for the Netherlands. In the order of single production countries, the Netherlands is ranked eighth, and only ninth for coproductions. In this context, we need to consider the differences between the stronger media market of Flanders and the one in Wallonia, which is weakened by competition with larger French companies. This trend is evident for the productions of drama, as Wallonia is often a minority partner in coproductions with France, but Flanders collaborates less with neighboring Netherlands (Raats, Evens, & Ruelens, 2016). French-Belgian coproductions have been ranked as the most frequent bi-national coproduction tie-ups in feature films, including fiction and documentary, produced between 2010 and 2015, while Belgian-French productions were also in the top five (EAO, 2017, p. 29). The significant number of German productions may also be explained through shared regional cooperation and cultural and historical background, as well as the noteworthy size of the German market itself.

When looking at the level of available funding for the production of documentary, the gap between public service broadcasters (PSB) in small versus larger markets becomes even more apparent. To this end, leaving U.S. productions aside, the remaining top players are public organizations such as BBC, Arte, ZDF, and the Australian ABC. Moreover, it was interesting to find that for the 26% of documentaries that we identified as coproductions, a wide diversity of production countries is involved, namely 140—over twice as many as involved in single country productions. These elements confirm the precarious funding situation that documentaries find themselves in, still depending largely on public support and encouraging collaborations between countries in order to produce more. Although our analysis could not take into account the contribution in cofinancing, it is still interesting to remark the global diversity of the top 25 most encountered countries, stretching from North and South America to Europe, Asia, and Africa. Nevertheless, it would be instrumental for future research into the topic to also consider the collaboration between majority and minority players, especially for the Belgian case, which is found to be one of the leading minority coproducing partners in Europe (EAO, 2017).

In the case of international documentary coproductions, the focus tends to fall less on local stories that may be relevant for the domestic market and more on topics of international appeal, such as nature, sports, international celebrities, and common histories (Baltruschat, 2002). Within flows research, this could be associated with the concept of "delocalization" (Straubhaar, 2007), where other audiovisual products are stripped of culturally specific elements in order to make them more popular with foreign audiences and thus more easily exportable. This discussion can be linked to our next point of attention: *language*. As our findings show, English is overwhelmingly present in 72.9% of the data available. This becomes even more striking when considering the overall count of different languages present in the dataset (118). The dominance of the English language in the study can be attributed to the following factors. First, there is a notable representation of powerful English-speaking media players in the production process, as the U.S., the UK, Canada, and Australia are among the six leading nations in the single country production category. Second, the aforementioned "delocalization" trend has led other producing countries to adopt English as the primary language in order to increase their chances of export, especially when the documentary deals with a topic of regional or international interest. As discussed in the previous sections, there is also proof of a strong geo-linguistic market, where French plays a central role. Therefore, even though its share was only at 20.16% of the total, this is still noteworthy in the context in which the following most popular languages from powerful media markets, such as German, Spanish, and Dutch, are only found in 5.6% of the titles or less. The language findings can be further contextualized by the difference between international and local platforms, as the former are all English-speaking organizations and represent over two-thirds of the documentary offerings analyzed. The latter set carries a majority of documentaries in French, followed by English.

Due to the specific character of documentary as a genre, we believe the findings on *filming locations* may add to the current flows discussion. Although the top results point to the same countries that are in the lead for production, the extensive diversity in locations, consisting of 163 different countries, may relate to a wider diversity in documentary topic and further to an enhanced interest in more culturally diverse content. However, it must be said that the primary production countries remain representatives of the "global North." Although insufficient research has been conducted on this specific area, we would like to also reflect on the discussion within media flows studies on global news. As the leading news agencies in the world expanded and broadcast news coverage from and to the entire globe, criticism from the "developing South" pointed to a Western perspective that filtered the information that was then sold back to the developing world (see Meyer, 1989; Mowlana, 1998). In-depth analysis would be required in order to study this particular aspect, both in terms of the content itself and the documentary offerings in the developing countries used as filming locations, but we believe it could add valuable nuance to the discussion.

Last but not least, we believe our findings can advance research and academic reflection on the underresearched genre of documentary. The key observation is related to the difficulties in defining the genre, as well as outlining the different factors that separate it from other forms of fiction, as is the case with docu-drama and nonfiction compared to journalistic programs, live events, action and adventure videos, and reality television. A second remark points to the increasing commercialization of the genre, whereby PSB organizations and domestic or regional funding remains scarce and thus limits the production and distribution of local documentary. This creates a viable market for new players such as Netflix that have been increasingly investing in commercial documentary for their libraries all over the world.

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