

2020 Festival Operations Survey

FilmEx 2021 Presentation

January 11, 2021

Overview and Project Objectives

Hello and **welcome** to a presentation of results from the first inaugural FFA surveys of several important film festival stakeholders.

3 Audiences Surveyed:

- Film Festival Organizers
- Filmmakers
- Film Festival Attendees



Objectives

1. Understand how key film festival audiences are responding to the moment in 2020
2. Learn what is going well for festivals, filmmakers and audience members...and where there are challenges
3. Identify actionable opportunities to strengthen festivals and the festival experience – both live and virtual

Thank You!

Profound thanks to...

6 festival organizers and **5** filmmakers who participated in in-depth interviews to shape key questions,
18 film festivals who partnered to help field the audience survey,
61 festival organizers, **46** filmmakers and **2,200** audience members who completed online surveys with detailed and thoughtful responses,
And of course Film Festival Alliance and The Gotham Film & Media Institute (formerly IFP) for sponsoring this work.



Sources and Methods: Fresh Data!

- There are three samples of data collected as part of this project

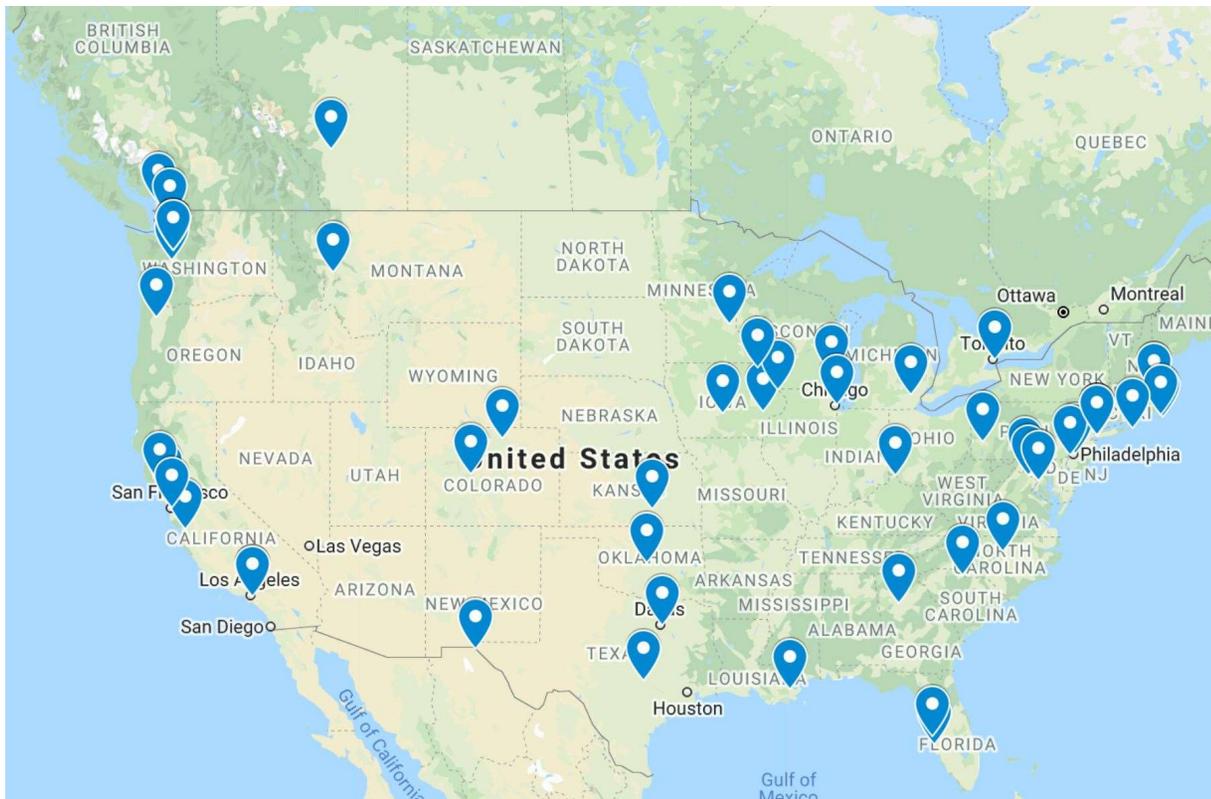
	Festival Organizers (reported today)	Filmmakers (to be reported Jan. 14)	Festival Attendees (to be reported Jan. 14)
Characteristics	Decision makers representing film festivals: <ul style="list-style-type: none"> • 51% Executive Directors • 51% Programmers, Curators or Artistic Directors • 15% Other Festival Managers Note: multiple categories could be selected	Professional involved in filmmaking: <ul style="list-style-type: none"> • 71% Directors • 70% Producers • 56% Writers Note: multiple categories could be selected	Festival attendees and other patrons of film festivals: <ul style="list-style-type: none"> • 94% attended either an in-person or virtual festival in the last 2 years
Sample Size	61	46	2,200
Research Method	Web Based Survey		
Collection Period	November/December, 2020		

Festival Organizer Survey Results

61 Festival Organizers, largely from the United States and Canada, participated in the 2020 study.

- In addition, one respondent from the UK, two from India and one with a purely virtual festival (no location specified) participated in the survey
- All regions of the U.S. are represented in the results

Location of Festival/Organization



Country	%
United States	88%
Canada	5%
Other (UK, India, Virtual)	7%

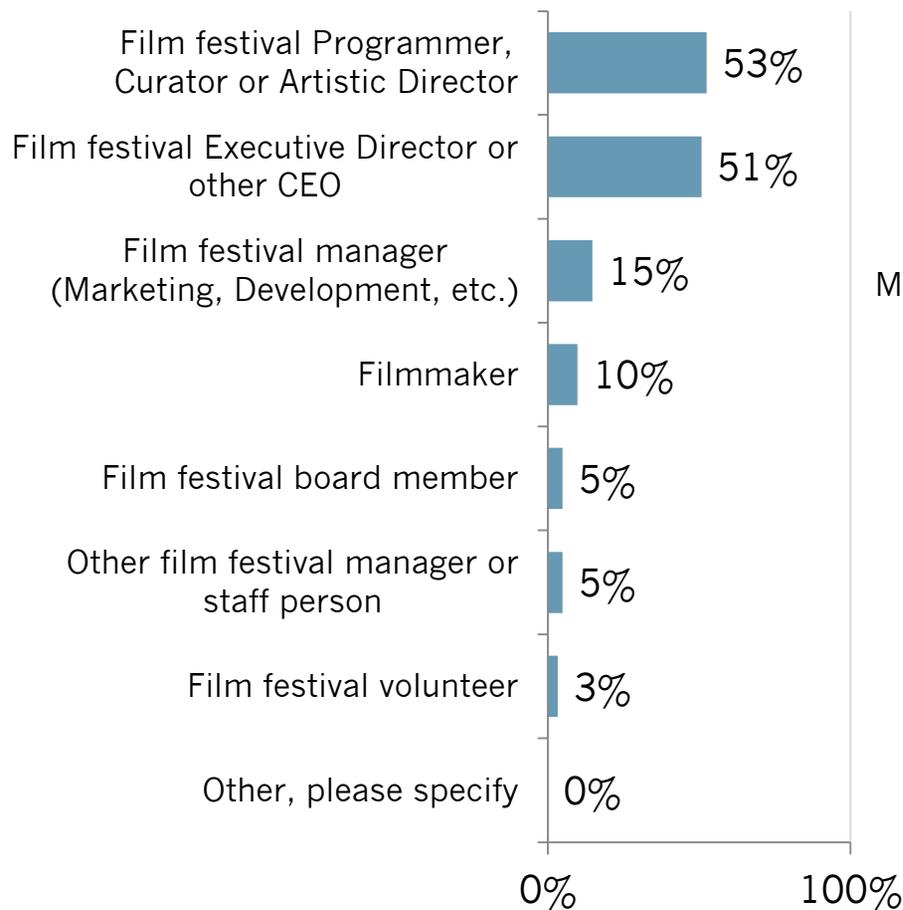
Question: *Where is your festival/organization located?*

Film Festival Alliance 2020 Festival Operations Survey: 61 Respondents (festival organizers)

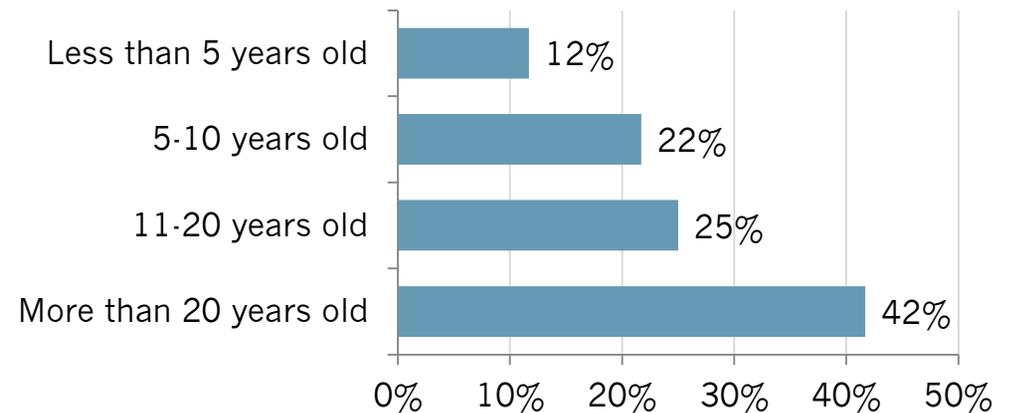
Respondents represent a variety of leadership roles with festivals with a range of ages.

- The majority, though not all, are FFA members

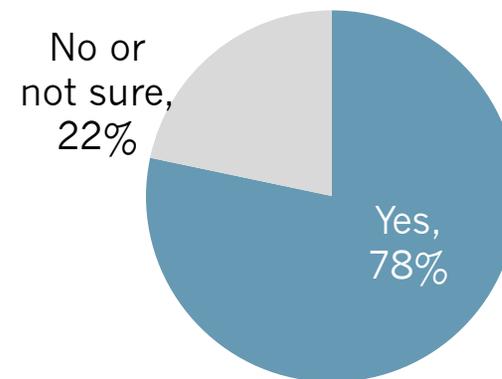
Role of Respondent (select all that apply)



Age/Tenure of Festival/Organization



Film Festival Alliance Member?

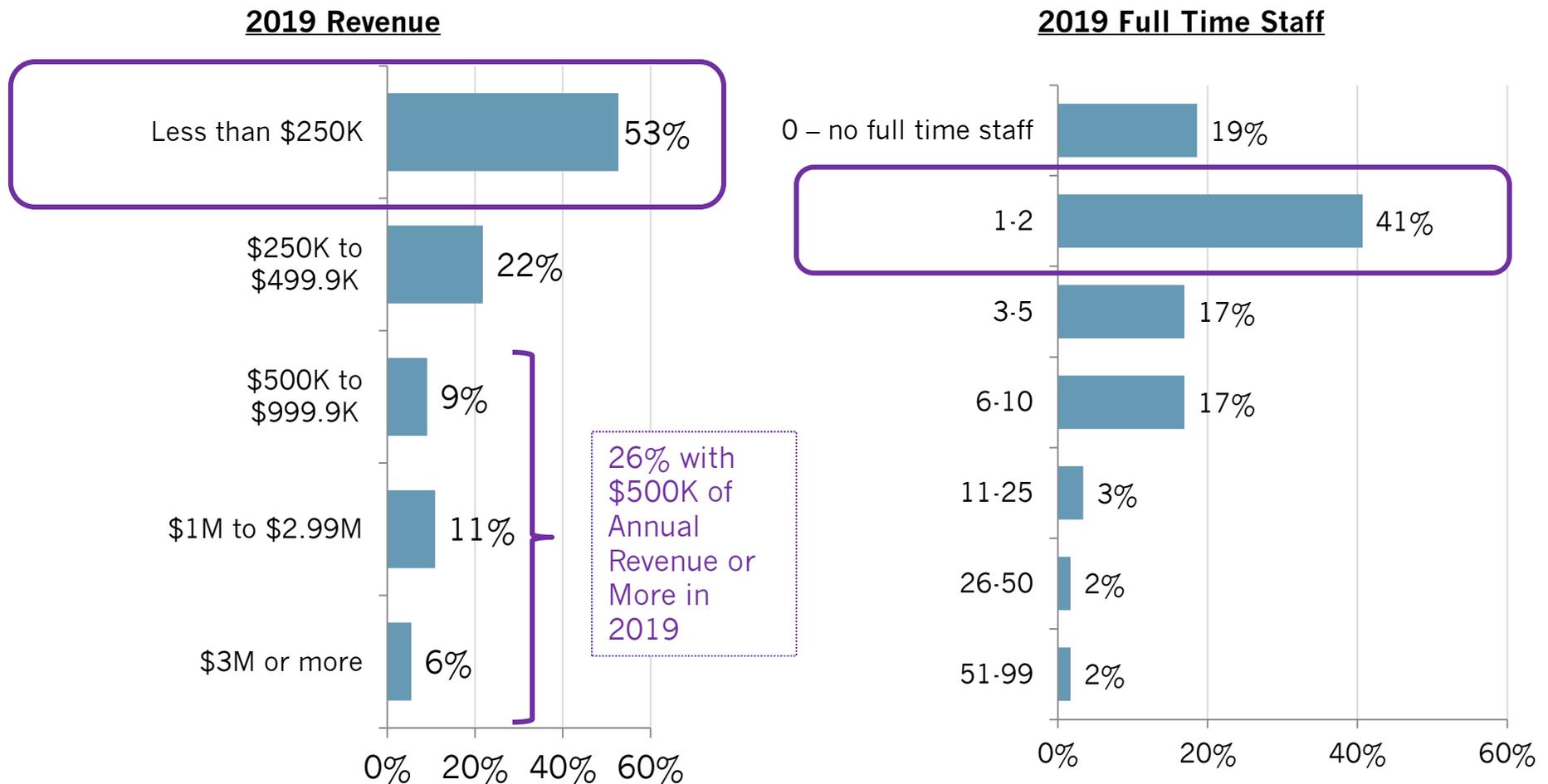


Question: Which of the following describe you? Please select all that apply

Film Festival Alliance 2020 Festival Operations Survey: 61 Respondents (festival organizers)

The “typical” respondent represents a festival with less than \$250K in annual revenue and 1-2 full time staff in 2019.

- However, a range of annual revenue and staffing is represented in the survey results



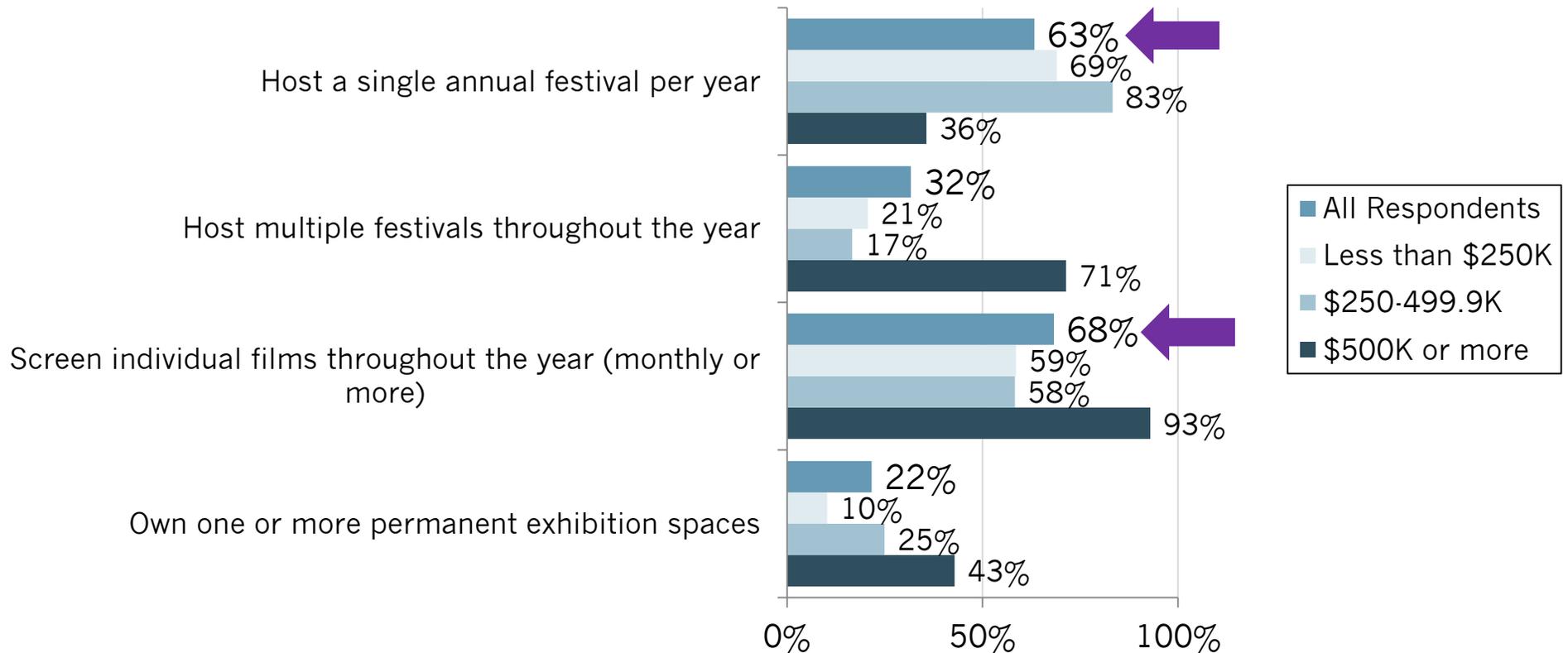
Question: Please give us some stats on your organization IN 2019?

Film Festival Alliance 2020 Festival Operations Survey: 61 Respondents (festival organizers)

These festivals tend to host a single annual festival per year (63%) plus screen individual films throughout the year (68%).

- Hosting multiple festivals throughout the year and owning permanent exhibition spaces are more common among larger festivals with annual revenue of \$500K+

Programming Schedule and Facilities



Question: Which of the following are true of your organization? Please select all that apply

Film Festival Alliance 2020 Festival Operations Survey: 61 Respondents (festival organizers)

Just over half of these festivals feature all types of independent film with many others focusing on particular topics and themes.

- Larger festivals are less likely to be focused on particular types of films

Areas of Focus

Types of Films Focused on by Festival	All Respondents	Annual Revenue (2019)		
		<\$250K	\$250-499.9K	\$500K+
All types of independent film	51%	45%	42%	77%
Shorts	22%	21%	50%	8%
Documentaries (all categories)	20%	28%	33%	0%
LGBTQIA+ films	15%	17%	25%	0%
Films about social justice	14%	17%	25%	0%
Environment/Nature	12%	17%	8%	8%
The Latin-x American Experience	10%	14%	17%	0%
Women/Female-identified themes and topics	10%	14%	17%	0%
The African American Experience	9%	10%	17%	0%
Horror	3%	7%	0%	0%
Repertory/Revival	3%	3%	8%	0%
Sci-Fi & Fantasy	3%	7%	0%	0%
Other*	19%	7%	33%	23%

*Other

- Jewish themes
- Asian cinema
- Southern/African diaspora
- Films directed by youth (under 25)
- Disability
- Experimental
- Films directed by women
- Mental health, addictions, recovery and wellness
- Montana-made/tied independent film

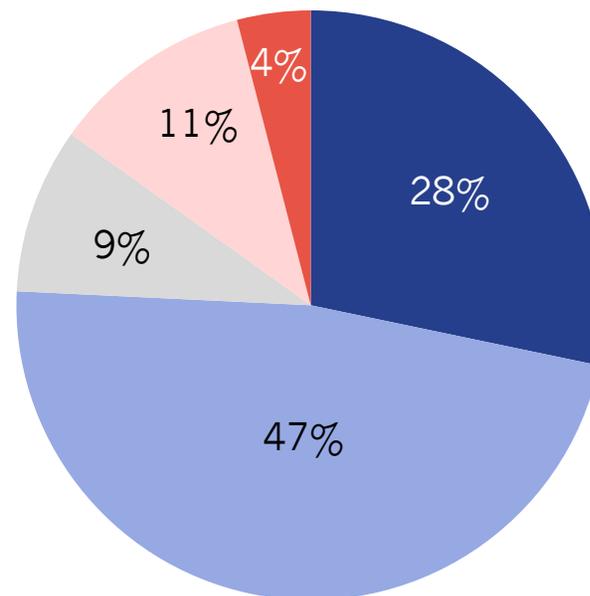
Question: Does your organization focus on particular types of films for your festival(s)? (select all that apply)

Film Festival Alliance 2020 Festival Operations Survey: 61 Respondents (festival organizers)

75% of these festival organizers report doing at least “somewhat” well as they have reacted to the challenges of 2020.

- However 15% of festival organizers, roughly 1 in 6, report doing somewhat badly or very badly

Overall State of Festivals (since March, 2020)



- Very well - we are pivoting and adapting, staying strong
- Somewhat well – we’re doing OK, but there have been some challenges
- Neutral – can’t say
- Somewhat badly – we’ve suffered a setback, but we’re hanging in there
- Very badly – we are in serious trouble

Question: Overall, how are you doing?

Film Festival Alliance 2020 Festival Operations Survey: 61 Respondents (festival organizers)

For the 15% of festivals that are doing “somewhat” or “very” badly, the greatest challenges tend to focus on funding and revenue.

Question: *What is your greatest challenge or issue right now?*

- **Revenue and Funding Pressure**

- *“Funding”*
- *“Continuing funding resources. Limited funds, oversaturation of existing donors, variables due to Covid19 pandemic.”*
- *“Lack of grant funding as foundations spend more on humanitarian basic needs and less on arts and the environment”*
- *“Sponsorship and attendance”*
- *“We have not been able to get engagement with our Virtual Cinema that comes close to tickets sales for our normal year-round programming. This loss of revenue threatens our ability to meet our expenses.”*
- *“The most important problem is finances and the exposure to reach the world.”*



- **Access to Titles**

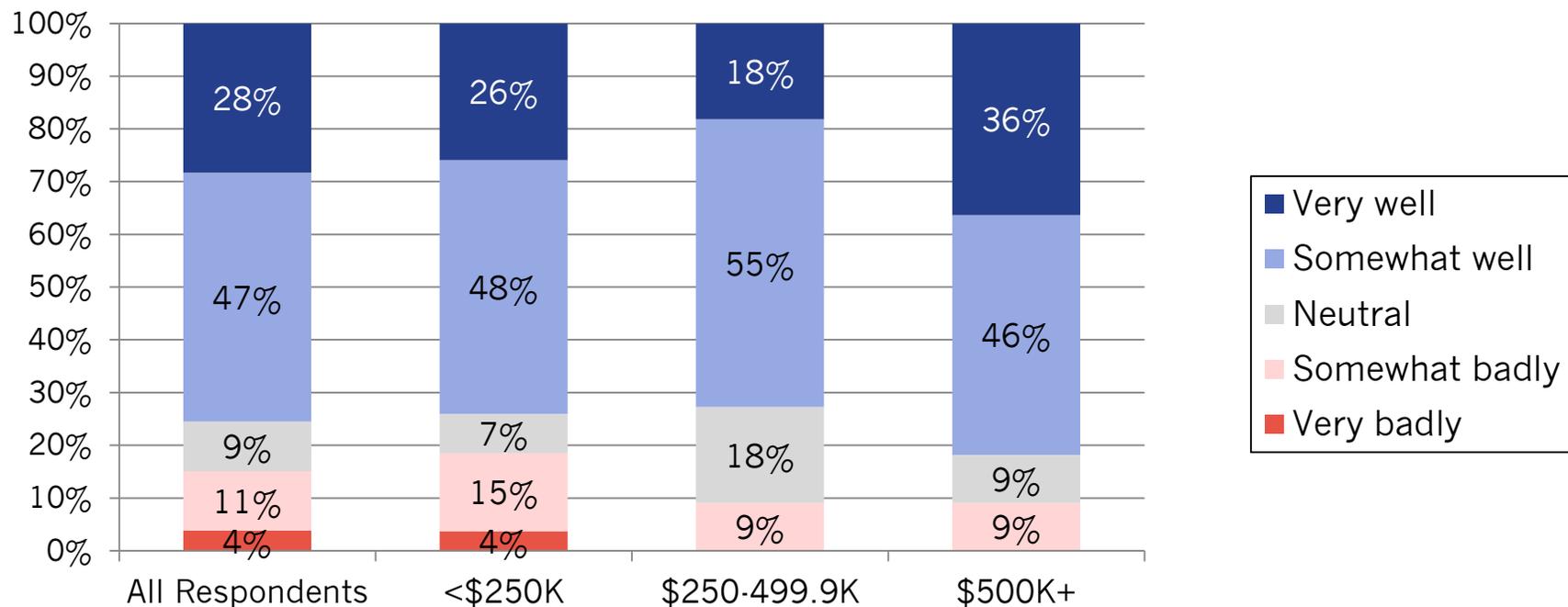
- *“Competing for title exclusivity without interfering with our local partner cinemas, which are also struggling.”*

Film Festival Alliance 2020 Festival Operations Survey: 61 Respondents (festival organizers)

Overall the current state of festivals is comparable regardless of size of organization.

- The majority of festivals across size groupings are doing “somewhat well” or “very well” with roughly a quarter doing less well

Overall State of Festivals (since March, 2020)



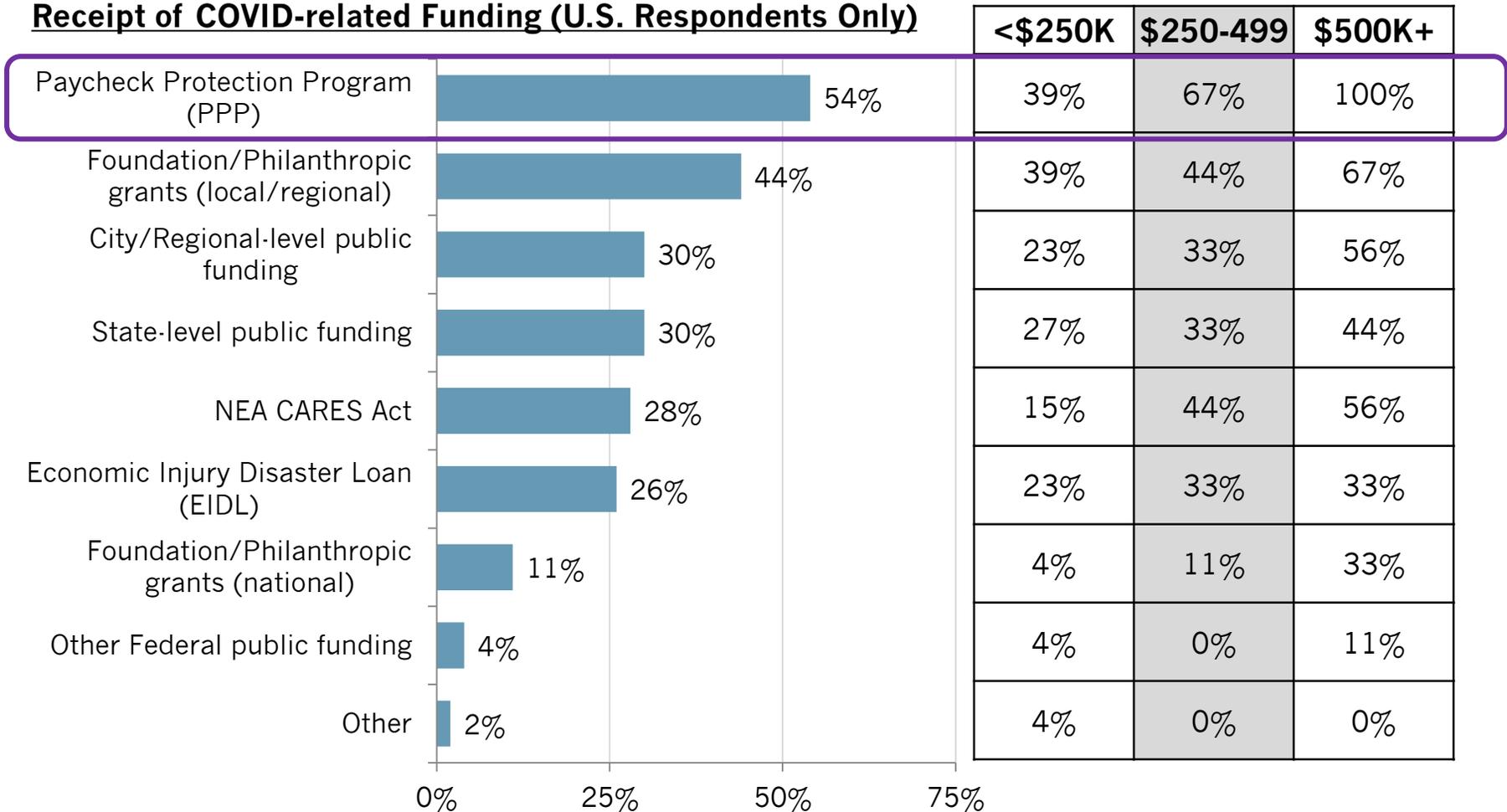
Question: Overall, how are you doing?

Film Festival Alliance 2020 Festival Operations Survey: 61 Respondents (festival organizers)

The majority of these festivals have received COVID-related funding from national, regional or local sources.

- The Paycheck Protection Program was most widely received
- Larger festivals appear to have been more likely to be awarded funding from most of these programs and sources

Receipt of COVID-related Funding (U.S. Respondents Only)



Question: Did you receive any of the following COVID-related funding? Please select all that apply

Film Festival Alliance 2020 Festival Operations Survey: 61 Respondents (festival organizers)

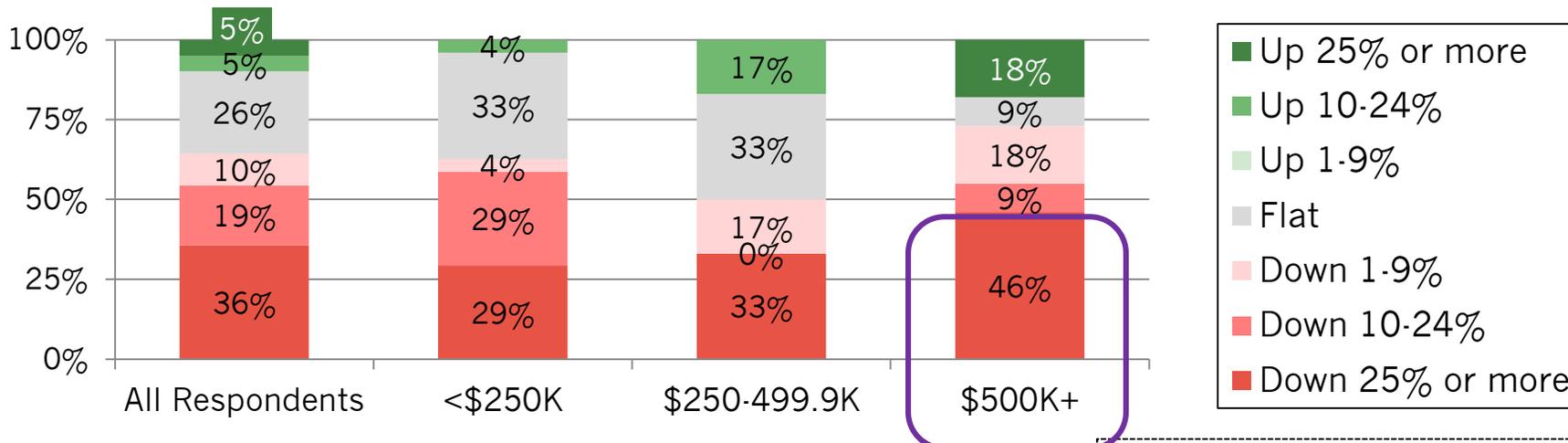
Nearly all of these festivals report declines in revenue, and the majority report declines in profitability/net revenue.

- The largest festivals are most likely to report steep (25%+) declines in net revenue

2020 Revenue Compared to 2019



2020 Profitability/Net Revenue Compared to 2019

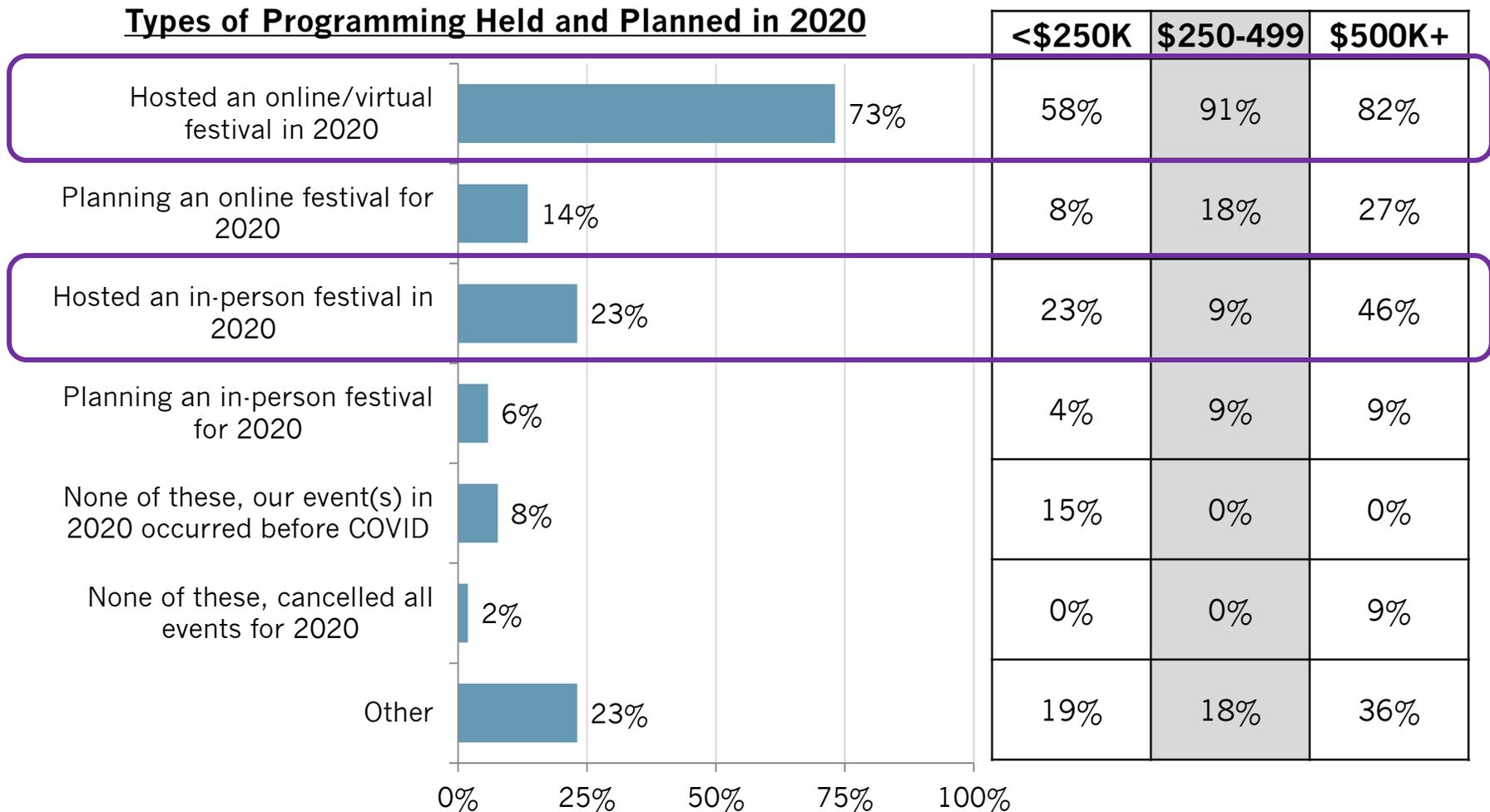


Question: What has the financial impact of 2020 been on your organization compared to 2019?

Film Festival Alliance 2020 Festival Operations Survey: 61 Respondents (festival organizers)

Nearly three-quarters (73%) of these festivals hosted online or virtual festivals since the beginning of the pandemic.

- Many, though a much smaller number, hosted in person events since the beginning of the pandemic



Question: Since the beginning of the COVID-19 pandemic, which of the following (if any) has your organization implemented for 2020?

Film Festival Alliance 2020 Festival Operations Survey: 61 Respondents (festival organizers)

These festival organizers created a variety of in person and virtual formats and experiences for their audiences in 2020.

Question: *Since the beginning of the COVID-19 pandemic, which of the following (if any) has your organization implemented for 2020?*

- **Other Types of Events Held in 2020**

- *“Hosted a few drive-In screenings in 2020”*
- *“Produced two **drive-in** festivals”*
- *“Hosted Free/Sponsored Drive-In & Online screening events”*
- *“Launched an online platform and app”*
- *“Added additional online programs”*
- *“Hosted **online retrospective and best of fest** events”*
- *“We **turned our Festival into virtual stand-alone screenings**, and produced a 5-day Day of the Dead celebration, mixing films and other online activities”*
- *“Had in-person events for virtual festival”*
- *“Hosted 3 fests online - April, Oct, Nov + **now planning hybrid fest for April 2021**”*
- *“Planning hybrid 2021: Live + online”*
- *“We were meant to launch our festival in September 2020, but chose to wait. We're TBD on a 2021 launch, knowing that it will be the first recovery year of many for our year-round art house cinemas.”*

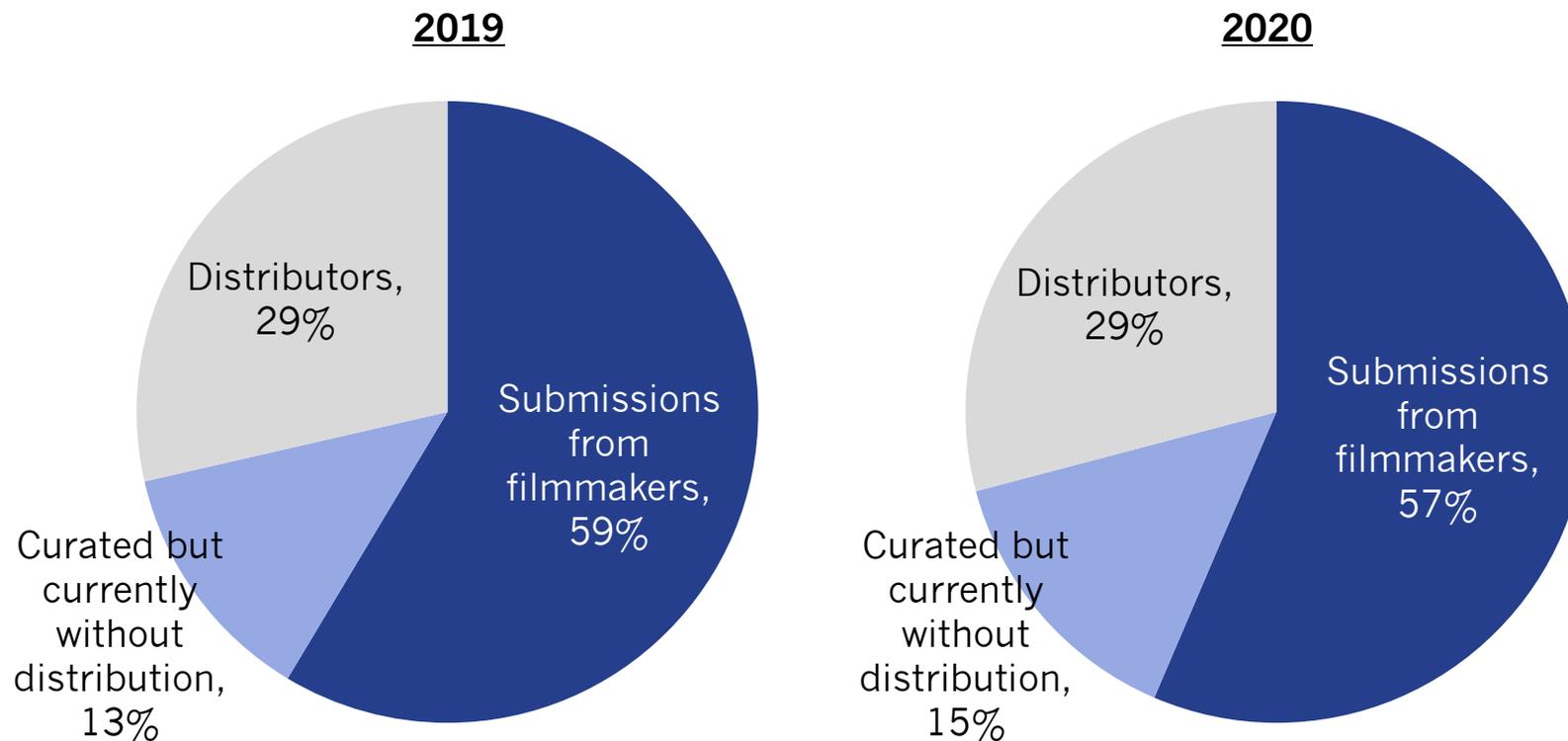


Film Festival Alliance 2020 Festival Operations Survey: 61 Respondents (festival organizers)

Those who held events in 2020 report a very similar mix in terms of the source of films compared to 2019.

- In both 2019 and 2020, the majority of festival films came from filmmaker submissions with 29% coming from distributors

Submissions vs. Distributors (Those Who Held Events in 2020 Only)



Question: In 2020, what percentage of the films you have shown (or will show) came through submission versus distributors? How does that compare to 2019?

Film Festival Alliance 2020 Festival Operations Survey: 61 Respondents (festival organizers)

A variety of films performed well in terms of gross revenue for the festivals that showed them.

- Parasite, MINARI and Fantastic Fungi were mentioned by two organizers each

Highest Grossing 2020 Films For Individual Festivals (self reported)

Film	Number of Mentions	Gross Revenue (rounded to nearest \$100)
Parasite	2	\$56,500
MINARI	2	\$4,000
Fantastic Fungi	2	\$1,800
Little Women	1	\$20,800
John Ware Reclaimed	1	\$9,100
Pink Skies Ahead	1	\$9,000
Small Town Wisconsin	1	\$3,600
Bleeding Audio	1	\$3,000
Judy Versus Capitalism	1	\$2,000
Birdie	1	\$900
Sell By	1	\$800
Other Mentions: Streaming Shorts Program, The Infiltrators, Euphoria of Being, Tribes on the Edge, Vasanthi	5	Less than \$800

Question: What was your highest grossing film for 2020 and how much did it gross?

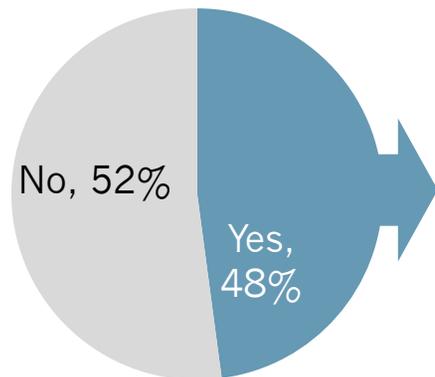
Film Festival Alliance 2020 Festival Operations Survey: 61 Respondents (festival organizers)

With such a varied group of festivals and curatorial focus, it may not be surprising that 32 different features and shorts were mentioned as audience award winners in 2020.

Question: *Did you host audience awards in 2020? If yes, what film won?*

Audience Awards Winners (all single mentions)

Hosted Audience Awards in 2020



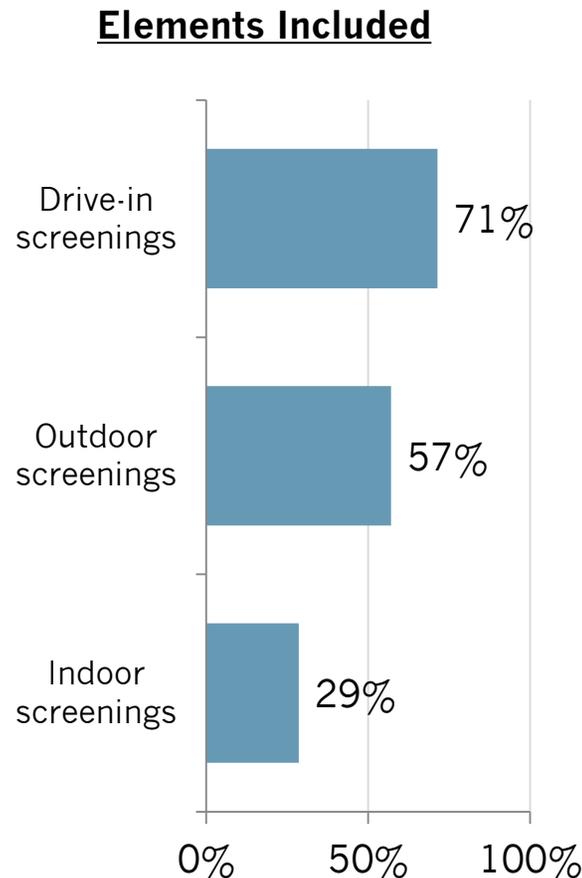
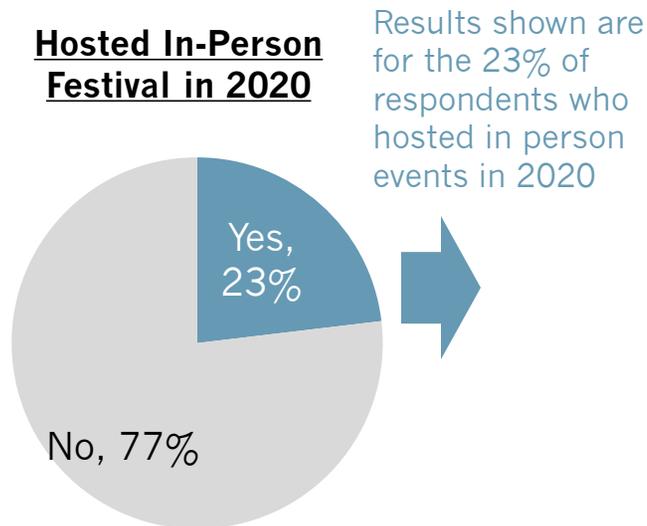
Results shown are for the 48% of festivals who hosted audience awards in 2020

- 76 Days
- Antigone
- Bridge
- The Dakota Entrapment Tapes
- The Dissident
- Dreamer
- The Foursome by Zach McTee
- The Haunted Swordsman
- Homecoming
- John Ware Reclaimed
- Lonely Blue Night
- The Love Bugs
- Lunana: A Yak in the Classroom
- March for Dignity
- MLK/FBI
- Nighthawks
- Once Upon A Time In Venezuela
- Overload: America's Toxic Love Story
- Percy
- The Place of Stones - Miguel Nájera
- The Quintet of the Sunset
- Save Me
- Selfish
- Stateless
- The Story of Plastic
- Tetlalli
- Tigerland
- Tree #3
- True West: The John Scott Story
- Us Kids
- Valentina
- Wolfwalkers

Film Festival Alliance 2020 Festival Operations Survey: 61 Respondents (festival organizers)

In Person Festivals: Those who hosted in-person events since March, 2020 tended to offer drive in or outdoor screenings.

- In general, in person festivals provided a positive experience for attendees but there were numerous added challenges



Question: Which of the following elements, if any, did you incorporate into your 2020 in-person festival(s)?

Went Well (select comments)

- Excitement, willingness of audience
- Picture and sound
- Terrific slate of films
- Safety procedure for in-person, in-theater events

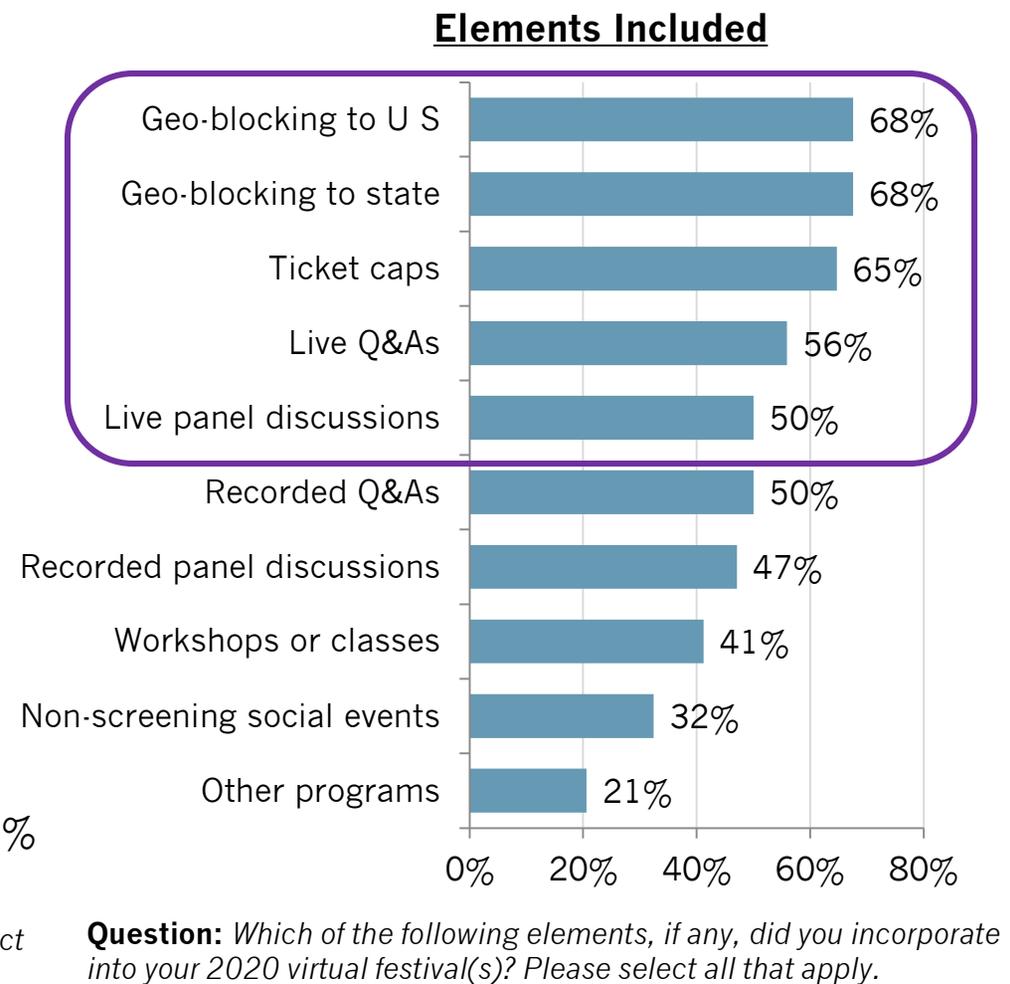
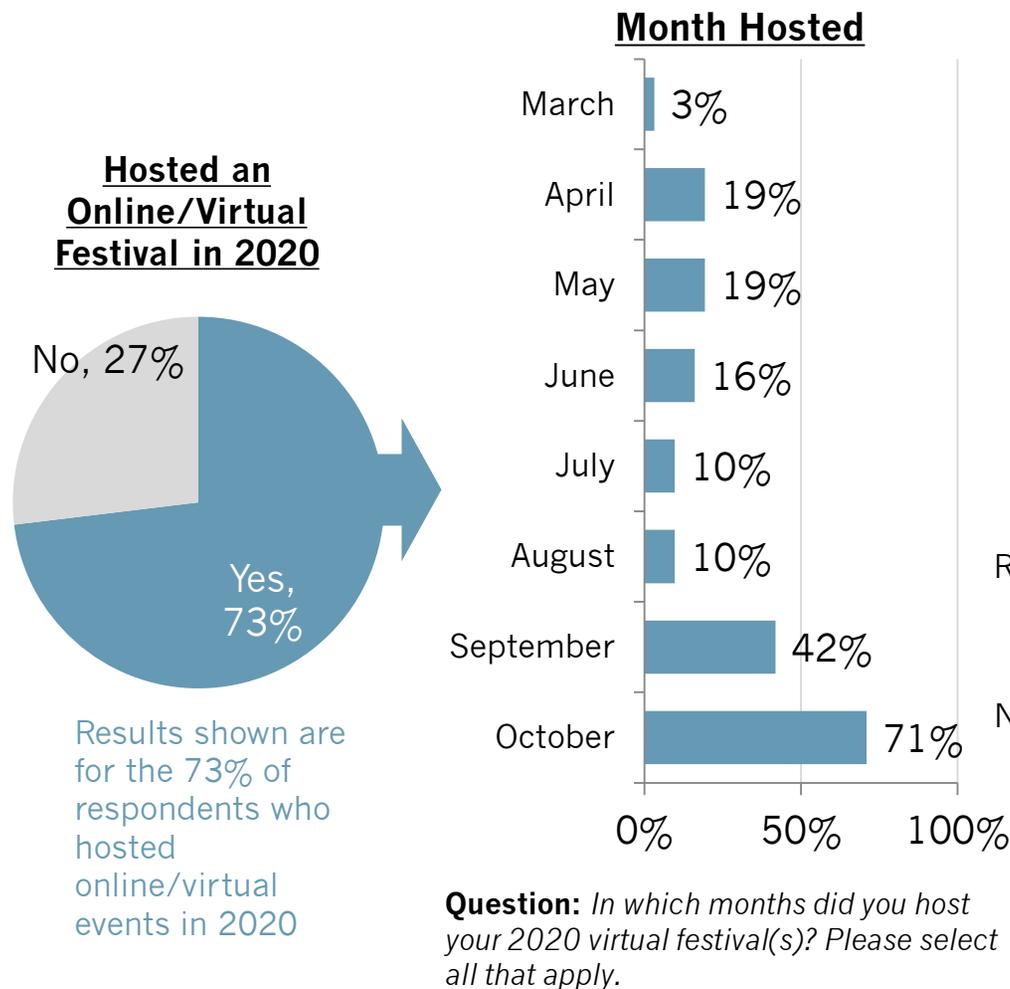
Could Have Been Improved (select comments)

- Weather and cost
- Lack of venue space, weather elements, and county curfew
- Getting audiences to attend.
- Getting guests to obey COVID protocols (though most did)
- Constantly changing city mandates for outdoor events

Film Festival Alliance 2020 Festival Operations Survey: 61 Respondents (festival organizers)

Virtual Festivals: Most of the festivals who hosted virtual events did so in September and October of this year.

- Most online festivals included many of the same elements: geo-blocking, ticket caps and some live programming (Q&As and panel discussions)

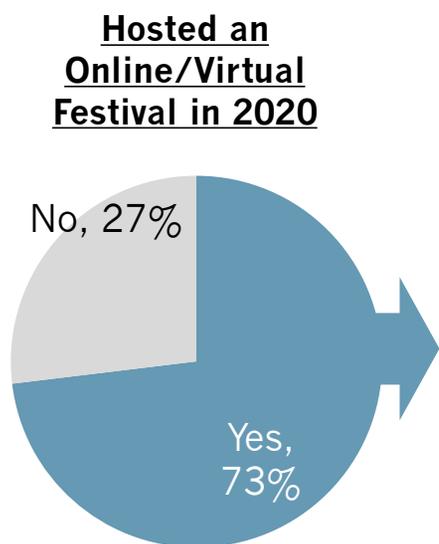


Film Festival Alliance 2020 Festival Operations Survey: 61 Respondents (festival organizers)

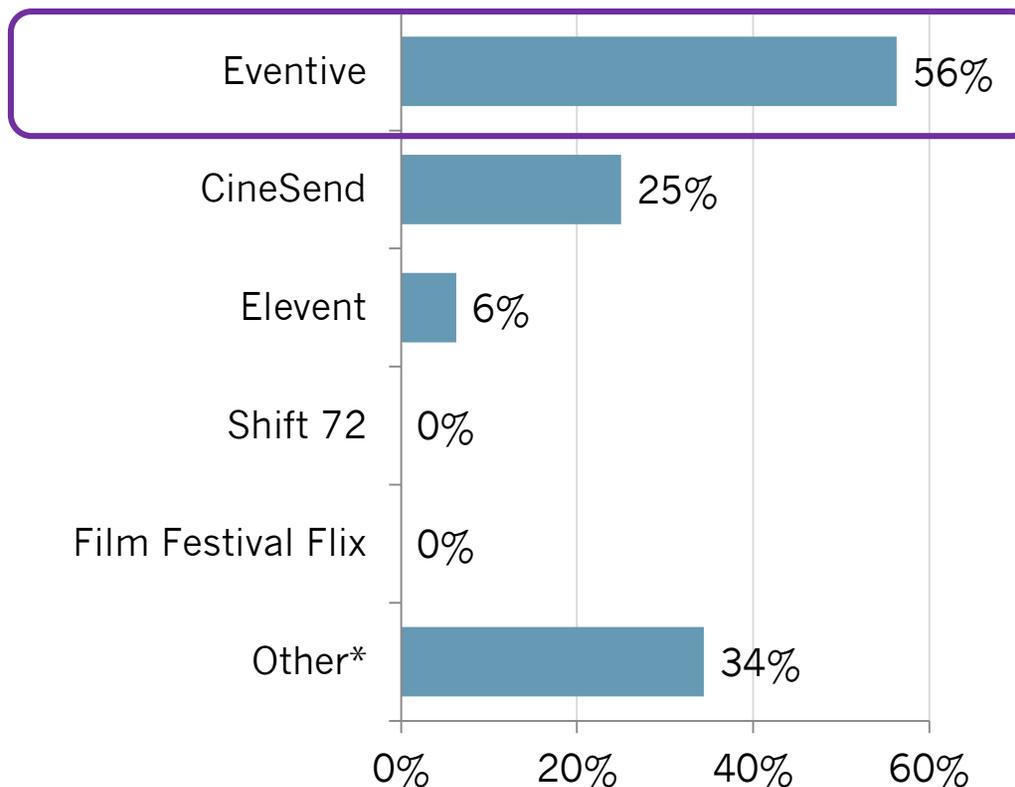
Virtual Festivals: Those holding virtual festivals used a variety of streaming platforms including Eventive, CineSend and Vimeo.

- A variety of other platforms have been used by one or more festivals in 2020

Virtual Streaming Platform Used



Results shown are for the 73% of respondents who hosted online/virtual events in 2020



***Other**

- Vimeo (6 responses, including “OBS through Vimeo)
- AgileLink (2 responses)

Single mentions:

- Custom Platform | Roku, Apple, Fire TV Channels
- Falcon Events
- Xerb
- In April, Vimeo/YouTube and a WordPress site

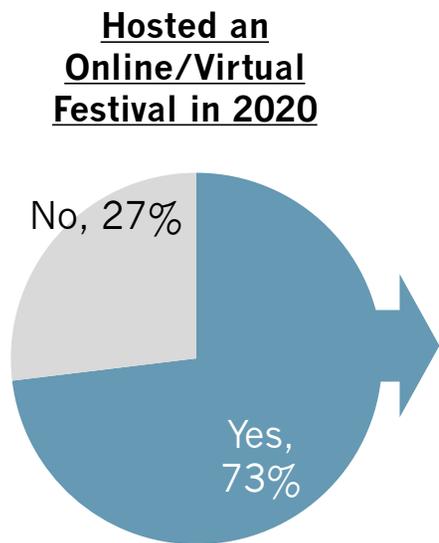
Question: Which virtual streaming platform(s) have you used? Please select all that apply.

Film Festival Alliance 2020 Festival Operations Survey: 61 Respondents (festival organizers)

Note: Tom Bray, Tech Director at the Ann Arbor Film Fest, included his notes on “Using Vimeo, Zoom, and Playback Pro (PBPro) local file playback to take a Film Festival Online”:
<https://docs.google.com/document/d/19NUARUf4aiadsCauG4TISswCU6Xa7iMjMPMYL5vDwQo/edit>

Virtual Festivals definitely allowed film festivals to reach wide audiences with festivals reporting large numbers of zip codes, states and countries reached.

- The median result reported by festivals was 36 states and 4 countries (outside your own) reached by virtual festivals



Results shown are for the 73% of respondents who hosted online/virtual events in 2020

Festival Stats

Performance Metric	Mean/ Average	Median
Number of tickets sold (rounded to nearest 100)	4,900	1,800
Number of passes sold (rounded to nearest 100)	500	250
Number of streams/views (rounded to nearest 100)	21,000	7,000
Number of in-state zip codes you reached	105	20
Number of US zip codes you reached (including in-state)	403	86
Number of US states, outside your own, you reached	29	36
Number of countries, outside your own, you reached	14	4
Average number of attendees for non-screening events	166	50

Film Festival Alliance 2020 Festival Operations Survey: 61 Respondents (festival organizers)

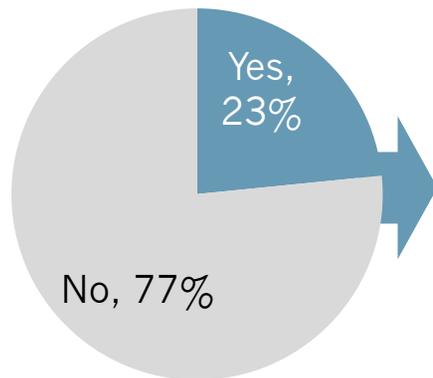
Question: Please provide some stats from your 2020 virtual festival(s). Make your best guess.

Non-Screening Social Events (Virtual Festivals): Most invited groups are participating somewhat in social events.

- Encouraging wider board participation in social events related to virtual festivals appears to be a common area of opportunity

Participation in Social Events (happy hours, parties, mixers, etc.)

Hosted Virtual Festival Non-Screening Social Events in 2020



Results shown are for the 23% of respondents who both hosted online/virtual events in 2020 and included non-screening social events

Groups	Encouraged to Participate?	Actually Participated?			
		All	Most	Some	Almost None or None
Festival leadership	92%	15%	23%	54%	8%
Staff	92%	46%	8%	39%	8%
Board members	73%	18%	0%	46%	36%
Invited filmmakers	92%	0%	54%	39%	8%

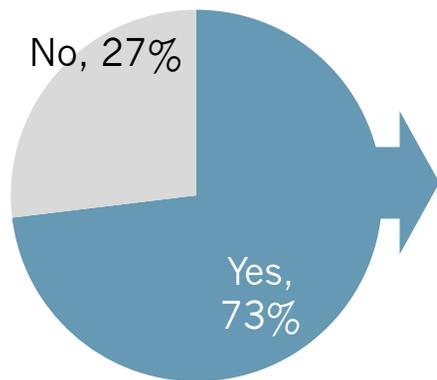
Question: Did your organization encourage leadership, staff, board members and/or invited filmmakers to participate in SOCIAL EVENTS? In general, how many of them participated?

Film Festival Alliance 2020 Festival Operations Survey: 61 Respondents (festival organizers)

Virtual Festivals: Despite staffing constraints, needing to learn new technologies and processes and the fundamental challenges of the moment, film festivals pulled off virtual events and extended their reach in 2020.

Question: Overall, what would you say went the best and what were some of your biggest challenges hosting a virtual festival in 2020?

Hosted an Online/Virtual Festival in 2020



Results shown are for the 73% of respondents who hosted online/virtual events in 2020

• **Went the best (select comments)**

- *“Flexibility for viewers to participate on their own time”*
- *“Expanding our audience across the country”*
- *“Attendance was up overall”*
- *“Ease of uploading the films”*
- *“Filmmaker attendance and engagement”*
- *“Panels and Q&A's as we were able to get more filmmaker participation than an in-person as no travel”*
- *“A number of individual donations attached to ticket purchases”*
- *“The communication amongst fests to help each other get through all the unknowns together.”*

• **Biggest challenges (select comments)**

- *“Audience engagement”*
- *“Digital fatigue”*
- *“Technical issues”*
- *“Navigating new technology, getting viewers, tracking audience participation and reaction”*
- *“Getting everything done with 1/3 of the staff but they did it!”*

Film Festival Alliance 2020 Festival Operations Survey: 61 Respondents (festival organizers)

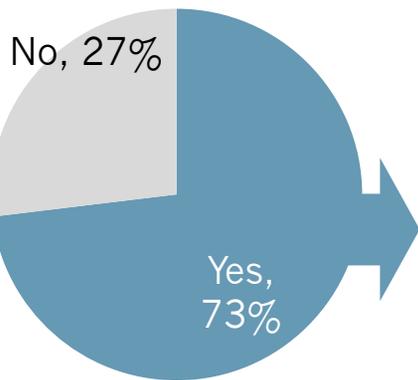
Virtual Festivals generally performed better than expected in terms of audience and filmmaker participation as well as individual donations.

- Virtual Festivals generally underperformed compared to expectations re: sponsorship and foundation dollars along with merchandise sales

Virtual Festivals: Experience Relative to Expectations

Film	Better Than Expected	Just As Expected	Worse Than Expected	N/A
Attendance by people OUTSIDE of our usual geographic area	61%	27%	9%	3%
Participant reaction to the virtual festival(s)	59%	34%	3%	3%
Filmmaker reaction	56%	41%	0%	3%
Individual donations	46%	24%	27%	3%
Overall attendance	35%	35%	27%	3%
Experience working with streaming platform(s)	35%	44%	15%	6%
Earned revenue from ticket and pass sales	27%	30%	27%	15%
Geo-blocking	19%	52%	13%	16%
Ticketing technology	18%	64%	6%	12%
Number of filmmaker submissions to virtual festival	18%	41%	15%	27%
Sponsorship dollars	16%	28%	47%	9%
Merchandise sales	10%	7%	32%	52%
Foundation dollars	9%	44%	25%	22%

Hosted an Online/Virtual Festival in 2020



Results shown are for the 73% of respondents who hosted online/virtual events in 2020

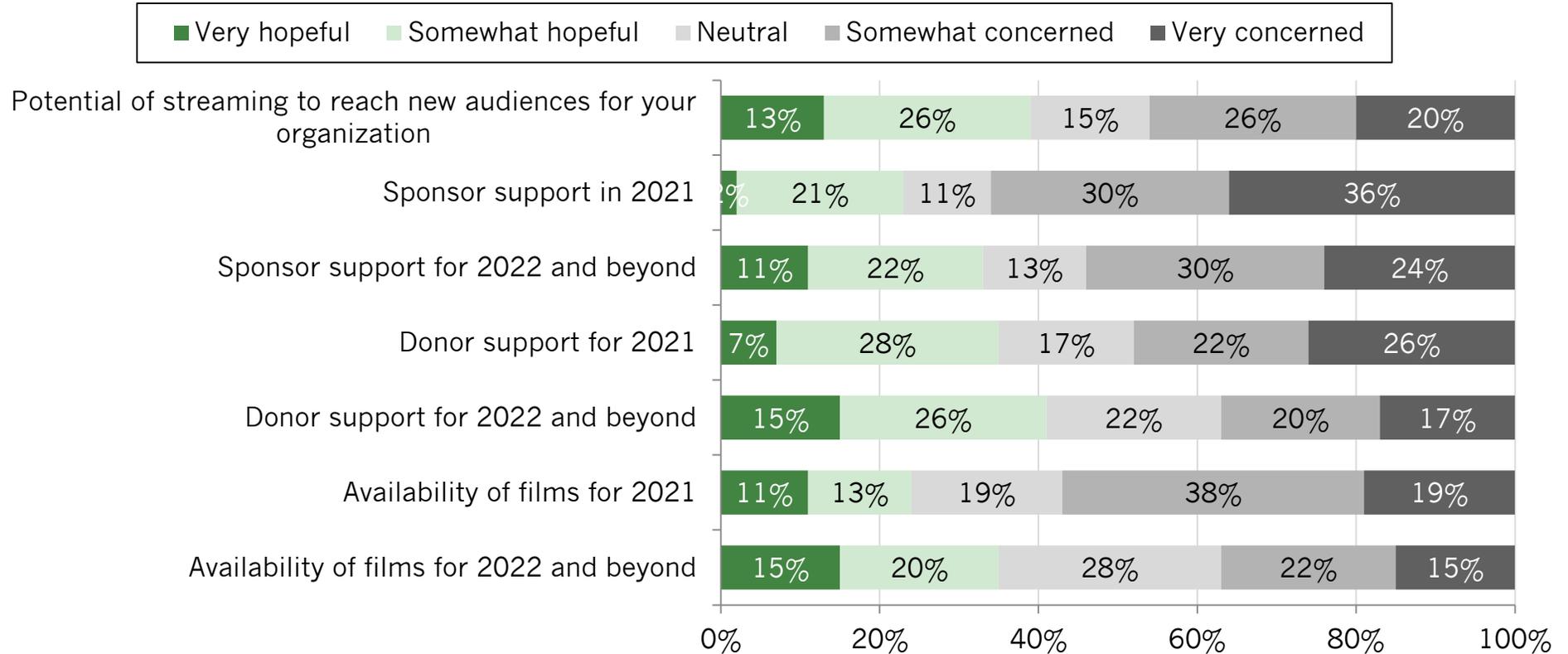
Question: Were the following aspects of your 2020 virtual festival(s) better than expected, just as expected or worse than expected

Film Festival Alliance 2020 Festival Operations Survey: 61 Respondents (festival organizers)

These festival organizers have a number of concerns for 2021, generally lessening for 2022 and beyond.

- These festival leaders are most worried about sponsor support, but donor support and the availability of films are also areas of concern

Programming Schedule and Facilities



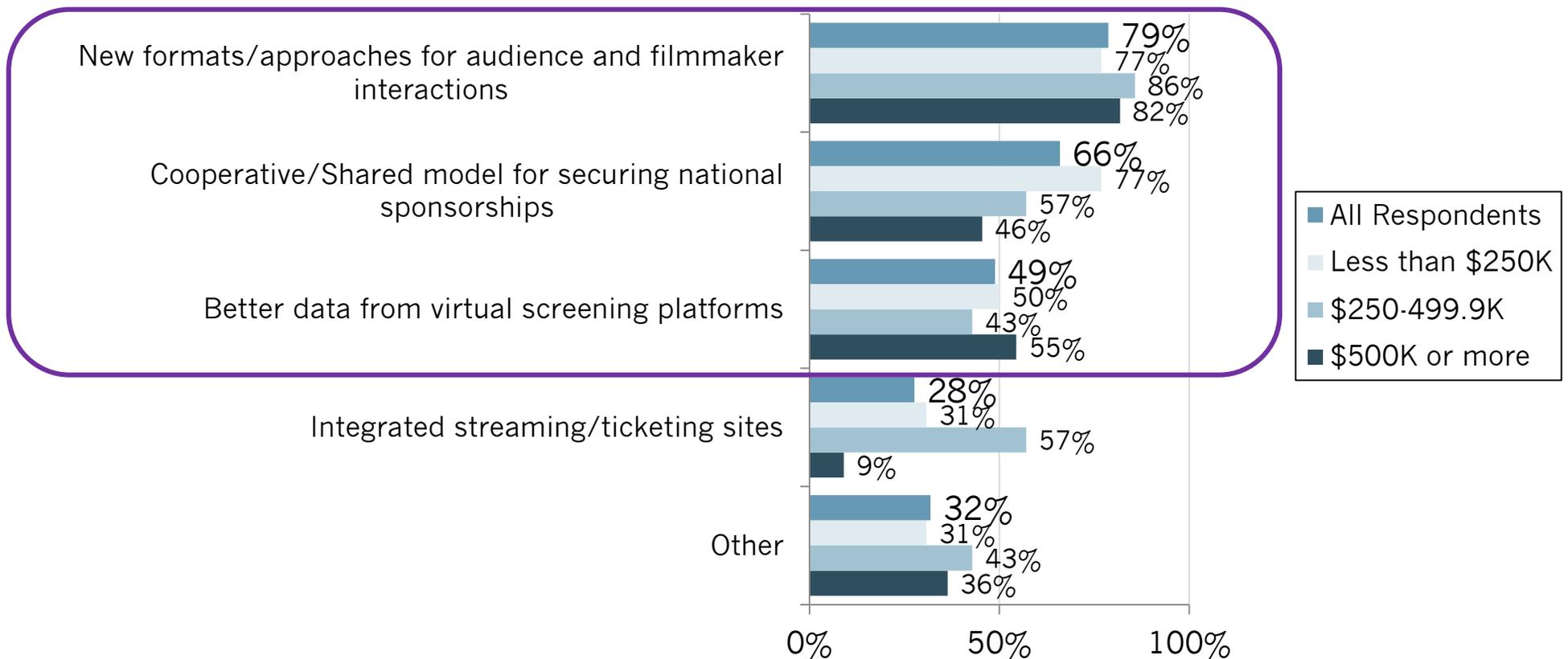
Question: Are you hopeful or concerned about the future of the independent film ecosystem?

Film Festival Alliance 2020 Festival Operations Survey: 61 Respondents (festival organizers)

Regardless of size, many festivals would like to see a number of changes to improve organization success.

- New approaches to audience and filmmaker interactions, shared approach to national sponsorships and securing better data from screening platforms are all widespread priorities

Priorities for Future Success



Question: Going forward, what needs to be addressed for your festival(s), in person or on-line, to be more successful?

Film Festival Alliance 2020 Festival Operations Survey: 61 Respondents (festival organizers)

Aside from the progress of vaccines (several comments related to this), festival organizers prioritize refining the technology interface and enhancing audience engagement to differentiate from other film experiences.

Question: *Going forward, what needs to be addressed for your festival(s), in person or on-line, to be more successful? (other responses)*

- **Other Needs, Concerns and Priorities**

- Interface/Experience*

- *“Better Technical presentation”*
 - *“Getting viewers over the technology hump”*
 - *“Advocating against geo-blocking/premiere status”*
 - *“Not integrated platforms, but better integrations of existing providers.”*



- Access to Films*

- *“The window of opportunity to screen indie films is getting more limited, because more films seem to be going directly to streaming from the large festivals to the big companies.”*

- Engagement*

- *“Better ways to promote interactivity with audience beyond filmmaker Q&As”*
 - *“Online festivals compete with Netflix and HBO Max, so they have to be better than what someone is already getting for \$15 a month.”*
 - *“Biggest festival challenge is bringing back the interactive part of a live event. Festivals cannot slide into becoming just another VOD platform. Lose audience and character.*
 - *“Trying to continue to build our base/ audience within our community is the only way I see longevity and support and success for our 3 festivals over time.”*

Film Festival Alliance 2020 Festival Operations Survey: 61 Respondents (festival organizers)

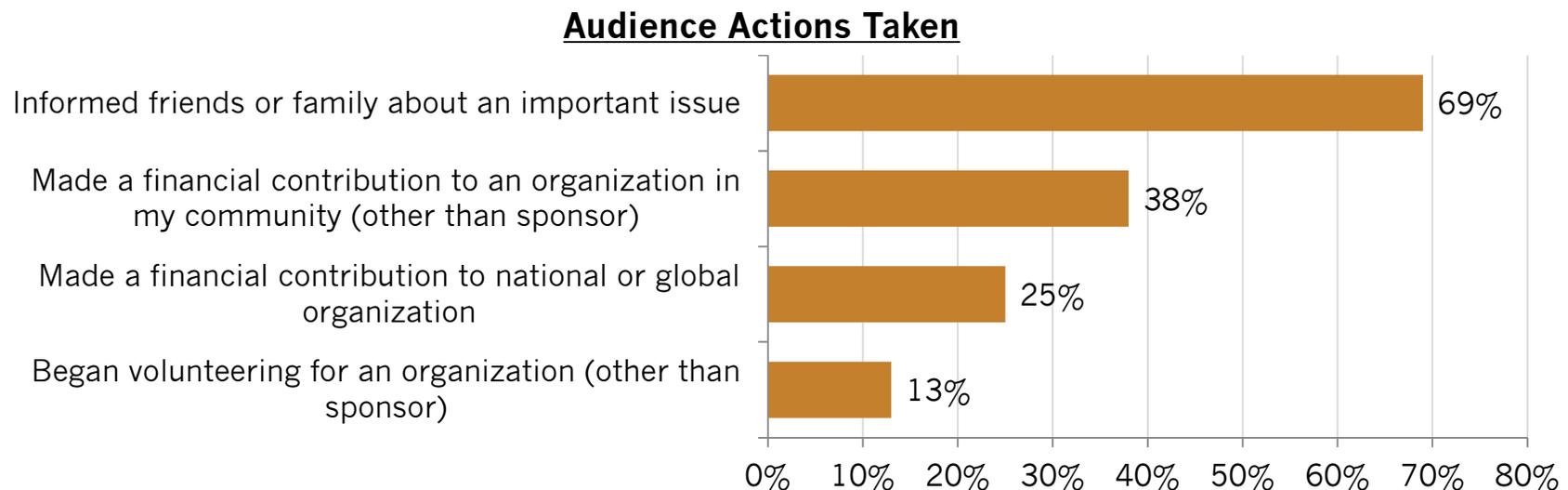
Audience Survey Results

(teaser – full results on January 14)

Film festival audience members are inspired...and inspired to take action.

Film Festival attendees agree (strongly or somewhat) that their festival...

- **96%: present films outside the mainstream**
- **94%: helps tell important stories that would otherwise not be told**
- **94%: elevates the experience of being in this community**
- **94%: presents films that are relevant to the present moment**
- **91%: one of the best things about this community**
- **91%: exposes me to new ideas and ways of thinking**



Audience Appreciation

Question: *What is a specific memory you have that highlights your experience of [Sponsor]?*

- **A Whole Lotta Love**

- *“Every year is a fun, entertaining, and inspiring. A great showcase for independent films.”*
- *“I remember sitting in my car crying about the injustices highlighted in After Selma. It both infuriated and energized me. I had attended alone, but I was so angry that after I left, I began texting and emailing everyone asking that they watch it so they could be enlightened and share it with others.”*
- *“I love the community that the festival brings. Everyone talking, laughing, walking the streets from event to event. It's a great atmosphere to be a part of.”*
- *“It was a beautiful online experience, where I felt community in an acute way even though we were disconnected physically”*
- *“It is so inspiring and positive”*
- *“It's a festival not just a movie.”*
- *“Feeling like I am part of something really special”*

*Film Festival Alliance 2020 Festival Operations
Survey: 2,200 Respondents (festival patrons)*

Key Takeaways and Implications

- It's been a hard year...of course!
- Most festivals, large and small, have managed to adapt and make the most of this time.
- The majority of these festivals have received COVID-related funding from national and local sources.
- The majority of respondents hosted a virtual festival in 2020, typically in September or October; although there were challenges, things went better than expected across a range of variables, and these events allowed many festivals to reach wider audiences.
- A minority also held in person events in 2020 that were generally positive
- Some key areas of opportunity going forward are to:
 - Strengthen audience engagement in digital spaces
 - Potentially work together to secure national sponsorship that can benefit individual FFA members
 - Continue to work together to strengthen operations and access to films while sharing best practices, etc.
- Film festivals play a critical role in the lives of their audiences and their communities, inspiring attendees and inspiring action across a range of issues.

Thank You! Questions?

