A Survey of the Audio-visual Sector in Palestine

English-language Summary of Results

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Introduction

The Palestinian Audio-visual Project (PAV) has carried out a comprehensive survey of professionals and individuals working in the audio-visual sector in Palestine and overseas. The main objectives of the survey included laying down foundations for the first comprehensive database on the sector, and opening up an opportunity for consultation with professionals to listen to their suggestions and to enrich the project with their ideas, in compliance with the consultative approach that the Foundation seeks to adopt in its policies in general.

The survey was announced on PAV's website and in the local media, and by directly contacting professionals currently or formerly active in the fields of cinema, television, documentary-making and audio-visual training, and various official and independent trade and government bodies. The survey also sought to include individuals and institutions in the region and overseas who have a prior history of involvement in the sector, such as non-Palestinian professionals who previously worked on Palestinian projects.

In addition to publishing the survey results, we have also started entering the information collected during the survey into an electronic database in Arabic and English, which will be available to the public on our website. It will include personal and contact information about individuals working in the sector, their professional histories, and their academic and technical qualifications. A database on Palestinian films will also be available. This practical resource will be announced on Arabic, English- and French-language trade websites, where internet users will be able to access information about the Palestinian audio-visual sector. We will continue to input and update the information on a regular basis.

We hope that over the coming three years we will be able to conduct further research on this vital sector, with the aim of supporting it, highlighting its most important problems and needs, and directing both private and public investment towards its most needy and productive areas.

Comprehensive Survey

Who was surveyed? – The survey covered Palestinians working in the audio-visual sector; non-Palestinians who had worked on films in Palestine or on Palestinian themes; and the cultural centres and institutions in the West Bank specialising in film screenings and in organising activities related to cinema. We also decided not to distinguish between films and television programmes or other filmed works, since it is not the role or aim of the survey to judge what does or does not constitute a film.

Objectives of the Survey

1) Creating a professional database on the audio-visual sector in Palestine;
2) Defining the problems and needs of the sector and its workforce;
3) Developing the Palestinian Audio-visual Project's document and its proposed objectives, through the suggestions and comments submitted by the individuals who completed the survey.

Survey Tools

Two questionnaires were specifically designed for the survey: the first covering professionals and companies; the second cultural centres and institutions in the West Bank.

The questionnaire relating to the audio-visual workforce sector included 56 questions, which focused on eight key areas:

1) Personal information;
2) Professional history/profile;
3) Problems and difficulties facing the sector as a whole;
4) Suggestions submitted by individuals;
5) Training;
6) Production;
7) Publication and Distribution;
8) Specific problems and difficulties faced by Palestinian directors in making their films.

As for the questionnaire relating to the cultural centres and institutions in the West Bank, it included 33 questions, which focused on the following main areas:

1) Screenings and films;
2) Activities related to cinema;
3) Problems and difficulties faced by cultural centres and institutions;
4) Sector needs.

Analysis

The data collected in the survey was entered, coded, and then analysed using SPSS software.

Problems Encountered

1) Difficulty in obtaining the addresses of many individuals working in the audio-visual sector, especially those who worked on films in the 70s or those living abroad. This took a great deal of time and effort;

2) Publishing the questionnaire on the PAV website and sending it via email with the aim of facilitating the process. The response rate was low. Therefore, we were forced to hire three field researchers to fill in the questionnaire by meeting people in person. One field researcher filled in the questionnaire inside the 'Green Line', another in the Jerusalem and Bethlehem area, and a third in the Ramallah area;

3) There was some criticism that there were too many questions and that filling the survey required too much time and effort.

Results

Despite these difficulties, the response was generally positive. Of the **259** questionnaires sent out, we received **156** replies, of which **135** were from Palestinian colleagues working in various fields of the audio-visual sector, and **10** from Palestinian cultural centres and institutions.

Summary of Findings

Despite enormous developments in the Palestinian audio-visual sector, largely due to the PLO's support for filmmaking in the late 60s as part of its cultural agenda, and despite the abundance of production during the past twenty years, the survey showed that the sector suffers from serious difficulties. **The problem considered most acute by those surveyed is the absence of qualified professionals in a market where production has become easier than ever before because of cheap digital technolog**y.[1] There has also been an increase in the number of directors and films, some of which have been awarded important international prizes. Nevertheless, the survey shows that this positive accumulation **has failed to make any noticeable impact on the local distribution market or in terms of the level of technical qualification in the workforce**, both of which remain extremely weak, especially since the Second Intifada started in 2000.

[1] In 2004, Palestinian production stood at 69 films compared to 9 films in 1994.

On the human-capacity level, the audio-visual sector continues to suffer from an imbalance between men and women, despite the relatively high percentage of women working in the sector (**34.6%**). **On the economic level, the survey shows that only a small percentage of individuals can afford to work full-time in the industry,** mainly due to a severe lack of job opportunities, an extremely limited market with restricted cash resources, which also limits opportunities for professional development or for gaining hands-on experience. This situation stands in paradoxical contrast to growing international interest in Palestinian issues (and filmmaking in particular) and to the growth of the number of audio-visual production being made in Palestine. This contradiction is attributed to the weakness of the local distribution market and the consequent weakness of local funding for the sector, both official and private-sector.

The majority of those who completed the survey believe that there is a direct correlation between funding and vocational training, as well as investment in new equipment. **Although most of those surveyed referred to insufficient funding as a major problem, they all highlighted the fact that the first and the most important solution to these funding problems lies in creating training opportunities and specialisation in all the basic professions of the sector.**

The near-disappearance of cinemas since the 1980s has created an enormous gap in local film distribution. Cultural centres and institutions are the only venues that continue to provide cinema screenings or organise cinema activities. However in spite of their noticeable contribution to disseminating film culture since 1994, they continue to suffer from numerous problems and difficulties, most **notably that film screenings predominantly take place in Ramallah, Jerusalem and Bethlehem and almost never take place outside these areas; difficulties in obtaining prints; and generally small audiences even when films are screened.**

Most Important Conclusions

1) **Large number of directors compared to a small number of qualified technicians and a weak professional base;**
2) **Consensus on the urgent need for training and specialisation;**
3) **Scarcity of independent and official local funding sources, lack of foreign aid, and the necessity for directors to invest their private money;**
4) **Complete absence of local distribution since mid–80s, and difficulty in securing international distribution, even for films that have been awarded Arab or international prizes.**

1. Professionals Working in the Audio-visual Sector

The data collected from professionals working in the audio-visual sector were classified according to the following categories:

1. Personal information;
2. Nature/type of profession;
3. Problems and difficulties faced by the sector;
4. Suggested solutions, made by the surveyed group;
5. Training;
6. Production;
7. Publication and distribution;
8. Problems and difficulties encountered by Palestinian directors in producing their films.

I. Personal Information

The questionnaire was sent to a group of **259** Palestinian and non-Palestinian professionals. Of the 259, **156** filled in the questionnaire. **86.5%** of those who filled in the survey were Palestinians, including those with Israeli passports, **5.2%** were non-Palestinian Arabs, **3.8%** Israelis, and **4.5%** from other countries. Men constituted **65.4%** of the group who answered the surveyed, and women **34.6%**, of whom **54.5%** live in the West Bank and Gaza Strip, although the number who answered in Gaza was unfortunately very small (1.3%); **25.6%** live in Israel, **7.7%** in Arab countries, and **12.2%** elsewhere.

26% of the group were less than 30 years of age, **29.5%** aged between 30 and 39, **27.4%** aged between 40 and 49, and **17.1%** aged over 50, thus reflecting a relatively good generational balance in the sector.

II. The Nature/Type of Profession in the Sector

On the academic level, **66.7%** of those who answered hold a BA or MA. However, only **37.2%** completed their academic studies in cinema, while **62.8%** did so in other fields and entered the field though practical experience or specialised training. Of those who completed their academic studies in the field of cinema, **51.6%** studied directing, **3.1%** script writing, **1.6%** photography, **3.1%** editing, **7.8%** production management, **6.3%** acting, and **3.1%** film criticism, indicating **a clear imbalance between the various professions in the sector.**

41% of those surveyed identify themselves as film directors, **2%** as script writers, **26.5%** as actors, and only **13.5%** as technicians. But these percentages change when they are asked about the professions they *actually* practise. Of those who work on films, **23.1%**

work in directing, **23.5%** in acting, **0.7%** in lighting, **0.7%** in photography, **0.7%** as assistant directors, **2%** in music, and **4.1%** in production management. Over **58.3%** of Palestinian film directors simultaneously work on different aspects of filmmaking.

Of the **89.7%** who currently still work in cinema, only **36.5%** work full-time, while the part-timers work in various other fields, including **52.9%** in the arts.

A number of the Palestinians surveyed have participated in training courses, **50%** in scriptwriting and directing courses, **10%** in media, **15%** in photography, **5%** in editing, **5%** in sound engineering, **5%** in acting, **10%** in research and film history.

There is a clear difference in the number of films made on different formats between Palestinian and non-Palestinian directors (35mm, 16mm and super 16mm). 9 Palestinian directors worked on sixteen 35mm films compared to 9 non-Palestinian directors who worked on one hundred and fourteen 35mm films; 8 Palestinian directors worked on fifteen super 16mm films compared to 4 non-Palestinian directors who worked on nineteen super 16mm films.

The difference is less noticeable with regard to Mini DV and DV Cam. 16 Palestinian directors worked on 79 films (Mini DV) and 30 directors worked on 114 films (DV Cam) for the following reasons: 1) working on filmstrips (35, 16 and super 16mm) requires higher budgets than videotapes; 2) the development of low-cost techniques has helped Palestinian directors to produce their films. **However, this relative facility fails to solve problems and difficulties encountered by the sector locally in terms of equipment and technical qualifications, even if it has increased production.**

There is a large state of imbalance in the local ability to use the most advanced and most expensive techniques. **33.3%** of Palestinian directors living in foreign countries have been able to direct films using 35mm, compared to **11.4%** of Palestinian directors living in Palestine.

III. Problems and Difficulties Faced by the Audio-visual Sector

1) **46.9%** consider that funding is the biggest problem faced by the audio-visual sector, though of these the largest group **(31%)** think that education and training are the areas most urgently in need of investment; followed by production funding (**23.3%);** institutional support (**13.8%**); spreading film culture and awareness (**7.8%);** raising the quality of films both technically and artistically (**7.8%);** forming a trade body to represent the workforce (**5.2%);** enacting laws and regulations for the sector (**1%).;** better film distribution in Palestine and more frequent participation in festivals (**6%**). **Most strikingly, only 4.3% considered political instability to be a major obstacle.**

IV. Suggestions Submitted To PAV

When asked on what areas should the Palestinian Audio-visual Project concentrate its efforts and investments, 39.7% proposed that it hold training programmes; 12.8% that it should fund production; **10.3%** that it should improve communication among individuals working in the field; **6.5%** that it should give specific attention to the younger generation; **3.8%** that it should invest in archiving; **3.8%** that it should provide opportunities for specialisation; **3.8%** that it should provide equipment and supplies; **7.7%** raise cinema awareness; and only **1.3%** that it should create job opportunities.

V. Training

97.6% of Palestinians surveyed believe that those working in filmmaking need training courses; **25.3%** of the Palestinian directors believe that this training should focus on directing, **29.3%** scriptwriting, **5.1%** to camera work; **5.1%** to lighting, **4%** to sound engineering, **4%** to editing, **3%** to production management, **10.1%** to acting, **4%** to the history of the cinema, **4%** to film analysis; **2%** to film criticism, and **4%** to set-decoration and special effects;

27.7% of Palestinians proposed that specialised training courses be organised in distribution and marketing, **16.7%** in animation, **5.6%** in art directing, **5.6%** in Palestinian cinema, **11%** in media studies, **5.6%** in camera and lighting, **5.6%** in fund-raising, **5.6%** in special effects, **5.6%** in costume design, and **11%** in film music.

VI. Production

94.4% of the Palestinian directors find their professional partners, including technicians and actors, through personal acquaintances, as opposed to agencies or via the internet, thus indicating the narrowness of the circle of people working in the sector and the lack of professional information.

Of the 74 films produced in Palestine and mentioned in the survey, **40** Palestinian films were produced by Palestinian companies or institutions, **23** by foreign production companies, **4** films by Arab production companies, and **7** films funded by international organisations. By far the most striking production statistic however is that **70.9% of Palestinian directors were obliged to fund or co-fund their films.**

Producers of Palestinian Films

Institution	*Percentage*	*No. of Films Produced*
International Organisations	*9.5%*	*7*
Palestinian Private Sector	*10.8%*	*8*
Palestinian Government Sector	*18.9%*	*14*
Palestinian Educational Sector	*8%*	*6*
Palestinian Non-Governmental Sector	*16.3%*	*12*
Arab Production	*5.4%*	*4*
Foreign Production	*31.1%*	*23*
Total	***100%***	***74***

However, the high number of films produced by Palestinian companies or institutions is mainly attributable to the fact that:

1) Many official and educational institutions, including the Ministry of Culture, Ministry of Public Works, Ministry of Planning, Ministry of Education and Higher Education, the PLO, the Palestinian Broadcasting Corporation and Bethlehem 2000 have produced Palestinian films of various lengths over the past ten years;
2) A number of non-governmental organisations have produced films dealing with various issues in their field, such as the abuse of prisoners, human rights, women's rights, and so on.

More importantly perhaps, the percentage of independent production (**35.1%**) is almost double that of the government (**18.9%**), **while foreign funding stands at 46% (international organisations 9.5%, Arab production 5.4%, and foreign production 31.1%).** However**,** most of the Palestinian non-governmental funding falls within the non-governmental organisations' activity, so does not in any way reflect a vital private sector whose real share is no more than **11%** of the investment in the films surveyed.

VII. Publication and Distribution

Festivals where Palestinians have participated

Country	*% of Palestinian Participation*	*No. of Festivals*
Palestinian Festival	*11.5%*	*15*
Arab Festival	*27.5%*	*36*
Foreign Festival	*61%*	*80*
Total	***100%***	***131***

Festivals in which Palestinian directors have been awarded prizes

Country	*Percentage*	*No. of Prizes*
Palestine	*6.5%*	*4*
Arab Country	*51.6%*	*32*
Foreign Country	*41.9%*	*26*
Total	***100%***	***62***

These tables show a good participation of Palestinian directors in film festivals. Of the films made by the **62** Palestinian directors surveyed, **131** participated in local, Arab and foreign festivals. The highest participation was in foreign festivals (an average of **80** festivals).

Although **60%** of the directors who participated in festivals have been awarded a total of **62** prizes (including **26** international prizes and **32** Arab prizes), most of their films continue to suffer from obstacles in distribution. **60.7%** of the Palestinian directors' films have not been published on DVD, and **40%** have not been published on VHS. Also, most of the films are available only through a European or American distributor. More gravely, **78.6%** of Palestinian directors do not have a local distributor, **21.4%** distribute their films themselves, and **54.5%** do not have a foreign distributor. **74.1%** of the directors' films are not available via the internet. **61.7%** expressed difficulties in finding a local distributor, **65.2%** in finding a foreign distributor, while **64.3%** find difficulties in selling their films to foreign TV stations, **65.1%** to Arab TV stations, and **67.4%** to local TV stations.

Of the films mentioned in the survey, only **25.9%** are sold via the internet, although Palestinian directors are very quick to have their films translated into other languages with the aim of disseminating and distributing them overseas. Thus **80.9%** of the Palestinian films mentioned in the survey are translated, **42** of them into English, **18** into both English and French, and **4** into Hebrew.

VIII. Problems and Difficulties Encountered by Palestinian Directors when Producing Films

Palestinian directors face numerous problems and difficulties during and after producing their films. These include: funding; distribution; finding qualified technicians; casting actors and finding locations.

Thus **72.9%** of them face numerous problems and difficulties with funding, **66%** with selling their films to TV stations, **63.5%** with film distribution in general, **57.4%** with finding qualified technicians, **37.8%** with casting, and **31.9%** with finding locations.

2. Cultural Centres and Institutions

There has been a continuous decline in the activity of cinemas in the West Bank and Gaza Strip since the mid–1980s. The first Intifada which started in December 1987 led to a standstill in cinema-related activities for several years. However, a small revival took place in 1992 with the setting up of cinema clubs and the organising of various activities related to cinema through the Al-Quds Institute for Cinema and TV in East Jerusalem. But this had a relatively limited effect.

Palestinian cultural institutions' interest in cinema has increased in recent years. Despite the lack of equipped cinemas, Palestinian cultural institutions have played an important role in reviving and activating film life and culture among the Palestinian public. However, local interest and attendance remain weak.

Please note that this study included only Palestinian cultural centres and institutions in the West Bank, and covered their screenings and other activities over the past year only (2004). Moreover, it did not cover the Gaza Strip, where film screenings are virtually non-existent. It also excluded Palestinian areas inside the 'Green Line' (i.e. Israel) because distribution conditions there are entirely dependent on the Israeli market and are different to those of the West Bank and Gaza Strip.

Questionnaires were returned by **ten** cultural centres and institutions in the West Bank. Results have been classified according to the following areas:

1. Screenings and films;
2. Activities related to cinema;
3. Problems and difficulties encountered;
4. Needs.

I. Cinema Performances and Films

Ten cultural institutions in the West Bank provide film screenings: **5** institutions in Ramallah and Al-Bireh, **three** in Bethlehem, and **two** in Jerusalem, with a total capacity of **2,930** seats. **During 2004, a total of 505 films were screened in 1,593 screenings, with a total of 49,438 viewers, an average of 31 viewers per performance.**

In 2004, some **71** Palestinian films were screened in different centres. However, despite growing interest in screening and watching Palestinian films, they continue to have problems in distribution and local marketing. The films were mainly screened as local premieres and played no more than five times per screen at best. Thus these films suffer from a near-total absence of local exposure, despite the fact that many of them are presented in Arab and international festivals where they are often very successful.

In 2004, Palestinians produced **69** films, compared to **9** films in 1994. Yet the number of directors and films (and prizes in festivals) has increased without any noticeable development in the local market, which remains very weak.

As for foreign films, **181** American films and **132** European films were screened. This high number of European films can be attributed to the interest of the European cultural centres in this field, especially the French Cultural Centre and the Goethe Institute. In addition, a number of festivals and cinema weeks were organised, screening European films, such as the Ramallah Cinema Festival and the European Cinema Festival.

Six Palestinian institutions own equipment to screen 35mm films. But most institutions choose to use LCD and DVD projectors. Performances using 35mm screening equipment are rare for the following reasons: a) institutions' lack of experience or contacts with international film distributors; b) high price of prints, both for purchase or rental; c) competition among local merchants who sell illegal/pirate copies of American and other films, especially on DVD; d) lack of a network of cinemas that cooperate together in organising film screenings.

It is also important to note that Israeli distributors of American and other films continue to monopolise the Palestinian market although they do not actually distribute the films in Palestinian areas. Some Arab distributors of American films also refuse to market their films in Palestine for fear of legal action either from Israeli distributors or from international distributors who still do not recognise Palestine as a separate license area.

Films can be obtained from merchants who sell DVDs, directors (especially Palestinian films), and the European cultural centres and consulates. Al-Kasaba Theatre and Cinema in Ramallah is the only cultural centre that imports films via distributors. However, normal conditions of distribution, which are applied in other Arab countries, are not applied to the Al-Kasaba Theatre. Thus it is forced to buy or rents copies and/or prints of films or renting it for a certain period of time for a lump sum, instead of paying a percentage on revenue, as is usual practise. There are also a number of Egyptian and Lebanese distributors who still refuse to market and distribute their films in Palestine for political reasons.

II. Activities Related to Cinema

It is noticeable that cinema has witnessed a period of heightened activity and attention by Palestinian cultural institutions, especially over the past three years. **50%** of the cultural institutions' activity is focused on cinema screenings. Some institutions also organise workshops and training courses in related topics. There is also a growing interest in organising festivals and cinema weeks.

III. Problems and Difficulties Encountered by Cultural Centres and Institutions

Despite this increase in cinema activity, cultural centres and institutions face a number of problems and difficulties, most importantly:

1. Cinema activity is mainly focused in the central areas (Ramallah, Jerusalem and Bethlehem) despite the urgent need for cinemas in the northern and southern West Bank and Gaza Strip;

2. Distributors have difficulty in obtaining films, and the prices of films are high compared to the size of the audience;

3. Many institutions have problems with their screening equipment. Some have old, unsuitable equipment, while others have 35mm screening equipment, but are unable to obtain prints;

4. **90%** of these institutions believe that the percentage of attendance is low, due to: the social attitudes towards cinema (**44.5%)**; Israeli military checkpoints (**11.1%);** quality of films (**22.2%)**; competition of satellite channels and shops selling pirate DVDs (**11.1%);** and lack of adequate advertising (**11.1%).**

IV. Needs

55.6% of the institutions need cinema equipment, **22.2%** need financial support to cover their expenses, and **22.2%** need to know the sources of film distribution.