

# **Evidencing the Economics of Film Festival Funding.**

## **Do Government Subsidies Help?**

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## **Abstract**

In this chapter, we analyze the economic situation of film festivals in Austria. We focus on different types of film festival funding and financing modes, the economic situation of film festival staff, and the effects of the festivals and related tourism on the national economy. Further, we look into audience behavior with regard to film festival attendance in Austria. Finally, we critically evaluate the situation of film festivals in Austria in 2015. We argue that Austrian film festivals are making an important contribution to the diversity of the Austrian film landscape by multiplying the number and genres of films available on screen. Helped out with government subsidies by a total revenue volume of 57 per cent to funding, Austria's film festivals manage to attract a substantial number of festival-goers every year. Achieving the highest factor of seat load in Austria, we consider them to be highly successful. This chapter also demonstrates that publicly supporting film festivals is an indispensable driver for film diversity in the country.

## Author biographies

**Gerald Zachar**, MA, has worked as consultant for *paul und collegen consulting* since 2012. He also has been involved in numerous studies on issues in film industry analysis. He served as an adviser of the *Austrian Federal Chancellery* for establishing a *Film Preservation Center*. He graduated from the *École des hautes études en sciences sociales* in Paris (EHESS) and has taught German language and South Asian history at the *École supérieure de commerce de Paris* (ESCP) and the University of Vienna.

**Michael Paul**, PhD., is founder and managing director of *paul und collegen consulting*, based in Vienna. Since 2000, he has served as a consultant for the film and television industries. His clients include UFA, *endemol*, *Murnau Stiftung*, the *Austrian Film Institute*, the *Vienna Film Fund*, and *film20*. He also teaches at the University of St. Gallen and has written numerous contributions for periodicals and books on a variety of subjects (*Leave the madhouse!*; Vienna, 2012).

# 1. Introduction: The Economics of Film Festivals

Since the first film festival was established in Venice in 1932, the number, worldwide distribution, thematic diversity and economic and cultural significance of film festivals have changed greatly. Even if numerous new festivals were founded in the decades after 1945, the total number of festivals around the world have strongly increased since the 1980s, a trend which climaxed in the years 2009 to 2010 (Follows, 2013). This argument is supported by Marijke de Valck as follows: “Festivals play immensely important roles in sustaining cultural diversity, nurturing cinematic appreciation, fostering communities, and instigating (political) debate. While the global film industry is dominated by a few players, the film festival landscape is characterized by diversity and difference (as well as hierarchical stratification, also see de Valck & Loist, 2009). The commitment to artistic excellence and the interest in showing the cinemas of the world are at the heart of festivals’ success and proliferation. Film festivals, however, have been equally effected by trends that apply to the cultural sector as large. In the European context, where the tradition of state subsidies for the arts and culture is strong, the trend towards a more instrumentalist understandings of the value of the arts and corresponding changes in cultural policy have indeed played a role in increased competition for public funds and sponsorship. The pressure on festival organizations to articulate their impact and provide (quantitative) evidence is high. Positively framed, one could say that this trend stems from a fundamental belief in art’s capacity to transform the lives of individuals and communities. A real danger however is the dominant (economic) interpretation of impact steers organizations toward more homogeneous practices, which ultimately may jeopardize festivals contribution to circulation of truly diverse forms of cultural expression.

Austria, a small country in the center of Europe, also reflects this wider trend. There, four were established in the 1980s, 12 in the 1990s, 15 in the 2000s, and 10 even after 2010 when a peak in number growth seemed to have reached.

As in many other European countries, however, there is little data available on the cultural and economic impact of film festivals in Austria.<sup>1</sup> It is mainly for this reason that we have been commissioned by the Association of Austrian Film Festivals (*Forum der Österreichischen Filmfestivals*, in the following abbreviated as FÖFF), the Austrian festival organizers' lobbying association, to undertake a first survey on the economics of Austrian film festivals. When founded in 2012 by 18 Austrian film festivals, the FÖFF claimed that public funding would be far from providing a solid financial basis. Film festivals in Austria would not have not enough security for long-term planning and were thus obliged to strongly rely on the commitment of their “unfairly” paid staff members.<sup>2</sup> As independent evaluators, it has been our task to collect reliable data in order to substantiate, interpret, or, in some cases, nuance these claims and to provide a solid basis for decision-making for all stakeholders in the film festival sector in Austria.

In this chapter, we will present major findings of a survey conducted in 2015 and discuss some main results in the context of the Austrian cinema landscape and the global transformation of film distribution. Certainly, the growing audience of Austrian film festivals and the number and quality of people employed in the sector is essential for their overall success. But what is the role of local, regional and national subsidies in this context? Are festivals *generically* dependent on government money in order to survive?

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<sup>1</sup> Some evidence related to the Austrian film festivals has already been collected and published by the Austrian Statistical Office (*Statistik Austria*, 2016a).

<sup>2</sup> See the first press release of the FÖFF, Oct. 31, 2012 (FÖFF, 2012)

### *Do government subsidies help?*

Given our evidence, we first concede that public grants are fundamentally safeguarding the economic existence of film festivals in Austria. In total, these grants account for by 57 per cent of all Austrian Film Festival revenues (FÖFF<sub>17</sub>). Certainly, these funds are of prime importance as they provide a stable financing base for the festivals. Sponsoring and ticket sales are the second and third most important sources of revenue (16 and 13 per cent on average across all film festival sizes).

Equally important is the fact that film festivals can only survive when film festival staff is committed to their jobs, often below standard industry wage rates. As staff expenditures form the majority of all film festival expenses with some 45 per cent of total budgets, the fact that festival staff, more often than not, accepts little to no payment for making film festivals happen is a big challenge for the sector.

In this chapter, we argue that Austrian film festivals make an important contribution to the diversity of the Austrian film landscape by multiplying the number and genres of films available on screen. This is essential as more and more films are produced every year across various AV platforms, making it harder for all of them to find an audience. Compared to the regular cinema exhibition, however, film festivals vitally contribute to a greater variety of different formats and genres for their audience. Hence, without subsidies for film festivals, “world cinema” would reach a significantly smaller audience in Austria.<sup>3</sup> It is also noteworthy that Austrian film festivals not only have a young, highly educated and predominantly female audience, but attract more than 12.000 visitors from abroad every year. On top, our findings substantiates the claim that Austrian film festivals generate a significant added value for each

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<sup>3</sup> We use the term “world cinema” as a synonym for foreign film, referring to films originating of all countries others than Austria, regardless of budget size or box office success. For a discussion of the term see Dennison 2006, Chapter 2 “Towards a definition of “world cinema””.

euro invested, leading to a total contribution to the Austrian gross domestic product of 14.6 million euro per year. Additionally, we explore short-term economic effects of film festival tourism in Austria, contributing 2.64 million euro to the country's economy.

In this chapter, we will not explicitly theorize on film festival governance and economics as this is done elsewhere (de Valck, 2007, and 2013; de Valck, Kredel, & Loist, 2016).<sup>4</sup> Instead, we will present empirical findings based on case study analysis. We collected audience data with a Web-based online survey distributed to both organizers and visitors of film festivals in Austria, querying on basic economic figures, audience socio-demographics, attitude towards film festivals and film consumption, and other indicators of media behavior of Austrian festival-goers. The survey was conducted between February 2015 and January 2016.

The survey consisted of two parts: (1) Festival visitors to answer 34 questions about their economic situation, audience demographics, attitude towards film festivals and film consumption and other indicators (such as the use of various media channels and devices for watching films); and (2) Festival organizers to answer 89 questions, covering information on financing, film festival funding, the festival's general direction and the social conditions experienced by employees. The festival-goers could provide answers in German or English. 1980 festival attendants completed the visitor's survey. Of the 22 festivals that belong to the FÖFF, 19 participated in the visitor's survey. Any information or conclusion based on this sample is therefore indicated as FÖFF<sub>19</sub>. The survey for the film festival organizers was

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<sup>4</sup> In an additional interview, Marijke de Valck named the disciplines that tackle research on film festivals as follows: "Film festivals are taken as research object by anthropologists, cultural sociologists, economists, and studied in the fields of organizational studies, urban research, communication studies as well as cultural policy studies. Most prominently, however, research on film festivals developed as part of film and media studies. Within this broad discipline it sports intersections with highly diverse traditions, such as media industries studies (production-oriented) and the work on world cinemas (which stays closer to the classical text-orientation of film studies). (Interviewed on August 30, 2017).

completed by 17 FÖFF film festivals. Whenever referred to this sample, it is designated as FÖFF<sub>17</sub>.<sup>5</sup>

The Web-based survey was self-administered. In addition, 16 qualitative interviews with film festival directors (under FÖFF) and other representatives were conducted between October 2015 and January 2016 (a detailed overview can be found in the Appendix). For this, we used in-depth interviews, allowing the interviewees a high degree of freedom to express their thoughts and concerns. Each of our interview partners were asked about the general situation and recent development of his or her film festival and the current financial and social situation of the festival and the festival's staff respectively. We also asked them to evaluate their specific funding situation.

### *Economic effects of festivals*

As no data on film festivals can be drawn from national economic statistics in Austria, we had to rely on calculations on their impacts made in other countries. And, based on the premise that the structure of economic activity of film festivals is comparable among different countries with a comparable level of economic activity, we used the multiplying factors measured for the *Berlinale* and the *Sundance film festival* (*Investitionsbank Berlin*, 2013; *Stambro*, 2015) and applied them to Austria. This enabled us to determine the indirect and induced economic effects triggered by the direct expenses of film festivals in Austria. For determining the extent to which a film festival induces tourism, we correlated the expenses of

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<sup>5</sup> Not all the required data were provided in a uniform set by all the Austrian film festivals gathered in the FÖFF. For this reason, we clearly indicate in this chapter on which data sample our conclusions are based. A detailed overview of the individual sample designations can be found in the Appendix.



film festival tourists during their stay in Austria (data drawn from our online survey) with data available for event visitor's expenses in Austria (*Institut für Höhere Studien*, 2012).<sup>6</sup>

In 2012, 22 Austrian film festivals gathered in the *Association of Austrian Film Festivals* (FÖFF), trying to improve networking with a view to improving their financial situation. As a result, they achieved that film festivals in Austria were recognized in 2013 by a resolution of the Austrian National Council (*Nationalrat*), requesting the *Austrian Federal Ministry of Education, Art and Culture* to gather and publish basic data.

Our analysis found that film festivals generate impressive results in terms of a continuous rising public demand and positive value creation effects. Further, our findings offer a solid basis of decision-making for funding institutions and policymakers. Given the lack of an Austrian national film festival strategy and precarious working conditions for film festival employees on the one hand, and rising demands for more funding inside the Austrian film industry and film archive community on the other hand, policymakers should now be able to make informed decisions on how public funding shall be shared within the Austrian film community in the mid-term. Based on the findings of our analysis, they can determine to what extent public funding should continue to support the presence of world cinema in Austria.

This chapter is organized as follows: First, we present key industry facts on film festivals in Austria, particularly on funding sources and employment. Second, we provide a detailed analysis of their visitors' socio-demographics and film consumption behaviours. We then assess the economic value added of film festivals and film festival tourism for Austria's

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<sup>6</sup> The completed study was presented at the *Diagonale - Festival of Austrian Film* on 9 March 2016. Financing was provided by the *Austrian Film Institute* (ÖFI), the *Austrian Federal Chancellery* (BKA), the *Collecting Society for Audiovisual Media* (VAM), the *Collecting Society for Filmmakers* (VdFS), and the *Professional Society for the Film and Music Industry, Film and Music Austria* (FAMA).

gross domestic product. Finally, we locate the current situation of film festivals in the larger context of an internationally changing distribution landscape for film and highlight the paramount importance of public funding for the existence of film festivals in Austria.

## **2. Film Festivals in Austria: Some Key Facts**

Film festivals in Austria are currently booming. In fact, between 2011 and 2015, the number of films screened at Austrian festivals increased by 19 per cent, from 1741 to 2073 (FÖFF<sub>20</sub>), while the number of days on which films were shown rose from 143 to 161 (plus 12.6 per cent). In the same time period, Austrian film festivals also saw an increase in the number of festival attendants (plus 19 per cent) (FÖFF<sub>20</sub>). Excluding the events that were not held during the festival period (some film festivals in Austria are organizing events outside their respective main film festival period), a total of 213,830 tickets were sold or issued (in the case of film festival accreditations) at Austrian festivals in 2015. Compared to 2011, this is an increase of 19 per cent. Additionally, 68 per cent of all seats were occupied in 2015 (FÖFF<sub>17Aus</sub>), a fact that accounts that festival-going is strong in Austria. As “seat load” data – data to indicate the percentage of occupied seats compared to the empty ones during one screening – is only available for 2015, we were neither able to evaluate how it developed prior to 2015, nor were we able to find out to what degree the above-mentioned 68 per cent of occupied seats, might correlate with the increase of the number of tickets sold at Austrian film festivals.

In our view, there are no investigations of the audience size or seat load of film festivals in other European countries. Still, if one compares the 68 per cent of seat load of Austria’s film festivals, with, let’s say, the frequency of France’s cinemas, it becomes clear

that the visitor's frequency at Austrian film festivals is indeed an outstanding one. In France, a country with an exceptionally high cinema visitor frequency, the average seat load is holding at only 14.2 per cent (CNC, 2016).<sup>7</sup>

With regard to the origin of films shown at Austrian film festivals, 26 per cent were of Austrian origin (including majority-share co-productions) (FÖFF<sub>20</sub>): 540 Austrian films in total (including those with multiple screenings). Considering the fact that between 42 and 52 Austrian films were released every year from 2012 to 2016, the number of Austrian film at Austrian film festivals seems pretty high. Of the majority of the 2073 films that were screened in 2015, 29 per cent were produced in other European countries, while 923 (44.5 per cent) came from non-European countries. The market share of European films at Austrian cinemas in 2015 was 30.5 per cent, while that of U.S. works amounted to 68.2 per cent (*Österreichisches Filminstitut*, 2016). Thus, Austrian film festivals provide more opportunity for screening European film productions than is possible at the regular Austrian box office.

Of those 2073 films screened in 2015, 43 per cent were feature films ("Films with mainly fictional action"), 27 per cent were documentaries ("Films with mainly non-fictional action"), 13 per cent experimental films and 17 per cent animation films.

Three-fourths of the films screened at Austrian film festivals (FÖFF<sub>20</sub>) in 2015 were less than two years old, calculated from production start. Some 60 per cent had run-times under 45 minutes, a length that is evidently hard to be placed in theaters. 60 per cent of the films screened at Austrian film festivals (FÖFF<sub>17</sub>) in 2015 had premiered in Austria. In total, this is true of 1102 films. According to an estimation of Doris Bauer and Daniel Ebner, both

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<sup>7</sup> Due to the lack of seat load data of Austrian cinemas (official data only account for the average "seat load" per year but not per screening; see: *Österreichisches Filminstitut*, 2016), it is not possible to draw a direct comparison between cinema and film festivals in Austria in this matter. Appropriate data are available for Austria's major cinematheque – the *Austrian Film Museum* – where the average seat load per year accounts for 47 per cent (*paul und collegen*, 2016).

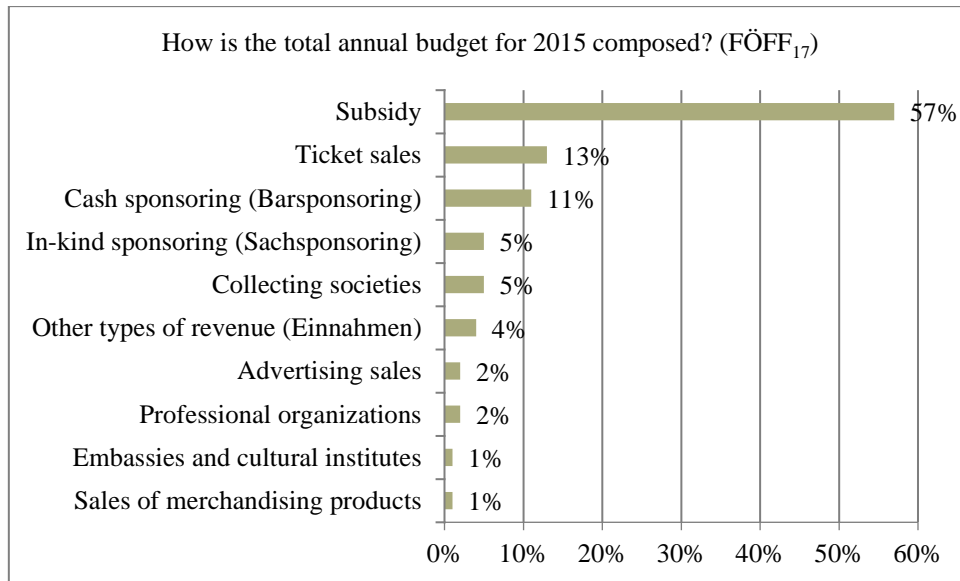
spokespersons of FÖFF, it can be assumed that more than half of those films screened at Austrian film festivals would not otherwise have a theatrical release in cinemas. Therefore, we argue that Austrian film festivals make a major contribution to the number and diversity of publicly screened films, being thus an important display window for “world cinema” in the country. Further, 90 per cent of the film projections at Austrian festivals (FÖFF<sub>17</sub>) are digital. Of all films screened, 9.3 per cent are shown in 35mm film. Hence, the percentage of analogue films at individual festivals represents over 50 per cent of the total. The open-air festival *Kino unter Sternen*, held in Vienna, is an exception. There films are mostly projected analogically.

### ***Funding sources***

In 2015, the total budget for all Austrian film festivals (FÖFF<sub>17</sub>) was 6.5 million euros. The *Viennale – Vienna International Film Festival*, Graz’s *Diagonale (Diagonale – Festival of Austrian Film)* and *Crossing Europe – Film Festival Linz* are the country’s three largest festivals. They each have total yearly budgets of 500,000 to three million euros. There are also eight medium-sized festivals with annual budgets of over 100,000 euros and five smaller festivals that budget with less than 50,000 euros per year (FÖFF<sub>17</sub>). The greater part of this budget, 57 per cent, comes from state subsidies, while one festival, the *Poolinale – Music Film Festival Vienna*, conceived as a “display window” (as the organizers put it) for the music label *ink Music*, never received any subsidies and therefore had to end in 2017). Cash and “in-kind sponsoring”, defined as sponsoring with products instead of cash, contributed with 16 per cent. Proceeds from ticket sales contributed with 13 per cent in total. Other sources of revenue, such as financial support provided by collection societies, professional organizations

or cultural institutes, represent solely a small portion of festival budgets. In all, financing for Austrian film festivals (FÖFF<sub>17</sub>) is as follows:

Fig. 1: Financing mix for Austrian film festivals (FÖFF<sub>17</sub>)



Source: the authors

Compared to the *New Horizons International Film Festival* in Poland and the *International Film Festival Rotterdam* in the Netherlands, where data about the revenue structure are available for 2005 and 2006 (Bauer, 2007), it becomes clear that film festivals in Austria have a higher share of subsidies and a smaller share of revenue from sponsoring than their colleagues abroad: Subsidies account for 57 per cent of the total budget of film festivals in Austria, while they contribute only 20 and 28 per cent to the budget of *New Horizons Film Festival* and the *Film Festival Rotterdam* respectively. With regard to the share of sponsoring, the difference is even more significant: it contributes with 41 and 23 per cent of the total budget to the *New Horizon Film Festival* and *the Film Festival Rotterdam*, whereas it accounts for only 16 per cent to the revenue of Austrian film festivals.

In 2015, Austrian film festivals (FÖFF<sub>17</sub>) were funded by a total of 36 different institutions at the municipal, federal or state level. The City of Vienna (MA 7, MA 13 and MA 57) was by far the most important source of funding, contributing approximately 50 per cent and disbursing funds amounting to over 1.8 million euros. It was followed by the *Austrian Federal Chancellery*, which provided 16.5 per cent (more than 600,000 euros). The third most important source of funding comes from the *Austrian Film Institute*, the country's national film board, with a share of 7.2 per cent and total funding of approximately 260,000 euros. The list of funding institutions that provided over 2 per cent of all funding includes the City of Graz (5.7 per cent), the *Länder* Styria (3.7 per cent), and Upper Austria (3.4 per cent) and the City of Linz (2.4 per cent).

All other sources of funding contributed a total of 10.6 per cent of the total budget, amounts between 67,000 and 500 euros. This cluster comprises of the:

- Tyrol (*Bundesland*)
- City of Wels
- *Vienna Film Fund*
- *Creative Europe* (MEDIA)
- Ministry of Education and Womens' Affairs (*Bundesministerium für Bildung und Frauen*)
- City of Innsbruck
- Municipality of Klosterneuburg
- City of Villach
- Lower Austria (*Bundesland*)
- Austrian Development Agency
- Carinthia (*Bundesland*)

- Ministry of Europe, Integration and External Affairs (*Bundesministerium für Europa, Integration und Äußeres*)
- Ministry of Labor, Social Affairs and Consumer Protection (*Bundesministerium für Arbeit, Soziales und Konsumentenschutz*)
- Salzburg (*Bundesland*)
- Future Fund of the Republic of Austria (*Zukunftsfonds der Republik Österreich*)
- University of Vienna's Institute of Cultural and Social Anthropology
- Municipal district of *Wien Margareten* (Vienna)
- *National Union of Austrian Students (Österreichische Hochschülerschaft)*.

In light of the varying sizes of the budgets of Austrian film festivals, even relatively small subsidies can be absolutely decisive for the survival of some of them. On average, each Austrian film festival had 4.7 sources of funding in 2015.

Applications for funding were normally submitted each year: Submissions at two or three year intervals, considerably reducing paper work for funding bodies and recipients alike, were the exception. In all, four festivals had agreements lasting several years with at least one funding institution (FÖFF<sub>17</sub>). Long-term contracts with sources of funding would not only increase the level of certainty with which festivals could plan, they would also have a positive effect on the overall budgetary situation by facilitating the acquisition of sponsoring revenues (FÖFF<sub>16</sub>). However, the highly fragmented funding landscape of Austrian film festivals, which includes a large number of small-sized actors, amounts to considerable administrative costs for film festivals and funding bodies alike. This is due to the absence of uniform

submission and accounting requirements and forms. Standardization would definitely improve process efficiency.<sup>8</sup>

### ***Employment***

In 2015, Austrian film festivals employed a total work force of 463 (FÖFF<sub>17</sub>) in administrative, organizational or technical areas. 68 per cent of those were women and 32 per cent men. The *Viennale – Vienna International Film Festival*, the *Diagonale – Festival of Austrian Film* and *Crossing Europe – Film Festival Linz* had an average of 98 employees; the figure was 16.8 at festivals with an annual budget between 100,000 and 500,000 euros, and 5.5 at festivals with a budget below 50,000 euros. In most of these cases, financially precarious job conditions were involved, since most employees received low salaries, worked on a project basis, part-time or were volunteers. No more than eight per cent of all festival employees worked full-time and for film festivals only.

From a legal point of view, the collective bargaining agreement for the film and music industry (excepting filmmakers) applies to all employees of Austrian film festivals, stipulating a minimum gross hourly wage of eight euros. In reality, this agreement is rarely observed and film festival staff members, more often than not, receive less payment: One Austrian festival (which prefers not to be named here) calculated the actual gross hourly wage received by its employees, which was five euros only. Even if this calculation is not wholly representative for the situation of all festival employees in Austria, only one conclusion can be made: most of the work performed at festivals represents a form of self-exploitation. Discussions with management staff of all festivals (FÖFF<sub>16</sub>) agreed on this. Still, numerous tasks do not require

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<sup>8</sup> In September 2016, the City of Vienna and the Austrian Federal Chancellery – the two most important funding bodies of film festivals in Austria – taking up some of our recommendations – announced their plan to partly centralise and harmonise submission requirements.

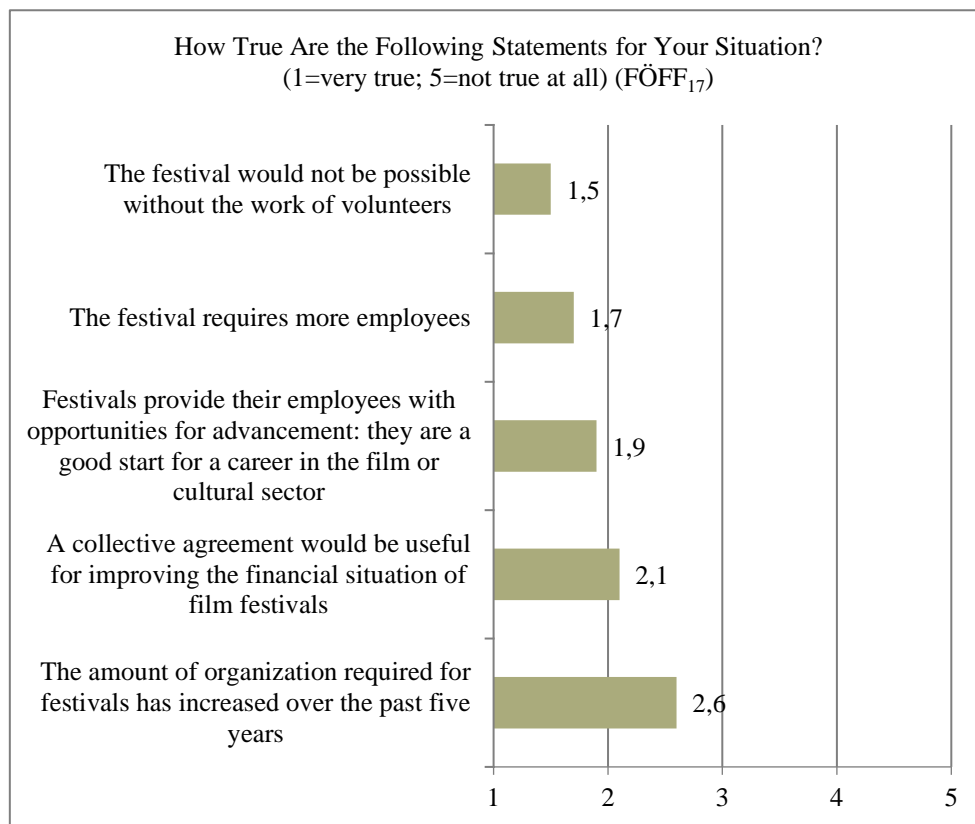


employee activity throughout the entire year. In other words, employees must offer their skills at several different festivals (as is the case with projectionists, hospitality service providers and technical service providers) or find other kinds of work.

Half of all employees have worked at a film festival for fewer than three years (FÖFF<sub>17</sub>) – the lack of a living wage is tenable for a limited amount of time only. For festivals, this entails the necessity of constantly finding new employees. When management staff of Austrian film festivals was asked on the budget they would require to pay “normal” salaries to their employees, salaries which are in line with collective bargaining agreements, Austrian film festivals would need eight million euros additionally (FÖFF<sub>16</sub>).

Considering that the total budget in 2015 is 6.5 million euros, Austrian festivals would need either 23 per cent more sponsoring funds or more funding in order to provide salaries and fees that are in conformity with the above-mentioned collective bargaining agreement for the film and music industry (excepting filmmakers). The statement that film festivals would not be able to operate without the work of volunteers is, according to management staffs, “very applicable.” At the same time, in the opinions of staff representatives, the professional experience gained at festivals represent opportunities for advancement in the scene in addition to a good start for a career in film or other culturally oriented activities.

Fig. 2: 2015: Survey of Festival Management on Their Work: "How True Are the Following Statements for Your Situation?" (FÖFF<sub>17</sub>)



Source: the authors

### 3. Visitors' Socio-demographics and Behavior

In 2015, a total of 213,830 tickets were purchased at Austrian film festivals (FÖFF<sub>20</sub>). But who are those visitors who come for 7.8 screened films (FÖFF<sub>17</sub>) at a single Austrian film festival on average? As no information has been available on Austria's film festival-goers, we launched an Online-survey in order to obtain more detailed data on demography, their educational level and media behavior, as well as their estimations of various aspects of the film festival they visited. With 1,980 completed online questionnaires, we obtained a

representative sample of Austria's film festival visitors, providing a reliable data basis for our inquiry. In general, it can be said, that the audience of Austria's film festivals is mainly female, young, educated and film aficionados, going to the movies as frequently as on film festivals.

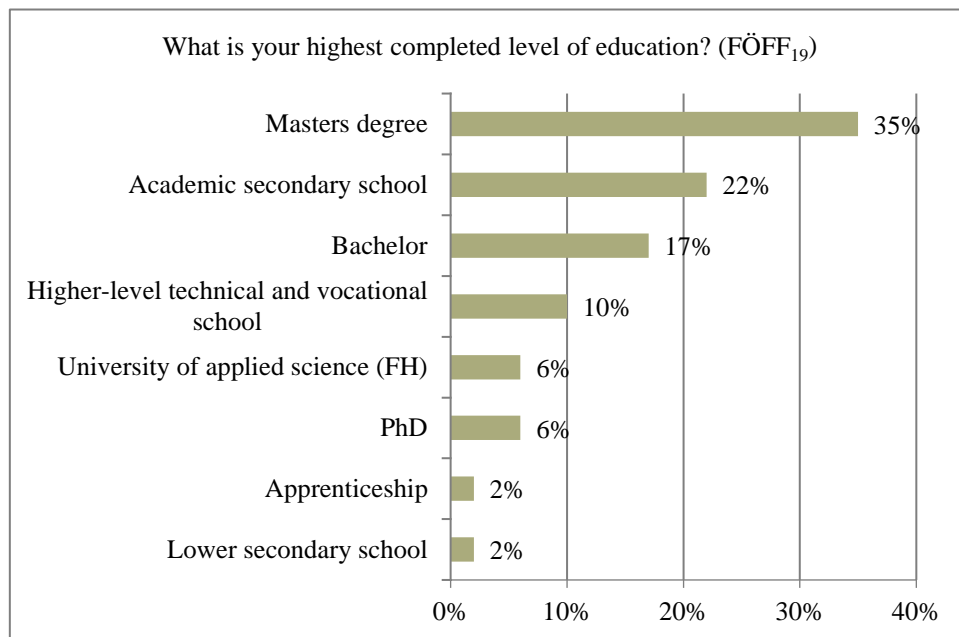
Audiences at Austrian film festivals were 63 per cent female and 37 per cent male. Of all visitors, 73 per cent have already been at the festival involved. The largest visitor segment is between 20 and 29 years of age (40 per cent), followed by 30 to 39 year olds (28 per cent). Visitors over the age of 40 represent a total of 28 per cent of all visitors: Thus, audiences at Austrian film festivals are younger and mostly female. In the latter, the percentages of gender is nearly equal (51 per cent male audience members and 49 per cent females), and the percentage of audience members under the age of 40 is 58 per cent, while the share at film festivals is 71 per cent (*Österreichisches Filminstitut*, 2016). Between 2012 and 2015, the age of the average cinema-goer in Austria rose from 39.7 to 40.2 years. Unfortunately, due to lack of data, it is not possible to determine whether Austrian theaters have lost younger audiences over the past 20 years, as is the case in Germany (GfK, 2016, p. 7).

The online survey on audiences at Austrian film festivals also shows that they are enthusiastic film lovers and watch nearly as many films at film festivals as at conventional theaters. Thus, this group's visits at festivals do not reduce their frequency at cinemas, and there is little differentiation between the two screening formats.

The audiences at Austrian film festivals have above-average educational levels. Thirty-five per cent of all visitors have a master's degree, and 22 per cent have graduated from high school (AHS). While the Austrian average in the area of tertiary education (bachelors, masters, PhD) according to the 2014 educational register is 28.3 per cent (*Statistik*

*Austria*, 2016b), that of audiences at Austrian film festivals is approximately twice as high, 58 per cent.

Fig. 3: 2015: Educational Level of Visitors (FÖFF<sub>19</sub>).



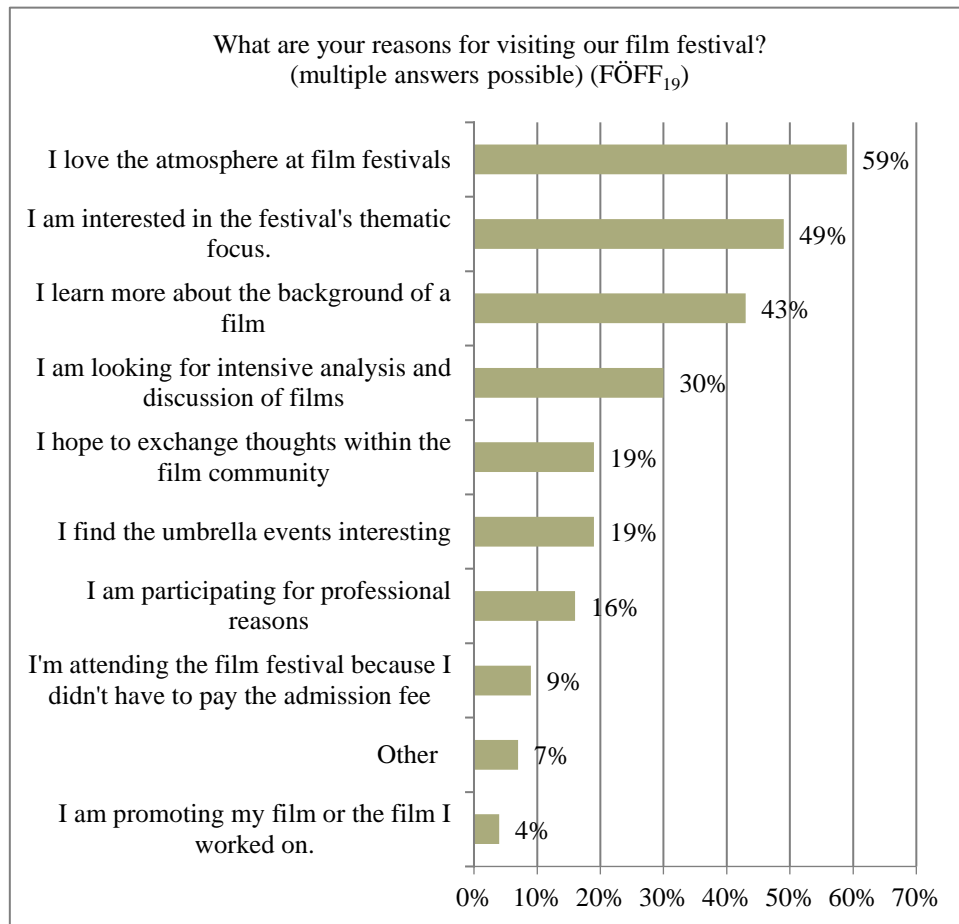
Source: the authors

For those film festivals that would like to explore new target groups (not only to even out the statistics with regard to educational level), interested viewers could possibly be found in what are termed uneducated groups, who are underrepresented among festival-goers compared to the national average. Successes in film education for apprentices, such as at the *Diagonale – Festival of Austrian Film*, could be employed for this purpose.

Ninety-three per cent of visitors at Austrian film festivals reside in Austria (FÖFF<sub>19</sub>). The remaining seven per cent came from abroad, most of them claiming to have come to Austria especially for the festival. This is not surprising, as three-fourths of the foreign guests are employed in the film sector in their home countries.

At the regional level, the majority of visitors at Austrian film festivals reside in Vienna (70 per cent). Twelve per cent of all visitors live in Upper Austria, seven per cent in Styria. In light of the fact that nearly half of all Austrian film festivals take place in Vienna and are easy to reach for residents of Lower Austria (in contrast to residents of Vorarlberg, Carinthia or Burgenland), the fact that only five per cent of all visitors live in that federal state is noteworthy. Of the international visitors, the majority, 67 per cent, were from Germany or Switzerland. Nearly seven per cent of foreign visitors were from the USA. Ten of 17 film festivals (FÖFF<sub>17</sub>) offered accreditation, and a total of 3,724 visitors took advantage of this. Of them, 54 per cent traveled to Austria from abroad. Of all accredited visitors at Austrian film festivals, 42 per cent were employed in the film sector, 35 per cent were moviemakers or film crew members, and 17 per cent were from the press sector (five per cent from other sectors).

According to responses to the question concerning their reason for visiting the festival (FÖFF<sub>19</sub>), the two most important factors were a strong general interest in film in combination with an opportunity to see films that would not normally have theater runs. Of all visitors, 59 per cent liked the “atmosphere at film festivals”, and 49 per cent of all visitors stated that the festival’s “thematic focus” was decisive for their visit. Normally, the more distinctive and nuanced a festival’s profile, the more important the thematic focus for visiting a festival (more than 80 per cent of visitors made statements to this effect for *FrauenFilmTage* – a Viennese film festival dedicated to the visibility of female filmmaking – and the */slash* film festival, Austria’s largest event dedicated to fantastic cinema). Interest in the festival's side program – solely 19 per cent of visitors named this as a reason – was only a minor reason for visiting a festival.

Fig. 4: 2015: Reasons for Visiting a Festival (FÖFF<sub>19</sub>).

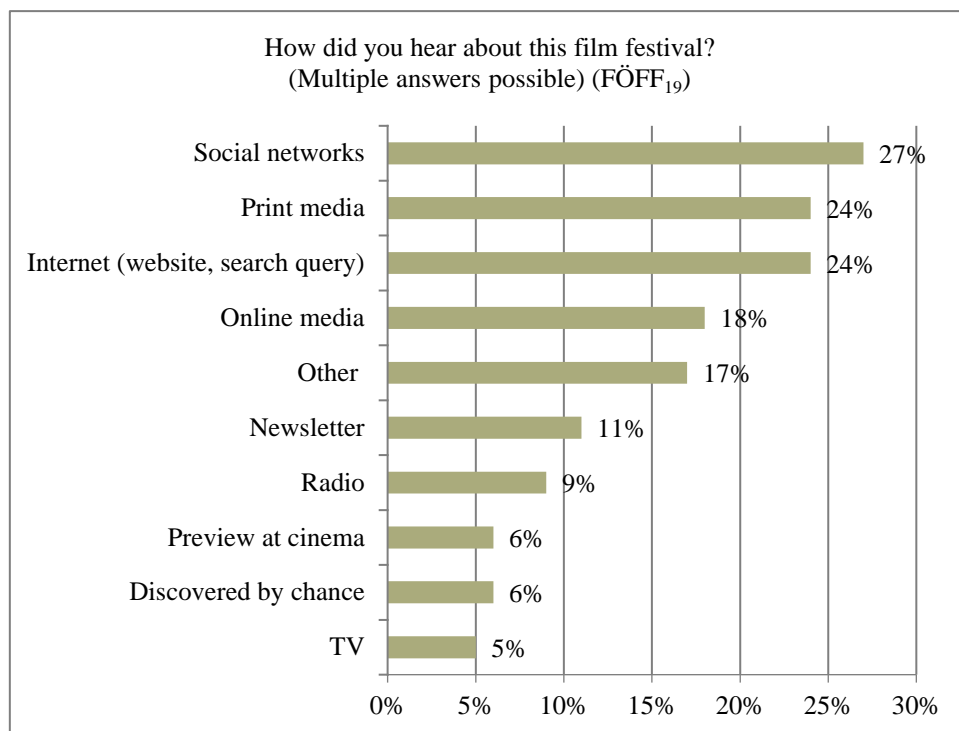
Source: the authors

97 per cent of all visitors plan to visit the festival again in the following year and were highly likely to recommend the festival they visited to others – both clear indicators of the visitor's overall satisfaction. A total of 57 per cent of all visitors were present at more than one film festival in Austria.

Since the audience at Austrian film festivals tends to be affine to film in general and to cinema-going in particular, the fact that most visitors described the statement “there should be more places in Austria offering an informed discussion about film” as “very accurate” is therefore not surprising. When visitors were asked about how they heard about the festival, recommendations from friends played a significant role (FÖFF<sub>19</sub>) insofar as word-of-mouth

was more important than recommendations on social networks. Classic outdoor advertising with posters and flyers were named by 34 per cent of visitors as how they heard about the festival. At the same time, the fact that this figure can vary greatly from one festival to the next must be considered here: for example, it is 19 per cent for visitors of *VIS Vienna Independent Shorts* and 55 per cent for the *Viennale – Vienna International Film Festival*. While the significance of print media equaled that of the internet (24 per cent for both), the online world elicited more attention for film festivals by far: together, social networks, the internet and online media were relevant for 69 per cent of all visitors. In the classic audiovisual media, 9 per cent of visitors named radio, and cinema trailers and television played solely a subordinate role.

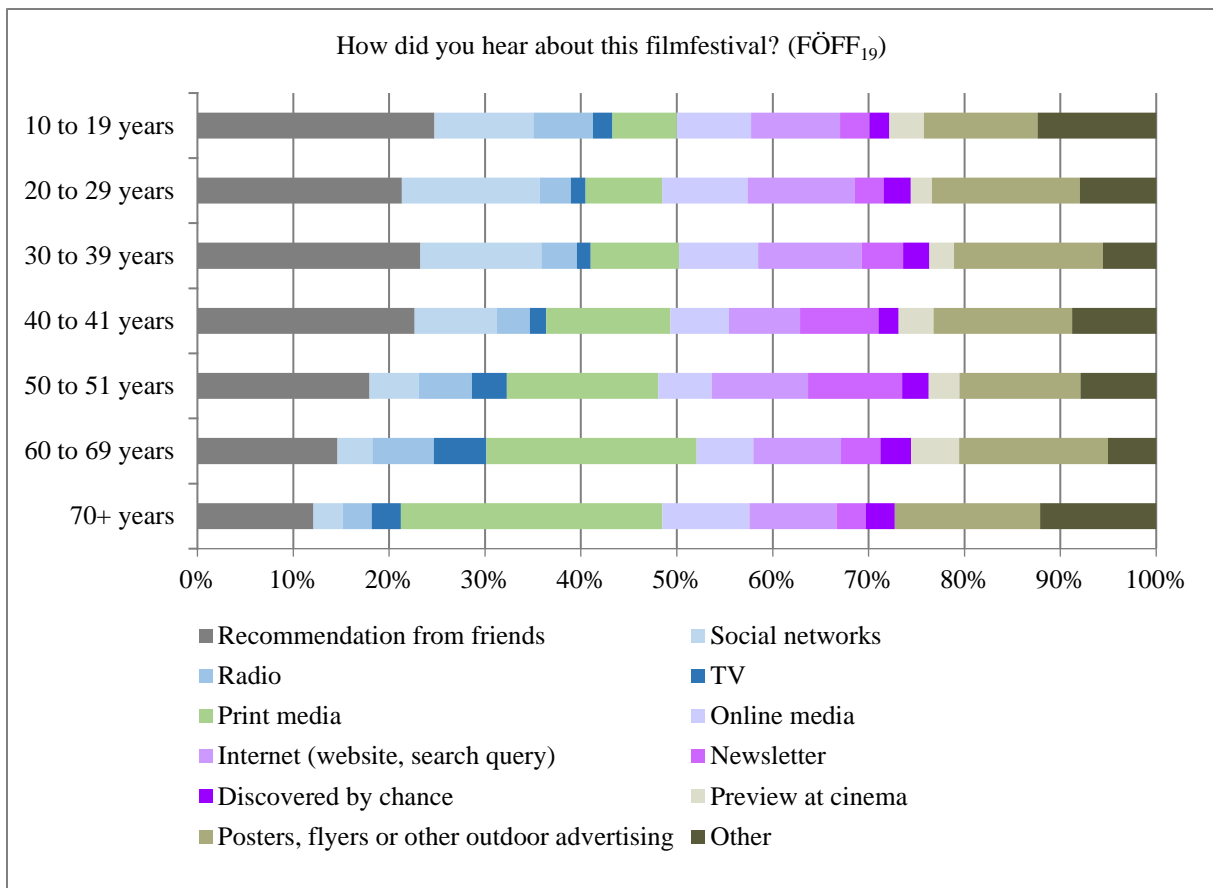
Fig. 5: 2015: How did you hear about this film festival? (Multiple answers possible)  
(FÖFF<sub>19</sub>).



Source: the authors

Considering visitors' awareness of Austrian film festivals according to age, findings revealed that the older the visitor, the greater the significance of print media and the smaller that of social networks (FÖFF<sub>19</sub>). Posters and flyers are nearly equally significant for all age groups. Outdoor advertising and the internet/online media play are approximately equally significant for all age groups.

Fig. 6: Awareness by Age and Media Channel: How did you hear about this film festival (Multiple answers possible)? (FÖFF<sub>19</sub>)



Source: the authors

Here, Austrian film festival websites are decisive for information about the programs in addition to their catalogues and program flyers. All other sources of information, such as

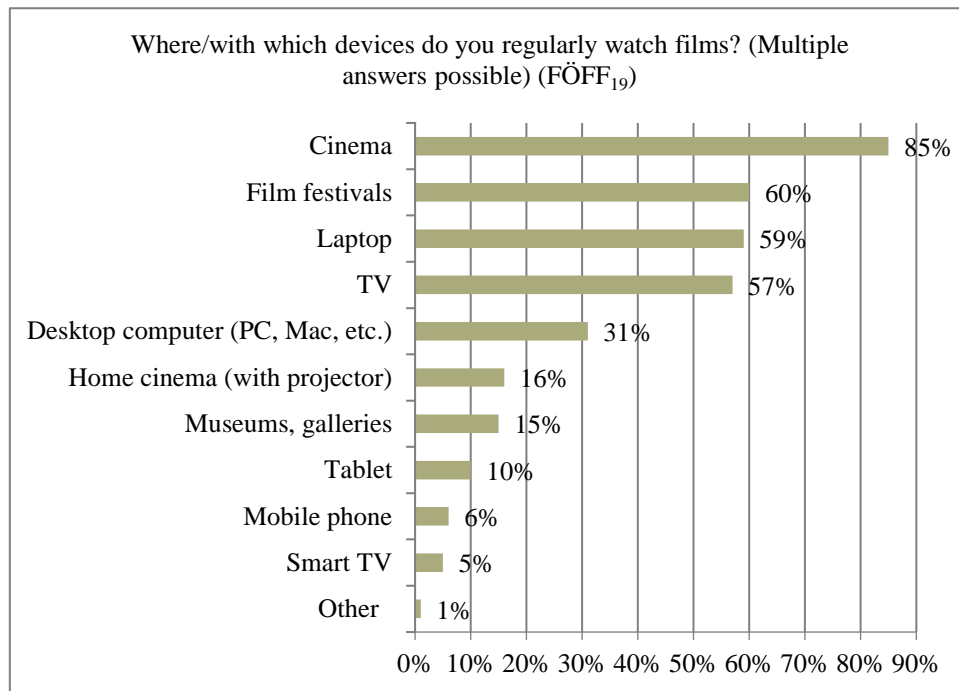


recommendations from friends, social networks, online and classic media play a comparatively subordinate role.

The strong affinity of the audiences of Austrian film festivals to film is also reflected in the above-average number of cinema visits per year. At film festivals, 27 per cent of the visitors were present at four to six screenings and 24 per cent were at two to three screenings. The number of visitors who were present at more than seven screenings is 40 per cent. The fact that the interest of audiences at Austrian film festivals in film is generally decisive is remarkable: whether the screening takes place as part of a cinema's regular program or at a festival is of secondary importance. In response to the question about how many films a visitor has viewed in the 12 months prior to the festival visit at cinemas or festivals, there are some minor differences, but it can be said overall that the numbers are equal. On the average, visitors of Austrian film festivals went to 7.8 screened films. This figure is considerably higher than for Austrians who go to the cinema regularly: in 2014, they saw 4.1 films per year at cinemas (*Österreichisches Filminstitut*, 2015, p. 34).

Cinema, as a traditional venue of consuming films, occupies an undisputed first place among visitors of Austrian film festivals. Among public screening venues, it is the most important by far (85 per cent of visitors surveyed go to the cinema), followed by film festivals (60 per cent) and museums and galleries (15 per cent). The fact that viewing habits – measured by the media channels through which films are watched – have changed drastically due to internet platforms has been confirmed by the survey. In private settings, classic television and digital forms such as DVDs and Blu-ray discs are nearly equally as important as newcomers in the exploitation chain: platforms such as *YouTube* and *Vimeo*, streaming platforms and video on demand. Classic television sets are used less often to watch films by the cinema-loving visitors of festivals than laptops. Mobile devices such as tablets and mobile telephones, on the other hand, play barely any role at all.

Fig. 7: 2015: Where/with which devices do you regularly watch films? (Multiple answers possible) – FÖFF<sub>19</sub>.



Source: the authors

## 4. Economic Value Added

In the past few years, numerous studies have examined the economic effects of film production in various countries (*Nordicity*, 2013; *Roland Berger*, 2015; *Olsberg SPI*, 2015; *Deloitte Access Economics* 2015; *PricewaterhouseCoopers*, 2016; *Goldmedia*, 2017).

However, no such examinations exist on film festivals.<sup>9</sup> The calculations provided in this chapter concerning economic effects of Austrian film festivals provide for some first information about the extent film festivals have on economic value added in Austria and might be useful for comparing the economics of Austrian film festivals with other countries

The total of such economic effects generated by domestic festivals primarily comprise overall economic effect of the organization and operation of the festival itself in addition to the expenditures of the visitors whose main purpose was to see the festival. Compared with the similar phenomenon of film or screen tourism (see: *Olsberg SPI*, 2007; Roesch, 2009; *Euroscreen*, 2015), we suggest to design festival-goers as film festival tourists. Since the expenditures of festival visitors who did not have to travel to a festival from outside, i.e. who generally live nearby, have not been taken into account in our calculation, the total expenditures of festival tourists represent a rather conservative figure, which is probably higher in reality. There are no data on film festivals that can be drawn from national economic statistics in Austria. For the calculation of the film festivals contribution to Austria's GDP, we are thus relying on calculations for film festivals in Germany and the U.S. What may seem odd at first sight – using data from abroad to determine the economic effects in Austria – is, in our opinion, justified by the similarities of economic activity of film festivals in Austria, Germany and the U.S., i.e. between countries with a similar level of economic activity. The

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<sup>9</sup> Research focus in the field of film festivals does not rely on economic aspects only. See, for instance, <http://www.filmfestivalresearch.org/> where an extensive bibliography on film festivals can be found, but not a single entry on film festival economics.

results of the above-mentioned studies on the economic impact of a national film and/or TV-industry substantiate this claim. Although the volume of total turnover, market orientation and the volume of the labor force in the film industry of France, Germany and the UK differ greatly from one another, the respective multiplier effect – enabling the calculation of the total economic contribution of one countries national film industry to the GDP – are in a small range, extending from 1.9 (France) to 2.7 (UK), with Germany in between with a factor of 2.6 (*Le BIPE*, 2013; *Roland Berger*, 2015; *Olsberg SPI*, 2015; *Goldmedia*, 2017). Based on the premise that the structure of economic activity of film festivals is comparable between Austria, Germany and the U.S., our calculation uses the multiplying factors measured for the *Berlinale* and the *Sundance Film Festival* (*Investitionsbank Berlin*, 2013; *Stambro* 2015) and applies them to the data gathered in our survey.

Fees, salaries and any other expenditures (rental fees, expenditures for technical service providers, advertising, etc.) account for direct expenditures, indirect economic effects are produced by service providers that assist operation of the festival, like hotels, printers, transport services etc. Induced effects are triggered by economic activity in other areas, e.g. on the part of employees, who spend their earnings for rent, electricity, food, etc.

Based on the calculations provided by *Investitionsbank Berlin* (2013) and *Stambro* (2015), the multiplier effects are, on average, 1.6 for film festival tourism and 1.84 for the production expenditures of the festivals themselves:

Fig. 8: Overview of Multiplier Effect for Events and Film Festivals

<b>Ratio of direct effect compared to total economic effects</b>	<b>Tourism</b>	<b>Gross production value</b>
Events in Austria	1.86	1.82
<i>Sundance Film Festival</i>	1.11	1.89
<i>Berlinale</i>		1.82
<b>Average</b>	<b>1.6</b>	<b>1.84</b>

Source: *Institut für Höhere Studien*, 2012; *Investitionsbank Berlin*, 2013; Stambro, 2015.

With a total budget of 6.5 million euros for Austrian film festivals (FÖFF<sub>19</sub>) – this equals the direct effects – the overall economic effects amount to 1.84 times this figure, or nearly 13 million euros.

On the basis of the data obtained in the survey, the number of individuals who came specifically to visit a certain film festival and were responsible for “expenditures outside of the festival” can be calculated. This represents a total of 3,715 film festival tourists: individuals interested in film, employees in the film sector, journalists, moviemakers and film crew members. Festival tourists contribute additional purchasing power to the location where the festival takes place. The beneficiaries are the festival box office, and also hotels, bars and restaurants, retail, and the transport industry (taxis, public transportation, the railway, etc.). When completing the survey, festival tourists claimed to have spent 64 euros per day for food and accommodation for an average of 3.9 nights. Based on figures by *Statistik Austria*, relating to the makeup of expenditures of tourists in Austria in the areas of accommodation, food, transportation, cultural and entertainment services, and other expenditures (bmwfj,

2013), the total daily expenditures per festival tourist can be calculated. When the figure for expenditures obtained by the survey of 64 euros for accommodation and the expenditure share published by *Statistics Austria* (56 per cent for accommodation) are employed for the calculation, total expenditures amount to 115 euros per person and day.

Fig. 9: Calculation of Consumption by Film-festival Tourists (Based on *Statistik Austria*)

Tourist consumption	Expenditure share	Amount for the film festivals
Accommodation	30%	€64
Food	26%	€19
Transportation	16%	€10
Cultural and entertainment services	9%	€2
Other	19%	€15
<b>Total</b>	<b>100%</b>	<b>€115</b>

Source: the authors; bmwfj, 2013.

Thus, the direct expenditures for festival tourism in Austria amount to 1.65 million euros. Multiplying this amount with the average factor gathered for the *Berlinale* and the *Sundance Film Festival* (1.6), the overall economic effects of festival tourism sum up to 2.64 million euros. Thus, the total amount of economic effects from festival operation and festival tourism for 17 Austrian film festivals amount to 14.62 million euros (FÖFF<sub>17</sub>). It was not possible to determine the share of expenditures that go to foreign countries (a majority, for example, for film rights) or services obtained from outside Austria. However, since the calculation of the economic effects is conservative (expenditures of visitors who did not travel to the festival were not taken into consideration), it can be assumed that the contribution of 17 film festivals (FÖFF<sub>17</sub>) to Austria's GDP amounts to at least 14.6 million euros.

As mentioned above, Austrian film festivals had a total budget of 6.5 million euros (FÖFF<sub>17</sub>). Approximately 57 per cent of that figure – 3.65 million euros – was obtained

through public funding (excluding sums from collecting societies and professional organizations). From the perspective of local, regional and national funding institutions, those 3.65 million euros generated a total of 14.6 million euros of added value. One euro of funding invested into an Austrian film festival thus generated four euros of added value.

## **5. Conclusion: Subsidies are Lifesavers for Festivals**

The strong increase in the number of film festivals around the world reflects their growing importance in distributing film. This has finally changed: since the global production of films has greatly increased and classic cinema exploitation is under pressure from new distribution channels – pay TV and video-on-demand – the importance of film festivals as a platform of distribution and visibility for films has risen. This is also true for Austrian films released every year: Growing in number, they have more and more difficulties to find their audience, as the frequency of cinema visits has not increased accordingly.

The late director of *Viennale – Vienna International Film Festival*, Hans Hurch, claimed when asked about the importance of film festivals, that 90 per cent of all films produced worldwide would find an audience through film festivals only. Although there is no evidence for this claim, our research confirms that cinema is only one way for films (out of several) to find their audience. An example of this phenomenon is the fact, that Austrian films reach an equal number of viewers through the branches and cultural institutes of the *Ministry for Europe, Integration and External Affairs* and on film festivals worldwide as they do in Austrian cinemas. This confirms the rising importance of film festivals and the puts the traditional focus on a film's theatrical release into perspective.

Another reason for the increase in the importance of film festivals lies in the fact that their role as “mediator” between a large world cinema production and its audience has grown in importance. Arguably, this is also due to the constant availability of films on various digital platforms: film festivals stand for the quality of their curated programs and selected films. In addition, film festivals offer a growing visibility for documentaries, which have – according to some of our interviewees (FÖFF<sub>16</sub>) – more and more troubles to find broadcast time on television: In past decades, documentaries were produced primarily for television before they moved to cinemas due to insufficient budgets and the lack of adequate formats. At present, exploitation of documentaries at cinemas only rarely works: such films have audiences primarily at film festivals – before they run elsewhere, possibly in paid-for and special-interest channels.

In times of the increasing disappearance of linear programming in classic television and the emergence of digital platforms in particular, film requires much more attention. Festivals offer this. Discussions, including with directors and other members of the film team, lectures, workshops, concerts, parties, exhibitions, and also award ceremonies, industry get-togethers and other activities that involve mediation increase the visitors’ total collective experience and set film festivals apart from classic cinema operations where this kind of events may take place, but on a much smaller scale.

The development of Austrian film festivals (FÖFF<sub>20</sub>) over the past few years has shown that the majority of films screened are not shown in domestic cinemas, and this fact is valued by an increasing number of visitors. The growth in the number of viewers leaves no doubt that Austrian film festivals have experienced success in the past few years. Festivals must establish themselves and develop their audiences independently. This requires consistency and endurance. Plans should be made for periods of five rather than two years.

The fragmented funding landscape and the funding approvals, which are often given for a



single year, do not fit in with this necessity. Funding policy oriented towards the long term and based on an overall strategy is required. Such a strategy must also include clearly defined goals that funding and the festivals are expected to achieve.

For Austria, this would mean that all important funding institutions work out such a strategy together. They could define the framework for future development of Austria's film festival landscape and identify areas where concrete improvements are possible. The precarious financial situation of festival employees and the related brain drain represent an important challenge. A corrective could be closer cooperation in those areas which do not involve the festival's core profile (advertising, marketing, technical service providers, print acquisition, etc.). However, improving employees' financial situation will only be possible with higher budgets. The conclusion of several-year funding agreements would have a positive effect by reducing the amount of administrative work required of both the funding institutions and festivals, and the festivals would also have a better position when negotiating framework agreements and acquiring sponsoring funds.

All film festival directors interviewed agreed that public funding – be it local, regional or national – is essential, if not indispensable for their continued existence. Public subsidies offer a basic revenue source, which enables film festivals to conclude sponsoring agreements and generate further income (ticket sales, etc.). At the same time, public funding enables film festivals to run a small organization, on the basis of which all financial, administrative and curatorial tasks – indispensable before the film festival can actually start (and is able to sell tickets, offer accreditations and fulfills the agreement with sponsoring partners) – can be performed. It goes without saying that a proper timing of subsidy payment is of the essence here: the selection of films, as well as the organization of film rights, take time. If the funding approval does not arrive early enough a film festival simply cannot take place. This happened for the 2017 edition of Vienna's open-air festival *Kino unter Sternen*: being left in the dark

from one major funding institution as to the effective starting date and amount of financing, *Kino unter Sternen* was not able to pay their employees and partners and had thus to be cancelled.

When asked about the prospects of growth of *Crossing Europe- Film Festival Linz* – one of Austria’s major film festivals – Christine Dollhofer, its director, highlighted the fact that public funding is just enough to hold the status quo, and that further development of new program agendas, the festival’s side program or staff development is only possible with additional sponsoring funds. This assessment is shared by those film festival directors in Austria whose film festival has been founded in the past decade, managed to establish their film festival in Austria’s festival scene, but now struggle to be more visible on the national and international scene, due to their stagnating funding situation. One Austrian film festival – *VIS Vienna Independent Shorts* – managed to gain visibility outside of Austria by being recognized as “Academy qualifying festival” for the *Oscar* of the best short film, i.e. the winners at VIS automatically qualify for the *Academy Award* from this point on.

When interviewed, film festival expert Marijke de Valck stressed that there are many examples of successful festival funding. Further: “A more important issue seems to be that since the start of the financial crisis there has been a watershed between established (major) and struggling (minor) events. The shift is towards a winner-takes-all approach, where established events, the major internationally recognized festivals, are (relatively) secured of (state) funding, while others struggle to survive. In other words, while the total amount of funding available for festivals has decreased, this pain is unevenly felt amongst festivals.” (de Valck, as interviewed in August 30, 2017).

As sponsoring money (or “in-kind” products sponsored) is a scarce and disputed resource in the cultural industry, we believe that a national funding strategy for film festivals

is the best way to further allow the Austrian film festivals success story to continue. Within Austria, this would enable a growing market of film festival visitors to see world cinema in front of their doorstep.<sup>10</sup>

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<sup>10</sup> This point is shared by Marijke de Valck: “In Europe, the necessity to complement state aid and ticket sales with sponsorship has increased, but state (or EU) subsidies remain crucial. Major film festivals have professionalized their sponsorship programmes, and the North American model of corporate sponsorship and mercenaries is tested and adapted to local societies. The commercial variant of festival organizations that emerges most strongly in Asia appears – at least for the moment - less influential in Europe.

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## Appendix

List of the Festivals gathered in the FÖFF:

Data base for the sample names

No.	Name of the FÖFF festival	Cultural statistics <sup>1)</sup>	Participation in visitor survey	Participation in festival management staff survey	Info on audience size (Auslastung)	Interview with management staff
1	FrauenFilm Tage	x	x	x	x	x
2	Tricky Women	x	x	x	x	x
3	Diagonale	x	x	x	x	x
4	Poolinale	x	x	x	x	x
5	Crossing Europe Filmfestival Linz	x	x	x	x	x
6	Ethnocineca	x	x	x	x	x
7	Festival of Nations <sup>2)</sup>					
8	VIS Vienna Independent Shorts	x	x	x	x	x
9	Internationales Film Festival Innsbruck	x	x	x	x	
10	Kino unter Sternen	x	x	x	x	x
11	Shortynale Klosterneuburg	x	x	x	x	x
12	Der neue Heimatfilm Freistadt	x	x			
13	Alpinale	x	x		x	
14	K3 Film Festival	x	x	x	x	x
15	/slash	x	x	x	x	x
16	LET'S CEE	x				
17	video&filmtage	x	x	x	x	x
18	Vienna Jewish Film Festival	x	x	x		x
19	Viennale – Vienna International Film Festival	x	x	x	x	x
20	YOUKI Int. Jugend Medien Festival	x	x	x	x	x
21	Internationales Kinderfilmfestival					
22	this human world	x	x	x	x	x
Total		20	19	17	17	16
<b>Sample name</b>		<b>FÖFF<sub>20</sub></b>	<b>FÖFF<sub>19</sub></b>	<b>FÖFF<sub>17</sub></b>	<b>FÖFF<sub>17Aus</sub></b>	<b>FÖFF<sub>16</sub></b>

<sup>1)</sup> The data relating to the cultural statistics comprise the number of screening days, film screenings and side events, information on the films shown at film festivals (current films, films shorter than 45 minutes, origin, genre), and the number of visitors at screening, side events and the annual program (if available). The FÖFF collects these data from its members, and they represent the basis of both the Austrian Film Institute's *Film-*



*Industry Report* (Österreichisches Filminstitut, 2016) and the cultural statistics published by Statistik Austria (Statistik Austria, 2016a).

<sup>2)</sup> The Festival of Nations joined the FÖFF as an associate member in September 2015 and did not participate in the study.