2020 Filmmaker and Audience Survey Results

FilmEx 2021 Presentation

January 14, 2021
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
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.
There are three samples of data collected as part of this project.

<table>
<thead>
<tr>
<th>Characteristics</th>
<th>Festival Organizers (reported Jan. 11)</th>
<th>Filmmakers (reported today)</th>
<th>Festival Attendees (reported today)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Decision makers representing film festivals:</td>
<td>• 51% Executive Directors</td>
<td>• 71% Directors</td>
<td>Festival attendees and other patrons of film festivals:</td>
</tr>
<tr>
<td></td>
<td>• 51% Programmers, Curators or Artistic Directors</td>
<td>• 70% Producers</td>
<td>• 94% attended either an in-person or virtual festival in the last 2 years</td>
</tr>
<tr>
<td></td>
<td>• 15% Other Festival Managers</td>
<td>• 56% Writers</td>
<td>Note: multiple categories could be selected</td>
</tr>
<tr>
<td>Note: multiple categories could be selected</td>
<td></td>
<td>Note: multiple categories could be selected</td>
<td></td>
</tr>
<tr>
<td>Sample Size</td>
<td>61</td>
<td>46</td>
<td>2,200</td>
</tr>
<tr>
<td>Research Method</td>
<td>Web Based Survey</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Collection Period</td>
<td>November/December, 2020</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
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)

- **Producer**: 83%
- **Director**: 78%
- **Writer**: 67%
- **Actor**: 13%
- **Other filmmaking role***: 15%
- **Distributor**: 2%
- **Other****: 7%

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### How Long Making Films?

- Less than 5 years: 37%
- 5-10 years: 37%
- More than 10 years: 26%

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### Age of Respondent

- Younger than 35: 52%
- 35-54: 36%
- 55 or older: 12%

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

**Question:** Which of the following filmmaking roles have you had in the last 3 years? Please select all that apply
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
  - Social Justice: 40%
  - LGBTQIA+ Films: 31%
  - Race in America: 24%
  - Environment/Nature: 20%
  - Reproductive Rights: 4%
  - Other, please specify: 24%
  - Other: black experience, culture/history, female perspective, feminism, identity, latin-x communities, personal/memoir, science and discovery, women/gender politics, veterans issues: 42%

- Format & Length
  - Full length features: 76%
  - Shorts: 71%
  - Non-Fiction: 40%
  - Fiction: 51%
  - Other, please specify: 4%
  - Other: animation, music videos: 4%

- Genre
  - Horror: 18%
  - Fantasy: 11%
  - Camp: 9%
  - Science Fiction: 7%
  - Musicals: 2%
  - Other, please specify: 42%
  - Other: drama (10 mentions), documentary (3), comedy (2), thriller (2), art, coming of age, dramedy, noir, romance: 4%

**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

<table>
<thead>
<tr>
<th>Benefit</th>
<th>Extremely important</th>
<th>Important</th>
<th>Not important</th>
<th>N/A – not applicable</th>
</tr>
</thead>
<tbody>
<tr>
<td>Connect with industry influencers</td>
<td>71%</td>
<td></td>
<td>30%</td>
<td></td>
</tr>
<tr>
<td>Advance my/our reputation</td>
<td>64%</td>
<td></td>
<td>33%</td>
<td>2%</td>
</tr>
<tr>
<td>Connect with other filmmakers/peers</td>
<td>64%</td>
<td></td>
<td>36%</td>
<td></td>
</tr>
<tr>
<td>Experience my films in person with a live audience</td>
<td>57%</td>
<td></td>
<td>43%</td>
<td></td>
</tr>
<tr>
<td>Build momentum for theatrical and/or streaming release</td>
<td>49%</td>
<td></td>
<td>36%</td>
<td>11%</td>
</tr>
<tr>
<td>Connect with communities of importance to me (e.g. LGBTQ+ communities)</td>
<td>40%</td>
<td></td>
<td>44%</td>
<td>11%</td>
</tr>
<tr>
<td>Just “making it” through a competitive selection process is important</td>
<td>49%</td>
<td></td>
<td>56%</td>
<td>16%</td>
</tr>
<tr>
<td>Win awards/acclaim for my projects at festivals</td>
<td>24%</td>
<td></td>
<td>62%</td>
<td>11%</td>
</tr>
<tr>
<td>Have an opportunity to visit other parts of the country/world</td>
<td>24%</td>
<td></td>
<td>49%</td>
<td>24%</td>
</tr>
<tr>
<td>Qualify for nomination to awards events (e.g. Oscars)</td>
<td>23%</td>
<td></td>
<td>55%</td>
<td>21%</td>
</tr>
</tbody>
</table>

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

**Films Released in 2020**

- No films at all: 24%
- 1 film: 60%
- 2-3 films: 14%
- More than 3 films: 2%

**Participation in 2020 Festivals (select all that apply)**

- Participated in one or more online/virtual festivals: 94%
- Participated in one or more in person festivals: 32%
- Postponed release of a film to wait for exhibition conditions to improve: 16%
- Held a film out of festivals and went directly to streaming: 10%
- Had a film accepted by a festival and then took it back when the festival went online: 16%

**Question:** How many films, if any, did you release in 2020?

**Question:** Did you do any of the following in 2020? Please select all that apply.
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.

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

**Number of Virtual Festivals**

- 5 or fewer: 46%
- 6-10: 43%
- 11-25: 11%
- More than 25: 0%

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

**Months (select all that apply)**

- March: 14%
- April: 21%
- May: 32%
- June: 46%
- July: 36%
- August: 50%
- September: 64%
- October: 71%

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

<table>
<thead>
<tr>
<th>Statement</th>
<th>Strongly agree</th>
<th>Somewhat agree</th>
<th>Neutral</th>
<th>Not applicable</th>
<th>Top 2 Box Strongly/Somewhat Agree</th>
</tr>
</thead>
<tbody>
<tr>
<td>Virtual festivals give me a chance to reach a wider audience than I otherwise would</td>
<td>26%</td>
<td>44%</td>
<td>15%</td>
<td>7%</td>
<td>7%</td>
</tr>
<tr>
<td>Online/Virtual festivals have been improving over time</td>
<td>11%</td>
<td>56%</td>
<td>19%</td>
<td>11%</td>
<td>70%</td>
</tr>
<tr>
<td>Festivals have done a good job w/ communications re: virtual festival submissions &amp; participation</td>
<td>7%</td>
<td>41%</td>
<td>15%</td>
<td>26%</td>
<td>41%</td>
</tr>
<tr>
<td>Film festivals have generally done a good job promoting me &amp; my film(s) at virtual festivals</td>
<td>7%</td>
<td>41%</td>
<td>19%</td>
<td>22%</td>
<td>7%</td>
</tr>
<tr>
<td>It’s been nice not to have to travel all over the place to participate in festivals</td>
<td>11%</td>
<td>22%</td>
<td>11%</td>
<td>30%</td>
<td>33%</td>
</tr>
<tr>
<td>Geo-blocking has generally worked well</td>
<td>4%</td>
<td>44%</td>
<td>19%</td>
<td>11%</td>
<td>22%</td>
</tr>
<tr>
<td>Ticket Capping has worked well</td>
<td>7%</td>
<td>11%</td>
<td>37%</td>
<td>11%</td>
<td>30%</td>
</tr>
</tbody>
</table>

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?
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)

1. Reimbursement for travel, lodging or meals for invited filmmakers whose films are playing in the festival (51%)
2. Festivals facilitating me building connections to audience members (voluntary email signups, social media, etc.) (43%)
3. Commitment by festivals to support me after the fact (features in festival newsletters, links to alternate streaming sites, etc.) (41%)
4. Festivals providing tools and information to allow me to do more local promotion (media lists, relevant interest groups, etc.): (30%)
5. Compensation for filmmaker workshops and other events where I share my knowledge and experiences with others (19%)
6. Activities and events for filmmakers that let me experience the best of the local area (beautiful hikes, local culinary experiences, etc.) (19%)
7. Other*: Facilitate filmmaker interactions with each other (8%)
8. Festivals need to pay screening fees! A few of the fests paid, but many don't. This is not sustainable for filmmakers! (5%)
9. Having industry or networking opportunities is extremely important to me (4%)

**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
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
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

<table>
<thead>
<tr>
<th>Region</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>East</td>
<td>14%</td>
</tr>
<tr>
<td>Midwest</td>
<td>53%</td>
</tr>
<tr>
<td>South</td>
<td>18%</td>
</tr>
<tr>
<td>West</td>
<td>15%</td>
</tr>
</tbody>
</table>
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**

- Attended [SPONSORING FESTIVAL] in-person: 82%
- Participated in an online or virtual film festival hosted by [SPONSORING FESTIVAL]: 61%
- Participated in an online or virtual film festival hosted by someone other than [SPONSORING FESTIVAL]: 28%
- Attended an in-person film festival other than [SPONSORING FESTIVAL]: 25%
- Attended a play: 66%
- Attended the ballet: 16%
- Participated in some other live exhibition or experience: 47%

**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

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

I have already attended one or more in-person festivals since March, 2020
- 5%

I will attend in an in-person film festival as soon as it is held
- 18%

I will attend an in-person festival if I am not going to be hassled about masks and such
- 3%

I will attend an in-person festival if I am sure they are taking safety steps to protect me
- 44%

I will not attend an in-person festival until we are all vaccinated
- 45%

I will not attend any in-person festivals in the future
- 1%

Other
- 11%

None of these
- 1%

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

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

- Quality of films presented: 87%
- Availability of tickets, passes or access: 86%
- Communications from [SF] about what to expect: 81%
- Technical performance of streaming: 77%
- Opportunities to interact with filmmakers: 38%
- Opportunities to interact with other audience members: 24%

*SF = Sponsoring festival

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

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

**Participated in Virtual Festival in 2020**

- Yes, 61%
- No, 39%

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

January 14, 2021
FilmEx 2021 Filmmaker & Audience Survey Results

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

- Film festivals account for 29% of all viewings

<table>
<thead>
<tr>
<th>Mean Number of Independent Films Watched Per Year</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Streaming Services</strong></td>
</tr>
<tr>
<td>35%</td>
</tr>
<tr>
<td>18 viewings per year</td>
</tr>
<tr>
<td><strong>Film Festivals</strong></td>
</tr>
<tr>
<td>29%</td>
</tr>
<tr>
<td>15 viewings per year</td>
</tr>
<tr>
<td><strong>Movie Theater Exhibition</strong></td>
</tr>
<tr>
<td>21%</td>
</tr>
<tr>
<td>11 viewings per year</td>
</tr>
<tr>
<td><strong>At-Home Rental</strong></td>
</tr>
<tr>
<td>15%</td>
</tr>
<tr>
<td>8 viewings per year</td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th>Streaming Service</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Netflix</td>
<td>80%</td>
</tr>
<tr>
<td>Amazon Prime</td>
<td>71%</td>
</tr>
<tr>
<td>Hulu</td>
<td>45%</td>
</tr>
<tr>
<td>HBO</td>
<td>37%</td>
</tr>
<tr>
<td>Disney +</td>
<td>32%</td>
</tr>
<tr>
<td>Apple TV</td>
<td>24%</td>
</tr>
<tr>
<td>Showtime</td>
<td>17%</td>
</tr>
<tr>
<td>Kanopy</td>
<td>15%</td>
</tr>
<tr>
<td>Criterion</td>
<td>6%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Streaming Service</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Shudder</td>
<td>4%</td>
</tr>
<tr>
<td>Mubi</td>
<td>3%</td>
</tr>
<tr>
<td>IndieFlix</td>
<td>1%</td>
</tr>
<tr>
<td>Fandor</td>
<td>1%</td>
</tr>
<tr>
<td>Filmatique</td>
<td>0%</td>
</tr>
<tr>
<td>None of these</td>
<td>9%</td>
</tr>
<tr>
<td>Other *</td>
<td>11%</td>
</tr>
</tbody>
</table>

*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.
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**

- Yes, 91%
- No, 9%

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

**Streaming Devices**

- Internet browser: 53%
- Cable box: 35%
- Roku: 35%
- Apple TV: 23%
- Amazon Firestick: 18%
- Android TV: 6%
- None of these: 3%
- Other: 13%

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

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

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

* *SF = Sponsoring festival*

- **Film festival series where [SF] partners with one or more other festivals**: 75%
- **“Sister Cities” model, I can participate virtually in a FF somewhere else in the world through a partnership with [SF]**: 69%
- **Film watching parties/chat rooms where I can meet people to discuss films offered by [SFL]**: 41%
- **Prepay now for unlimited access to [SF] in 2021**: 36%
- **Crowdfunding opportunities to invest in the work of independent filmmakers**: 22%
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]**

- **Yes**: 57%
- **No, but I would if asked**: 32%
- **No, and not able and/or willing at this time**: 11%

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

- Presents films outside the mainstream: 96%
- Presents films that are profound: 93%
- Presents films that are relevant to the present moment: 94%
- Exposes me to new ideas and ways of thinking: 91%
- Raises my consciousness of important issues: 90%
- Connects me to people who share my interests/beliefs: 83%
- Sparks art and culture: 95%
- Enhances economic vitality: 91%
- Helps tell important stories that would otherwise not be told: 94%
- Creates a forum for important community conversations: 87%
- Elevates the experience of being in this community: 94%
- One of the best things about this community: 91%

**Question:** 5. To what extent do you agree with the following statements about film festivals?
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 Actions Taken**

- 69% informed friends or family about an important issue
- 44% visited a cultural/arts venue
- 38% made a financial contribution to an organization in my community (other than sponsor)
- 25% made a financial contribution to a national or global organization
- 13% began volunteering for an organization (other than sponsor)

*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.
Most of these festival attendees identify female.

- Average age is 53

Gender Identity

- Female, 64%
- Male, 35%
- Gender Diverse / Gender Non-conforming, 1%

Age

- Mean Age = 53
Although the majority of respondents have household income above the U.S. median of $69,000, many with lower incomes participate in festivals.
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. If 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”
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?