

2020 Filmmaker and Audience Survey Results

FilmEx 2021 Presentation

January 14, 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

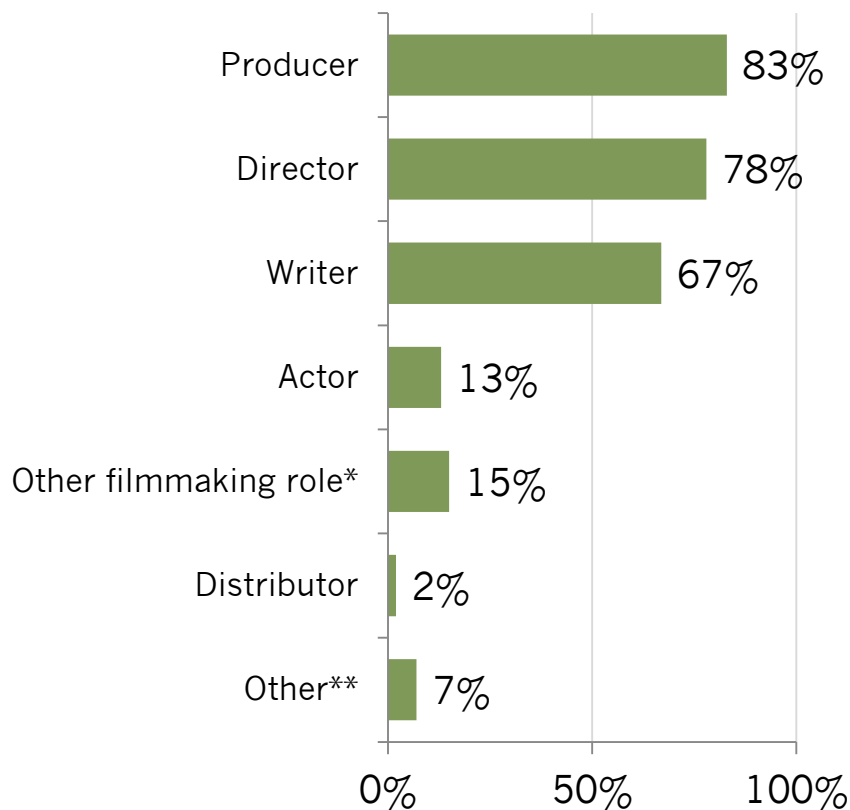
	Festival Organizers (reported Jan. 11)	Filmmakers (reported today)	Festival Attendees (reported today)
Characteristics	Decision makers representing film festivals: <ul style="list-style-type: none"> • 51% Executive Directors • 51% Programmers, Curators or Artistic Directors • 15% Other Festival Managers 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		

Filmmaker Survey Results

Respondents are generally experienced and have a variety of filmmaking roles.

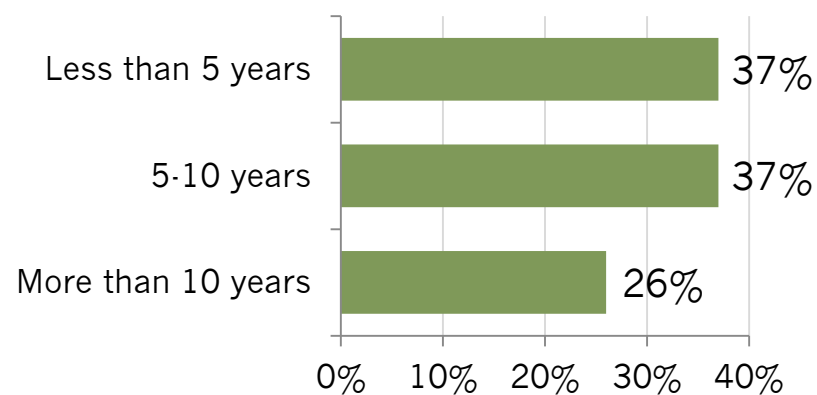
- 63% of respondents have been making films for 5 years or more
- About half (52%) of respondents are younger than 35

Filmmaking Role – Last 3 Years (select all that apply)

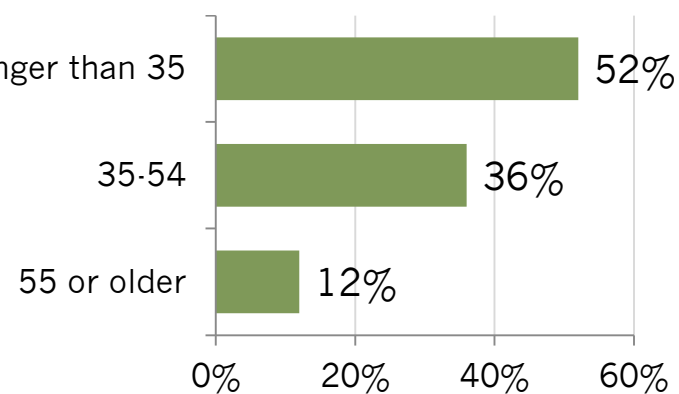


* Cinematographer (2), Composer, Production Designer, Art Director
** Director of Sponsorships for a Film Non-Profit, Development Executive

How Long Making Films?



Age of Respondent



Question: Which of the following filmmaking roles have you had in the last 3 years?
Please select all that apply

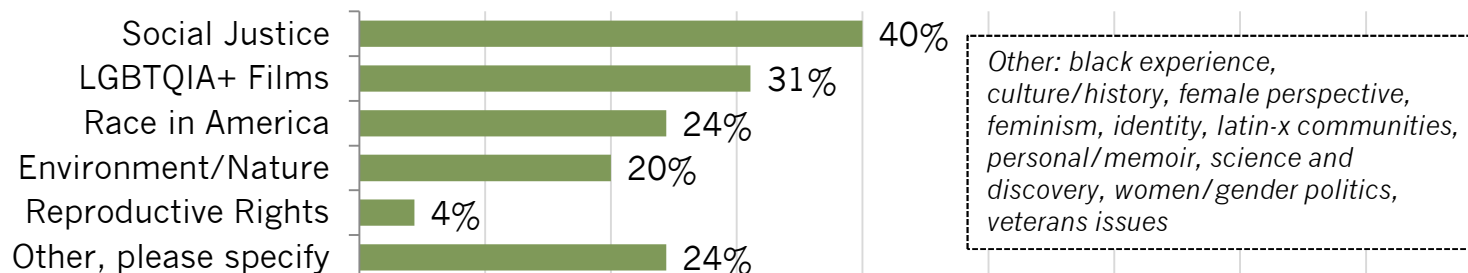
Film Festival Alliance 2020 Filmmaker Survey:
46 Respondents

Respondents are focused on a variety of film projects by subject, format and genre.

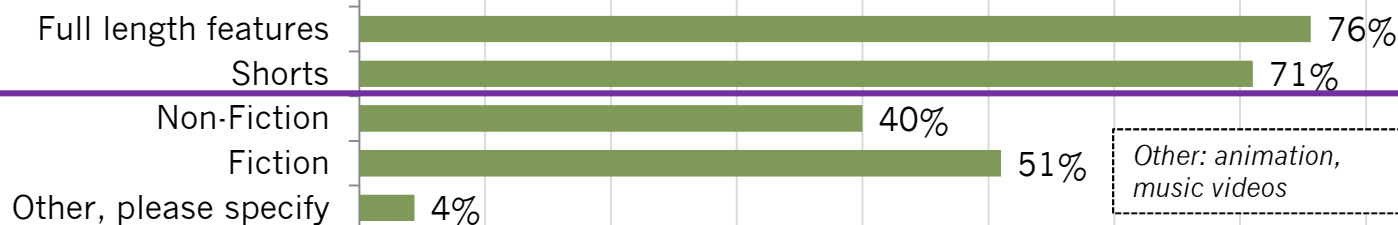
- Respondents are pretty evenly split between those who make full length features and those who make shorts

Types of Film Projects (select all that apply)

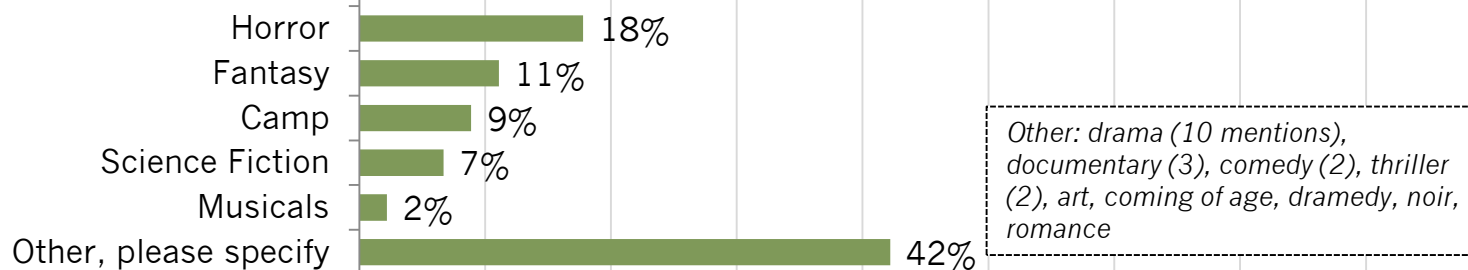
Subject



Format & Length



Genre



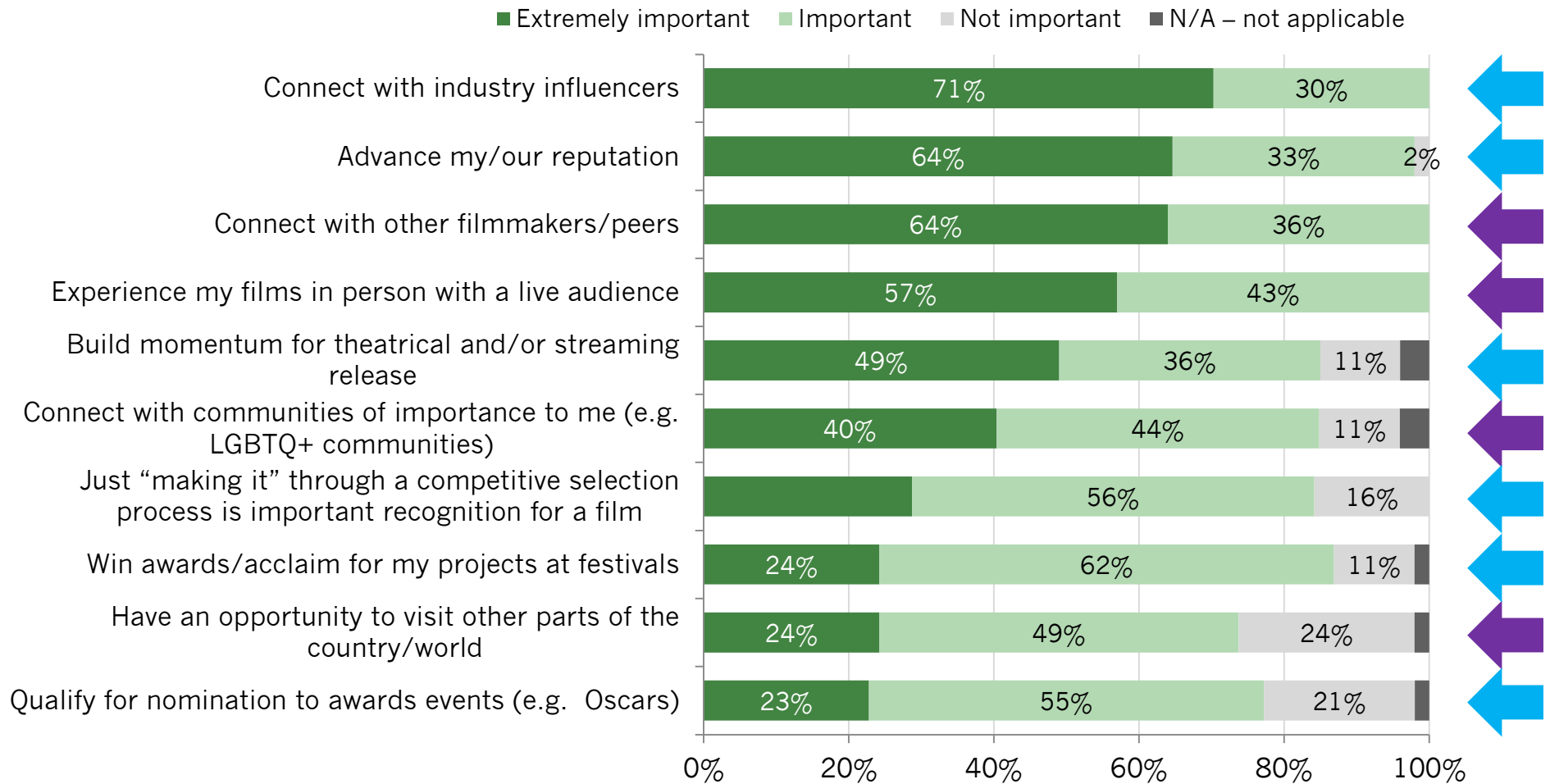
Question: In general (i.e. before the COVID-19 pandemic), do you tend to focus on particular types of film projects? Please select all that apply

Film Festival Alliance 2020 Filmmaker Survey: 46 Respondents

These filmmakers seek a wide variety of connections and experiences from their film festival experiences.

- They both seek to advance their films/careers (blue arrows) and connect with peers and audience members (purple arrows)

Filmmaker Benefits Sought From Festivals



Question: In general (i.e. before the COVID-19 pandemic), what benefits do you seek from having your films shown at FILM FESTIVALS?

Film Festival Alliance 2020 Filmmaker Survey:
46 Respondents

Best Large Festivals: Comments generally focus on industry exposure and networking plus operational and programming strength.

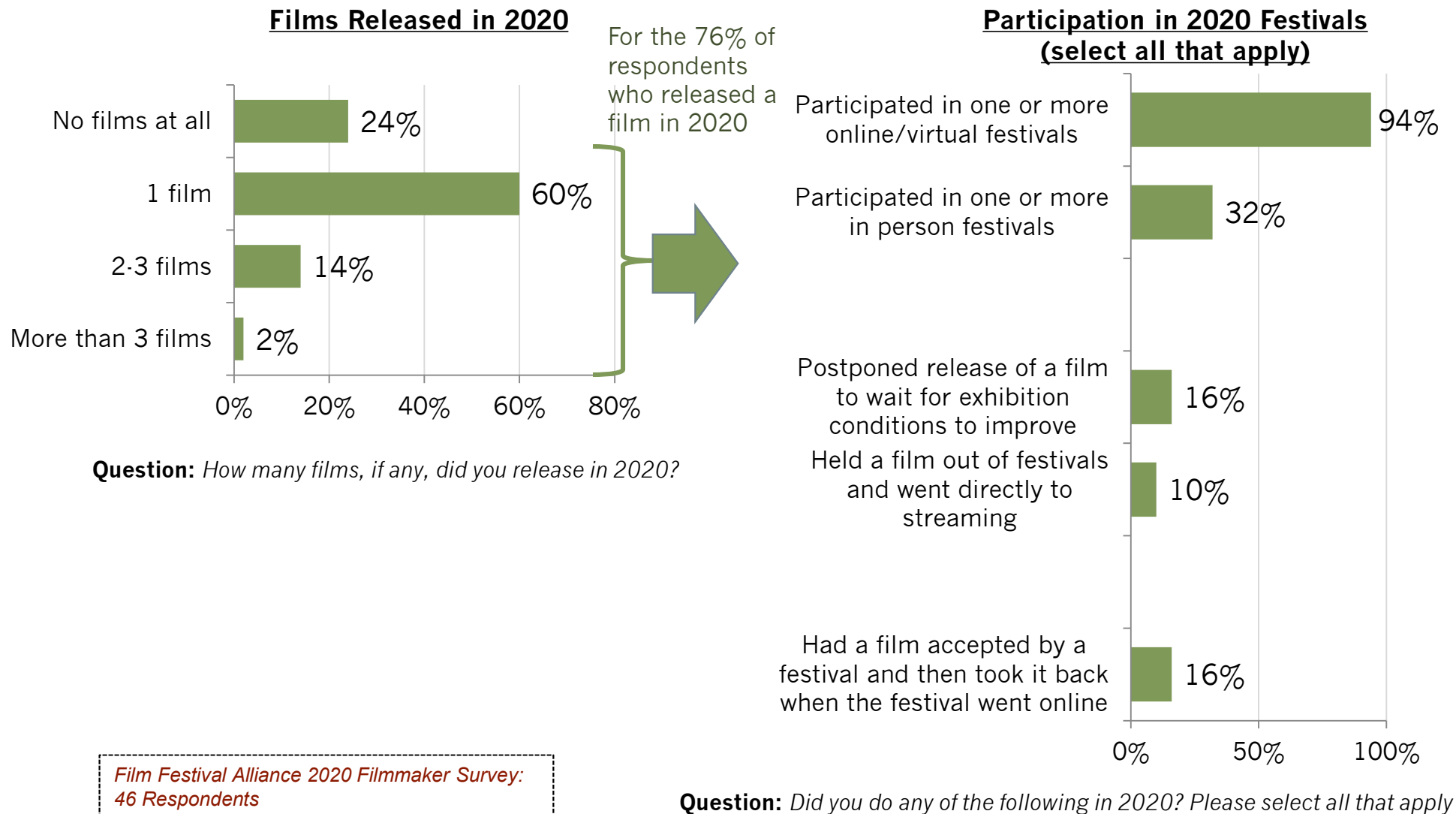
- Cannes (3 mentions)
 - *Labs, industry connections*
 - *Having many different outlets to connect filmmakers*
 - *International exposure*
- Berlinale (3 mentions)
 - *Talent Campus, Networking Events*
 - *They promote movies and support filmmakers in future projects*
 - *Well-organized and well-prepared: the whole thing always runs very smoothly; met lots of filmmakers and facilitators*
- American Black Film Festival (2 mentions)
 - *Saw a film that screened there in June on Netflix that following January.*
 - *They provide a great experience and opportunity for independent filmmakers.*
- TIFF (2 mentions)
 - *Many connections there to networking*
- Tribeca (2 mentions)
 - *Incredible filmmaker support through TFI including grants, labs, networking opportunities, etc. Also their filmmaker press relations is top notch!*
- Palm Springs International Short Fest (2 mentions)
 - *Relevant panels for up-and-coming filmmakers, Filmmaker mixers, Programmer mixers*
 - *A lot of exposure to the industry.*
- Woodstock (2 mentions)
 - *Support filmmaker with outreach and PR*
- Others: ARPA, Aspen ShortsFest, Austin Film Festival, New Filmmakers Los Angeles, NewFest, Outfest, San Francisco International, SXSW, Telluride, True/False

Best Small Festivals: Comments generally focus on an intimate experience, opportunities for connection and filmmaker appreciation.

- Adirondack Film Festival
 - Atlanta Film Festival
 - Beloit International Film Festival
 - BendFilm Fest
 - Bergen Film Festival
 - CAAMFest
 - California Independent Film Festival - CAIFF
 - Camden Film Festival
 - Cinequest
 - Cordillera Film Festival
 - Freep Film Festival
 - Helsinki African Film Festival
 - High Falls Intl Women's Film Fest
 - IndieMemphis
 - Julien Dubuque International Film Festival (Dubuque, IA)
 - LALIFF
 - Malaga IFF
 - Mammoth Lake Film Festival
 - Minneapolis International FF
 - Monmouth
 - Native Spirit
 - NFFTY
 - Oakville
 - One Earth Film Festival (Chicago)
 - Oxford Film Festival
 - Pendance Film Festival
 - Philadelphia Latino Film Festival
 - Rhode Island IFF
 - RiverRun international
 - San Francisco Latino Film Festival
 - Sarajevo Film Festival
 - Screencraft Screenwriting Summit
 - SF Indie Shorts
 - Snake Alley Festival of Film (Burlington, IA)
 - SoHo Film Festival
 - St. John's International Women's Film Festival
 - Urbanworld Film Festival
 - Vegas Movie Awards
- Areas of Support
- *Invite Filmmakers and pay for their lodging making the experience more accessible and provide a higher level of engagement*
 - *Covered all travel expenses*
 - *Has a fund supporting independent filmmakers.*
 - *Programming of films that are diverse in style and subject, rather than only the largest films and social issue documentaries.*
 - *Audiences are enthusiastic and the venues are just really, really cool.*
 - *Interesting approach to programming by hosting screenings at community settings, excellent at teaming up with other organizations, very impact driven*
 - *Many small social engagements with other filmmakers*
 - *They make networking opportunities for filmmakers.*
 - *Provided a person dedicated to making sure we are fine and at the right places at the right time*
 - *Dedicated festival liaison*
 - *Very welcoming*
 - *Treated us well*
 - *General support*

Of the 76% of these filmmakers who released one or more films in 2020, nearly all (94%) participated in virtual festivals

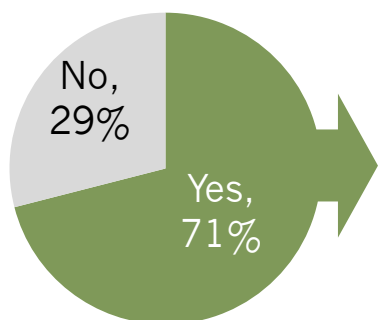
- Several, though not the majority, held a film back from festivals, either for release in 2021 or for direct release to streaming



These filmmakers have typically participated in 1-10 virtual festivals, gradually increasing over 2020

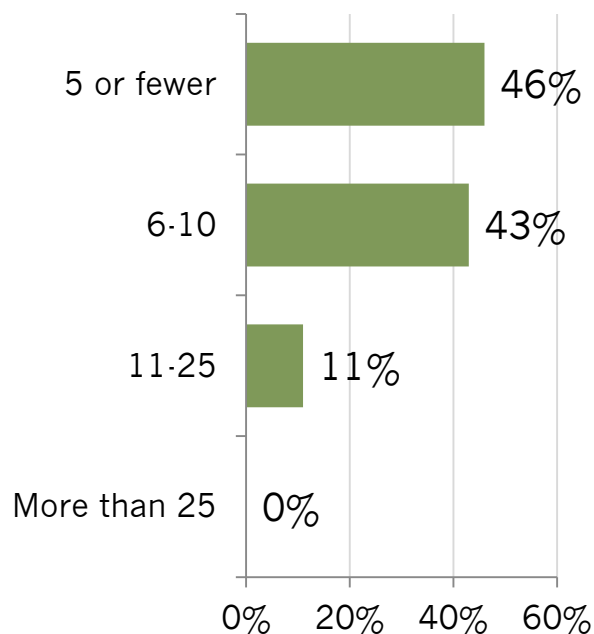
- This roughly corresponds to the months that the Festival Organizer Survey showed were most widely used for hosting virtual festivals

Participated in Virtual Festival in 2020



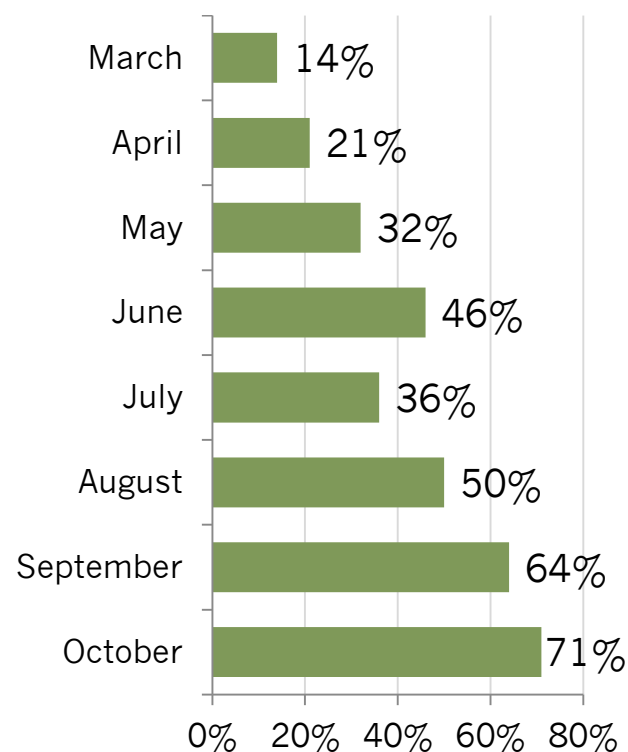
Results shown are for the 71% of respondents who participated in virtual festivals in 2020

Number of Virtual Festivals



Question: *Altogether, how many virtual festivals have you participated in during 2020?*

Months (select all that apply)



Question: *In which months did you participate in 2020 virtual festival(s)? Please select all that apply*

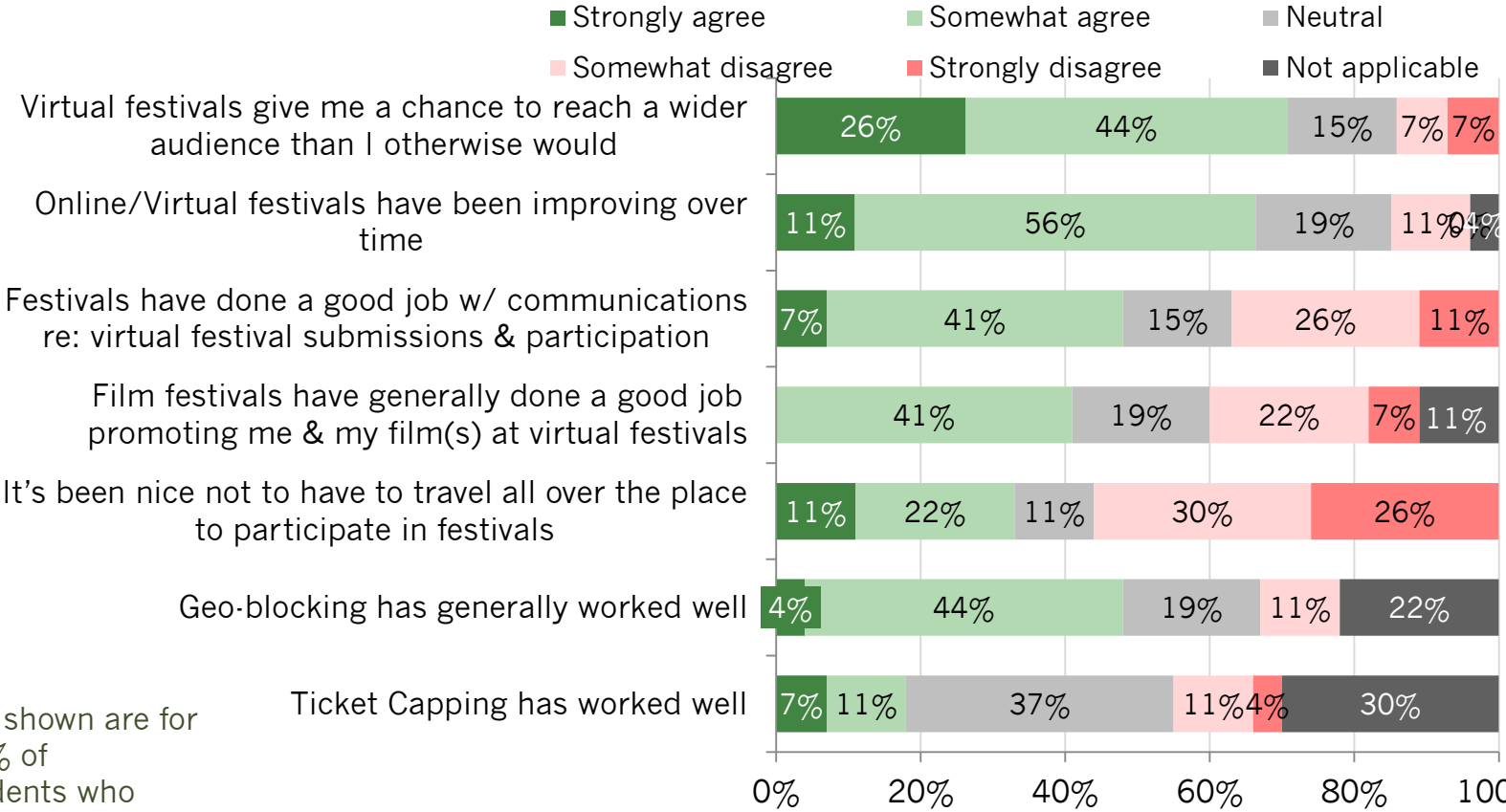
*Film Festival Alliance 2020 Filmmaker Survey:
46 Respondents*

The majority of filmmakers who participated in virtual festivals agree that virtual festivals help expand their audience and have been improving over time.

- However, there is some room for improvement in terms of communications and film promotion

2020 Filmmaker Experiences of Virtual Festivals

**Top 2 Box
Strongly/Somewhat
Agree**



70%

67%

48%

41%

33%

48%

18%

Results shown are for the 71% of respondents who participated in virtual festivals in 2020

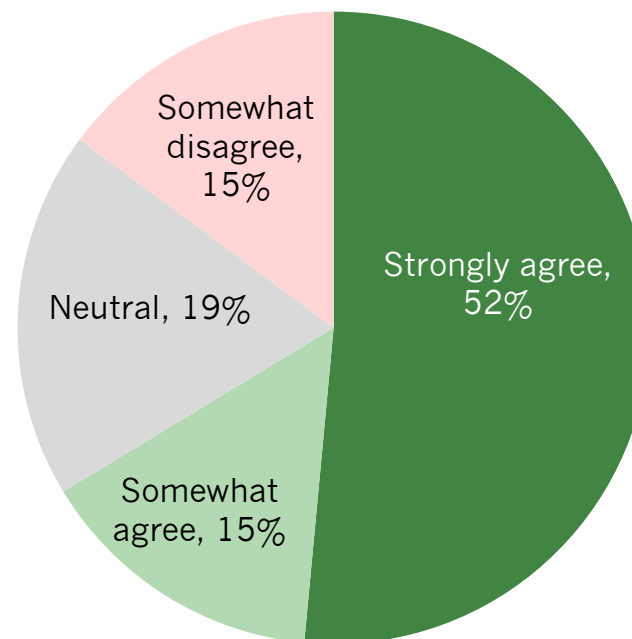
Question: Overall, would you agree or disagree with the following statements about your 2020 virtual festival experiences?

Film Festival Alliance 2020 Filmmaker Survey: 46 Respondents

Two thirds (67%) of filmmakers who participated in virtual festivals in 2020 prefer live Q&A's to pre-recorded Q&A's.

- 15%, about one in 6 or 7, disagree and somewhat prefer pre-recorded Q&A's

“I prefer live Q&A's to pre-recorded Q&A's” (Those Who Participated in Virtual Festivals in 2020 Only)



Results shown are for the 71% of filmmakers who participated in virtual festivals in 2020

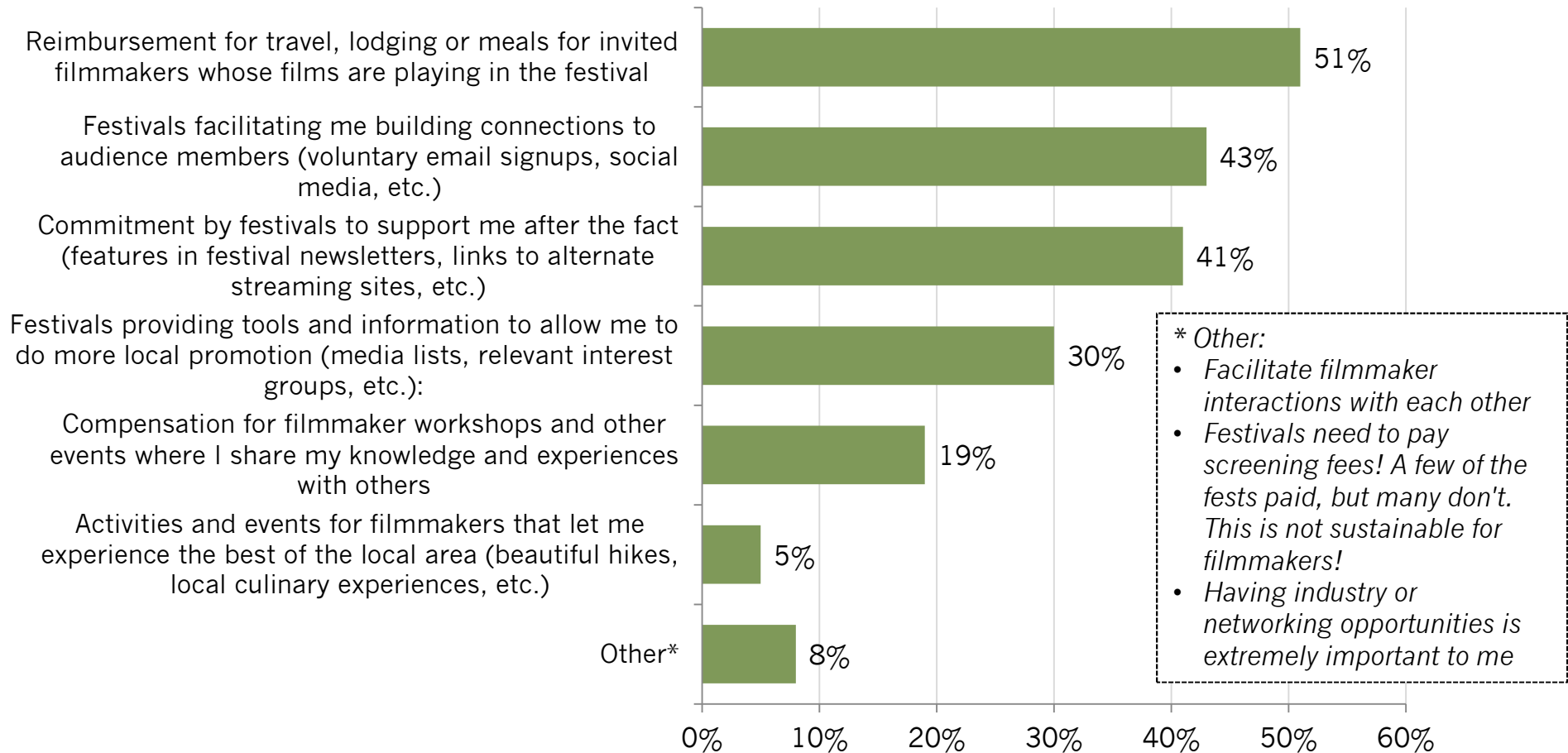
Question: Overall, would you agree or disagree with the following statements about your 2020 virtual festival experiences?

*Film Festival Alliance 2020 Filmmaker Survey:
46 Respondents*

There are several steps that festivals can take to improve filmmaker experiences.

- Some of these (i.e. those with a hard cost) would obviously have to be balanced with operational priorities and realities, but they could provide opportunities for festivals to distinguish themselves among filmmakers

Making The Festival Experience Better (choose up to 2)



Question: Going forward, what needs to be addressed for your experience of festivals to be more successful? Choose up to 2

Film Festival Alliance 2020 Filmmaker Survey:
46 Respondents

Final Thoughts (select comments)

Question: Do you have any FINAL thoughts on the topics in this survey? If yes, please enter them here.

- “Virtual film festivals screened my film and made Q&As available in festivals that ***I would never be able to attend in person.***”
- “***Festivals play an important role but are basically subsidized by filmmakers*** who pay an entry fee, but frequently don't get a screening fee. Compensation should be the #1 issue that fests need to address.”
- “The submission fees are ***too hard to afford for student filmmakers and independent filmmakers.***”
- “Festivals need to be more conscious about ***independent filmmakers who are part of marginalized communities and that the struggle twice as hard to make a film and promote it.*** So any help/support towards that reality is very welcoming and necessary.”
- “Festivals are what the filmmakers make of them, but the important thing is to have people in attendance, so ***any way the festival and filmmaker can work together*** for that to happen would be beneficial to both parties.
- “Q&As almost entirely focus on writers + directors, but ***as a producer, I have a lot to share too!*** Don't forget about us who are usually the ones managing the festival run and have been with the project from the beginning.”
- “***Let's hope Covid gets cleared up*** and we can all get back to real life, in person festivals soon!”

Audience Survey Results

Sources and Methods

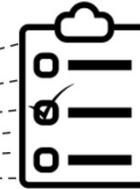
1



2



3



18 film festivals simultaneously fielded the survey with common questions and customized language

- Email invitations
- Social media posts
- Local press releases
- Etc.



TODAY:

Report of overall findings and implications

- Overall findings
- Implications
- Story lines

Each participating festival will receive a customized individual report showing festival-specific findings and how these compare to overall averages, along with detailed patron comments and requests

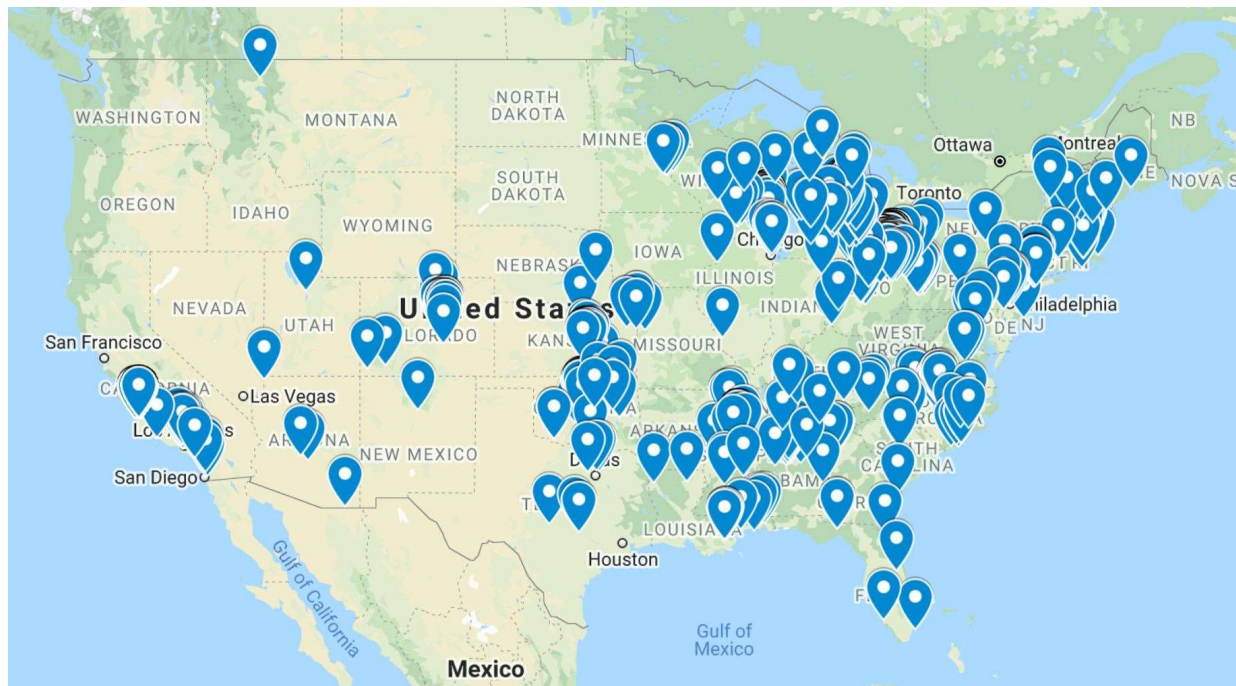
Particular thanks to the following festivals for participating in this first ever effort.

2020 Participating Festivals

- Alexander Valley Film Society
- BlackStar Film Festival
- Cleveland International Film Festival
- Cucalorus
- deadCenter Film
- Film Pittsburgh
- Hell's Half Mile Film & Music Festival
- IFFBoston
- Milwaukee Film
- New Orleans Film Society
- Oxford Film Festival
- Rocky Mountain Women's Film
- San Luis Obispo International Film Festival
- Sidewalk Film
- SIFF
- Tallgrass Film Festival
- Trees Columbus

More than 2,200 festival patrons participated in the study.

- There is representation within all of the principal regions of the U.S., with many hundreds of respondents from each
- Just over 50% of U.S. respondents currently live in the Midwest



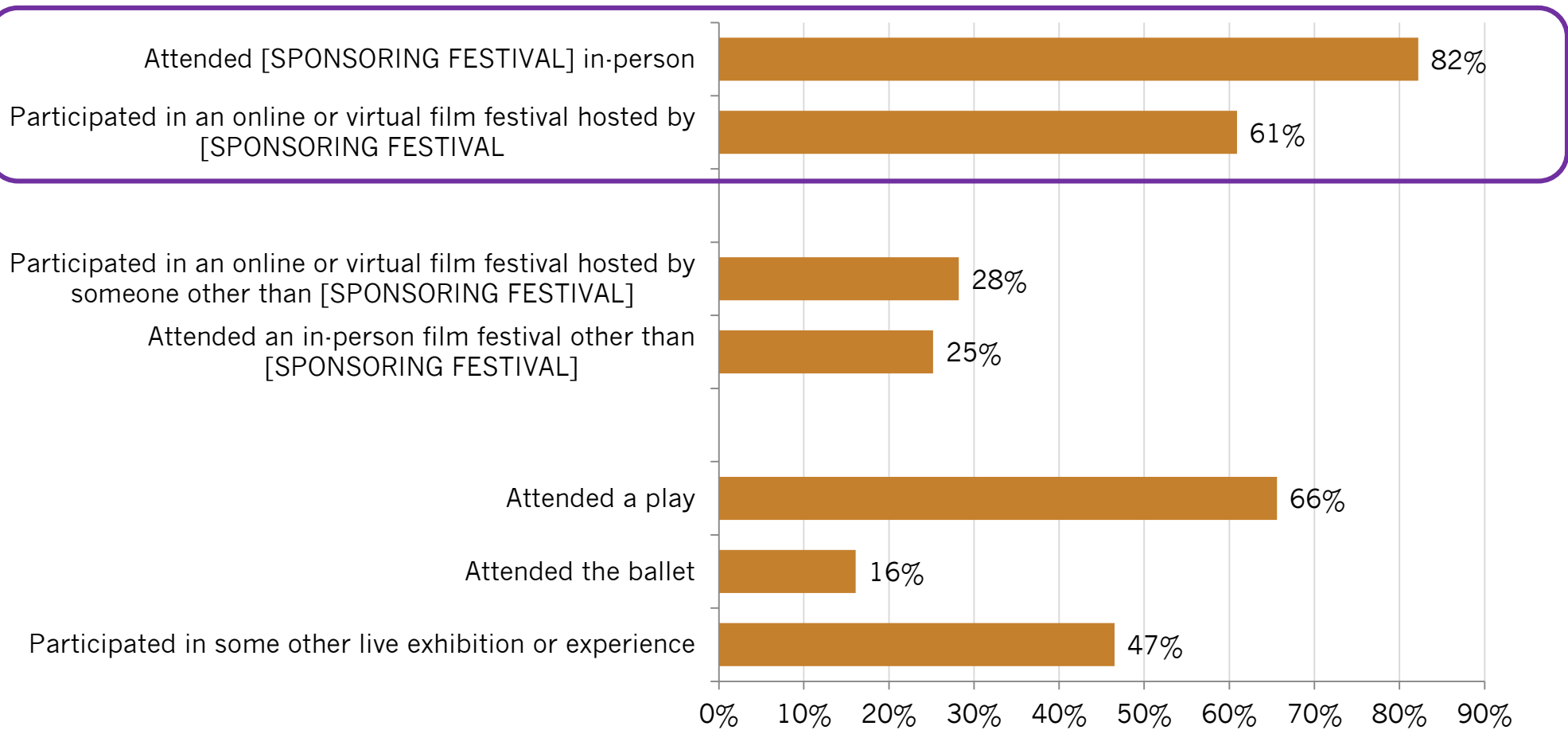
U.S. Region	%
East	14%
Midwest	53%
South	18%
West	15%

*Film Festival Alliance 2020 Audience Survey:
2,200 Respondents (festival attendees)*

The majority of respondents have both attended an in person festival and an online festival in the last 2 years.

- Many have participated in multiple film festivals and other arts performances

Arts and Culture Event Attendance



Question: In the last 2 years, which of these arts and culture events have you participated in?

*Film Festival Alliance 2020 Audience Survey:
2,200 Respondents (festival attendees)*

Given the wide variety among festivals, any “top” list will not reflect every audience...

- ...but here are the 17 films most often written in films that recently “made you appreciate [your] festival”

Films that Make Attendees Appreciate These Festivals

- *The Donut King*
- *Black Bear*
- *Coded Bias*
- *Minari*
- *Parasite*
- *Beanpole*
- *Aggie*
- *H is for Happiness*
- *Small Town Wisconsin*
- *Zappa*
- *Drought*
- *Ema*
- *Red Dog*
- *Sound of Metal*
- *Dramarama*
- *Jasper Mall*
- *The Crossing*



The Donut King



Black Bear



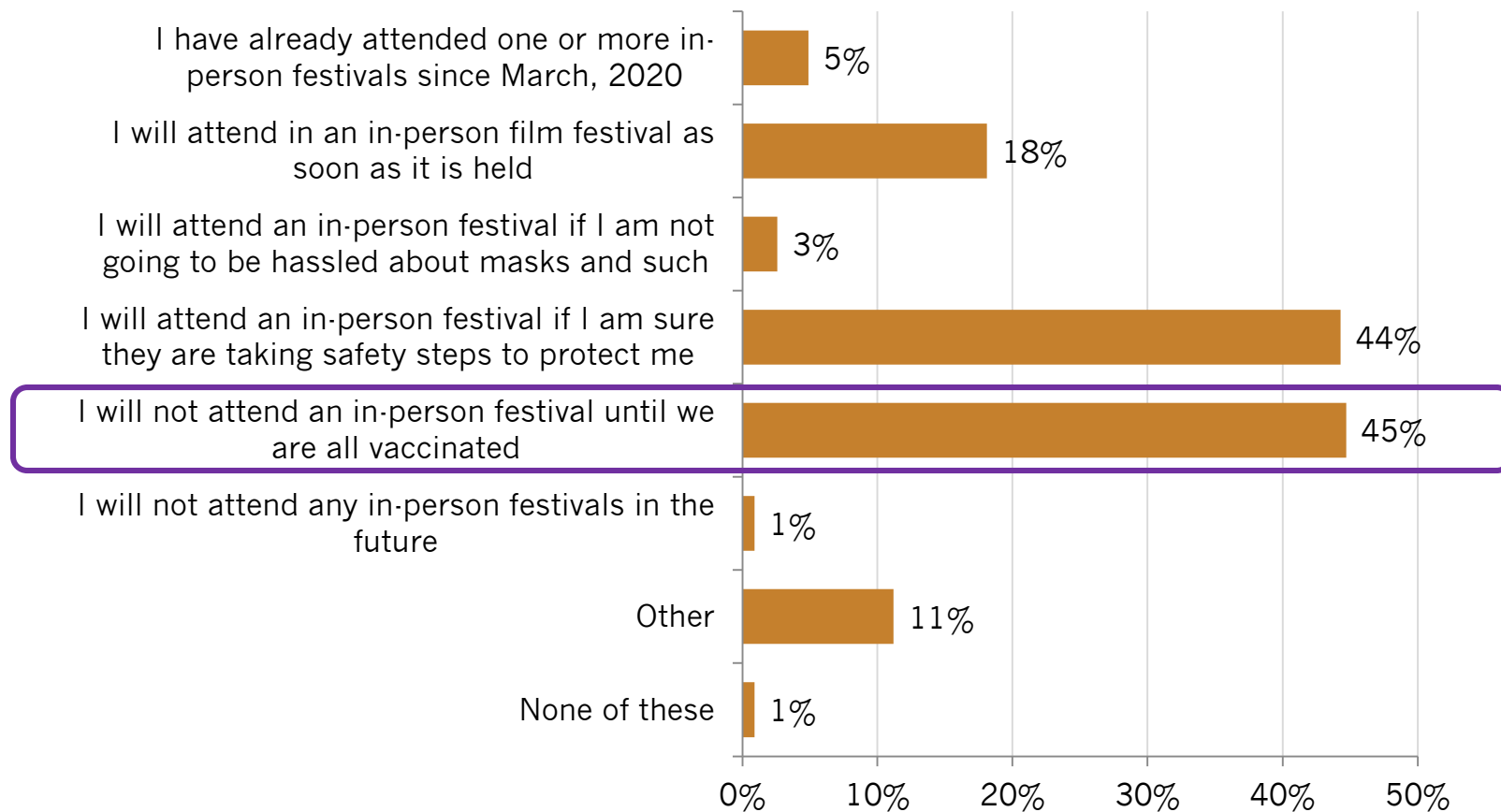
Coded Bias

Question: *What is a movie you have recently seen that really made you appreciate [SPONSORING FESTIVAL]?*

Although some attendees are ready to attend in-person festivals as soon as possible, most will need some assurance before returning

- About half of respondents will not attend in-person festivals until “we are all vaccinated”
- Only 1% indicated they will not attend festivals in the future

Future In Person Festival Attendance



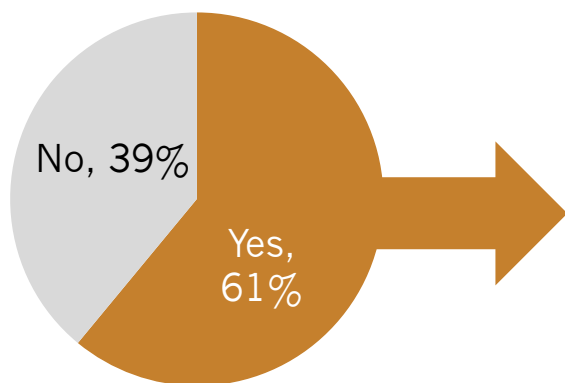
Question: How do you feel about attending in-person film festivals?
Please select all that apply.

Film Festival Alliance 2020 Audience Survey:
2,200 Respondents (festival attendees)

Audience members who participated in virtual festivals in 2020 generally give high marks to festival curation, ticket/pass sales, communications and technical performance.

- The biggest gaps are in opportunities to interact with filmmakers and with each other

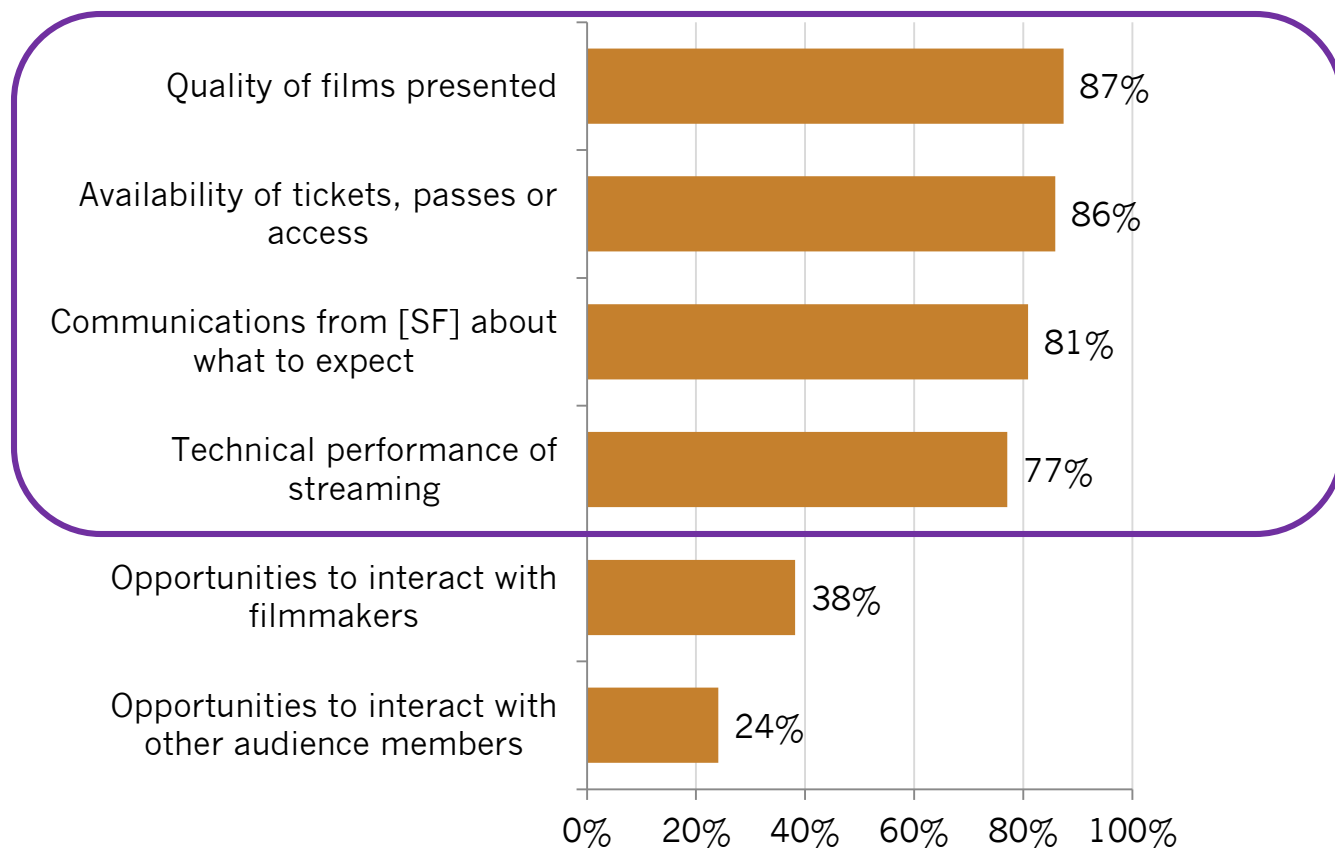
Participated in Virtual Festival in 2020



Results shown are for the 61% of respondents who attended a virtual film festival in 2020

*SF = Sponsoring festival

Virtual Event Experience – Top 2 Box (Very Good or Excellent)



Question: Please rate the following aspects of the virtual/online experience offered by [SPONSORING FESTIVAL].

Film Festival Alliance 2020 Audience Survey: 2,200 Respondents (festival attendees)

Most who participated in virtual festivals in 2020 had very positive comments and few suggestions. Those suggestions offered tended to fall in a few areas.

Question: Overall, what could have improved your experience of the virtual/online experience offered by [SPONSORING FESTIVAL]?



Opportunities to interact

- *“A 'watch party' experience similar to what Netflix offers where a group of people can watch a film together and have a chat area.”*
- *“More opportunities to interact”*
- *“Break out rooms in zooms, more audience interaction”*
- *“Live interviews with creative teams”*

Fewer Technical Issues (user error or otherwise)

- *“Ease of access. Had to have correct browser. Technical issues.”*
- *“I didn't like the online experience, too many technical difficulties. I understand the reason to do so but I wouldn't do it again.”*
- *“I thought I needed an HDMI cord which I bought. I had it all set up and it worked well, however afterwards I found out I could've done it on my Roku ...maybe an 800 number for assistance”*
- *“If movie was stopped mid-film it was not possible to resume. That was annoying.”*

Selection and Access to Films

- *“It would have been great to be able to see all the films I wanted to see. I was shut out of many of them. I will not subscribe to the virtual experience again. The offerings were too limited.”*
- *“Longer length of time to see the films. Luckily I was furloughed off in the spring of 2020 and could see many films all day, but I was tired. It was great!”*

Results shown are for the 61% of respondents who attended a virtual film festival in 2020

*Film Festival Alliance 2020 Audience Survey:
2,200 Respondents (festival attendees)*

Respondents indicate that in a “typical” year they are watching about one independent film per week.

- Film festivals account for 29% of all viewings

Mean Number of Independent Films Watched Per Year

Streaming Services



35%
18 viewings
per year

Movie Theater Exhibition



21%
11 viewings
per year

Film Festivals



29%
15 viewings
per year

At-Home Rental



15%
8 viewings
per year

BlackStar

Question: Over the course of a “typical” year, about how many independent films do you watch in each of these ways?

*Film Festival Alliance 2020 Audience Survey:
2,200 Respondents (festival attendees)*

91% of these film festival attendees subscribe to one or more streaming services.

- Although there is some participation in more niche platforms focusing on independent film, top services are Netflix, Amazon Prime, Hulu and HBO

Streaming Services (Prompted)

Streaming Service		Streaming Service	
Netflix	80%	Shudder	4%
Amazon Prime	71%	Mubi	3%
Hulu	45%	IndieFlix	1%
HBO	37%	Fandor	1%
Disney +	32%	Filmatique	0%
Apple TV	24%	Docsville	60%
Showtime	17%	None of these	9%
Kanopy	15%	Other *	11%
Criterion	6%		

* Other Streaming Services Top Mentions

- Acorn
- Hoopla
- CBS All Access
- BritBox
- PBS Passport
- Starz
- Sundance Now
- YouTube TV
- Peacock
- Tubi
- HBO MAX
- Friendly
- Curiosity Stream
- Broadway HD

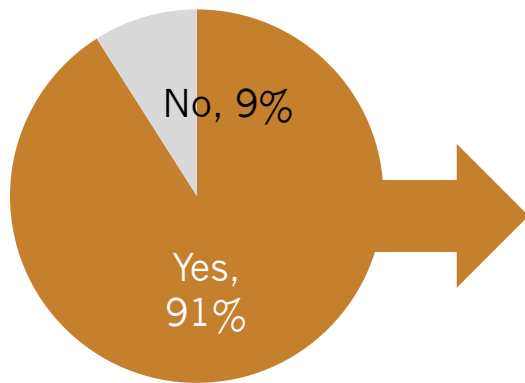
Question: Which of the following streaming services, if any, do you subscribe to?
Please select all that apply.

*Film Festival Alliance 2020 Audience Survey:
2,200 Respondents (festival attendees)*

If audience members do subscribe to streaming services, they generally are streaming on an internet browser, cable box or Roku.

- A wide array of other devices and formats are also used

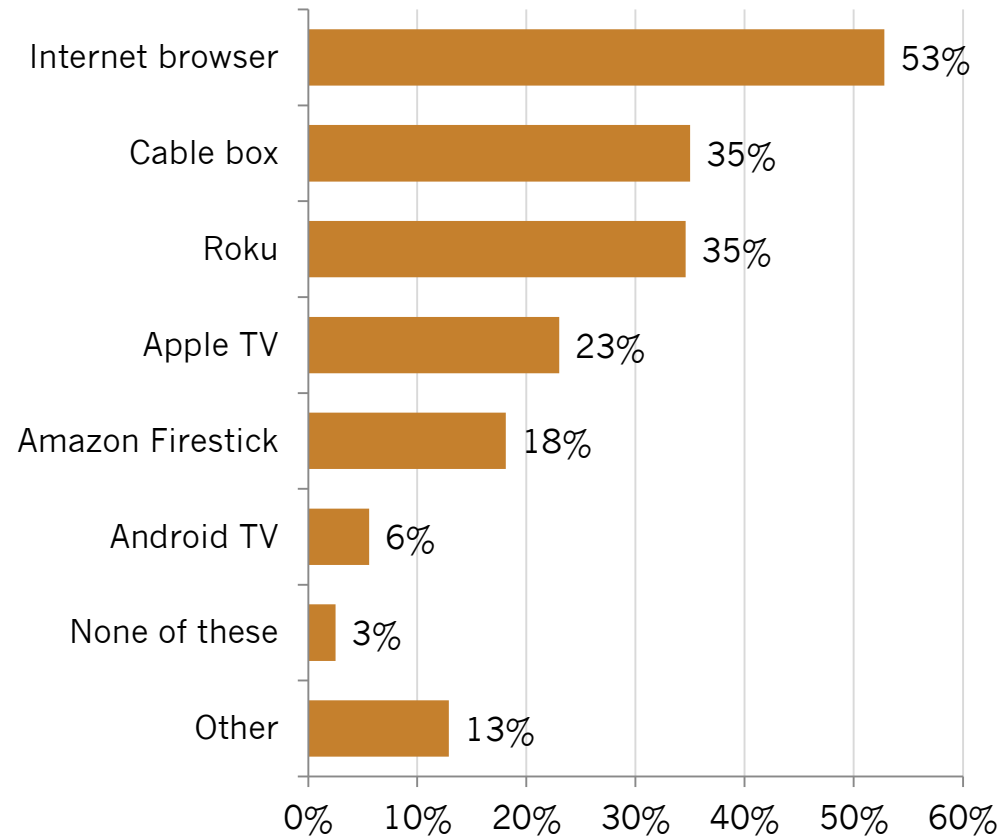
Subscribe to Streaming Service



Results shown are for the 91% of festival attendees who subscribe to one or more streaming services

Film Festival Alliance 2020 Audience Survey: 2,200 Respondents (festival attendees)

Streaming Devices

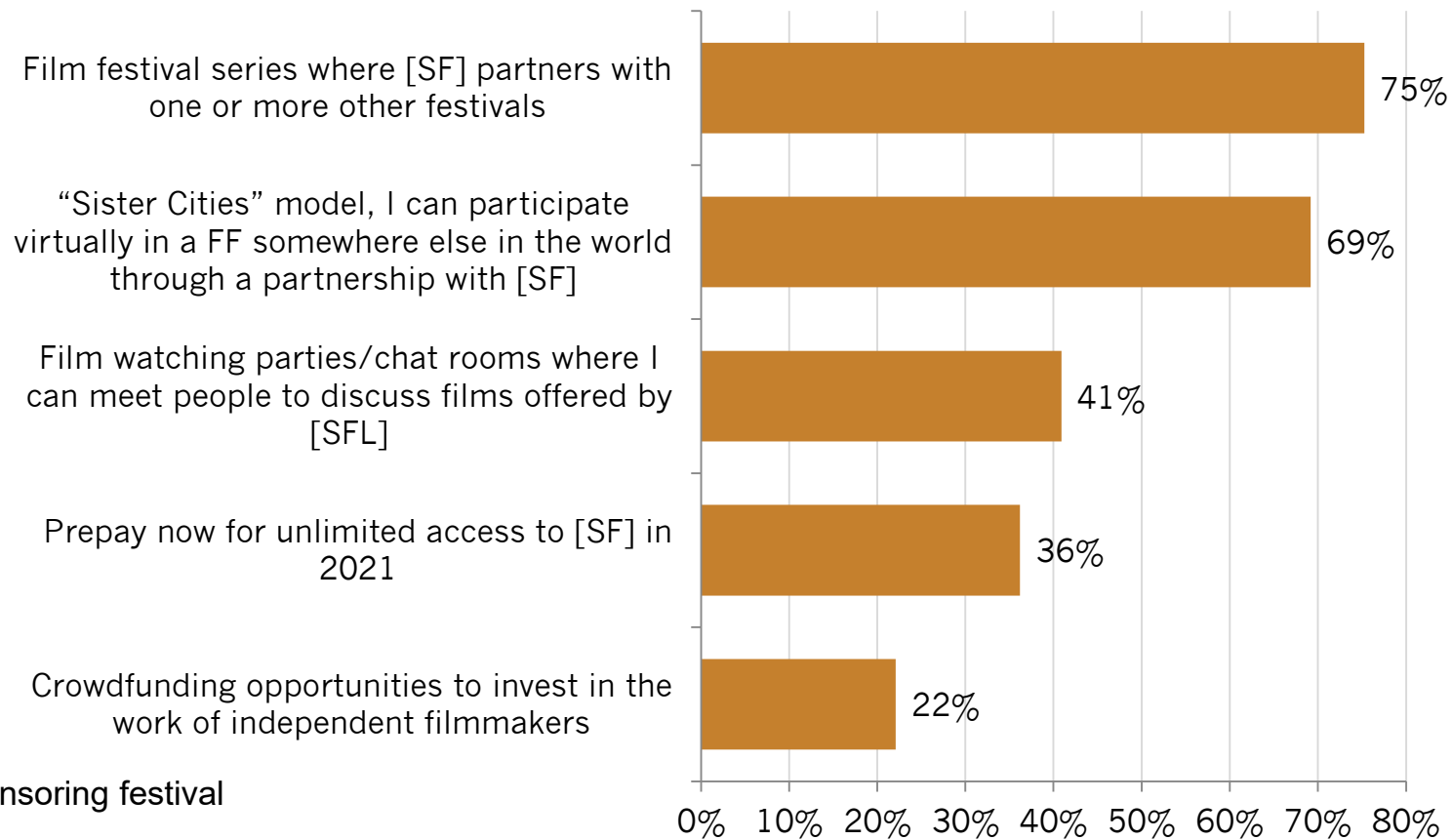


Question: Which of the following, if any, do you use to stream movies and/or TV? Please select all that apply.

Looking forward, film festival audiences are interested in opportunities to engage with festivals and festival audiences in new ways.

- These ideas were just thought starters; it is clear that there are multiple opportunities for festival collaboration in programming, pre-sales, crowdfunding for film production, etc.

Interest In Potential New Programs



*SF = Sponsoring festival

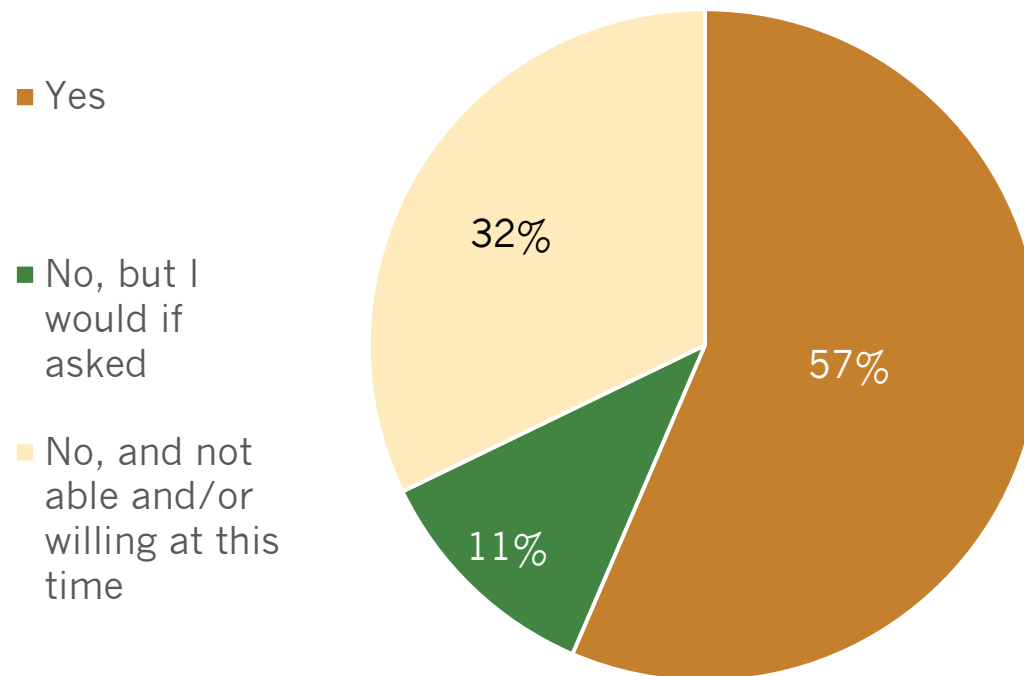
Question: Which of the following programs would you be interested in participating in? If already participating, please select anyway. Select all that apply.

Film Festival Alliance 2020 Audience Survey:
2,200 Respondents (festival attendees)

Although most respondents already provide some financial support to festivals, many more would do so if asked.

- This serves as an evergreen reminder of the opportunity to migrate patrons and audience members to financial contributors

Have Made Contributions to [Sponsoring Festival]



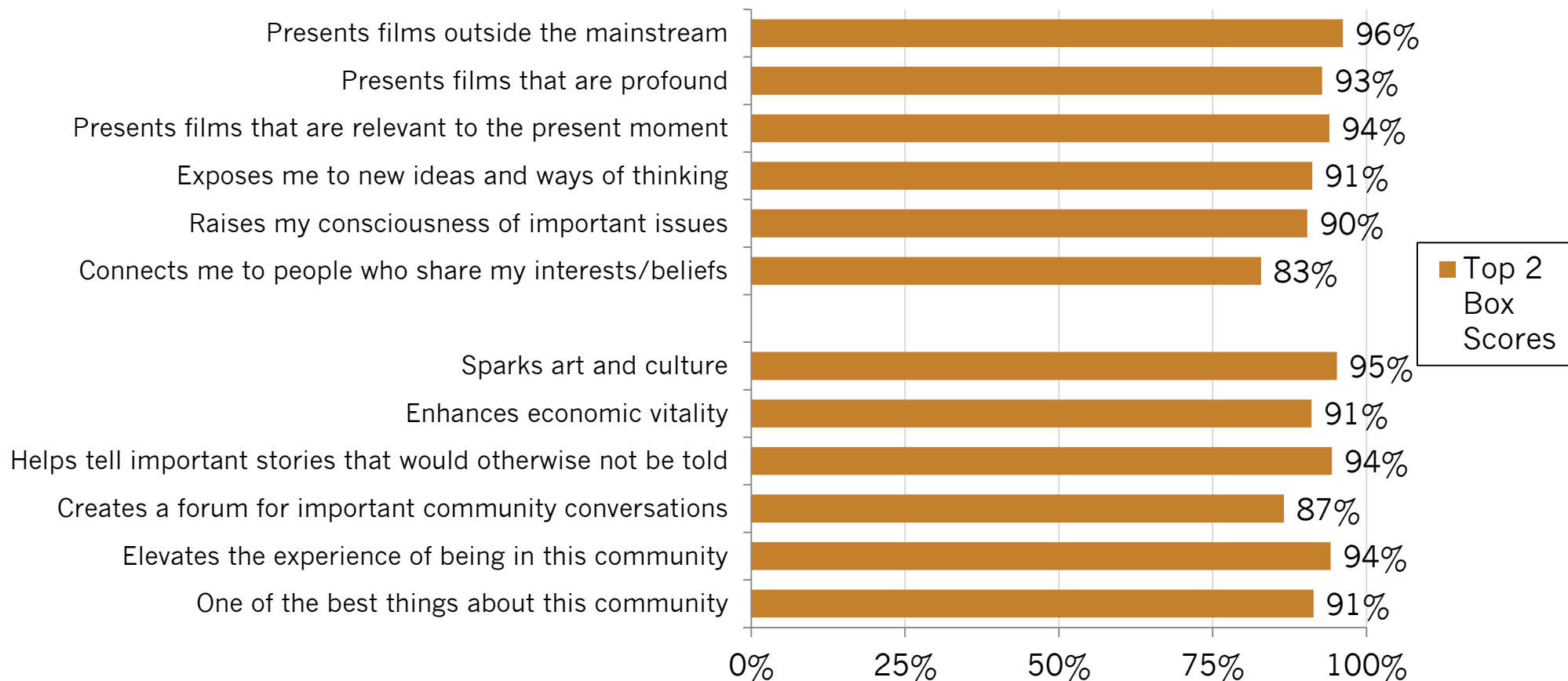
Question: *Have you ever given a cash contribution to [SPONSORING FESTIVAL], beyond a basic annual membership?*

*Film Festival Alliance 2020 Audience Survey:
2,200 Respondents (festival attendees)*

These audience members agree that film festivals have profound impacts on them and on their communities.

- In addition to helping attendees gain new perspective and understanding, film festivals enhance their community experience

Personal Impacts: Top 2 Box (Strongly or Somewhat Agree)



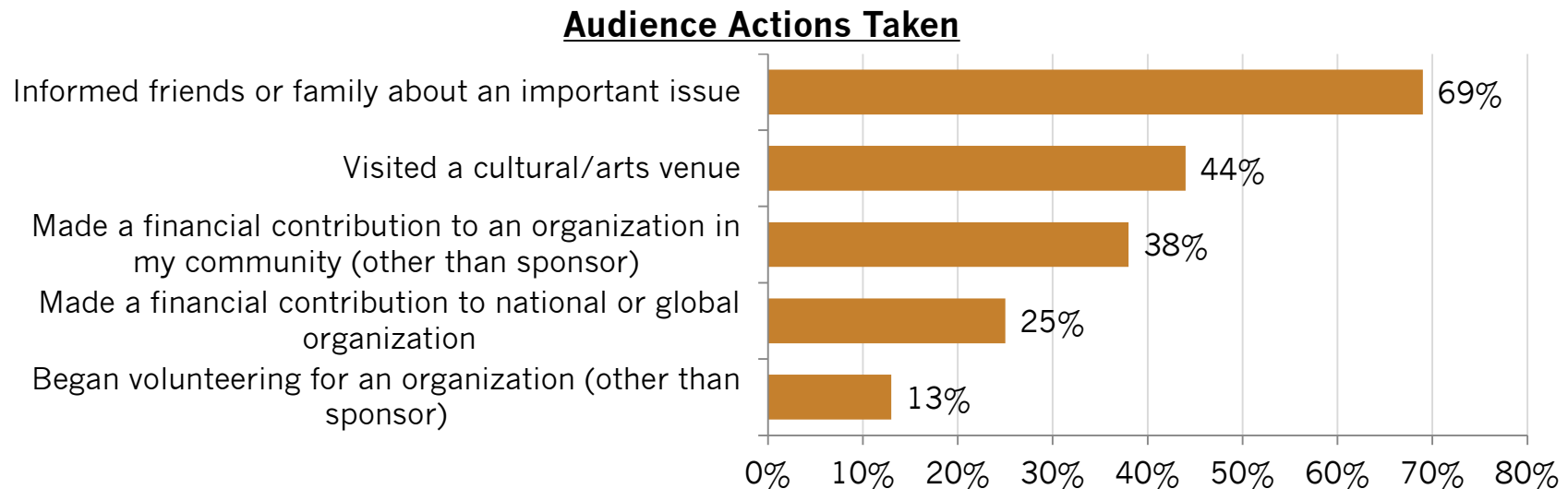
Question: 5. To what extent do you agree with the following statements about

*Film Festival Alliance 2020 Audience Survey:
2,200 Respondents (festival attendees)*

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**

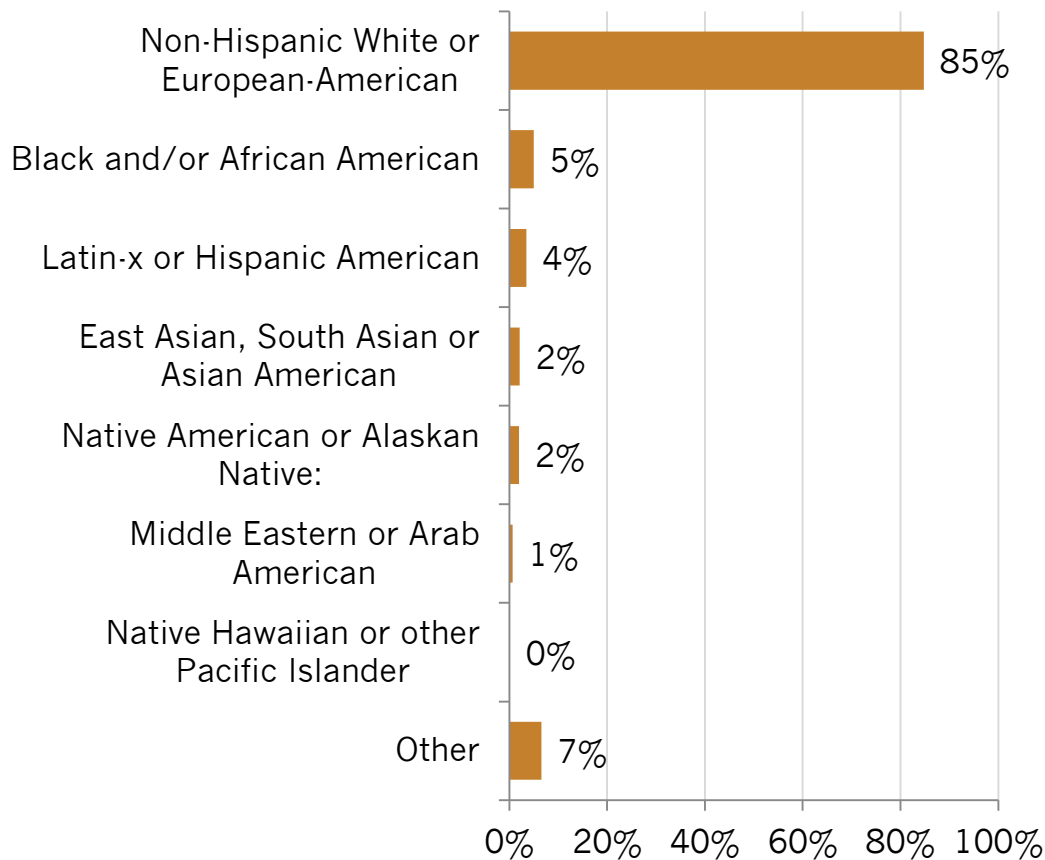


*Film Festival Alliance 2020 Audience Survey:
2,200 Respondents (festival attendees)*

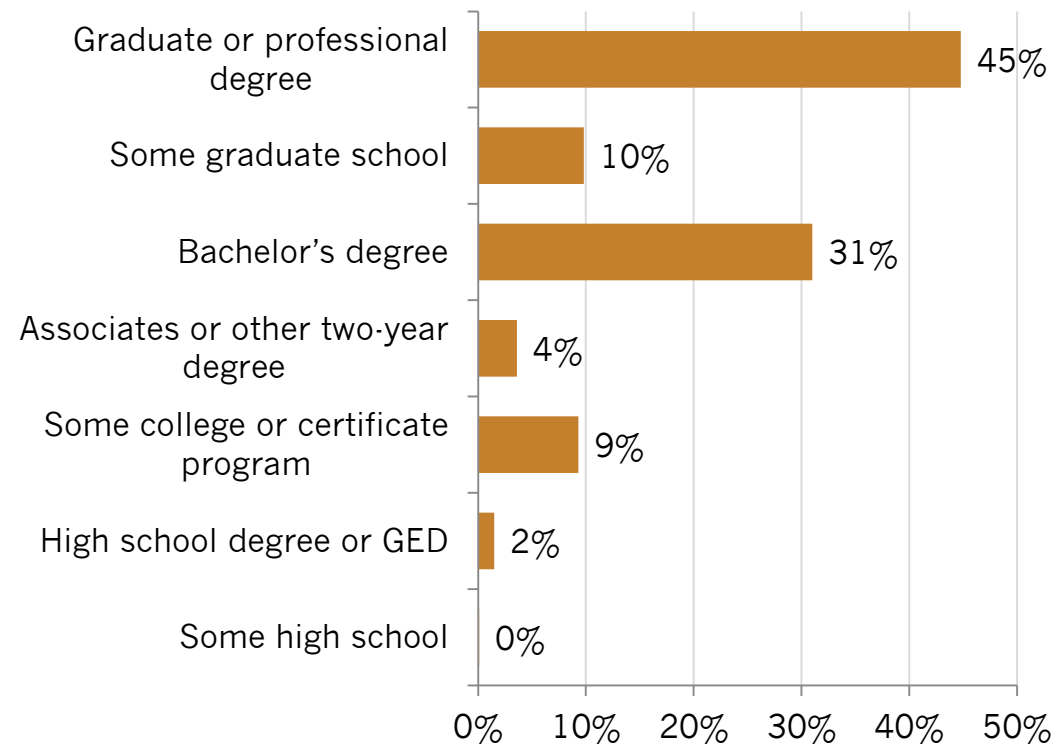
Demographics: This film festival audiences are highly-educated, with 85% having a bachelor's degree or higher.

- Although the majority of these attendees are white, people of many other ethnic backgrounds are represented

Racial or Ethnic Background (select all that apply)



Education Level

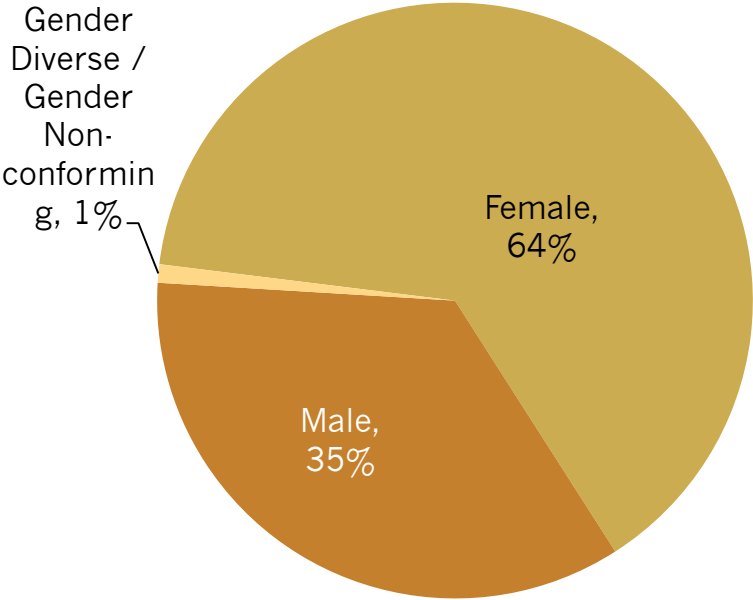


*Film Festival Alliance 2020 Audience Survey:
2,200 Respondents (festival attendees)*

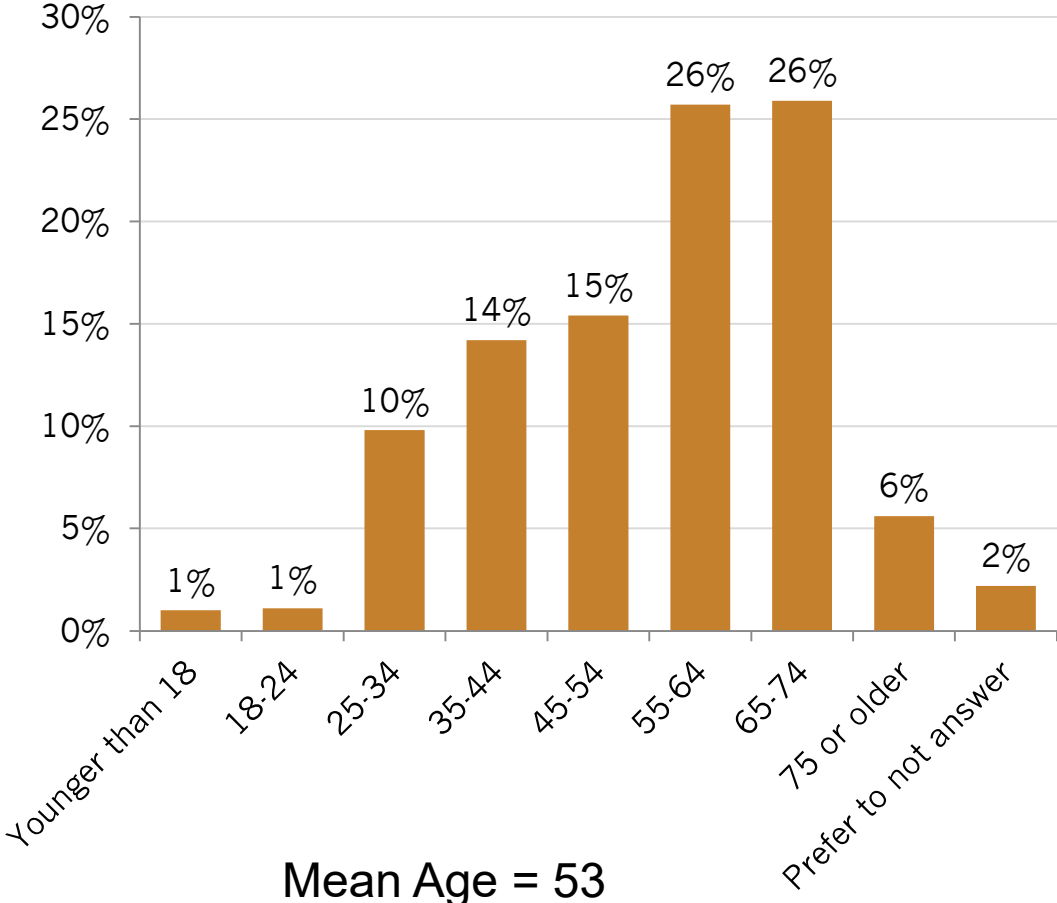
Most of these festival attendees identify female.

- Average age is 53

Gender Identity

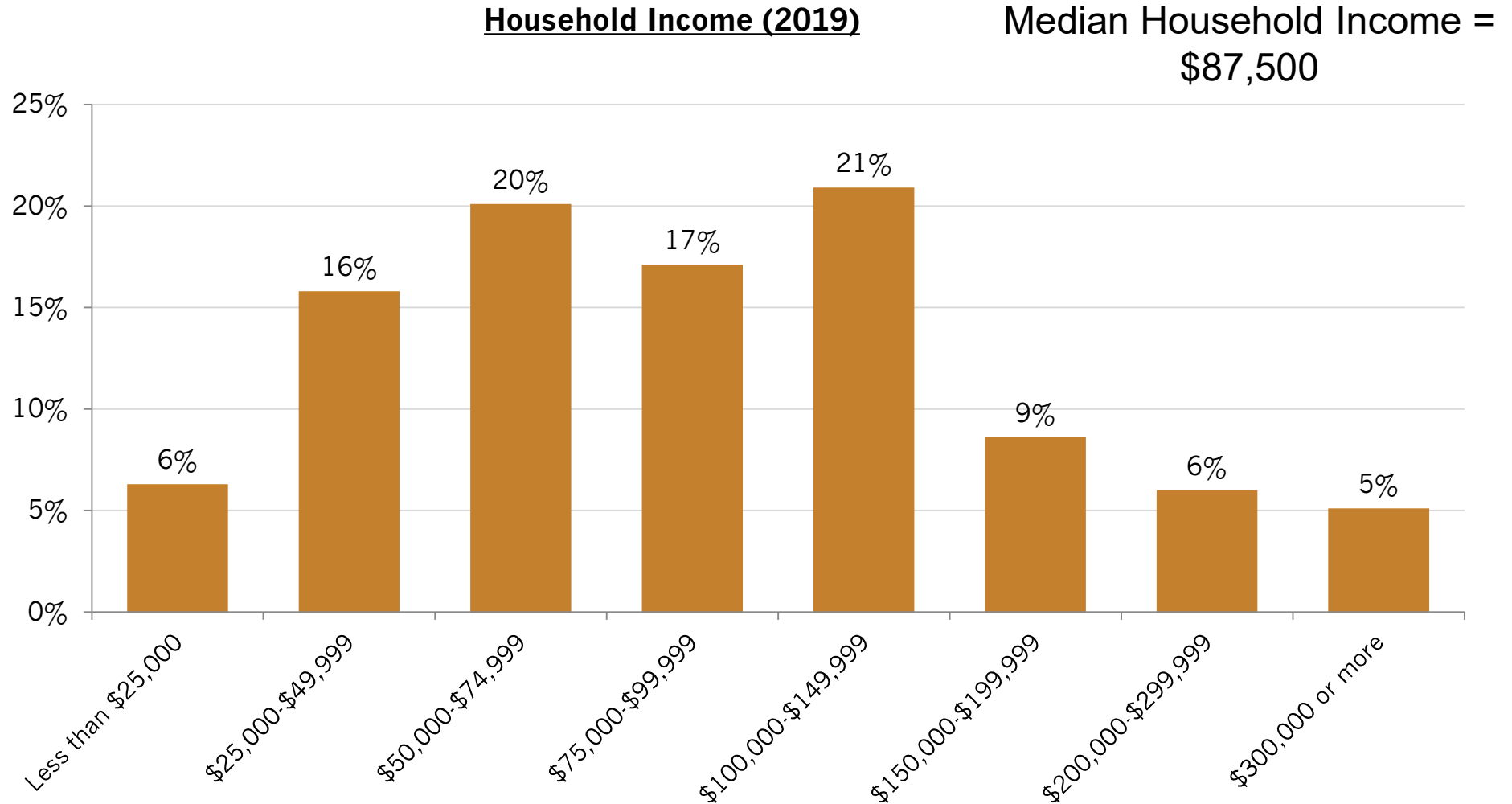


Age



*Film Festival Alliance 2020 Audience Survey:
2,200 Respondents (festival attendees)*

Although the majority of respondents have household income above the U.S. median of \$69,000, many with lower incomes participate in festivals.



*Film Festival Alliance 2020 Audience Survey:
2,200 Respondents (festival attendees)*

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 Audience Survey:
2,200 Respondents (festival attendees)*

Key Takeaways and Implications

From Filmmakers we learned...

- Film festivals are important to advance their careers and the success of their films
- Film festivals are also essential forums for them to connect with other filmmakers, festival audiences and other important communities
- The best large festivals provide industry visibility and connections along with specific programs designed to support festivals
- The best small festivals show appreciation for filmmakers and support them in a number of ways
- Independent filmmakers, who may be young or from marginalized communities, would appreciate more financial support from festivals
- There are other opportunities to improve in the eyes of filmmakers

From Film Festival Audience Members we learned....

- Festivals elevate their lives and inspire them to take action
- Audience members who participated in virtual festivals in 2020 are generally positive about the experience, though they would appreciate more opportunities to engage with each other and with filmmakers
- Audience members are cautious but looking forward to returning to in person festivals
- There may be opportunities to expand audience support of festivals through cross-festival collaboration, pre-paid subscription options and donation requests

Thank You! Questions?

