



# 中国纪录片 发展研究报告 (2012)

张同道 胡智锋 ◎ 主 编  
赵 蓉 樊启鹏 喻 溟 ◎ 副主编

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## 内 容 摘 要

2011 年，21 世纪的第二个十年开始了。

纪录电影延续了新世纪以来的强劲势头，在全球市场内积极传播，继续着美学和市场的历险，并创造了新的神话。法国纪录电影《海洋》以 2700 万元票房在中国电影市场掀起一阵蓝色的纪录片旋涡，而中国是《海洋》自 2009 年以来放映的第 33 个国家，从欧洲、美洲到亚洲，该片全球票房已达 8200 多万美元。

2011 年，来自世界各地超过 300 部纪录电影在美国纽约的影院上映，其中美国制作的影片多达 133 部。票房前三名是《非洲大猫》(*African Cats*) 和《生来狂野》(*Born to Be Wild*) 以超过 1500 万美元的票房名列冠亚军，《哈勃望远镜 3D》(*Hubble 3D*) 以 1000 万美元名列第三。

法国 2011 年纪录电影票房冠军是法德合拍片，德国新浪潮导演维姆·文德斯导演的 3D 纪录片《皮娜》(*Pina*)。2009 年《牛铃之声》成功之后，韩国纪录电影成为商业电影类型，200 万观众观看了《走出院子的母鸡》。而在我国台湾，杨力州导演的《青春拉拉队》票房大赢。

以英国、日本为代表的公共模式，以法国、韩国为代表的政府扶持模式和以美国为典型代表的商业化运营模式多元共生，维系着电视纪录片的发展。

2011 年，美国探索传播集团全球订户超过 15 亿，总收入为 42.35 亿美元，比 2010 年增长 12%。国家地理频道在美国的订户数，从开播时的 1000 万增长到 7000 多万。

与美国纪录片成熟的商业特质不同，公共纪录片显现出更多的公共特质。BBC 的原则是“品质第一，收视其次”。2011 年，BBC 推出投资 1600 万英镑的《冰冻星球》。法德合作频道 ARTE 也以制作和播出纪录片见长，2011 年制作及合拍纪录片近 94 部，购买约 23 部。日本 NHK 黄金时段播出的纪录片不受收视率制约，以高品质著称。2011 年 3 月 11 日日本福冈大地震发生后，NHK 立即启动地震报道，不仅有应急紧急预报、地震新闻，还有地震纪录片及时播出。纪录片已成为 NHK 品

质的标志与象征。

以美、英、法、德、日等国为代表的国际纪录片已经形成了较为成熟的制作与放映/播出体系，并且相互合作，汇成开放、宽阔的全球市场。与此同时，Discovery Channel、National Geography Channel、BBC、NHK、ARTE 都已经发育为国际知名品牌，占领了国际主流市场。纪录片不仅是文化创意产业的一部分，而且是文明传播的媒介与文化形象的载体。

2011 年 10 月 18 日，中国共产党第十七届中央委员会第六次全体会议通过了《中共中央关于深化文化体制改革推动社会主义文化大发展大繁荣若干重大问题的决定》，为文化产业发展提供了政策支持与战略方向。

2011 年中国启动了纪录片产业化引擎，也许可称为产业元年。

中央电视台纪录频道于 2011 年 1 月 1 日以中英文同时开播，秉承对内“为时代中国存像”。对外“与大千世界共鸣”的频道理念，成为中国唯一全球覆盖的卫星纪录片频道，力求打造中国的高端平台与国际传播平台。事实上，纪录频道播出一年来已经从某种程度上扭转了公众对于纪录片的观念，不同阶层的意见领袖通过各种场合表达了对于纪录片的尊重。地面纪录频道也逐渐出现分化，上海纪实频道依托上海本地传播，制作优势进一步显现，公司化运营实现突破，正以节目输出的方式突破地域限制横向发展。中国教育电视台第三频道、重庆电视台科教频道、湖南金鹰纪实频道获得大幅增长，北京纪实高清频道高起点开播，而辽宁北方频道借纪录片的独特魅力成为贴近本地观众的风格独具的综合频道，为地面纪录片频道开创了一种可资借鉴的发展模式。

在这一形势下，社会各界对于纪录片的认知发生变化，一些地方政府、大型企业与社会机构发现了纪录片的力量，社会资本涌入纪录片行业。与此同时，民营传媒机构趋于活跃，纪录片制作量与交易量明显提升。新媒体传播异军突起。

据不完全统计（只计算卫视与纪录片专业频道），2011 年中国纪录片首播总量为 16000 小时，制作节目约 8700 小时。电视栏目为 83 档，其中重复播出为 6 档，停播或改版共 12 档。市场总投资约为 8 亿元，总收入超过 10 亿元。

2011年正值中国共产党成立90周年、辛亥革命100周年，主流意识形态话语尤其强劲。十集文献纪录片《旗帜》是央视的重大献礼作品，制作精良，大气磅礴。《中国三峡》、《理想照耀中国》、《奠基新中国》、《千秋红岩》、《青春放歌》等作品也从不同角度向红色历史致敬。在纪念辛亥革命100周年的作品里，《辛亥》、《天下为公——孙中山1911》、《大辛亥》与《民的1911》各有千秋。

这一年，纪录作品视野更加开阔，制作更为精美。《走向海洋》呈现了中国的海洋意识；《南海I号》记录了水下打捞的传奇历程；《当卢浮宫遇见紫禁城》展示了东西方文明的对话；《教育能改变吗》则直面现实，探讨每一个家庭都无法回避的问题；《在一起》关注艾滋病人的生活处境。

总体来看，2011年各种文化形态的纪录片此消彼长：主流文化发挥了强劲的意识形态引领作用，宏大主题纪录片更加注重历史和国际的视野，而精英文化和消费文化向主流文化的渗透更加明显。影像品质和视听效果趋于极致，情景再现更加广泛，戏剧表现力更强，而纪实美学也更加微弱。当三维动画、情境再现时髦甚至泛滥时，不过是采用炫目的技术遮掩内容的空洞和思想的贫乏。

2011年，大众文化成为市场的主角。作为一种消费文化，纪录片借用故事性、趣味性、观赏性吸引大众，在轻松愉快的环境中，大众享受着视觉盛宴，感应着故事的波澜起伏。人们消费着大众文化纪录片，消费着纪录片里的自然与历史。

纪录片具有跨时空、跨文化的传播属性，在所有媒介形态中最易于交流和沟通，在中华文明传承与国际文明对话中具有不可替代的位置。因此，纪录片具有突出的公共文化特性：对内，它是民族文化遗产、社会心理凝聚的重要载体；对外，它是传播国家形象、实现文明对话的有力媒介。同时，纪录片又是文化创意产业的一部分。为此，我们建议：一要编制中国纪录片发展规划纲要。二要设立国家级纪录片产业园。三要出台关于纪录片产业的具体政策法规。

中国纪录片正处于一个新的行业起点，期待我们的纪录片以市场为驱动，以文化为使命，精英与大众、主流与民间相互辉映，共同发展，因为只有多元共生才是真正的繁荣。

## Abstract

The year of 2011 is the beginning of the second decade in 21<sup>st</sup> century.

Documentary as an overwhelming tendency write the legend of movie, which having been sold dynamically and explore the value of aesthetic and brave the challenge of marketing. French documentary named “The Ocean” with 27 million dollars’ box office sweep across Chinese market. Meanwhile, from the year of 2009, this movie gets the profit of about 82 million dollars through out of Europe, America, and Asia, among them, China at the list of the thirty-three.

Over 300 Documentaries released in the theater of New York from all over the world, 133 made of American. The top three is “African Cats”, “Born to Be Wild”, which are all exceed 15million dollars, and the “Hubble 3D” with 10 million dollars as the third one.

In 2011, the box office champion went to “Pina”, the German-French co-production and a 3D documentary, made by a New Wave director, Wim Wenders. After the success of “Old Partner”, Documentary in Korea became the commercial film. “Leafie: A Hen into the Wild” attracts 2 million audiences, and “Cheer Team of Youth” by Chinese Taiwan director Yang Lizhou became the box office smash.

The multi-mode of public system represented by British and Japan, government supporting system represented by France and Korea, and commercial operation mode represented by America maintain the development of television documentary.

The United States Exploring Media Group owns the 1.5 billion subscribers all over the world in 2011; gets the gross of 4.235 billion dollars, which reach the rate of 12% in growth. The National Geographic Channel reaches the growth from beginning of 10 million to 70 million of the local subscribers.

Different from American commercial operation, Documentary shows more

character of public. The principle of BBC is “first quality, then audience ratings”. BBC has put forward the “Titan A. E. ”, with 16 million pounds’ investment. The Franco-German channel ARTE is also good at producing and broadcasting documentary. In 2011 it had produced and co-produced nearly 94 documentaries, and purchased about 23 documentaries. Japan NHK documentary is known for high quality, and also unrestricted by the ratings in prime-time. In March 11, 2011, after the earthquake in Japan Fukuoka, NHK reported the earthquake emergency immediately, from earthquake forecast, news to earthquake documentary. The last one is the logo and symbol of NHK’s quality.

As the representative of the international documentary , the United States, Britain, Germany, Japan and other countries have formed a relatively mature production and projection/broadcasting system, and merged into the open, global market. Meanwhile, Discovery Channel, National Geography Channel, BBC, NHK, ARTE have been developed into international famous brands, occupying the international mainstream market. The documentary is not only a part of the creative cultural industry, and it is also the carrier medium of civilization and cultural image.

On October 18, 2011, Chinese Communist Party’s Seventeenth Central Committee Sixth Plenary Session made an important decision “about deepening the reform of the cultural system and promoting socialist cultural development and prosperity”, which provides policy and strategic direction for the cultural industry development

China launched a documentary industrialization engine in 2011, a year called the first industry year.

CCTV Documentary Channel was launched both Chinese and English version in Jan. 1st, 2011. With the channel ideas, “Save imagery for contemporary China” and “Resonate with the outside world”, the only documentary channel in China, which is delivered by satellite and cover the whole world, will become a high-end international communication platform. Actually, since its launch a year ago, documentary channel has changed

audience's view about documentary to some extent. And opinion leaders of various social groups have expressed their respect for documentary. Differentiation gradually appeared among regional documentary channels. Distributed locally, the production advantage of Shanghai Documentary Channel is playing more and more important role. The company broke the regional limit by program output and developed horizontally. CETV-3, CQTV- Science and Education, and Hunan Jinying Documentary Channel, have all got great improvement. Beijing HD Documentary Channel launched, and with the special charm from documentaries, Liaoning North Channel becomes an integrated channel close to local audience, which put emphasis on close, locality, and interest, and provides an new development model for documentary channels.

In this situation, people's cognition on documentary changes greatly. Some local governments, large enterprises and social institutions discover the power of documentaries, and social capital goes into the documentary industry. Meanwhile, private media organizations become active, documentary production and trading volume improved significantly. The New media Spreaded sudden rapidly.

According to the incomplete statistics by research group ( only counting satellite channels and documentary specialty channels) , in 2011, documentary premiered a total of 16,000 hours, the production of programs are about 8700 hours. The documentary TV Columns are 83, 6 of which are broadcast repeatedly, 12 of which are changed or inactivated. The total market investment is about 800 million RMB, and the total revenue is over 1 billion RMB.

2011 is the 90th anniversary of the founding of the Communist Party of China, the 100th anniversary of Xinhai Revolution, so the mainstream ideological discourse is particularly strong. The 10-episode documentary "Banner" is a major gift of works by CCTV, which is produced sophisticatedly. "Three Gorges in China", "Ideal over China", "the Founding of New China", "Red Rock", "Youth Sing" and other works also pay tribute to the red history from different angles. In the works to commemorate the 100th anniversary of Xinhai Revolution, "Xinhai", "Tianxiaweigong—Sun Yat-sen

1911”, “Great Xinhai” and “China’s 1911” all have their own strengths.

This year, documentaries have more broad vision, and more sophisticated production. “Go to the Ocean” shows China’s maritime awareness; “the South China Sea No. 1” records the legendary underwater salvage history; “When the Louvre meets the Forbidden City” shows the dialogue between eastern and western civilizations; “Can Education be Changed?” faces the reality directly, and explores the problem, which can not avoided by every family. “Together” concerns about the living conditions of people with AIDS.

Overall, in 2011, documentaries of the various cultural forms share the whole market, some more, some less: the mainstream culture has played a strong role to lead ideology; documentaries with grand theme pay more attention to the historical and international perspective; the penetration of elite culture and consumer culture to the mainstream culture is more apparent. The ultimate image quality and audio-visual effects become an extreme pursuit, scene reproduction is used more extensively, the power of dramatic performance become stronger, meanwhile the power of documentary aesthetics is becoming more weak. When the three-dimensional animation and situation reproduce become fashionable and even flooding, some dazzling technology are only used to cover the lack of content and ideas.

In 2011, popular culture has become the protagonist of the market. As a consumer culture, documentaries get story, interest and imagery to attract the public. In a pleasant environment, the audience enjoys the visual feast, and feel the ups and downs of the story. People are consuming popular culture documentaries, and consuming the nature and history in the documentaries.

The documentary has attribution of communication across time-space, and cross cultural. It is the easiest way to communicate in all media forms, and has an irreplaceable position in the heritage of Chinese civilization and the international dialogue among civilizations. So documentary has prominent public cultural characteristics: internally, it is the national cultural heritage method, an important carrier of psycho-social cohesion; Externally, it is a powerful medium to disseminate national image and promote dialogue among



civilizations. At the same time, the documentary is also part of the cultural and creative industries. So we suggests:

First, draw up Chinese Documentary Development Plan.

Second, establish a National Documentary Industrial Park.

Third, introduce specific policies and regulations on the industry of documentaries.

Chinese documentary is in a new starting point of the industry. We are looking forward to our documentary market, with the market drive and culture mission, the elite and the general public, the mainstream and the grass root, develop simultaneously. Because only the symbiosis is the real prosperity.