



whistler
FILM FESTIVAL

The Future of Film Festivals

Emerging models
and relevant practices for
media arts organizations

FINAL REPORT

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1. Introduction

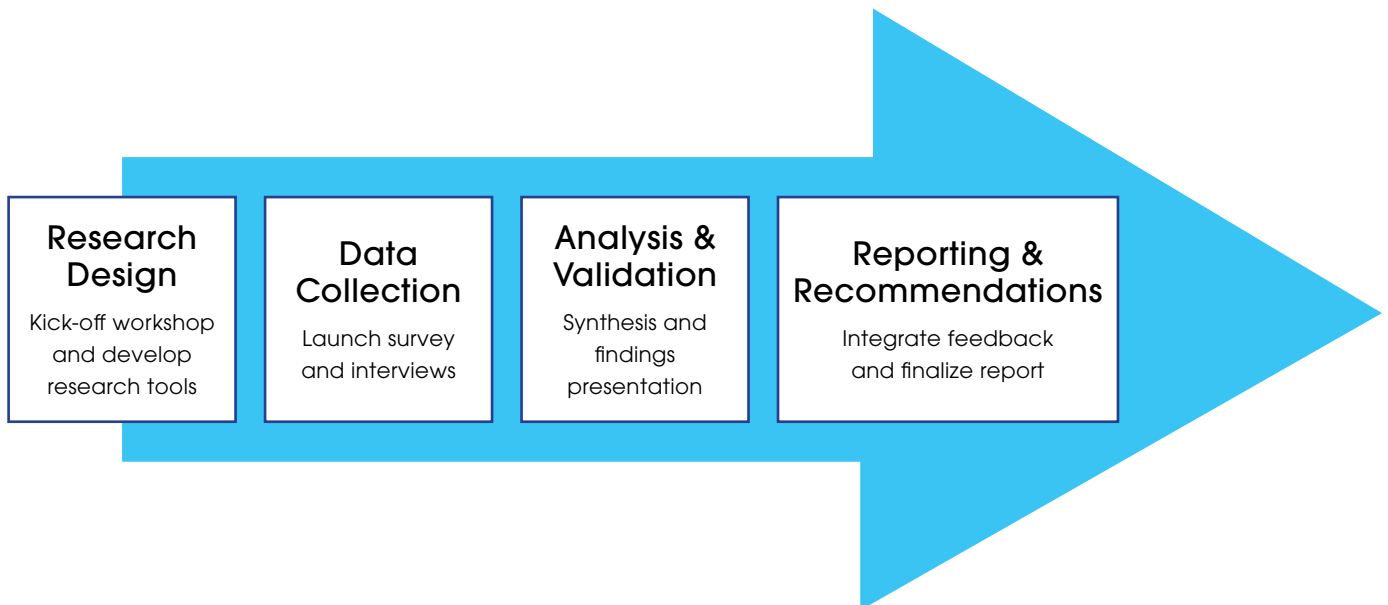
Film festivals are increasingly being recognized for their significant role in the global cultural landscape. Through innovations, initiatives, and influence, **festivals attract a wide variety of artists, creators, audiences, and change-makers**. Having such a platform can mean sudden fluctuations can have wide-reaching implications and impacts felt by all. The film industry has experienced unprecedented change during the pandemic – from theatre closures and festival cancellations to disruption in film production and distribution channels. More specifically, the disruption has resulted in the loss of in-person showings, unpredictable funding, and changes in viewer preferences and behaviours.

The disruption has also forced many organizations to re-evaluate their current program planning, organizational practices, and business models in order to survive, causing **a shift in the industry that has now been accelerated due to the increased and evolving use of digital platforms**. These shifts in the broader film sector ecosystem are creating new challenges and opportunities for film festivals, in particular impacting the content creators and filmmakers showcased on these platforms.

1.1 Approach

It is with the above context in mind that Nordicity was engaged by the Whistler Film Festival to assess the evolving digital models for film festivals moving into the post-pandemic landscape. Moreover, the research seeks to develop a greater understanding of the emerging models for film festivals¹ and the relevant practices supporting content creators, enabling collaboration, and fostering innovation.

As illustrated below, Nordicity employed a mixed method approach to conduct the research for this assessment.



¹ The research was primarily focused on small and mid-sized and/or independent festivals representing a diverse range of communities.

The research design phase included a kick-off workshop (attended by key industry stakeholders), the development of a stakeholder list, and design of bespoke research tools to be used in Phase Two. Primary research involved conducting interviews and a short online survey (described further in Appendix A). Secondary research included a review of a wide range of strategic reports pertinent to film festivals since March 2020.

Following primary and secondary research, the Project Team analyzed the data, including identifying key trends and learnings relating to evolving film festival models. Some of these key trends speak to the new role of film festivals in supporting media artists and filmmakers, what digital technologies are most critical to support online learning and engagement, and strategies to ensure discoverability in a competitive video-on-demand landscape.

The findings were collated into an Interim Report and then presented at an online session that resulted in approximately 80 people viewing the online presentation/report with many providing feedback and validation of the findings. This feedback was then added to the report to create the Final Report contained herein.

2. The Context

The end of 2019 was what we might now consider 'normal' for the film industry. Film festivals were in preparation for their spring festivals, which included elements such as opening night galas, big releases, and a series of in-person events – drawing all types of moviegoers to the theatre for the interaction and excitement that in-person experiences bring. While much excitement was being built, little was known of the disruption the industry would face come Spring 2020.

With a widespread lockdown sweeping the globe in response to the COVID-19 pandemic in March 2020, activities ranging from film production to theatre screenings were abruptly put on hold, and ultimately, were required to shut down. While some film festivals chose to postpone or cancel their planned events, many chose to press on for the season, adapting to the new environment as quickly as possible. **2020 became a year of adjustment for many in the film industry.**² The months that followed involved resetting and often redoing months of planning, budgeting, and programming.³ Festivals were required to be nimble and capable of pivoting their programming at short notice.⁴

This shift required most festivals to develop new strategies, often moving to a partial or entirely **virtual festival experience**. The shift often resulted in the need to develop a festival digital strategy, meaning that festivals **needed the right resources to operate online**. These resources included building up staff capacity, in-house knowledge to use and operate digital platforms, the development of an online interface, and the ability to offer technical customer support. This learning also included how to interact with creators/filmmakers through digital platforms and determining how to run professional development programs online.

Hosting on a virtual platform presented many new challenges and opportunities for the industry. Speaking to challenges, **virtual meetings have limitations and cannot replace face-to-face interactions**, especially when it comes to creating meaningful relationships and communicating a film's vision and potential.⁵ Ensuring robust security measures to protect film content also creates challenges as these measures have increasingly become standard industry practice.⁶ Other challenges relate to **today's uncertain market economics**. Although government grants and rebates supported many independent films, it remains difficult to finance a production without private equity.⁷ While the widespread shutdown of the global economy for the majority of 2020 has not yet trickled down to production financing, many investors have braced for a recessionary environment in 2021, making it much more challenging to raise funds for independent films.⁸

² Frater, P. (2020). Global Film Festivals are Taking a Hybrid Route that's Here to Stay. Published by Variety. [Global Film Festivals Likely to Remain Hybrid After Pandemic - Variety](#)

³ Ibid.

⁴ Ibid.

⁵ (2021). The Future of Film Markets. Film Take. [The Future of Film Markets » FilmTake](#)

⁶ Frater, P. (2020). Global Film Festivals are Taking a Hybrid Route that's Here to Stay. Published by Variety. [Global Film Festivals Likely to Remain Hybrid After Pandemic - Variety](#)

⁷ (2021). The Future of Film Markets. Film Take. [The Future of Film Markets » FilmTake](#)

⁸ Ibid.

At the same time, many film festivals seized digitization opportunities such as those who created new initiatives and programs in professional development and skills training. **Industry and talent programs were expanded** to take place online over a longer period of time with **increased access to industry executives and meeting opportunities**, as well as enhanced mentorship offering. Broader supports voiced by industry stakeholders included the waiving of fees to the creator for film submissions.

The industry is also seeing an oversupply of available content, often created for broader audiences on streaming platforms. More specifically, buyers are **searching for films that can appeal to wider audiences**, especially as streaming platforms continue to drive the market.⁹ At the same time, there is a **lack of demand from buyers for art-house and more esoteric projects** that are more challenging to incorporate into streaming pipelines.¹⁰ However, some in the industry argue that as the **availability of quality content shrinks, there are enormous opportunities** to create and program niche offerings to targeted audiences outside the confines of the mainstream media monoliths.¹¹ In other words, **some argue the pandemic period has provided a window of opportunity for the discoverability of independent films.**¹²

While some have described the year 2020 as cataclysmic for the industry,¹³ others argued that the shift in the industry was already underway, and the pandemic has simply accelerated this shift substantially.¹⁴ After more than year of operating during the pandemic, most **film festivals have now had time to prepare, plan, and be ready for 2021**. Given the current environment, it is expected that festival formats will most likely stay online for the time being. Most festivals have planned for a full **digital festival** format. However, in the chance that restrictions decrease, **some festivals will have a small number of in-person ‘networking-focused’ events prepared** which can be cancelled last minute if necessary.

It is likely that 2021 will be the year for festivals to be very **clear and deliberate about their offerings and position** within the festival ecosystem. This work may include determining programming portfolio style and fully developing the innovations that were created during the pandemic to have this work come to fruition. Working within the context of 2020’s challenges, and the uncertainty of 2021, film festivals are now presented a unique opportunity to continue developing their virtual offerings while preparing for a post-pandemic environment, where virtual and in-person programming can coexist.

⁹ [WFF4046_ImpactReport_HR-spread.pdf \(netdna-ssl.com\)](#)

¹⁰ Ibid.

¹¹ Ibid.

¹² McLean, P. (2020). Is this the future of film festivals? The BBC. [Is this the future for film festivals? - BBC News](#)

¹³ Scott A.O (2020). The year was a disaster. We hope the sequel is better. NY Times. [This Year Was a Disaster. We Hope the Sequel Is Better. - The New York Times \(nytimes.com\)](#)

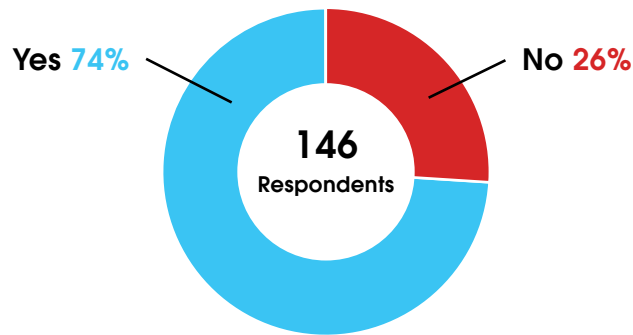
¹⁴ Ibid.

3. Engagement Findings

The following sections provide a summary of key findings relating to experiences of film festivals over the past year, as well as key **needs and priorities going forward**. The findings are largely based on interviews conducted by the Project Team and responses to a brief online survey (described in Appendix A).

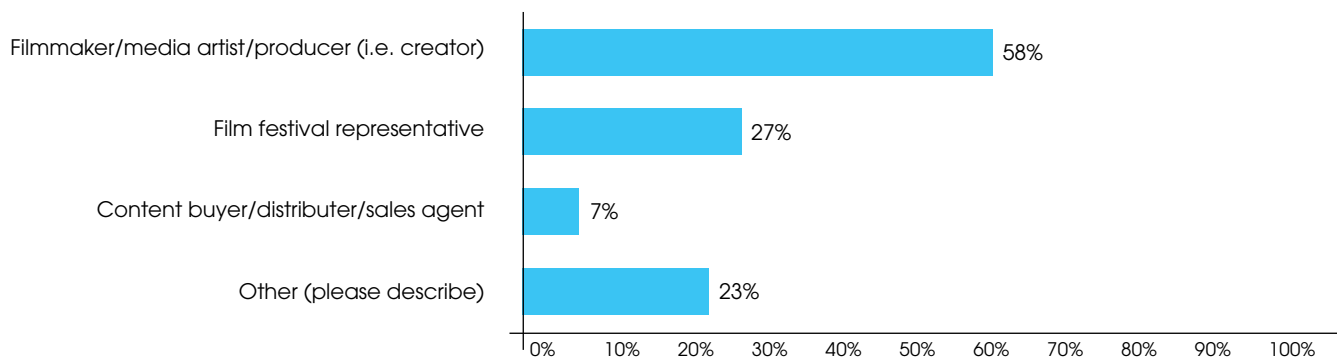
As seen below in Figure 1, it was found that nearly three quarters of the individuals had participated in a film festival in some way (74%).

Figure 1: Have you attended or hosted a virtual film festival since March 2020? (n=146)



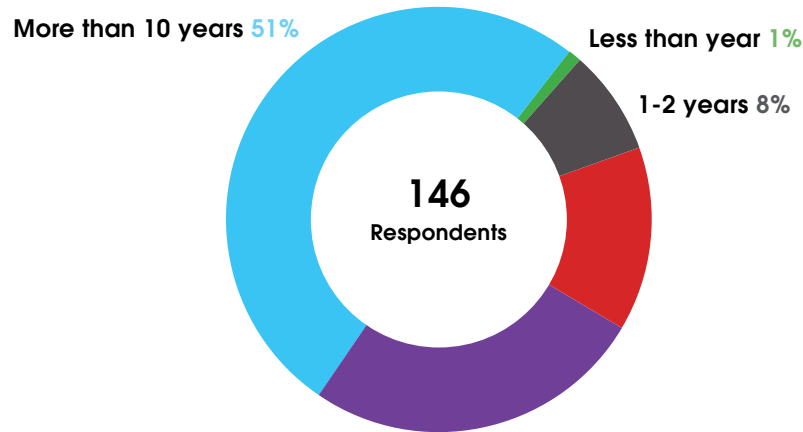
Asked to identify their current role in the film festival ecosystem (Figure 2), over half of the respondents identified themselves as a filmmaker, media artist, producer, or creator (58%), while just over a quarter identified as a film festival representative (27%). Other survey respondents included sponsors, vendors, talent managers, and publicists.

Figure 2: What is your current role in the film festival ecosystem? (n=144)



As seen in Figure 3, just over half of the respondents noted being involved with film festivals for over 10 years (51%), followed by 6-10 years (26%) and 3-5 years (14%), respectively, indicating that many individuals reached through the survey are very established within their respective fields. Only 9% of individuals identified themselves as being involved with film festivals for 2 years or less.

Figure 3: How many years have you been involved with (in any role) film festivals? (n=146)



As this work is interested in understanding how **the evolution of film festivals impact diverse individuals and equity-seeking groups**, questions outlined in Figure 4 and 5 asked respondents how they self-identify and identify within groups. 55% of respondents identified as female, while 41% identified as male. 4% chose not to identify and no respondents identified as gender diverse. As noted in Figure 5, 39% chose not to identify, 21% identified as a racialized person, 20% identified as LGBTQ2s+, 11% identified as Indigenous, and 7% identified as persons with disabilities. Given the range of responses, the survey succeeded in engaging a wide variety of diverse individuals and groups.

Figure 4: How do you self-identify? (n=145)

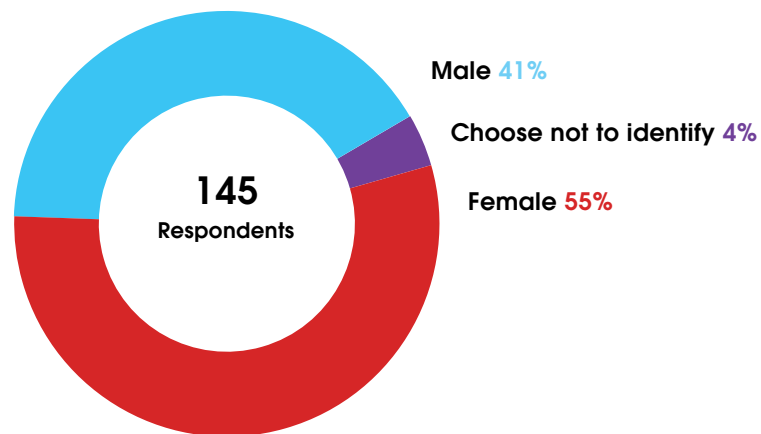
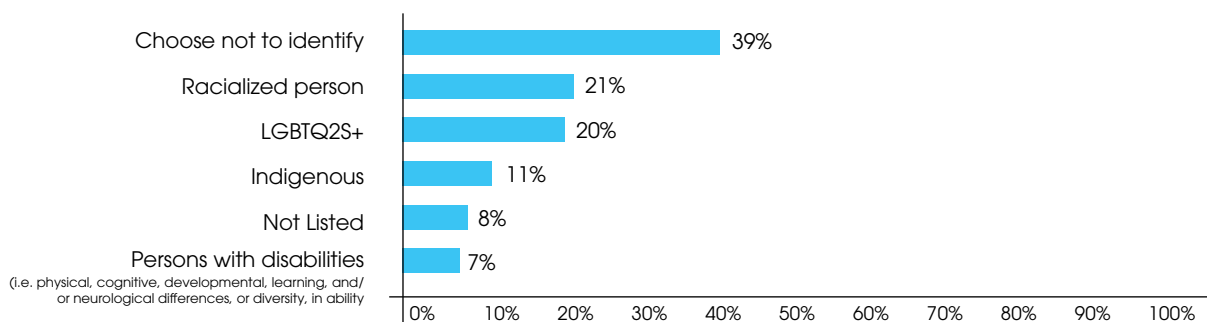


Figure 5: Do you self-identify with any of the following groups? (n=87)



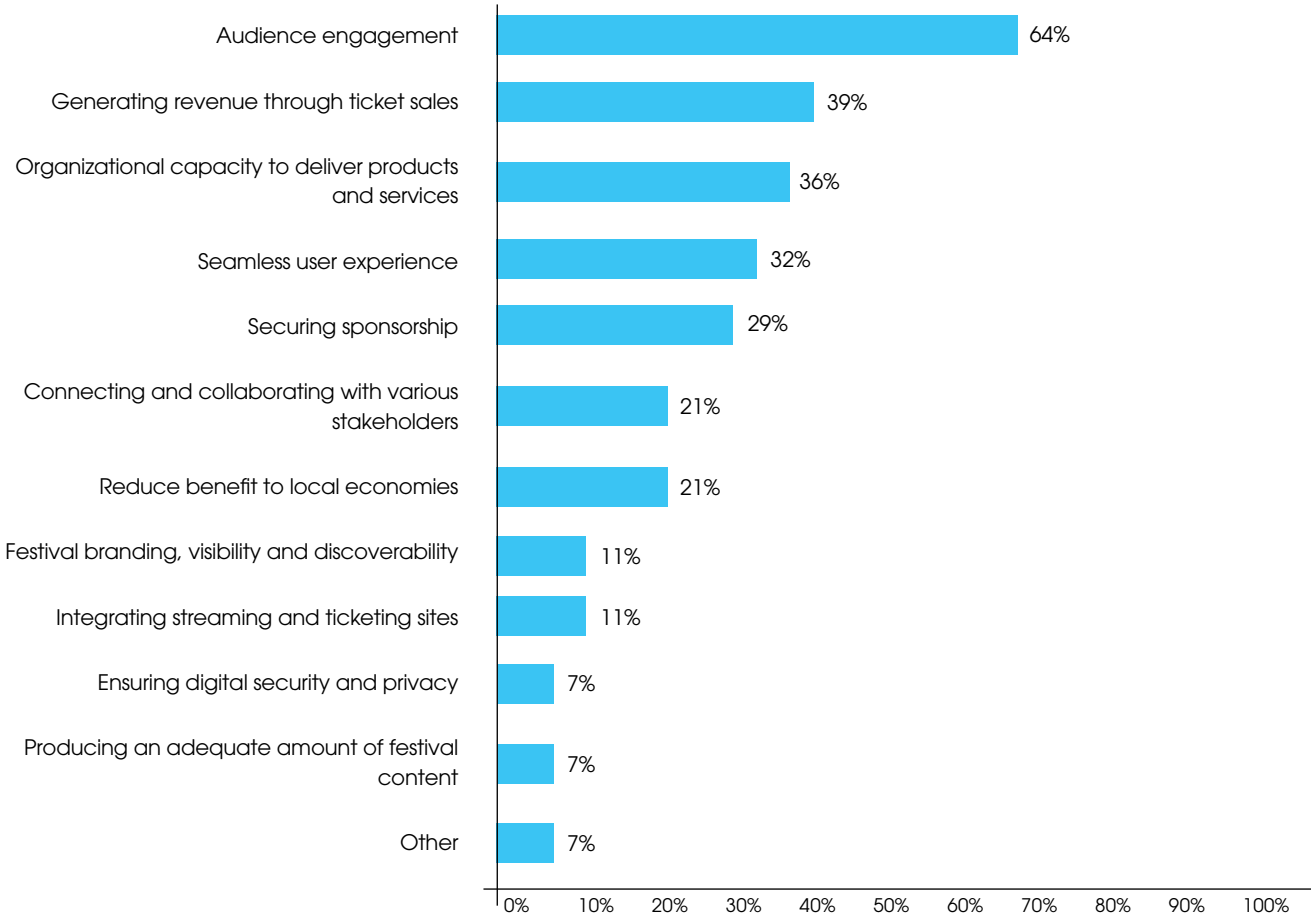
3.1 Film Festivals

The sections below summarize the findings from more the 30 survey responses and numerous key informant interviews with film festival representatives from around the country.

3.1.1 Challenges

As visualized in Figure 6 below, audience engagement (64%), generating revenue through ticket sales (39%), and organizational capacity (36%) were commonly cited challenges for the hybrid festival model.¹⁵ While the subsections that follow unpack each of those challenges in further detail, the visualization below also illustrates that producing content was not a significant challenge for festivals. In fact, many film festivals noted that the increase in submissions was likely a result of the increased accessibility of festivals (this finding is further expanded on in Section 3.1.2).

Figure 6: What are the main challenges for film festivals in maintaining a 'hybrid' festival model moving forward? (n=32)



¹⁵ A hybrid event is a live in-person experience, combined with a virtual element that is streamed out to a wider audience connecting online.

Audience Engagement

As demonstrated in Figure 6, the primary challenge identified by respondents was the ability to **engage audiences (64%)**. This finding is aligned with what was found in the research and interviews where stakeholders noted that it is **challenging to create an engaging user experience** and create a festival 'buzz'. This challenge also relates to the fourth most common challenge, seamless user experience (32%), where many festivals noted challenges regarding finding the right platform(s) to ensure smooth user interface and engagement with different types of content.

Different **windows of film availability** were noted as a critical component relating to audience engagement. It was found that most festivals chose not to have a set schedule for audiences but, rather, have content available 24/7 for a set period. The average period was one week, but some festivals included special extensions such as extended access of up to a month (e.g., Whistler Film Festival) if tickets were purchased in advance. While extended windows often resulted in higher viewership, it also created challenges for engaging audiences as there was a lack of 'critical mass' of viewers watching a film at the same time.

"We had to ask ourselves, how do we create an experience for our audience that is just as good as our usual in-person offering?"

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Alongside windows of film availability, film festivals took different approaches regarding **festival online programming**. For example, while some increased the number of shorts, others focused on providing a wider selection of industry panels.

Ticket Sale Revenue

The second most noted challenge was generating revenue through ticket sales (39%). Related to this, stakeholders commonly noted that the **online ticket sale model is quite different than the in-person model many are used to**, posing a challenge to generate revenue. Festivals were often **expected to lower ticket prices** for digital content, as audiences generally expected to pay less for a virtual experience. While the move online eliminated some physical costs (e.g., renting theatre space), festivals incurred new costs such as subscriptions to streaming platforms and geo-blocking services.

The drop in ticket sales placed increased importance on other sources of revenue such as sponsorship and funding. While some film festivals had secured funding, others had sponsorships or funding drop out at the last minute. As such, being creative regarding financial planning was often critical, as some festivals experienced a major contraction from public funders and private sponsors over the past year.

Organizational Capacity

Organizational capacity to deliver products and services (36%) was also noted as a key challenge, especially for the smaller film festivals that were operating with very few full-time staff. Individuals often had to **take on more than usual** with their role and wear many 'hats' to meet their programming timeframes. For larger film festivals that were able to retain some of their part-time staff, individual roles were often shuffled around temporarily to meet new needs such as customer online support.

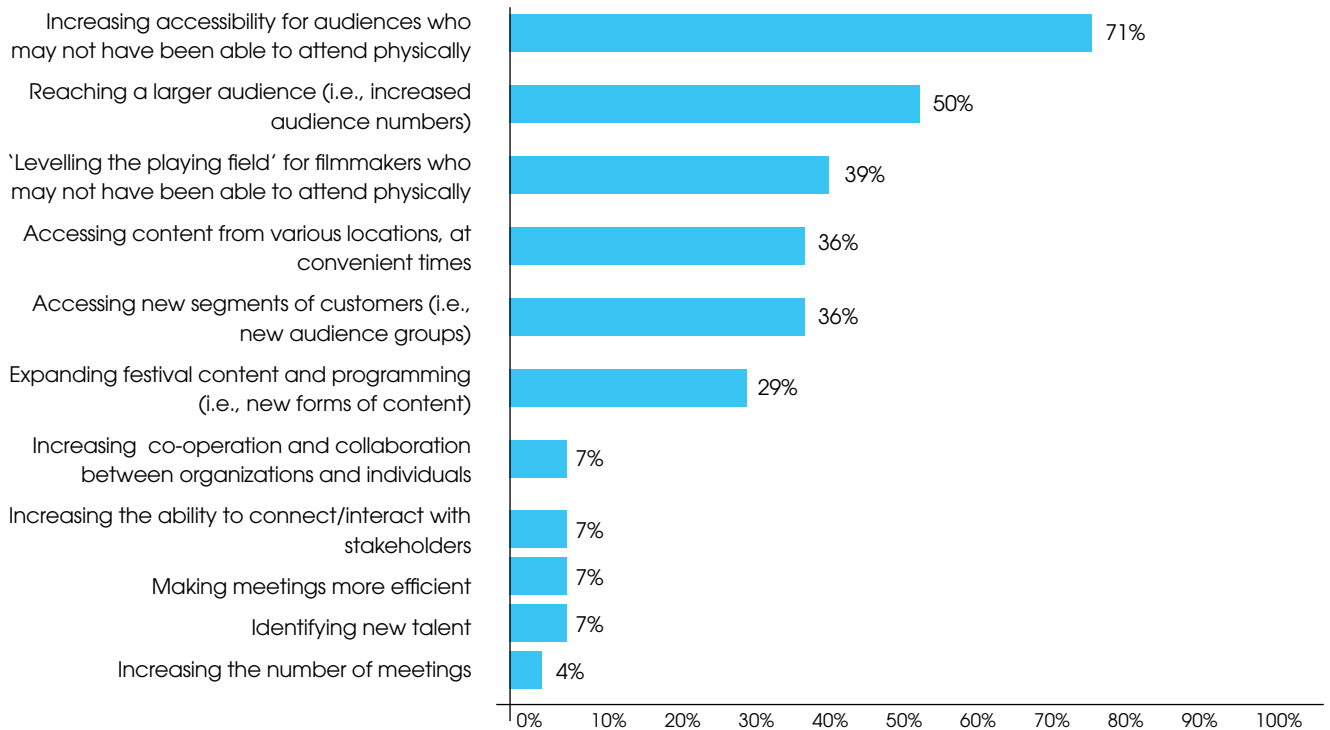
The challenges described portray the complexity of the environment that film festivals are having to navigate. 2020 included many challenges for festivals, from reevaluating current strategies and business models to ensure they are continually providing an exceptional audience experience.

3.1.2 Benefits

Figure 7 portrays the large range of benefits that festivals harness through delivering virtual festivals. Increasing **accessibility for audiences** who may not have been able to attend physically was overwhelmingly identified as the biggest benefit (71%). Examples include reaching those with disabilities, those who do not like in-person crowds, as well as those who live in other locations (36%).

Windows of film availability not only play a role in festival audience engagement strategy but also allowed festivals to expand **opportunities for festivals to show content for longer periods** of time to reach larger audience numbers (50%). Relatedly, this broadening of reach also provided the ability to access new segments of customers which they were unable to access previously (36%).

Figure 7: Benefits of shifting to a hybrid model (n=32)



Key stakeholder interviews noted that ensuring robust access and inclusion practices and activities have been a priority for some time but have been accelerated during the pandemic. While digital access meant wider reach, it also revealed **inequities regarding digital literacy and access** to the technology to view content. Festivals tried to mitigate these issues by ensuring that technical assistance was always available, whether that was through email, ensuring a very active FAQs page, or having a helpline. Several festivals **designed specific roles to meet access and inclusion objectives**, such as creating an 'Accessibility Coordinator Role,' or partnering with external organizations who specialize in these fields.

"In an ongoing effort to continually improve and remediate accessibility issues, we also regularly scan our festival with UserWay to identify and fix accessibility barriers on our site."

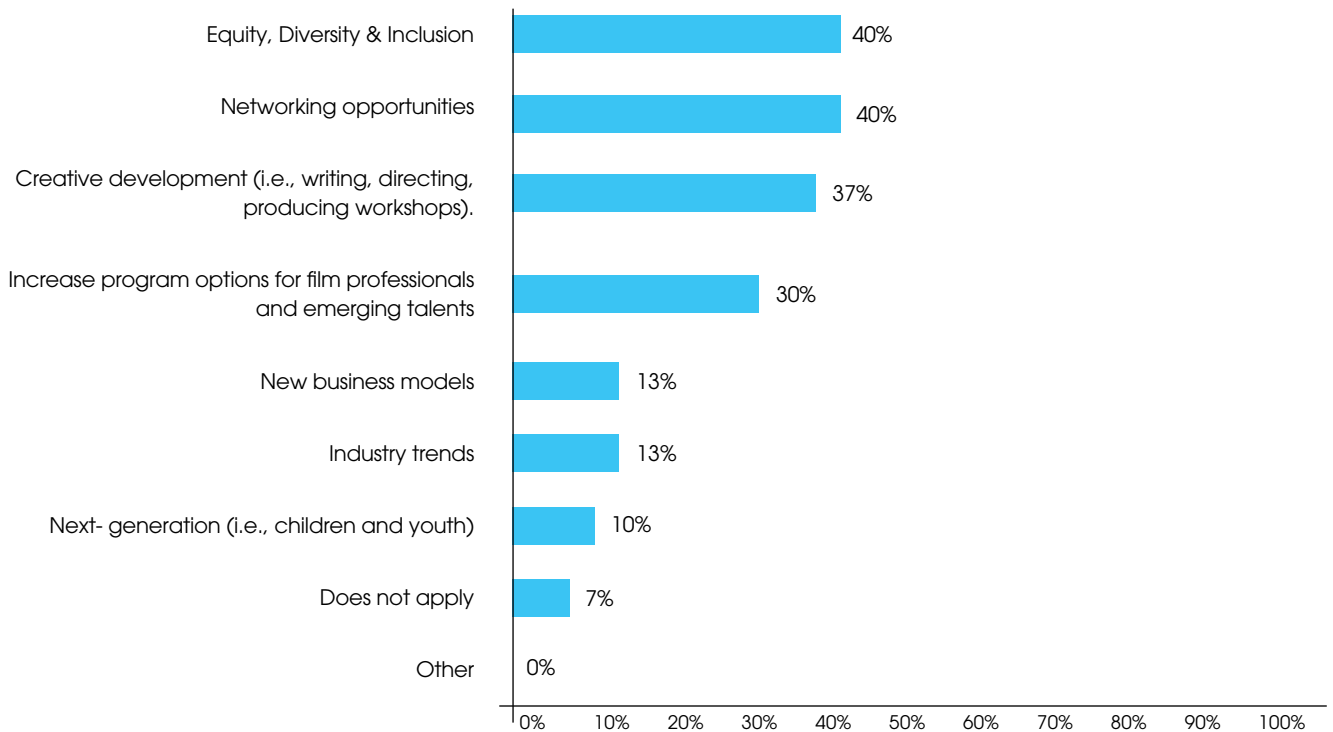
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Many festivals noted that access and inclusion work is at the foundation of their mandates and have taken further measures such as **accessibility audits** to determine where they can improve.

3.1.3 Professional Development

Figure 8 illustrates where film festivals have focused their professional development and industry programming for filmmakers, creators, and storytellers since March 2020. Overall, there was a balanced proportion of agreement that the focus has been on Equity, Diversity & Inclusion (EDI) (40%) and networking opportunities (40%), closely followed by creative development (including writing, directing, and producing workshops) (37%). These findings are supported by research and interview findings for this work.

Figure 8: Since March 2020, where have you focused your professional development and industry programming for filmmakers/ creators/ storytellers? (n=32)



"We hope to expand our offerings which will focus on positive and future-focused programming. We hope we can provide the tools and inspire people to keep going!"

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The work of festivals in EDI has included **expanding festival programming categories** to include more types of film genres, specifically providing opportunities that are inclusive of equity-seeking groups. Other examples include **extending the range of languages** offered on festival websites. Noted above in section 3.1.2 as a benefit by stakeholders was the ability for digital to **level the playing field for film makers who want to show their work** but cannot attend physically. Creators were able to submit their work to festivals that they usually would not consider due to film festivals expanding submission ranges to access from different locations.

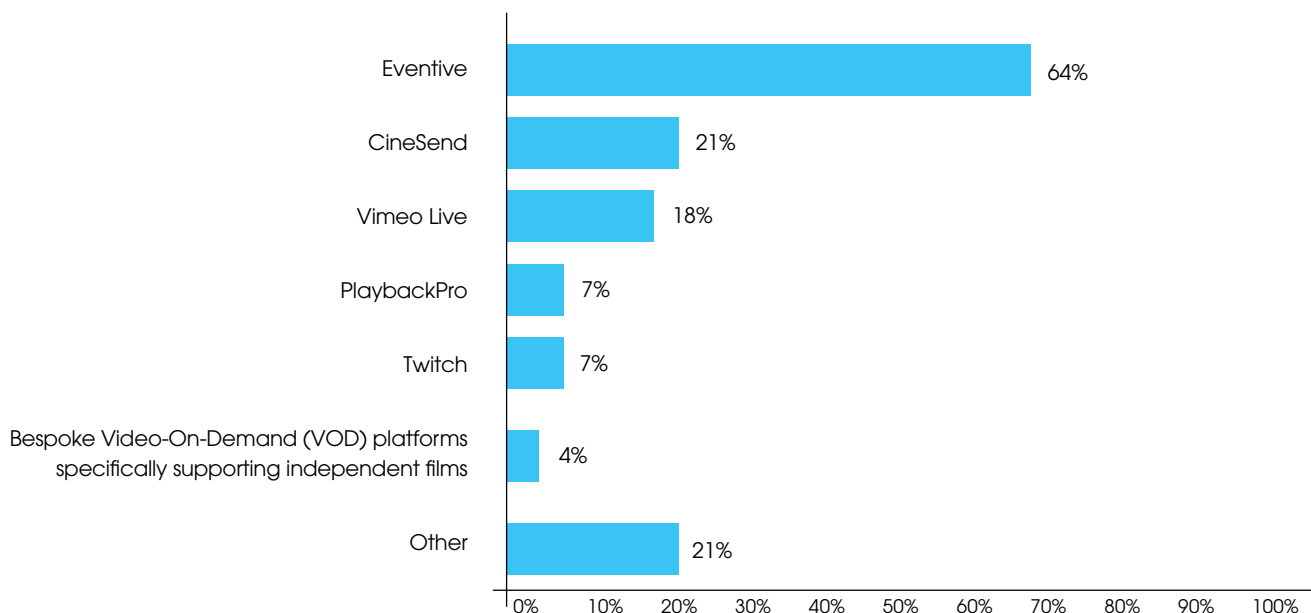
Industry programming opportunities are evolving to be their own component in the film festival model. Redefined as a major experience component, many festivals are including an **expanded repertoire of webinars, workshops**, as well as smaller (sometimes in-person events) to create excitement and still involve those who prefer the in-person experience.

3.1.4 Digital Tools

Several types of digital platforms are being used by film festivals to facilitate the shift online. The major platform used by far was Eventive (64%), followed by CineSend (21%) and Vimeo Live (18%). Other platforms identified included PlaybackPro, Twitch, Youtube LiveStream, and StreamYard.

It was noted by participants that these were often the platforms where they had existing relationships through other uses such as box office sales. Often, they were most beneficial to use for their **viewing services** because it was easy to integrate across several types of services. Along with these capabilities, platforms were chosen based on **safety and security**.

Figure 9: Digital platforms or technologies have you used to facilitate the shift online? (n=32)



Discoverability

Strategies to ensure visibility varied widely between festivals given their differing needs and capabilities. For example, **smaller film festivals pursued bespoke digital outreach** strategies that would **attract the audience in their niche**. In addition, smaller festivals also extended viewing windows to take the 'long tail' approach for discoverability, helping to ensure that word of mouth was still a key avenue for discoverability. Moreover, many smaller festivals did not have the resources for extensive marketing campaigns, making word of mouth all the more critical.

Traditional forms of marketing such as through local news outlets and newspapers were pursued alongside standard social media uses, such as Facebook and Instagram. Alternatively, **larger festivals often had established partnerships** with large streaming platforms such as Eventive and CineSend, having used them for services in the past. This familiarity allowed them to scale up through these platforms and integrate marketing and outreach within these digital service offerings.

Many festivals spoke to the **importance of drawing from their network** of members, alumni, family, and friends through word-of-mouth and encouraging their networks to do the same. For example, one festival used its strong alumni network to act like festival ambassadors to spread the word. Other festivals found additional creative ways to reach certain audiences by creating new roles such as 'Digital Communications Coordinator' or 'Online Services Coordinator' to support their differentiation and discoverability work. That said, these responses were often only options for the larger festivals.

Respondents were also given the opportunity to provide open-ended responses to expand on how they have differentiated their festival to be discoverable in a crowded online space. Notable responses are quoted below:

- “We pursued a big media blitz with exceptional editorial. This has been more important than ever before. Additionally, participating in Eventive’s searchable fest database was valuable.”
- “Mostly we relied on word of mouth from our core fans, email lists, and social media to advertise. We also engaged in some limited cross-Canada advertising in 2020, which we believe was part of our significant increase in out-of-province viewership.”
- “We are a small local festival with a long track record and devoted audience base, so it was really more a matter of reaching out to new audiences. We were very successful in this: usually, only 25%-35% of our audience is from out of town - this year it was over 60%.”
- “Our festival focused on the commitment to our current core audience and their desires/needs, and the promotional channel we know they can be reached by. At the same time, we were “testing the water” with new audiences (i.e., local vs national) and promotional avenues (i.e., paid vs word-of-mouth advertising) to slowly expand.”

Digital Capacity

Film festivals recognized the immense importance of digital knowledge and capacity, both of which remain in high demand. Training staff on **technical skills, digital literacy have been essential** to get festival teams operational for digital festival offerings. These digital-specific challenges also relate to the broader finding that festivals were feeling constrained by their organizational capacity over the past year (33%, Figure 6).

Stakeholders noted that this learning curve involved a lot of online meetings through platforms such as Zoom and Google Meet, as well as coordination through team management platforms such as Slack. Some mentioned that this **led to ‘Zoom fatigue’ and staff burnout**.

In addition to the above, respondents were given the opportunity to provide open-ended responses to describe their experiences with the digital tools they had used. Notable responses are quoted below:

- “Zoom for panel discussions have been very effective allowing a greater range of people from around the world to participate as panelists, mentors, filmmakers and audiences.”
- “Gather.town has been great for implementing a creative, interactive networking environment for conferences. It looks and functions like a Super Nintendo game, with attendees being given 8-bit avatars in which to wander a virtual space and mingle.”
- “It was a brand-new experience that was definitely a learning curve to us and our audience, but we had great support internally with the platform provider and with collaborators. In doing so, we were able to shift some of our funding that usually would go towards expenses to more artist fees and more films in our festival.”
- “It was a seamless process. We could showcase more films than usual, and not limit it to a tight timeframe for audiences to watch them.”

Data Analytics

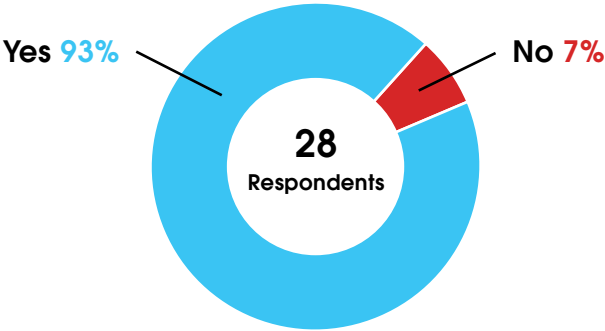
Digital platforms are allowing festivals to **collect data, feedback, audience analytics** like never before. Stakeholders noted that this is extremely valuable for festival management moving forward. The data can be used to inform management on things such as **the ROI of streaming, grant writing requirements, pursuing sponsorship, and evaluating user experience**. An example of where a festival was able to draw from this newly available information was determined from user responses that it needed to improve its website to make it more user-friendly. Another festival created an internal Economic Impact Committee early in the pandemic to ensure its team was planning to use the data comprehensively to communicate impact. That said, it was also conferred by a few stakeholders that they are still not sure how the data will look in the future. There is not enough data yet to make projections or conclude if 2020-2021 was an 'outlier' year.

“Data is so critical and now more than ever is a driving force for festival management and decision making.”

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It was overwhelmingly concurred by respondents (93%) that they plan to continue using these new technologies even as gathering restrictions are reduced (Figure 10). Globally, the role and perception of in-person engagement is evolving, given the rise of digital convening during the COVID-19 pandemic. Respondents suggest that the film industry ecosystem is looking to move forward within this digital environment, albeit embracing the combination of online and in-person resources.

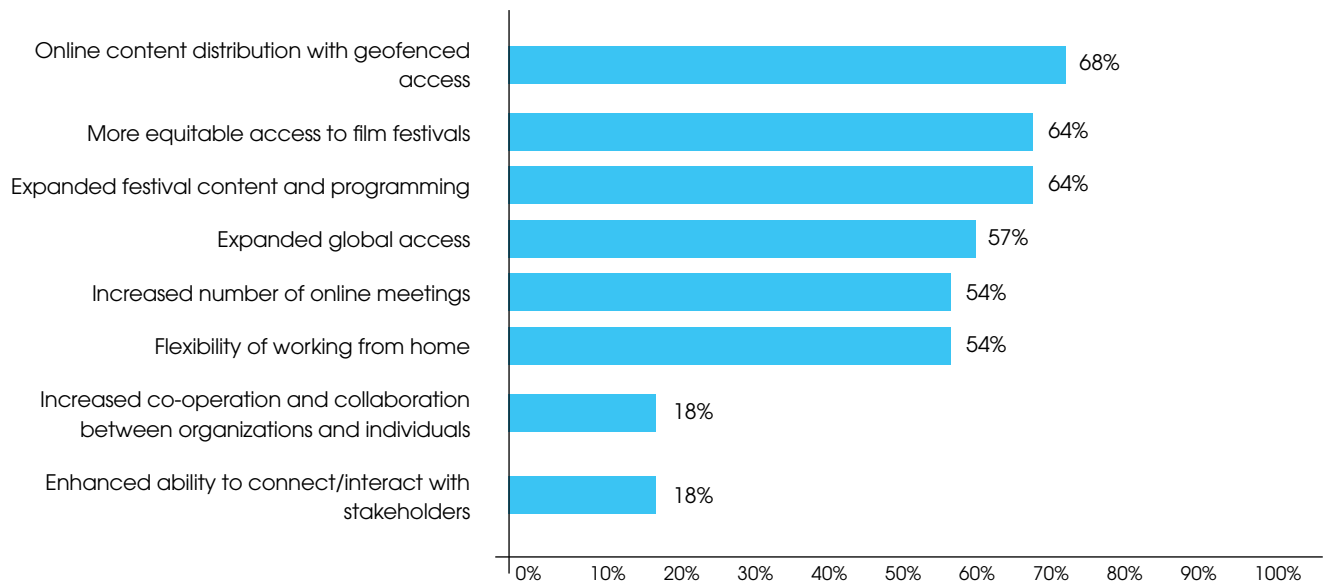
Figure 10: Do you plan to continue using these new technologies even as gathering restrictions are reduced? (n=28)



3.1.5 Future Characteristics

Looking at what key characteristics of the hybrid festival are here to stay, there was a balanced selection from respondents (Figure 11). The top three characteristics include online content distribution, equitable access to film festivals, and expanding festival content and programming offerings.

Figure 11: What are the key characteristics of the hybrid festival that are here to stay? (n=28)



Online Content Distribution

While it was found that producing enough content was rarely a challenge for festivals (7%, Figure 6), the means through which the rights for said content was secured varied widely. That is, each festival **secured bespoke agreements from distributors** whereby the length through which something could be streamed and the geographies in which it was available were different. For example, stakeholders noted that ‘Oscar bait’ films wanted much tighter geofences (to allow for multiple festival releases) and shorter windows. That is, the larger distributors wanted to maintain the **territorial sequential window model**.

While the larger, international distributors were often opposed to the ‘long tail’ approach, it was reported by festivals that **most creators were happy for the most part with increased exposure**. However, it was also noted by respondents that many filmmakers were reluctant at first and required discussions to further understand their options. As a result, it was critical for festivals to be transparent regarding what the digital model options meant for creators. In the case of the Whistler Film Festival, the shared revenue model allowed creators to benefit from the additional views accrued through longer and wider streaming windows.

“There is a huge opportunity to change the way that content creators are being compensated in the filmmaker ecosystem.”

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As more established films will likely continue to explore the opportunity to skip theatrical releases, film festivals will be a critical avenue for creators to reach new audiences with their films. As such, the distribution means through which hybrid festivals operate will be a critical consideration going forward.

Equitable Access

Many festivals noted that they tried to **keep costs low** for their audience and community members and offered a certain amount of **free content** as a means to **improve equitable access** to film festivals digitally. Other efforts included ensuring **multi-lingual subtitle** options and **closed captioning** for those with disabilities.

In addition to broad access, film festivals also explored means to support creators who were struggling with the film industry slowdown. Most indicated that **they did not cut artist compensation** and tried to increase it where possible. For example, organizations that had sufficient funding looked to increase prizes and awards for filmmakers. Additionally, savings from in-person venues were often put towards compensation for creators. For those who experienced major funding changes last minute, ensuring fair artist compensations remained a top priority.

It was conferred by several festivals that the **number of applications** for creators for training and development programs rose drastically over the last year, reflecting the more accessible nature of online programming options. With limited options for filming in-person, and more time spent at home, many creators saw the opportunity to take time to focus on career and personal development opportunities. Additionally, creators also noted gaps in digital knowledge (see Section 3.2.3) and literacy, thus seeing the need to expand their skill set to keep digital acceleration in the industry.

Future Role of Festivals

Ultimately, the characteristics noted above and those described in Sections 3.1.2 and 3.2.2 point to the wide range of **benefits that can be harnessed through a 'hybrid'** festival model going forward. In addition to the points above, respondents were also given the opportunity to provide open-ended responses regarding how the function/purpose of film festivals has shifted and will evolve. Notable responses are quoted below:

- “Film festivals are key in various ways: nurturing talent through labs, connecting talent with industry gatekeepers through contests and competitions, and providing market intelligence and networking opportunities. It is important for these activities to continue but in a way that is sustainable and safe, accessible and affordable, and inclusive. What I liked seeing during the pandemic was festivals and buyers like broadcasters joining forces to make sure films were being exposed as widely as possible and opportunities were not missed as a result of the pandemic. I hope that such trends will continue into the future even as we move beyond the crisis.”
- “I think festivals are more important now than ever. However, maybe it is too soon to tell, but I don’t believe that the base function or purpose of the film festival has actually shifted very much. The methods of achieving the function or purpose may have changed, but not the purpose. With the rise in streaming and the limited “communal viewing” of weekly releases, festivals are seen as the gatekeepers. People already associate some festivals with certain attributes, and I think that will only become more entrenched.”
- “Promotional and marketing power of film festivals as well as networking, professional development, and career opportunities for industry players, now must be available more than ever, in order to continue to justify the film festival model in an online space well into the future. Community connections, unique and fun professional opportunities and creativity in offerings continue to be paramount in festivals making their mark in their industry.”
- “Among younger generations, there has already been a significant decrease in their interest in going to film screenings and theatres, and so we wonder if there will ever be a resurgence in in-person shows now that people are so accustomed to watching films online. It leads us to wonder if attracting a younger audience will have to be approached more so through film networking events and live events (live scores or a/v performance events).”

3.2 Creators

Creators (i.e., filmmakers, media artists) were asked a stream of questions in the survey – the findings of which are reported in the sections below.

3.2.1 Challenges

Speaking first to challenges (Figure 12), there was wide agreement that the loss of organic connections and networking was key. This sentiment was also reflected in interviews with creators as well as distributors who noted that online meetings (while efficient) did not bring the same level of deep connection and discussion.

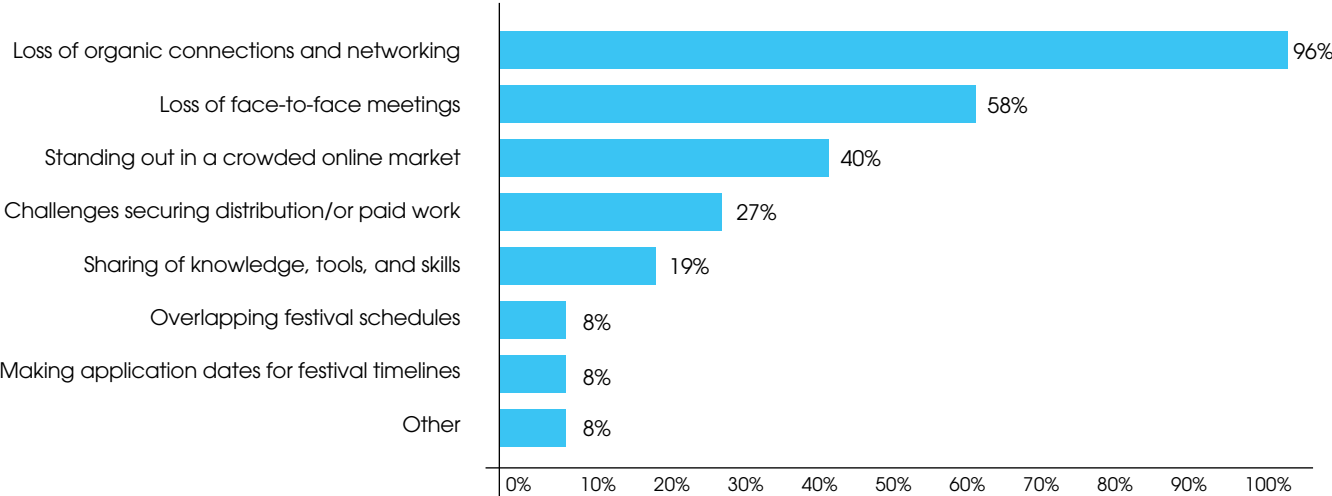
In addition to the loss of in-person connections is the loss of face-to-face meetings that would occur between different creators and industry players which often could lead to the formation of new relationships and business opportunities. Sentiments reverberated across the industry that **face-to-face is something that the virtual model will never be able to replace.**

“I am missing the in-person reaction (organic feedback) to films presented.”

FESTIVAL INTERVIEWEE

The respondents also noted that **standing out in a crowded online market has also been challenging.** That is, a streamed online festival essentially competes with any other streaming service that potential audiences could choose to use from their home. As such, filmmakers lose the ‘captive audience’ that would normally be present at a traditional film festival, putting more of an onus on the creator to ‘market’ or create a buzz for their film streaming through the festival’s platform. These skills were identified as a key opportunity for film festivals to provide professional development and training programs, as described further in Section 3.2.3.

Figure 12: What have been your main challenges in the new and evolving role of film festivals? (n=48)



3.2.2 Benefits

Figure 13 outlines the main benefits of shifting to a hybrid model for creators. Overall, 85% of respondents noted being able to participate when previously it may not have been possible as the greatest benefit, followed by working from home (62%), and the ability to reach a larger audience (47%).

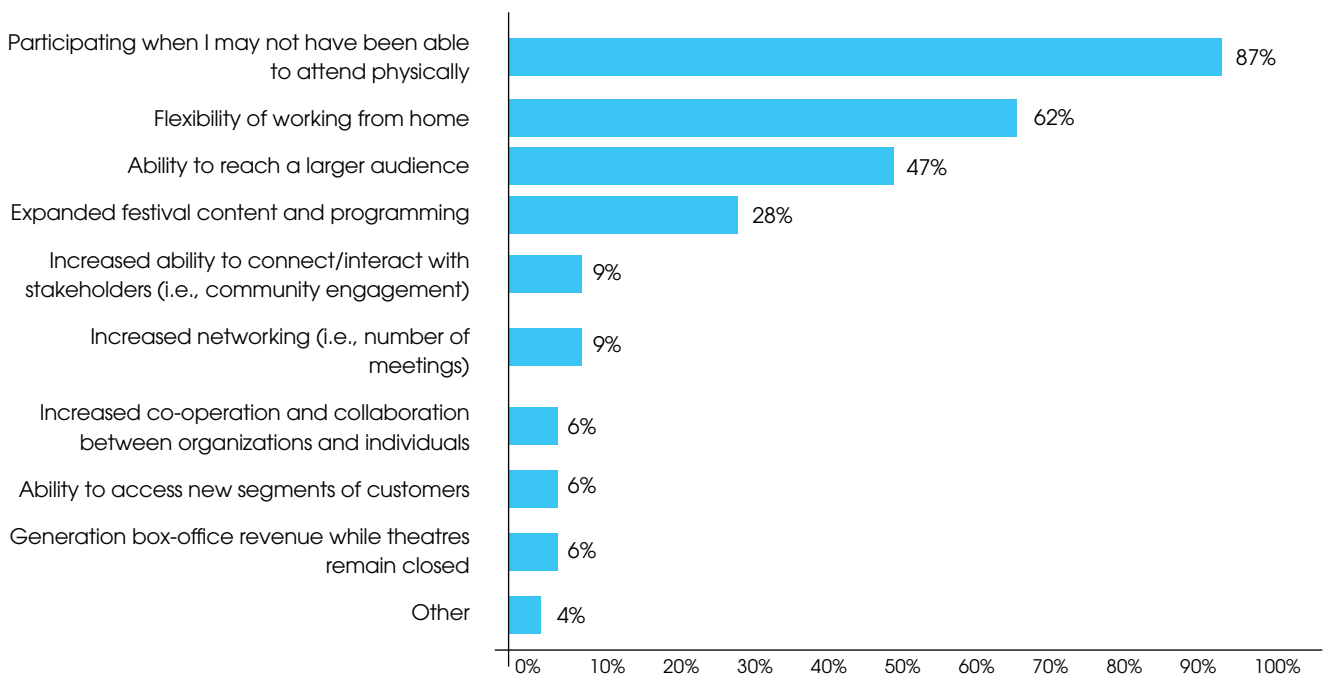
“Industry professionals whose schedules would normally be too busy to attend in-person have been able to commit to their participation virtually.”

SURVEY RESPONDENT

While the **important benefits of increased access** are described in detail herein, it is also notable that this is seen as both a positive and negative outcome of the hybrid model. For example, filmmakers revealed that the online market made it easier for them to connect with distributors or other industry professionals, but it also meant these participants were often overwhelmed with a barrage of ‘cold emails’ from creators wanting to discuss their films. As a result, the online ‘marketplace’ to connect creators to distributors was often very crowded and difficult for new filmmakers to stand out, further illustrating the importance of the skills necessary to ensure discoverability and competitive edge. As one stakeholder put it, **“before they couldn’t get in the room, now they can get in the room, but it is so crowded that it is hard to create meaningful relationships.”**

As noted in many of the quotes below, the **ability to reach larger audiences** was a critical benefit for filmmakers. While the potential audience size was dependent on the festival’s geofence or streaming window, the reach was always significantly more than is possible with a physical showing. The extended reach was especially beneficial for emerging creators who would not have otherwise been able to reach such a large (often national) audience. At the same time, it also meant that films were competing with other stay-at-home options like Netflix (as noted in Section 3.1.4), **making it important for filmmakers to create online buzz for their films.**

Figure 13: What have been the main benefits of shifting to a hybrid model? (n=47)



In addition to the above, respondents were also given the opportunity to provide open-ended responses to expand on their experience with film festivals since March 2020. Notable responses are quoted below:

- “I like the hybrid model as it allows more accessibility and affordability for those, including filmmakers, who otherwise wouldn’t be able to participate. Many of them are also from marginalized communities that are often overlooked. I hope this type of model will continue post-COVID.”
- “Reaching a wide audience with our film online has helped build our fan base for our film and help create more opportunities for development of feature films. That said, time is very limited for individuals, especially as many of us work two jobs and are raising families.”
- “It has been a very disappointing experience and not due to anyone’s fault. This was my first feature film and I feel it has been completely buried by COVID. Putting up the film on a website and posting a few links about it is not at all the festival experience I’ve had in the past with my short films. Also, in the long run, it devalues the film since it’s already been screened.”

3.2.3 Professional Development

Film festivals have an increasingly important and evolving role in supporting media artists and filmmakers. While some festivals have been able to expand their offerings, others have been temporarily limited by resources, financial constraints, or time caused by the pandemic period, ultimately impacting their professional development offerings and priorities.

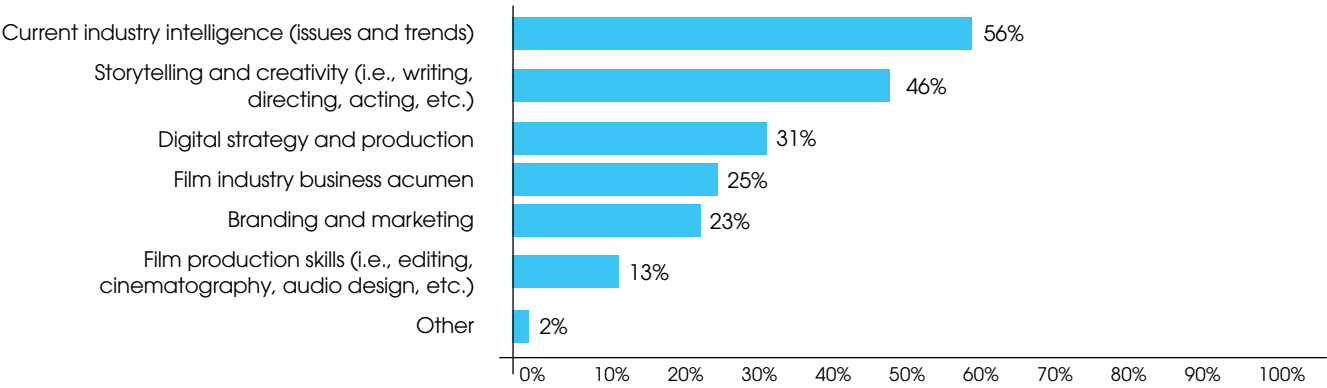
Creators noted (Figure 14) that important professional development programs will likely relate to current industry intelligence (issues and trends) (56%), hard skills such as storytelling and creativity (writing, directing, and acting) (46%), and digital strategy and production (31%). The need for additional training on **current industry intelligence and digital strategy portrays** how this new film landscape brought on by the pandemic has opened up a new area of learning to be desired to navigate the profession.

“I have been excited by the opportunity to participate in talent labs from home which I may not have been able to attend.”

SURVEY RESPONDENT

As previously referenced, film festivals recognize that they have experienced a dramatic increase in the number of applications for training and development programs over the last year. This is reflective of the **increased accessibility through virtual programs and creators seizing the time** to focus on career and personal development opportunities.

Figure 14: What do you believe are the most important types of professional development programs that festivals can provide going forward? (n=48)



4. Key Conclusions

Throughout the **research** and **validation** of the preliminary findings – based on extended engagement and a presentation on May 12th – several key findings have emerged.

4.1 The Hybrid Festival is Here to Stay

It was unanimously agreed that the combination of the digital and in-person (hybrid) festival delivery will be the standard model moving forward. The sentiment was also reflected in the fact that **93% of festival survey respondents plan to continue using new technologies**, even as restrictions are reduced. Over the past year, stakeholders noted the variety of benefits that can be harnessed using the digital model even with the move away from pandemic restrictions. Most determined that using both in-person and online platforms have their strengths which make the other more productive (e.g., in-person screening to generate connections with virtual showings to widen audience reach). It was widely agreed that drawing from the mutually reinforcing **strengths of both delivery methods can create a more well-rounded festival experience**.

“What stood out for us is how accurate the report is from our experience as festival workers who had to pivot. Thank you.”

MAY 12TH VALIDATION SESSION PARTICIPANT

While it was established that the hybrid model is here to stay, the main point of contention between industry members is **what that festival experience will look like moving forward**. A large part of the shift will be driven by how much value will be placed on cinema by the distributors and creators. For example, many noted that there will be varied purposes for each festival (e.g., cinema for premieres or for networking and special showings).

Wider Access Brings Benefits and Challenges

Engagement with festivals, filmmakers and distributors alike illustrated that the wider access created by new online digital presence brings many benefits and challenges. A key benefit was the **increased access for diverse artists/creators/filmmakers to participate** in virtual festivals and digital training programs. Increased exposure meant that artists could interact with new industry networks such as the opportunity to work with new distributors. Additionally, it was found that **larger audiences can access film content online**, creating immense opportunities especially for emerging filmmakers and smaller film festivals.

At the same time, these virtual platforms meant that **artists (and the festivals themselves) needed to find new ways to stand out in a virtual space**. Stakeholders noted the critical importance for filmmakers to create some of their own buzz to help promote their film when it was showing during online festivals. In addition, while it was easier for filmmakers to connect with industry professionals online, it also meant these professionals were often busy sorting through many competing ‘cold emails’ from creators. As a result, the online ‘marketplace’ was very crowded, making it **difficult for filmmakers to create meaningful professional relationships and opportunities**.

Festivals as Curators and Convenors

Film festivals play an important role as curators of film content by providing an audience with a **specially selected program** of film shorts, full-length films or themed collections. It was recognized that film festivals are curators and will stay as curators, with this identity becoming more important than ever. For example, one festival noted that “we cannot compete with platforms like Netflix and do not plan on trying to”. Instead, festivals will continue to focus on providing the viewer with a different type of experience. Such niche experiences include screenings from independent filmmakers, providing region-specific content, or amplifying films from equity-seeking groups. More specifically, the film festival experience is the opportunity for viewers to relax and **enjoy a curated program** with a collective selection of high-quality film content.

The pandemic period has also brought to light the increased desire **of festivals to expand their role in collaborating** with industry stakeholders. Certainly, the digital model has advanced the industry’s ability to connect almost anyone, anywhere, at any time. However, many noted that there is still a huge gap in connectivity between stakeholders (e.g., opportunities for networking and mentorship), recognizing the opportunity for festivals to fill that gap. In addition to individual **festivals being a centre for ecosystem collaboration**, many also noted the opportunity to **increase collaboration between festivals themselves**. Ultimately, acting as a convener can help solve problems and overcome challenges that arise as the film ecosystem continues to evolve.

A Strategic Approach is Needed

As film festivals are competing for people’s time online in the attention economy, **differentiating themselves in the online market will be a strategic necessity when retaining a hybrid model**. Examples of differentiating strategies provided by interviewees include focusing on regional-specific content or specific film genres and niches. **Articulating a specific identity** as an organization will be key to making that differentiation clear to existing and potential new audiences. The research indicates that many festivals focused on ‘doing what they do best’ (staying authentic to themselves) to differentiate themselves in the online market.

Other key strategic positioning considerations include the **level of in-person vs. online** screening and the balance of **industry programming** (e.g., panels, networking) vs. **film screenings** that may attract a wider, non-industry audience. Different festivals will have different approaches regarding the hybrid delivery and their positioning. Film festivals will need to have a clear understanding of their audiences and develop clear communications on what is held in-person and online. Approaches may also be driven by how creators/filmmakers will want an audience to engage with their content and be driven by communication between the creators and film festivals. The choices to be made will require strategic deliberation and evidence-based decisions to inform positioning and planning.

The **Film Festival Survival Pledge** is requesting action to support the independent film ecosystem in the wake of the COVID-19 pandemic. By signing the [Film Festival Survival Pledge](#), film festivals and distributors support the independent film community affected by the COVID-19 pandemic.

4.2 Ongoing Research Opportunities

The research conducted by Nordicity provides an analysis of the film festival ecosystem, particularly focusing on the evolving hybrid models regarding artists/creators/filmmakers and festival operators. However, it is important to note that this is preliminary and significant opportunities to expand on this research have emerged. The following sections provide **key areas where further research can help support the ecosystem's evolution.**

Sharing Relevant Practice and Industry Trends

It was voiced by many film festivals that they often **did not know where to start** when investigating how they could develop a hybrid festival model in March 2020. Many found that much of the process involved learning new skills while on the job, trial-and-error, and learning from mistakes. There was not a lot of guidance available so support was sought through conversations with industry colleagues.

While this model is quite new, it was recognized that having a set of **“best practices” or standards for film festivals in navigating the hybrid model would be incredibly valuable.** Best practices could include resources such as:

- Industry trends¹⁶ and lessons learned from other festivals, including stories or case studies;
- How to implement industry products and services (e.g., online ticketing or virtual streaming services);
- Clear data standards and checklists for ensuring safety of online content;
- How to troubleshoot common digital user issues, including who to contact for additional assistance; and,
- Contact databases for digital platform service providers.

Conducting Audience Assessments

While the scope of this study did not include an examination of film festival audiences, various stakeholders and community members brought up their interest in learning more about **audience engagement trends, changing preferences, and audience segments.** Such research could help to better inform festivals regarding who they are reaching (and who they are not) and allow them to compare and contrast the online audience data with their in-person audience survey data.

In addition, festivals could also explore **audience perceptions** of film festivals during the pandemic, allowing for input on preferred **content and format** of hybrid festivals. Research could also be conducted regarding how different audiences value hybrid festival activities (e.g., **Willingness to Pay analytical methods**). For example, a future assessment could study to what extent individuals value in-person content, as opposed to digital content, and evaluate how this may evolve over time.

¹⁶ The most commonly noted ‘important types of professional development programs’ going forward was industry intelligence (56%).

Leveraging the Data Opportunity

Research indicated that leveraging **new sources of data** was one of the greatest opportunities provided by the expanded use of digital platforms. Indeed, many of these platforms generate a plethora of valuable data which can be further analyzed and leveraged. Examples of opportunities that advanced data collection and analysis could allow for include:

- Gaining a better understanding of how audiences engage with content to understand their preferences (e.g., length of engagement with certain content).
- Gathering more compelling and tailored sponsorship data (e.g., click rates regarding online advertising).
- Allowing for more detailed assessments of revenue streams (e.g., specific numbers of paid participants per type of activity, such as panels compared to film screenings).
- Evaluating progress and impact of industry programming and training available to creators/filmmakers over time (e.g., longitudinal analysis of participant growth).
- Leveraging demographic data to better understanding how BIPOC creators are engaging with festival programming and professional development activities.¹⁷

In summary, the pandemic-induced disruption has had a devastating impact on livelihoods, challenged many organizational business models, forced rapid change of industry operations, and required all types of stakeholders to learn new skills. At the same time, it has opened new means for collaboration and increased access to programming. The **rapid and ongoing shifts illustrate a resilient ecosystem** and the kind of innovation and understanding that come about when efforts are focused. While there are significant challenges identified, it was also found that film festivals are ready to **move into the post-pandemic landscape leveraging a hybrid festival model with a renewed sense of energy and vision, a deepened awareness of the power of collaboration, and a heightened understanding of the value of data.**

¹⁷ It is recommended that such research align to several ongoing initiatives such as: producer pledge, Independent Media Producers Association of Cinematic Talent.

Appendix A. Engagement Details

As detailed below, the research included multiple ways to engage in the process. While intended to be preliminary research (i.e., not fully representative), the feedback provided through the survey, interviews and feedback provided an informative snapshot-in-time of relevant trends and industry experiences. It is also notable that the research came at a time of immense 'Zoom fatigue' with many being overly consulted through several industry surveys and parallel research initiatives.

A.1 Online Survey

A brief survey was launched from March 4th to March 17th via the Voxco survey platform. More than 140 responses were collected, helping to inform priorities and identify current trends and challenges related to the future role of film festivals.

Outreach was led by the WFF marketing team and supported by Nordicity. WFF leveraged its existing organizational networks and marketing teams' insights to gather further insights from a broad spectrum of film festivals and creators. Specific effort was made to reach out to diverse communities across the country.

A.2 Stakeholders Engaged

Key Informant interviews facilitated conversations, and opportunities to provide feedback were used to gather detailed insights regarding the future of film festivals.¹⁸

Stakeholder	Organization	Role
Alan Black	Hot Docs	Director of Operations and Managing Director of the Ted Rogers Cinema
Jenn Brown	St. John's International Women's Film Festival	Executive Director
Naomi Johnson	imagineNATIVE	Executive Director
Wayne Carter	FIN Atlantic International Film Festival	Festival Director
Shauna Hardy Mishaw	Whistler Film Festival	Founder and Board of Directors
Paul Gratton	Whistler Film Festival	Director of Film Programming
Lauren Grant	Clique Pictures	Producer
Brandon Yan	Out on Screen	Executive Director
Corey Marr	Corey Marr Productions	Producer
Tom Alexander	Mongrel Media	Distributor
John Bain	LevelFilm	Distributor
Matt Orenstein	Vortex Media (formerly A71)	Distributor
Arnold Lim	ALL-IN MADONNA	Director
Tanya Lapointe	THE PAPER MAN	Director, Writer, Producer
Ava Karvonen	Reel Girls Media	Producer
Trish Dolman	Screen Siren Pictures	Producer
Ruth Lawrence	LITTLE ORPHANS	Director

¹⁸ Numerous outreach efforts were made to additional film festivals which received no response despite multiple follow-ups.



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