

EUROPEAN FILM FESTIVALS IN TRANSITION?



Film Festival Formats in Times of COVID

RODERIK SMITS



THESSALONIKI INTERNATIONAL FILM FESTIVAL
NOVEMBER 2021

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FOREWORD

When the first film festivals were cancelled in March 2020, we were far from envisaging what would happen next.

The dramatic impact of the COVID-19 pandemic has accelerated changes in the film festival sector. It has challenged film festivals to reconsider their strategies, work practices and business models.

In the past few months, I have participated in many knowledge-exchange events about current developments and the future of film festivals. During these events, I learned that there is a need for more comparative research about the transition state of European festivals. The COVID-19 pandemic has affected the film festival sector for the past 20 months, and will continue to have an impact.

I would like to thank researcher Roderik Smits for producing this excellent report in which various film festival formats are discussed in detail. Drawing on 12 interviews with some of the leading European film festivals, it provides key insights into strategic directions, with a vision for the future.

This study was supported by the Senate of Berlin (Germany), the Thessaloniki International Film Festival (Greece) and the CONEX-Plus research programme of University Carlos III of Madrid (Spain).

I hope that this study will help us to develop discussions about the transitional state of film festivals further.

Elise Jalladeau
General director, Thessaloniki International Film Festival

November, 2021

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EXECUTIVE SUMMARY

This industry report examines how European film festivals are responding to the challenges imposed by the COVID-19 pandemic on staging large gatherings and in-person events. Drawing on 12 interviews with Directors and Programmers of some of the largest festivals in Europe, it provides insight in the direction that European film festivals have taken during the COVID-19 pandemic.

The analysis focuses on the way that festivals have engaged with different formats during the period between August 2020 and July 2021:

- **The physical format**, whereby festivals show films in physical venues like cinemas or open-air sites, on the 'big screen'.
- **The hybrid format**, whereby festivals show films in physical venues as well as online platforms.
- **The online format**, whereby festivals show films on online platforms.

What becomes clear is that film festivals express a strong desire and prioritisation for the physical or hybrid format:

- Several European film festivals organised a physical festival or a hybrid festival during the period between August 2020 and July 2021.
- Several European film festivals pivoted to an online format during the period between August 2020 and July 2021, but they will return to a physical format or hybrid format if COVID-19 circumstances allow.

What also becomes clear is that the online film programme could take various forms in support of the physical festival. Such forms are by no means mutually exclusive:

- Online screenings of films are (temporarily) available as part of hybrid film festivals. The online festival programme can be an extension or reflection of the physical festival programme, showing new releases and retrospectives.
- A selection of festival programmes remains available online after the festival, for the rest of the year or permanently. That is particularly common for retrospective films.

Overall, I demonstrate that the concept of film festival culture has expanded and become more diverse. It is based on processes of continuity and change, resistance and innovation, physical and online formats, and long-established practices and newly-established practices. It also based on processes of exclusivity and inclusivity in terms of the extent to which films are accessible for audiences.

In the conclusion, I reflect more generally on questions about the future of festivals:

- Will the function of film festivals as premiere events change?
- What is their role in the windowing sequence of films?
- Can they continue to provide a springboard for the distribution of films?
- Can they take on other functions to support films?

Socially distanced seating in the Olympion cinema during the Thessaloniki Film Festival, November 2020



1

INTRODUCTION

This study examines how European film festivals are responding to the challenges imposed by the COVID-19 pandemic on physically-sited events and in-person gatherings. Lockdowns and other policy restrictions have reduced the capacity of many festivals to work together with physical cinemas in order to offer a collective, in-person viewing experience for audiences.

The resulting effect is that less festivals have been able to organise physically-sited screenings and events. Given such changing circumstances, the hybrid format that combines both physically-sited and online screenings became the preferred alternative for most festivals. Other festivals necessarily pivoted to an online-only format because cinemas were closed.

Analytically, such developments have fuelled discussions about the contradictory nature of physical, hybrid and online film festivals, and particularly whether they can co-exist in harmony. The longstanding reputation of the physical festival format is at stake as the COVID-19 pandemic accelerates experimentation with hybrid and online formats.

What becomes clear in this study is that there are mixed responses towards festival formats. Some festivals see online screenings as an expansion of or alternative to their physical programming, while other festivals see online screenings through a perspective of disruption and change because they offer a viewing experience that is different, or at least non-identical, for festival audiences. The purpose of this study is then to provide insight in the strategic direction that European film festivals have taken during the COVID-19 pandemic.

This study builds in various ways on knowledge exchange events organised by film festivals and screen agencies in the first stages of the COVID-19 pandemic. For example, dozens of film festivals participated in a series of online meetings about film festival formats and examples of best-practice. Further, Thessaloniki International Film Festival developed activities to protect the audio-visual ecosystem, including a petition to support geo-blocking of international and regional premieres that was signed by more than 60 festivals.¹

1. <https://form.jotform.com/201551821474047>

This study also develops analytical discussions about the transitional state of film festivals. News articles consistently inform about strategies of individual festivals during the COVID-19 pandemic, but there is a need for more comparative research. In order to bring together perspectives from various festivals, this study develops research undertaken by industry studies such as “The New Era of Indie Film Exhibition” (2020), which focuses primarily on film festivals in the North American region and “Festival Platforms: Survey on the Future of Cinema Events” (2021), which focuses specifically on film festivals in Italy.²

2

RESEARCH CONSIDERATIONS

The scope of the study is deliberately restricted to a relatively small sample of 13 European film festivals. This sample ranges from (major) flagship festivals with international appeal to more specialised and localised festivals (see Table 1). Analysing this specific sample within the context of the wider film festival landscape helps reveal the motivations behind strategic decision-making. The primary focus of those festivals is feature films (including documentaries), even though they may also show short films, television series, immersive art and extended reality (XR).

The research draws primarily on insights gathered from 12 interviews with Managing Directors, Artistic Directors and Lead Programmers of European film festivals (see Appendix 1 for the list of interviewees).³ Ten online face-to-face interviews were conducted with festivals over Zoom, while two festivals preferred written interviews over e-mail. The purpose of the interviews was to learn about the festival format in the period leading up to the festival, the programmes they put together, their audience engagement strategies, and the continuing value of film festivals in the future (see Appendix 2 for the list of interview topics). In addition to interviews, information was gathered from festival websites and news articles.⁴

2. Fitzgerald, J., Newman, B. and Meadow-Conner, L. (2020). The New Era of Indie Film Exhibition, December 2020. <https://www.indiewire.com/wp-content/uploads/2020/12/The-New-Era-of-Indie-Film-Exhibition.pdf>. De Marco, C. (2021). The Association of Italian Film Festivals' Research Confirms the Future of Festivals is Hybrid. Cineuropa, 1 April 2021. <https://cineuropa.org/en/dossiernewsdetail/3378/399463/#cm>.

3. Interviews were undertaken in Spring 2021. Some interviews were conducted with two representatives of a festival.

4. Interviews were carried out with all festivals except Cannes. An interview by IndieWire reporter Eric Kohn with Cannes' Festival Director Thierry Frémaux provided useful information about the Cannes festival in July 2021.

Table 1 — Film Festivals ordered by their festival format

Film Festival	Country in Europe	Date of the Festival	Festival Format
Venice International Film Festival	Italy	1 Sep - 11Sep 2020	Physical
San Sebastian International Film Festival	Spain	18 Sep - 26 Sep 2020	Physical
Zurich Film Festival	Switzerland	24 Sep - 4 Oct 2020	Physical
Berlin International Film Festival	Germany	9 Jun - 20 Jun 2021	Physical
Cannes Film Festival	France	6 - 17 July 2021	Physical
Karlovy Vary International Film Festival	Czech Republic	Cancelled	Physical
BFI London Film Festival	United Kingdom	7 Oct - 18 Oct 2020	Hybrid
Film Fest Ghent	Belgium	13 Oct - 24 Oct 2020	Hybrid
International Film Festival Rotterdam	Netherlands	1 Feb - 7 Feb and 2 June - 6 June 2021	Hybrid
Thessaloniki International Film Festival	Greece	5 Nov - 15 Nov 2020	Online
Les Arcs Film Festival	France	12 Dec - 19 Dec 2020	Online
Göteborg Film Festival	Sweden	29 Jan - 8 Feb 2021	Online
Dublin International Film Festival	Ireland	3 - 14 March 2021	Online

As we are gradually learning about the effects of COVID-19 pandemic, it remains too early to draw long-term conclusions. Research about European film festivals during the COVID-19 pandemic has limitations; festivals are organised in different countries and on different dates throughout the year, and are therefore confronted with different policy interventions and audience restrictions. Given these methodological difficulties, this study focuses only on festivals which took place between August 2020 and July 2021. Table 1 above provides an overview of festivals included in the analysis and the format they used.⁵

The structure of Table 1 provides guidance for the rest of this study, beginning with a discussion of physically-sited film festivals and then moving on to hybrid and fully online festivals.⁶ In addition to festival formats, Table 1 also indicates the scope of this study. It is, for example, important to include the perspectives of major festivals such as Cannes, Venice and Berlin, but equally of other festivals in Europe. The study is therefore based on the perspectives from film festivals in 12 countries in Europe, with France being the only country that represents two festivals.

3

RECREATING THE FILM FESTIVAL FORMAT

The conventional concept of a film festival is based on the 'physical' format, where film screenings and other events (e.g. award ceremonies, industry talks, press conferences, networking events and sales markets) take place in-person within physical spaces. Film festivals are thought of as physically-sited events that bring together an audience of cinephiles and film enthusiasts, local and global communities, or other specific audience groups. They have important

5. In terms of terminology, it is important to distinguish between audience festivals and industry events. This analysis focuses primarily on audience festivals, which are publicly accessible festivals. Some audience festivals also organise industry events, which are business markets with restricted access for industry participants.

6. The terms physically-sited festivals and physical festivals are used interchangeably for reasons of style.

roles to play for filmmakers and the film industry, as well as for cities, regions and nations. The COVID-19 pandemic demonstrates that a smooth transition from physical to an online festival model is complicated. Some of the functions of physically-sited festivals are difficult to recreate online, including:

- Replicating the ‘big screen cinema experience’, which enables audiences to watch films collectively in high quality visuals and sound.
- Functioning as sites for international or national premieres of high-profile films.
- Making a contribution to the cultural economy of cities, regions and nations (i.e. use of cinema venues as well as accommodation and transportation for guests, industry participants and audiences).

Other functions of physically-sited festivals are easier to recreate online, albeit in slightly new or different ways. Such functions include:

- Working with a festival jury for competition programmes and prize winners of festival awards.
- Involving film critics and other media to raise expectations and attention for films through reviews, ratings and interviews.
- Stimulating the collective viewing experience by offering film programmes with timed or ‘live’ screenings, either through pay-per-view or subscription pricing options.
- Organising audience engagement activities such as Q&As with film directors and creative talent.
- Facilitating networking opportunities between filmmakers, film festivals, distributors, exhibitors and other stakeholders in the film industry, and also between festival audiences.
- Organising knowledge exchange events to provide educational learning opportunities and reflection upon important themes in the world we live in.

There are also several functions that are more specifically associated with online access to festivals, including:

- Providing opportunities for festivals to expand their audience base. Online access allows audiences nation-wide to participate in festivals. They usually respect geo-blocking measures for films to prevent that they become accessible beyond national borders. Online content that is produced by festivals themselves, such as introductions to films by film directors and Q&As sessions, can also become available to audiences in international countries.
- Supporting equality, diversity and inclusion (EDI) in terms of online audiences that festivals could reach. Encourage the participation of disadvantaged groups in society, including people with disabilities, by offering a variety of viewing options to enrich their viewing experience on online platforms. This could for instance involve closed caption (CC) subtitles, sign language (SL) interpretation and audio-description (AD) for a select number of films.
- Giving audiences more authority and flexibility in terms of when and where to watch films on an on-demand basis. Some online festivals, however, work with specific time-frames in which films are accessible.
- Encouraging audiences to create user profiles in order to connect with other users and exchange watchlists, rate films, participate in live chats and engage in festival activities via social media.

Having identified key functions of physical and online formats, interview insights from festival executives will be used to support the analysis of festival formats in the remaining sections of this report. The hybrid festival format will be included also in this analysis.

4

PHYSICAL FILM FESTIVALS

Table 1 (see above) shows that Cannes, Berlin, Venice, San Sebastian, Zurich and Karlovy Vary are film festivals that continued to rely on the physical format during the period between August 2020 and July 2021. It is not a coincidence that Cannes, Berlin and Venice belong to this

category as the biggest European film festivals with international appeal. They are premiere events for high-profile films that are introduced and promoted through the festival circuit to a relatively large number of industry participants, international press and an audience of cinephiles. Through powerful processes of selection and promotion, they can also provide a stepping-stone for films to be picked up by other film festivals and distributors in national and international markets.

Although some of their activities can be recreated online, the Festival Directors of Venice and Berlin point to differences in the way that physical, on-site festivals are experienced. For Alberto Barbera (Venice): “The film industry needs to have physical film festivals to give proper promotion for world premieres”. In addition, Mariëtte Rissenbeek (Berlin) notes that physical film festivals enable film premieres to be promoted in an environment that provides a “different emotional and collective experience” than online festivals.

Other physically-sited festivals like San Sebastian and Karlovy Vary are also premiere festivals for high-profile films. José Luis Rebordinos (San Sebastian) draws attention to different competition sections in this respect:

It has always been clear to us that the Official section and the New Directors sections can only be in-person. They are sections of World and European premieres and we think that the critics and our audience should be able to judge and enjoy these films for the first time in a cinema. For other parallel sections (such as Perlak, Zabaltegi-Tabakalera or Horizontes Latinos), whose films have already been premiered at other festivals, the hybrid formula, physical and online, can be a good possibility, but we will always screen all our films in cinema venues.

Karel Och (Karlovy Vary) takes the same position. He also explains the reasons behind their philosophy: “We have always perceived a film festival as a physical event, which is based on the phenomenon of a physical screening and the audience being able to talk to a filmmaker”. He continues: “An online version has never been an option for us because it goes against the very reason why film festivals exist”.

Zurich is more flexible in terms of their policy for festival premieres, but they are also advocates of the in-person theatrical cinema experience. In the spirit of cinephilia, Christian Jungen (Zurich) notes that some festivals have taken responsibility to “defend the very meaning of cinema” in times of disruption and COVID.

For Jungen, cinema is not simply about watching films with an audience on the big screen:

A film festival is about people, the aura of an artist, hearing the filmmaker introduce his film, having the chance to ask questions and getting a drink afterwards, that's all part of the mythology of physical film festivals. We are there to make a bridge between filmmakers and audiences, and that's definitely more inspiring in a physical cinema.

Audience impression at the Ghent Film Festival, October 2020



4.1 —

Responding to the COVID-19 pandemic

The Berlin International Film Festival in late February 2020 was the last big European festival that took place in a physical format before COVID was declared a global pandemic by the World Health Organisations and governments across Europe introduced measures to halt the spread of the disease. Though the first Coronavirus cases had been identified in China and some Chinese guests did not attend the festival, it was only in the weeks after Berlin that the threat of COVID was recognised in Europe, with cinemas closing in many countries.

The consequence of this development was that physically-sited festivals explored alternative options in the period that followed, including re-scheduling the dates of their physical editions:

- While Cannes had to cancel its regular audience festival in May 2020, alternative dates in June 2020 and July 2020 were also not feasible due to COVID restrictions.⁷ Instead, they organised an online edition for industry professionals in June 2020.
- Karlovy Vary had to cancel its regular festival edition in July 2020 and a different version in November 2020 (called Karlovy Vary IFF 54 ½) also proved not to be feasible.
- Berlin organised two separate festival editions in 2021. The first edition was an online industry festival for film professionals that took place in March 2021, while the second event was a physical audience festival that took place in June 2021. Due to COVID restrictions, Berlin organised the audience screenings across 16 outdoor, open-air cinemas rather than indoor cinemas.

Other festivals were less dramatically affected by COVID. After a period of several months, Venice, San Sebastian and Zurich were amongst the first big festivals in Europe that returned to their physical format by late summer 2020. Their editions were also organised on the same dates as in previous years.

What those festivals experienced, however, were challenges in terms of getting access to film premieres and other new films because sales agents or distributors delayed their release in some cases, particularly in periods that cinemas were closed. They also found that audience capacity in cinemas was usually restricted, in line with COVID guidelines. Both restrictions are described in more detail in Section 4.3 below.

7. Cannes organised an online business market for industry professionals in June 2020

If we return to all six festivals, it is clear that each of them held on to the physically-sited format. They relied on different versions of a physical edition, such as indoor and outdoor screenings, and industry and audience events. In addition, re-scheduling the physical edition to another date was an alternative option before cancelling the festival entirely. Critically, none of these festivals considered a hybrid or fully online edition as an alternative option for cultural, social and political reasons, as already demonstrated in some of the quotes above.

4.2 — Preparing for the festival

Given the various versions of the physically-sited format, how did festival organisers experience the period leading up to their editions during the period between August 2020 and July 2021?

Organising a film festival requires preparations and arrangements in terms of assessing film submissions and putting together the film festival programme, involving film directors and creative talent, and working together with local authorities, cinema venues and sponsors. Decisions about organising a physical edition were then made well in advance. Such decisions were particularly complex because COVID measures often changed at short notice:

- By mid-March 2020, Cannes was the first big film festival in Europe to announce that their audience edition in May 2020 would be postponed to July 2020 due to government measures in France. Their 2020 audience edition was ultimately cancelled in the midst of the first wave of the COVID crisis. In 2021, their audience edition was re-scheduled from May to July.
- By late April 2020, Karlovy Vary made the decision to cancel their regular festival edition in July 2020. Because COVID circumstances in the Czech Republic improved in summer 2020, they organised a different version, Karlovy Vary IFF 54 ½, to take place in November 2020. However, this was later also cancelled when COVID regulations changed again.
- By mid-June 2020, Venice decided that they were going ahead with their regular festival edition in September 2020, as Festival Director Alberto Barbera explains: “We took a risk by mid-June 2020 because we were going to have a physical edition of the festival, but the situation was improving. The lockdown was almost over and the government announced that cinemas in Italy would reopen by 15 July 2020”.

- San Sebastian worked towards a physical festival edition in September 2020, but only knew 15 days before the event that it would happen. Festival Director José Luis Rebordinos explains: “The organisation of the 2020 edition was very complicated because the circumstances could change every day. We worked in coordination with the Department of Health of the Basque Government and with the Ministries of Culture of both the Spanish and Basque Government”.
- By early July 2020, Zurich decided that they were going ahead with their regular festival edition in September 2020. Festival Director Christian Jungen explains that they considered two options: “We were going to do it or we were going to cancel. We didn’t have this hybrid scenario and we didn’t want to postpone, either we did it in our slot physically or not at all”.

As in many sectors of the cultural industries, COVID was initially thought of as having a short-term effect on film festivals. Venice, San Sebastian and Zurich made a statement by returning to the physical format, whilst also giving hope and confidence to the film festival sector. However, such optimism disappeared when lockdowns and other restrictions were re-introduced to seek control over a second wave of the COVID crisis. Film festivals in various European countries were of course also affected by the second wave between about October 2020 and March 2021.

The preparations undertaken by the Berlin festival for their edition in February 2021 were in various ways illustrative of the challenges that festivals faced. Festival Director Mariëtte Rissenbeek (Berlin) notes:

We got worried especially in October 2020, November 2020 and December 2020. We realised that to carry through the Berlin Film Festival in February 2021, it got more difficult and we started thinking about what could we do alternatively. By then, our Artistic Director Carlo Chatrian had already made the selection for our film programme, so we felt very committed towards the filmmakers to make it possible for them to show their films. We developed a two-step model by organising an online industry market [EFM] in March 2021 and audience screenings in physical cinemas in June 2021.

Such a commitment to filmmakers or producers was of more relevance during the second wave when film festivals had more time to prepare than during the first wave.

Another concern was the period in which festivals were taking place, with various festivals re-scheduling to the summer when COVID cases were expected to be lower and physically-sited festivals could also use outdoor,

open-air cinemas to show films. Berlin developed their two-step model in December 2020, based on the period in which other international festivals were expected to take place. Because Cannes was at that point scheduled for May 2021, Berlin decided to organise their industry event in March 2021. Even though this was an online edition, it provided an opportunity for producers to secure press coverage and negotiate distribution deals. Their audience festival was then moved to June 2021. Rissenbeek explains this decision: “You have to take decisions based on the situation you are in. By early December, it was clear that Cannes was set for May and you have to make a decision. In the end Cannes moved from May to July but that was already when we had decided to do the two-step Berlinale”.

4.3 — Programming festival films

Rights holders such as producers, sales agents and distributors exert control over the timing of premieres for their films. While Cannes and other film festivals were cancelled or organised online, Venice and San Sebastian were among the first premiere festivals for high-profile films in Europe since the beginning of the COVID crisis. The physical editions of Venice and San Sebastian, in combination with indications that cinemas were re-opening in several European countries and beyond, gave reason to believe that progress was being made. Some rights holders thus submitted high-profile films for festival competitions, while others delayed premieres.

Alberto Barbera (Venice) recalls: “There were so many films that it was not so difficult to put together a satisfying line-up in terms of the quality of films and geographical representations, because we had films from all over the world”. He also notes that sales agents postponed the release of films in some cases: “We saw a lot of films and we tried to get some of them for the festival but some sales agents decided to wait for the next year in Cannes or Venice”. Zurich, which took place just after Venice and San Sebastian, speaks of a tense situation whereby rights holders could change their strategies depending on COVID circumstances. Christian Jungen (Zurich) notes:

We received answers very late. It was nerve-wrecking because American sales agents kept asking how the situation was in Switzerland. Los Angeles was in lockdown and we had a hard time convincing the Americans that we were going to do a physical festival. For a long time, they didn't believe us and so they waited, but then shortly before the closure of our programme we got *One Night in Miami* (2020) and we got *Nomadland* (2020). So we got films, but that was very late in the process.

Another point related to festival programming concerned audience occupancy in cinemas. In line with COVID safety protocols at different times during the year, festivals in European countries were required to reduce audience occupancy as follow:

- Venice: 50% of seats available at in-cinema venues by September 2020.
- San Sebastian: 40% of seats available at in-cinema venues by September 2020.
- Zurich: 60% of seats available at in-cinema venues by September 2020.
- Berlin: outdoor cinemas with socially distanced seating by June 2021.
- Cannes: 100% of seats available at in-cinema venues by July 2021.

For Berlin, the size of the film programme for their audience festival was also reduced because of cinema occupancy restrictions. Rather than a large-scale in-cinema festival, they organised a one-off, small-scale festival with outdoor, open-air cinemas to build-in more certainty. Their capacity was reduced to 16 screens where they showed films.⁸ As Mariëtte Rissenbeek (Berlin) explains: “The June event was a smaller event. COVID cases increased and cinemas closed just after Easter. It became clear for us then that the only option we had was trying a special event open-air without indoor screenings”.

For Venice, their emphasis remained very much on the physical in-cinema festival format, even though they made subtle changes to their film programme. This involved working with other festivals, organising additional open-air screenings and moving one festival section online. As Alberto Barbera (Venice) explains:

We decided to reduce the programme of the festival a little bit. (1) We accepted the hospitality of the festival in Bologna, where we screened restored films which were part of the Venice Classics section. (2) We added two extra open-air theatres to our screening locations, one in Venice and one the Lido, and we used all the cinemas in Venice and in Mestre to offer more screenings of all the films for the audience. (3) We screened our VR competition section online. (4) We cancelled a small section which is called Sconfini. It included screenings of eight or nine films in the evening, in specific theatres.

In terms of programming, it is worth mentioning that Venice had already experimented for several years with online screenings for selected films, such as small independent productions from their Horizon or Out of Competition

8. They organised 193 screenings for 126 films.

sections. Barbera notes: “Since 2012, we have this virtual theatre in which we screen a certain number of films during the festival period, with a limited number of about 1.500 tickets for each film. At the same time, we do not have intentions to increase online screening activities in order to become a hybrid festival”.

Overall, Festival Directors experienced cinema occupancy restrictions as a major challenge. They privileged physical screenings of high-profile films selected for the most important festival competitions over screenings for other festival sections. They also sought to work with other screening locations to organise more screenings.

Audience impression of the Berlinale Freiluftkino Museumsinsel



Table 1 (see above) shows that the London, Rotterdam and Ghent film festivals relied on a hybrid format during the period between August 2020 and July 2021. Hybrid festivals combine a physical edition with an online edition. Of course, building in more certainties in times of COVID is also important for hybrid festivals, but they experience different opportunities and challenges to physical or online festivals. Festival Directors and Programmers identify the following differences:

- The hybrid format could create a context for online screenings to augment physically-sited screenings.
- The hybrid format is used by festivals to reach their regular audience, but also to reach a broader audience online.
- The hybrid format requires more organisational work and skills because it relies on two models, and some films are shown at the same time in physical cinemas and online.
- The hybrid format is still a relatively new and innovative model. Many festivals have not worked or experimented with online platforms before.

While those festivals organised a hybrid edition, they point to the continuing importance of a festival sphere. Therefore, they refer to various characteristics of a physically-sited format. As Tricia Tuttle (London) notes:

What we tried to do was making sure that we created a festival experience, so we were not replacing the in-cinema experience. We did timed screenings so that everyone was watching the films at the same time and also encouraged people to feedback their thoughts via social media platforms and share reactions to the films with each other. We also we made sure we had Q&As or introductions for every film from the filmmakers.

Wim de Witte (Ghent) notes that Ghent had a similar strategy in mind for online screenings: “There was this kind of consideration that perhaps we should also create a sort of festival atmosphere on the online platform. And the idea was that this was partly created by making titles only available at certain time slots. Just like in real life, like a live event”.

For Vanja Kaludjercic (Rotterdam), live screenings were complemented with an option to watch films within a three-day window:

We wanted to create the live experience and have the online audience directly interact with the filmmaker after the screening, so we offered timed screenings you could come to 20 minutes before the film would start. And then after the screening we started directly with the Q&A. We wanted to offer the collective experience but we also offered a 72 hours window for people to decide when they want to watch films on-demand.

5.1 — Preparing for the festival

London and Ghent were organised in October 2020, just after the first festivals were re-introduced in physical format and COVID was supposedly under control. By the time that London and Ghent made decisions about their festival format, it was of course unclear if cinemas would be open during the festival period. Nevertheless, they were hopeful and the hybrid format meant that they did not have to move their festival dates because they could fall back on the alternative, online format:

- London decided in June that their October edition would be hybrid. Tricia Tuttle notes: “When we locked our model the cinemas were closed but we knew that all the cinemas were moving towards that sort of hopeful day of opening either in late August or early September. We knew that it would happen about four to six weeks before the London Film Festival. And we wanted to be part of a sort of ‘back to cinemas’ campaign”.
- Ghent also decided early in the process that their October edition would be hybrid. Wim de Witte notes: “We had a preference for physical screenings and adopted strict security measures to make that happen. It was clear to us that the online platform was out of necessity for when we would have no other choice than going online”.

Other than London and Ghent, Rotterdam developed a two-step model to separate their industry event from their audience festival. Their industry event took place online in February 2021, while their audience festival took place in a hybrid format in June 2021. They celebrated their 50th year anniversary in 2021, and therefore decided already in September 2020 to put this model into practice.

5.2 — Programming festival films

How did the hybrid format impact on negotiations for films with rights holders? As mentioned in Section 4, the timing of a festival premiere or release matters for the distribution of films. London, Rotterdam and Ghent can provide a stepping-stone for the distribution of films in their national markets, and for some films even internationally.

There can be tensions, however, between films shown in cinemas and online. The assumption here is that an in-cinema release adds more promotional values to films than an online release, and that rights-holders are not always prepared to release films online. In particular, high-profile films are deemed to take advantage from a release in cinemas rather than online at film festivals, which can have implications for the hybrid festival programme.

The Ghent festival, for instance, included 140 films in their physical edition, and 60 films in their online edition. Marijke Vandebuerie (Ghent) explains this difference: “The films that were shown online were dependent on having the approval from rights holders to put them online, which means that the online programme is not always representative for the whole programme of the festival”.

Given strict COVID restrictions in cinemas in the Netherlands, Rotterdam developed a policy whereby rights holders were committed to give permission to show films in both physical and online format, even though this had a restricting impact on the films shown at the festival. Vanja Kaludjeric (Rotterdam) notes: “Showing films only online was always a fall-back scenario for us. We could not include films if online rights were not part of deals with rights holders”.

Trica Tuttle (London) notes that the timing of their festival in October worked out in their favour. Just as with Venice and Zurich, Tuttle found that rights holders were initially reluctant to release new films but that changed when COVID cases decreased:

I thought it would be a lot more difficult for us to license the films that ultimately became part of the virtual screening programme. We were in a perfect window for the model that we delivered. I think if we would have been a June festival, our programme would not have of the same quality in 2020.

Although the film programme of festivals was affected by various such influences, the hybrid format provided an opportunity to reach a broader

audience in national markets. Rotterdam and London explain that accessibility was a key motivation for including online screenings. It helped them to redefine their reputation as serving a niche audience of cinephiles. Limited audience occupancy in cinemas was used as an argument in favour for online platforms.

Vanja Kaludjeric (Rotterdam) notes: “The Dutch government limited the capacity in cinemas to thirty people. When we put the numbers together, it was clear that it had a big impact on accessibility and it made our event small and exclusive, which is something we did not want to be”.

Tricia Tuttle (London) makes the same argument: “We wanted the festival to be available to public audiences and you know if we were to just deliver a physical film festival with 35% capacity, you are servicing a very small, elite audience, so that was a big driver for us to organise a hybrid festival”.

5.3 —

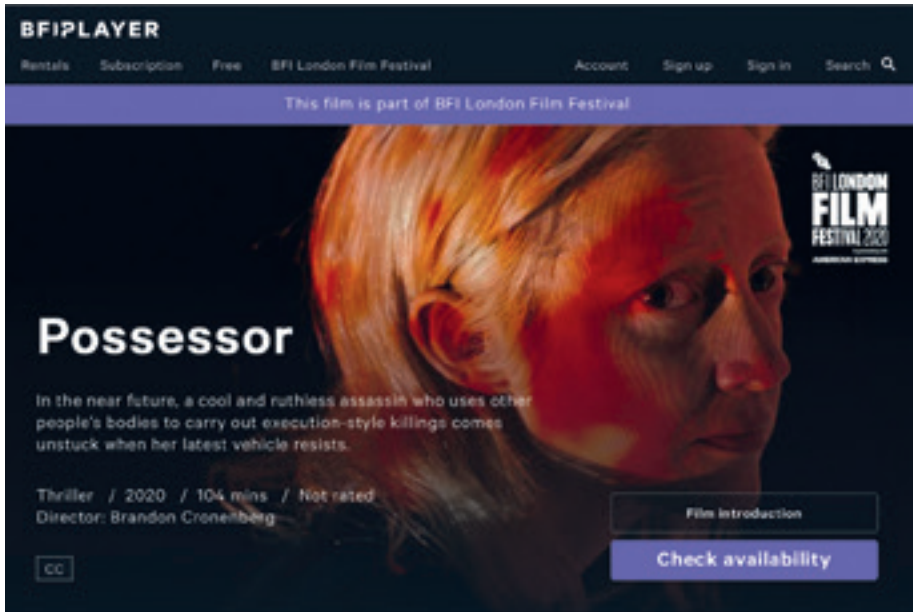
Online platforms

The first relationships between film festivals and online platforms were developed in the years preceding COVID, but they have intensified during the pandemic. Rotterdam and London are examples of film festivals that provide access for festival films on their own online platforms throughout the year, as an extension of their physical festival. Films are initially part of their physical festival programme, and a selection of those films become at the same time, or subsequently, available on their in-house platform. Rotterdam created the platform IFFR Unleashed in 2016 and London has worked with BFI Player for several years.

Another important change during the COVID-19 pandemic was the development of online providers such as Shift72, Festival Scope, Eventive and Cinesend. They build and design (white label) platforms for film festivals, with functions such as live streaming, curation and scheduling. Some festivals were already working with such providers to facilitate online industry screenings and press screenings before COVID. What changed with COVID was that the demand for white label platforms increased when festivals started to consider hybrid or online versions for their audience screenings. As a result, many festivals began to work with those online providers.

In Europe, for instance, the online provider Festival Scope experienced a huge demand from film festivals.⁹ They started a partnership with Shift72 during the COVID-19 pandemic in order to meet this demand. Online platforms through Festival Scope are hosted by Shift72.

9. The aim of Festival Scope is to promote the online availability and visibility of European films, for which they receive funding from Create Europe.



Screenshot of the BFI London Film Festival platform (14 April 2021)

5.4 — Working with online platforms

For London, it is an ambition to make festival films available to audiences in regions across the United Kingdom. By working with their online platform, BFI Player, they are able to build collections of festival films shown previously in their physical festival editions. While the BFI (British Film Institute) is responsible for both the London film festival and BFI Player, cross-collaborations are encouraged to work towards cultural targets and achievements.

In 2020, such cross-collaborations between the hybrid festival and the BFI Player provided a new opportunity, as Tricia Tuttle (London) explains:

There were two ways to get to the festival homepage. (1) You could either go to the website of the BFI London film festival. (2) Customers of the BFI Player could find their way to the festival collection. And the positive side was, and I know this happened, is that audiences who used the BFI Player year-round from outside of London, discovered festival films through the BFI Player as well. There were cross-marketing opportunities.

Despite new opportunities, there were technical complexities in terms of the design of the platform, as Tuttle notes: “One of the drawbacks for us was that BFI player is designed to be a SVOD and TVOD platform for film lovers rather than a festival premiere platform, so we had to build new functionality. The BFI Player team did a great job, but it was challenging”.

In addition to London, the Rotterdam festival also worked with their own, in-house online platform, as Vanja Kaludjeric (Rotterdam) notes:

What we started thinking about is the online side of it because we have our own platform, IFFR Unleashed, that we have introduced a couple of years ago and in which we are screening some of our festival films to Benelux or worldwide audiences, depending on the availability of the rights. IFFR Unleashed is a year-round complement to the festival, in terms of providing more visibility to the filmmakers that we are passionate about and want to support”.

Kaludjeric also experienced complexities in terms of organising the festival on their IFFR Unleashed platform: “The demands with what we had to come up with to accommodate for digital screenings required a lot of technical development without so much of a research stage. If you start something in June for the next January edition, you have very little time to put it properly in place”.

She continues: “What worked a lot in our favour was teaming up with other Dutch film festivals, such as IDFA and Cinekid. We put teams together that were developing these digital screenings for us. And we received the support from the Netherlands Film Fund to develop it”.

Ghent developed a different platform strategy by relying on the services of provider Shift72. Wim de Witte (Ghent) notes:

We thought a lot about setting up our own white-label platform through Shift72 but also talked with other platforms. We heard a lot about the Shift72 platform, particularly that sales agents might be more relaxed about platforms created specifically for festivals. The audience might then not get the idea that films are already available on the same platform.

6

**ONLINE
FESTIVALS**

As indicated in Table 1 (see above), Göteborg, Thessaloniki, Dublin and Les Arcs organised online film festivals during the period between August 2020 and July 2021. It is important to note that they prepared for a hybrid version, but they pivoted to an online festival format because cinemas were closed during their festival editions.

There are of course benefits and drawbacks associated with the online format. In line with the hybrid format, a key motivation concerns building in certainties to be able to guarantee in advance that the festival will take place. There is also no need to change the date of the festival because of COVID restrictions. Another key motivation concerns the argument that online festivals can reach a broader audience than physical festivals.

At the same time, online festivals have been the subject of criticism, with commentators asking to what extent they can recreate the physical festival experience:

- Which promotional values can they add to the profile of festival films?
- Can they create the industry buzz and word-of-mouth interest for festival films that might enable them to be picked up by distributors in national markets?
- Or do they simply contribute to the circulation of festival films as another (but limited) circuit of distribution in order to reach audiences?

There are also questions about audience demand and competition for online festivals, given that existing specialised platforms in national markets (such as MUBI) also provide curated programmes of smaller, independent films.

6.1



Connections with the physical format

What sort of initiatives did Göteborg, Thessaloniki, Dublin and Les Arcs develop to make connections with the physical format? And how did they produce a festival culture?

Göteborg developed innovative, promotional activities by making use of their flagship festival cinema (the Draken) and a large ice hockey stadium (the Scandinavium arena). In those venues, they organised physical screenings of 22 festival films for only one audience member, while film directors were invited to introduce the films. The films and introductions were at the same time available online on their platform for a broader audience.

As Jonas Holmberg (Göteborg) explains:

It was important for us to tie online events to the physical space of Göteborg and the Draken cinema, where our big festival films get a premiere. The filmmakers (mostly Swedish) were there to present their films. They were dressed up because we had a red-carpet presentation. The festival was very much organised as usual, but only for one person. We communicated the activities on social media and encouraged audiences to participate in live events. It created a feeling of collectiveness.

Another innovative event by Göteborg that raised much attention, particularly from international press, focused on the psychological effects of the isolated cinema experience. One audience member was selected to spend seven days on a remote island (called Pater Noster) in Sweden, with access to the entire festival programme of 60 films. This event was not about introducing and promoting individual films, but the theme of collectiveness, or community, was once again emphasised through use of social media, where individual experiences were shared in online videos.

Likewise, Thessaloniki raised attention by making a connection with the physical format. They showed their opening film *The Whaler Boy* (2020) in their flagship cinema, the Olympion. However, the cinema was completely empty because audiences were not allowed inside. The film was shown at the same time on their online platform. Orestis Andreadakis (Thessaloniki) notes: “We used recordings of our live stream in the cinema to strengthen the collective experience. The idea was to create an awareness amongst audiences that they were part of a bigger, live event.”

Les Arcs also developed innovative initiatives in support of their online festival. They organised events such as Q&As around festival films in order to engage audiences. Because their festival is based in a ski resort in the South-East of France, they experienced difficulties for directors and creative talent to travel to Les Arcs in a time of COVID. They therefore decided to build a (studio) chalet in Paris from where Q&As were organised. As Guillaume Calop (Les Arcs) explains:

A film festival is not only about showing films, it is also about talking about the films, and having the films presented by their directors and talents. We set up a little studio in Paris that looked like a chalet, so you had the impression that it took place in Les Arcs. The French directors would come to Paris and join us live, and with directors from outside France we did it over Zoom. We filmed the sessions and we did some round tables, and this was supposed to be shown in cinemas, like Q&As after the films. But eventually we used the recordings to complement online screenings.

In addition to innovative online initiatives to do with audience engagement, there were questions among festivals about the transition from a physical festival to an online festival. Would the online format diminish their key rationale for existing? How does the core festival audience engage with an online version of the film festival? All four Festival Directors describe the transition with terms like 'strange' and 'uncomfortable'.

Gráinne Humphreys (Dublin) points to the viewing experience of audiences:

Our biggest screen is an IMAX screen, so you just feel like audiences would regularly say: 'I love seeing films in this space'. But suddenly you take away that beautiful cinema space, so what are you offering? I think that's a really tricky thing for filmmakers because I don't think I've spent as much time as this year talking to filmmakers about what they want from festivals.

On the other hand, there was also a realisation that the online format provides a different viewing experience, which has both benefits and drawbacks. Within the limitations of the online format, conversations between filmmakers and festivals were about the same sort of subjects as they would be for a physical festival. When and where will you show my film? For which competition programmes will it be selected? Is the press going to be invited?

Another discussion point was that COVID encouraged rights holders to develop distribution strategies, whereby films became available online before

they were released in cinemas. Such release strategies were a reflection of broader changes in the market for film distribution and exhibition. In particular, Hollywood studio films and independent films were released directly in the online market.

Changing release patterns raised questions about the role that online festivals can play in support of the distribution for films. Do rights holders use online festivals for the premiere of films? Can they subsequently release those films in physical festivals? And what is the ripple effect of an online festival release for films?

Elise Jalladeau (Thessaloniki) notes that some rights holders adapted to COVID circumstances: “We prepared for a hybrid festival but pivoted in a late stage to an online format because of COVID constraints. Some of the sales agents and distributors followed and supported us. However, we also noticed that they returned to more traditional distribution patterns in periods that COVID circumstances improved”.

6.2 —

Networking and knowledge-sharing

Working with online platforms was a new and innovative experience for many film festivals. It created a need for knowledge-sharing events. In absence of an association for European film festivals, several film festivals took initiative and organised online seminars. Festivals such as Thessaloniki, Dublin, Copenhagen (i.e. CHP:DOX) and Vilnius were among the initiators of self-created networks.

Festivals participated in knowledge-sharing events to learn from the experiences of other festivals that worked with online platforms and benefit from best-practice. Such knowledge-sharing involved specific subjects such as online programming and the platform interface, live events and on-demand screenings, ticketing and data collection, and geo-blocking and piracy.

Guillaume Calop (Les Arcs) explains the benefits of such networks: “We had a lot of conversations during the first lockdown. Thessaloniki organised several Zoom meetings with festivals. We spoke with other festival about different platforms. We learned what the others were doing, how they worked and their solutions”.

Elise Jalladeau (Thessaloniki) notes that Thessaloniki encouraged networking between festivals:

We had numerous of conversations with our peers. The issue of geo-blocking of international, national and regional premieres was initially an important discussion point, but we were also concerned with other regulations for online film festivals in Europe, such as piracy. Informal networks are getting more structured and organised to speak on behalf of large groups of film festivals. There are associations that represent the interest for sales agents and film distributors in Europe, but an association for film festivals does not exist.

Gráinne Humphreys (Dublin) created an informal network for film festival programmers. In addition to questions about piracy, they discussed technical issues associated with online platforms: “What happens if a film collapses? What happens if it stops? We brought in experts to talk to the group. And after every festival someone had to reveal how they got on and what sort of films worked best”.

Humphreys notes that the advantage of conversations and web seminars was that festivals were able to obtain insights and undertake research: “The pivot online was brilliant because you suddenly saw how other festivals managed it. The industry programmes from most festivals became available online, so you were actually getting greater access than you would have if you were not travelling to a festival. It felt like we got a greater connection and we got access to a lot of research”.

6.3 — Preparing for the festival

How did online festivals experience the period leading up to their editions, why did they decide to organise an online edition and at which point did they make that decision?

- Thessaloniki prepared a hybrid film festival for November 2020. They decided only in October 2020 to pivot to an online festival because cinemas in Greece were closed down by the end of October. Their film festival could take advantage of experiences from their online documentary festival, which took place in May 2020.
- Les Arcs also locked down their model in a late stage of the preparation process. They considered different options for organising the festival in

physical or hybrid format, but decided in November 2020 to organise an online edition in December 2020.

- Göteborg prepared for a hybrid edition to be keep options open and ensure flexibility. They decided to go online in November 2020, with the festival taking place in January 2021.

- Dublin was also hoping to organise a hybrid festival. They had plans for drive-ins, outdoor screenings and in-door screenings. They decided to move online in January 2021 to be able to organise the festival in March 2021.

What the preparation of these four festivals demonstrates once again is that they worked with different formats in mind and that the online edition was a fall-back scenario. The main reasons for choosing an online edition were lockdowns and other COVID regulations with a severely reductive impact on the physical format. As Jonas Holmberg (Göteborg) explains:

We had big plans for a large-scale physical festival, even though COVID restrictions allowed access to only fifty audience members in cinemas. We discussed how it could be organised and how many screening locations there were available for fifty people. But then after the summer when the second wave came, the maximum number of audience members in cinemas went down from fifty to eight people. We decided subsequently to change the strategy and focus our energy on an online film festival.

Mirja Wester (Göteborg) refers to experiences with their children festival (i.e. Göteborg Film Festival Prisma): “We also had the experience with our local children festival which was organised in October as a hybrid event. We experienced a different sphere in cinemas with a maximum of fifty people. That is simply not what you want for a premiere. When the number of audience members dropped to eight, it was an easy decision to go for an online edition”. Gráinne Humphreys (Dublin) makes a similar point: “We are an audience festival, so it actually tries to bring a large number of audiences into seeing the programme. We were very aware of the capacities, which meant that reduced capacity was going to make some of our physical screenings really kind of nonsensical”.

6.4 — Programming festival films

There was a general sense amongst film festivals that the online format was disadvantageous for festival programmes. Some high-profile films were difficult to get hold of for online festivals because rights holders demanded a physical release or postponed the release. On the other hand, conversations between online festivals and rights holders addressed the same sort of questions as in pre-COVID circumstances: for which films is my festival the right place? And is my festival able to help support the profile of this film? An advantage for online festivals was that there were also rights holders that pivoted towards an online release in anticipation of uncertainties about COVID developments.

As noted above, another aspect of online festival involved the extent to which they could replicate the live experience of films screened in cinemas. While all four festivals considered the hybrid format initially as a realistic option, their online festival programmes were partly structured in a way that reflected their physical editions.

- Thessaloniki notes: “We had timed screenings because we were supposed to be a hybrid festival. When we decided to organise the festival online, the programme was shaped in the same way as a physical edition”.
- Les Arcs notes: “We did everything like in real life, including the festival programme”.
- Dublin notes: “Our audience could do it like a physical festival, so that they had a two o’clock, four o’clock and seven o’clock screening. They could see three films a day. And what was really interesting is that the data shows that some people did do that”.
- Göteborg, who used their own, in-house platform for their online festival, notes: “We asked ourselves how we can make this a festival that doesn’t feel like our steaming service. It had to be an event that is happening now. We built a homepage for the festival that provided access to a specific section on the platform and we asked audiences to create a festival profile in order to log-in. Then we decided to treat that environment as a cinema with a screening room. So there will be one film premiere at a time, and then the next premiere, followed by another premiere, etcetera. And that of course made it impossible to have so many films and we needed to restrict the number of films”.

While one part of the online festival programme was based on the logic of making films available on particular days and times, the other part was based on the logic of on-demand viewing. That is to say, those films usually remained available for a period of at least 48 hours from the moment of its online premiere or release. Although this provided an extra option for audiences, it could be confusing for festival audiences who were not familiar with the specifics of this model. As Orestis Andreadakis (Thessaloniki) notes:

Most films were sold out from the first day of the festival so that was not an issue, but other films needed more word-of-mouth support. While people were trying to watch the films after 48 hours since the release, it was no longer available. An online film festival provides a different offer than other platforms that audiences are familiar with in terms of accessibility.

There is also a point to make about programming decisions for online festivals. One important activity of festival programmers is that they travel to other festival to watch films, talk with other programmers and get a sense of the all-important buzz surrounding the release of films. In particular, networking is experienced as a key aspect of the decision-making process of festival programmers. As Gráinne Humphreys (Dublin) notes:

I was conscious that I missed these off-the-record, gossipy kind of conversations, where you unpack what works. And I also was beginning to feel that sense that everybody else was feeling the same about films coming through. It was slightly like a kind of isolated loneliness that you get when you don't go to physical festivals.

Humphreys also points to audience responses:

When I see a film at a festival, you get a sense of the audiences that would go to it, but online they are often invisible. I know what works for specific audience groups in a cinema. I know what films work for a six o'clock screening on Thursday, or an eight o'clock screening on Friday. And that was really interesting, the idea that you were taking away those clear criteria for online programming.

Further, Humphreys is concerned that some films are not appreciated online:

Do online screenings of films need to be films that allow you to stop, go off to make tea and come back? I was really intrigued once I locked the programme to see that most films were about 90 and 100 minutes. There was obviously something in my head around the idea that the length of films matters online. And that is my fear to be honest about the future, that online will be dominated by a particular kind of narrative cinema, and that more experimental or challenging narratives will not be included in the same numbers.

6.5 —

Working with online platforms

Online providers like Festival Scope and Shift72 are leaders in the market for European festival platforms. As noted in Section 5.3, online platforms through Festival Scope were hosted by Shift72. Other European festivals worked with platform providers such as Eventive and Cinesend, or with their own in-house platform, as in the case of Rotterdam, London and Göteborg. Table 2 provides an overview of all festivals with an online component and the platforms they used.

	Hybrid or online format	External (white label) or in-house platform	The platform
Rotterdam	Hybrid	In-house	IFFR Unleashed
London	Hybrid	In-house	BFI Player
Ghent	Hybrid	External (white label)	Shift72
Göteborg	Online	In-house	Draken Film
Dublin	Online	External (white label)	Eventive
Les Arcs	Online	External (white label)	Festival Scope (hosted by Shift72)
Thessaloniki	Online	External (white label)	Festival Scope (hosted by Shift72)

Table 2 — Online platforms for film festivals

The table demonstrates that Göteborg used their own, in-house streaming platform (i.e. Draken Film) to organise the online festival. Because the festival and streaming platform are more or less part of the same organisation, they could work together as one team. Mirja Wester (Göteborg) explains that cross-collaborations had a positive effect on their labour and work practices:

We could put all the hours of our employees into working with Draken film during the Autumn and that was very good for opening the mindset of the whole organisation because the festival is a big part of that. In preparation for the festival, we organised events where the festival and platform teams watched films together. The pandemic made our collaborations more productive.

Their programming collaborations also changed. While their streaming service was used as an extra screen for the festival in previous years, it became their only screen during the COVID-19 pandemic. Jonas Holmberg (Göteborg) explains: “In addition to 24 physical screens in previous editions of our film festival, we also had a small online programme during the festival, but that was for limited niche content like retrospectives. We used our streaming service Draken Film as the 25th screen”.

Göteborg also used their streaming service to provide greater access for festival films throughout year. As discussed in Section 5.3, that strategy was also developed by Rotterdam and London, working with their in-house streaming platforms. Holmberg notes: “One of the ideas when we started Draken film was to play the festival films on Draken film after the festival because people wanted to see films but they were not available anymore”.

For Dublin, the process of searching for a suitable online platform was based on their research and networking activities. Gráinne Humphreys (Dublin) notes: “We listened to our peers in Ireland and the Cork International Film Festival went with Eventive. We thought that Eventive was best suited for the hybrid format before we pivoted to the online format”.

Humphreys also refers to the skills that were required for an online festival: “We needed a digital festival manager, whose job it was to manage the online structure and everybody else had to kind of revolve around that. It was like making the projectionist of a cinema the key person in a festival organisation. It was interesting to see how that worked”.

Another organisational aspect concerned the reliability of online platforms. Because online festivals rely on online technology, they are more vulnerable than physical festivals. Elise Jalladeau (Thessaloniki) explains: “If you show films online, you rely to a greater extent on online technology to organise your festival and the films you show. Digital rights management is important for films to ensure anti-piracy and geo-blocking, but as a festival you also work with an internet browser and you think about features like device management and payment processing. Despite such dependencies on online technology, we have positive experiences with Festival Scope”.

7 — RELATIONSHIPS WITH CINEMAS AND OTHER FESTIVALS

While most of the attention during the COVID crisis has thus far focused on relationships between festivals and online platforms, there are also examples of relationships between festivals and (physical) cinema venues. Such relationships are not limited to cinema venues in the city or region where a festival is based, but they are developed with cinema venues nation-wide.

The idea is generally that the release of festival films is extended to other physical locations across the country during the festival. It is a strategy for festivals to reach a bigger audience in physical cinemas, while festival films can build up a profile and benefit from word-of-mouth interest. This model is not completely new, with some festivals already experimenting with a wider cinema release before COVID, but it has been developed further. London and Karlovy Vary were among the festivals that worked with this model during the COVID-19 pandemic.

Tricia Tuttle (London) notes: “We worked with 12 partner venues for a limited number of films. Five partner venues were located in London and seven partner venues were located in the four nations of the UK. And we worked with a much higher number of cinemas across the UK for our closing night film”.

Karlovy Vary cancelled their festival edition in July 2020. However, when COVID circumstances improved and cinemas re-opened in May 2020, they established a partnership with cinemas across the country. Karel Och (Karlovy Vary) explains: “An idea occurred to us to organise the event ‘KVIFF at your cinema’, for which we selected a line-up of 16 titles. There were 96 exhibitors across the country that participated and they screened the films simultaneously”.

Rotterdam and Les Arcs also developed plans to work with a large number of cinemas across their countries. Rotterdam had 43 partner venues lined up nation-wide but ultimately scaled down to cinemas in their own city. Les Arcs created a programme called ‘Off Piste’ (Hors Piste in French). They

selected ten films and had 150 partner venues lined up nation-wide to show at least three films. The screenings were however cancelled because cinemas stayed closed.

Guillaume Calop (Les Arcs) notes: “It would have been a great initiative to respond to the difficulties we were facing. We could have a festival presence across France and promote the big screen experience. The cinemas were very happy to participate while it was also a great event to engage audiences”.

Another initiative that festivals developed during the COVID crisis involved partnerships with other festivals to help each other and strengthen relationships. Although the Cannes festival for May 2020 was cancelled, they selected 56 films that would have been part of their competition programmes. Those films were branded with a Cannes 2020 label before they were shown at other festivals. In particular, San Sebastian paid homage to Cannes: they included 17 films with a Cannes 2020 label in their competition programmes, of which 5 films were selected for the main competition programme.

In addition to initiatives between festivals in different countries, there were collaborations between festivals within specific countries. The reasons behind such collaborations had also to do with festivals that were cancelled. Wim de Witte (Ghent) explains: “We were in contact with some festivals in Belgium that were cancelled because of COVID. One festival in particular, MOOOV, was scheduled for March 2020 at the beginning of the first lockdown in Belgium, but they had to cancel their edition. We developed relationships with them and talked about showing some of their films in our programme. We included seven or eight of their films in our festival and used the label ‘selected by MOOOV’ to promote those films”.

8 — CONCLUSION: EUROPEAN FILM FESTIVALS IN TRANSITION

All film festivals express a strong desire and prioritisation for the physical or hybrid format. Several European film festivals pivoted to an online format during the period between August 2020 and July 2021, but they will return to a physical format or hybrid format if COVID-19 circumstances allow.

There are mixed responses towards an engagement with online platforms and how they can be used best to generate value. The online film programme could take various forms in support of the physical festival. Such forms are by no means mutually exclusive:

1. Online screenings of films are (temporarily) available as part of hybrid film festivals. The online festival programme can be an extension or reflection of the physical festival programme, showing new releases and retrospectives. A limitation of this model is that not every film is available for online screenings and that there are often a specific number of tickets available for audiences.

2. A selection of festival programmes remains available online after the festival, for the rest of the year or permanently. That is particularly common for retrospective films. A limitation of this model is that the availability of those films for a longer period of time is reliant on negotiations with rights holders.

8.1 — The future of film festivals

Because European film festivals are in transition, the concept of film festival culture has expanded and become more diverse. It is based on processes of continuity and change, resistance and innovation, physical and online formats, and long-established practices and newly-established practices. It also based on processes of exclusivity and inclusivity in terms of the extent to which films are accessible for audiences:

- Some film festivals continue to introduce and promote films as part of (exclusively) physical screenings. In particular, they rely on the privilege to be the first to release and show films to what some festival organisers refer to as 'elite audiences'.
- Other film festivals are adapting to new circumstances created by on-demand culture in order to be more accessible and inclusive. For them, the hybrid format clearly makes sense for the world we live in and is a response to wider changes in film culture around the rise of streamers and online viewing.

A discussion point for the future of hybrid festivals is to what extent the online programme could be a reflection of the physical programme. Rotterdam put together a programme of physical and online screenings that was identical. That is however not always the case, with the online programme usually being restricted to a smaller selection of films in the physical programme because rights holders prevent online access.

The online film programme is then an extension rather than a reflection of the physical programme. While the film industry continues to evolve, it is important for hybrid festivals to keep informed about the way that sales agents and distributors adapt and respond to online opportunities.

More generally, the situation of physical and hybrid festivals is broadly comparable to those involved in theatrical cinema exhibition, particularly in European countries where release windows have become more flexible during the COVID-19 pandemic. Some cinema exhibitors continue to work with conventional theatrical release windows; while others collaborate with online platforms to reach a broader audience for films. What this means is that binary industry models and strategies can co-exist.

8.2 — Film festivals and powerful streaming services

There are discussions about film festivals and streaming services. In particular, the most powerful streaming services are making an impact on release patterns for films. Some films are released directly on streaming services, rather than following conventional release patterns whereby they are first released in the festival circuit.

The question is to what extent film festivals with international appeal continue to function as premiere events and provide a springboard for the distribution of high-profile films in the future. There are of course collaborations between festivals and powerful streaming platforms to develop conventional release strategies for high-profile films. At the same time, there is the risk that festivals might become dependent on release strategies developed by streaming services:

- Jonas Holmberg (Göteborg) notes: “One of the potential threats for the future revolves around the premiere status that is so important for some film festivals. You would like to have world premieres or European premieres of films, which gives your festival prestige and status. This might change in a more and more online environment because the release patterns of films are changing. However, it is of course something that we do not want to give up”.
- Alberto Barbera (Venice) notes: “The film industry needs to have physical events to get proper promotion for their world premieres. We will learn how to manage this new situation with streaming services. The streamers and their films also benefit from promotional activities at film festivals”.
- Elise Jalladeau (Thessaloniki): “We have noticed a change in the strategies of streamers towards film festivals: five years ago, it was difficult to include films from streamers in our film festival. The streamers relied on their in-house marketing to promote their films. But nowadays their films are increasingly released in film festival circuit, and our added value is recognised”.
- José Luis Rebordinos (San Sebastian) notes: “I strongly believe that festivals must continue to show films first in cinemas, on the big screen. Streaming platforms have diversified to areas of production and distribution. We work with them just as we work with traditional players. We are going through a period of change, but what will come out of it will be positive for film culture”.

8.3 — The value of film festivals

Given the development of streaming services, which functions will then construct and define the value of festivals in the future? The role of festivals as intermediaries between producers and audiences remains critical. It is the expertise of festival curators, the immediacy of festivals as temporal events, and their contextual and promotional activities for films that continue to be distinctive factors. Jonas Holmberg (Göteborg) notes: “More than before, festivals could be about creating a cultural environment where people engage with cinema on a deeper level. The role of film festivals could be about providing reasons for audiences to watch films”.

Mirja Wester (Göteborg), in addition, argues for the political value of film festivals: “If festivals are not so much about premiere or gala events, then I see a shift towards a more political function. Festivals could be a political place that make films more relevant. Not that many people have an arthouse cinema close to their homes, and that is a gap that festivals could fill. We might play a bigger role in terms of raising attention for films to engage audiences nation-wide”.

Physical festivals can also play a role for streaming services. Mariëtte Rissenbeek (Berlin) notes that curated festival programmes, collective experiences and media attention generate word-of-mouth interest and provide guidance for audiences: “All these films on streaming platforms, it is everywhere and it is difficult to know what you want to see. Festivals remain important in the future for that reason”.

PROJECT INFORMATION AND ACKNOWLEDGEMENTS

Thessaloniki Film Festival

Thessaloniki Film Festival is a film institution that consists of two international festivals with industry markets: Thessaloniki International Film Festival and Thessaloniki Documentary Festival. It also runs a cinema museum, a cinémathèque, a film library and two cinema venues in Thessaloniki.

Website: www.filmfestival.gr

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A digital copy of the report is available for free on the following websites:

- www.filmfestival.gr
- www.onlinefilmcirculation.com

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Appendix 1 — List of interviewees (in chronological order)¹⁰

Name of Interviewee	Job Title	Type of Interview
Tricia Tuttle	Director, BFI London Film Festival	Face-to-face over Zoom
Christian Jungen	Artistic Director, Zurich Film Festival	Face-to-face over Zoom
Gráinne Humphreys	Director, Dublin International Film Festival	Face-to-face over Zoom
Marijke Vandebuerie and Wim de Witte	Manager and Head of Programming, Film Fest Ghent	Face-to-face over Zoom
José Luis Rebordinos	Director, San Sebastian International Film Festival	Written interview over e-mail
Mariëtte Rissenbeek	Executive Director, Berlin International Film Festival	Face-to-face over Zoom
Vanja Kaludjercic	Director, International Film Festival Rotterdam	Face-to-face over Zoom
Guillaume Calop	Les Arcs International Film Festival	Face-to-face over Zoom
Karel Och	Artistic Director, Karlovy Vary International Film Festival	Written interview over e-mail
Elise Jalladeau and Orestis Andreadakis	General Director and Artistic Director, Thessaloniki International Film Festival	Face-to-face over Zoom
Alberto Barbera	Venice International Film Festival	Face-to-face over Zoom

10. All interviewees have given consent for quotes to be used in this report.

Appendix 2 — List of interview topics

Interviews were semi-structured. The starting point of every interview was the festival format. Where applicable, the strategic direction of festivals was discussed in relation to the following topics and questions.

The festival format:

- How have film festivals responded to the COVID-19 pandemic?
 - How have film festivals experienced the period leading up to their most recent edition?
 - What were some of the considerations for film festivals in terms of the format in preparation for their most recent edition?
 - To what extent do film festivals engage with online opportunities?
-

The online festival format:

- What sort of opportunities and restrictions do online screenings offer?
 - How do such online opportunities and restrictions compare to the in-cinema festival format?
 - How is the online programme of film festivals organised?
 - How do film festivals work with online platforms?
 - How is the organisational team of film festivals affected by an online edition?
-

Current developments:

- How can film festivals find a balance between the in-cinema experience and online screenings?
 - What do film festivals see as innovative developments within the film festival circuit?
 - What are lessons that film festivals are currently learning?
 - What are some of the complications that film festivals experience?
-

The future of film festivals:

- What is their view on the role of film festivals in the future?
- Is the traditional film festival format likely to change in the future?
- How can film festivals remain attractive for films as they experience competition from VOD platforms (with some platforms also investing in film productions)?
- How can film festivals preserve the collective, in-cinema experience and continue to engage audiences?

