

Flickering Shadow. Quantifying the European Film Festival Phenomenon
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The Film Festival Phenomenon

Over the past decade, the number of events going under the label "film festival" has literally exploded across all European countries. From being confined to a fairly limited number of professional events with a specific function for the introducing films and new talents to the commercial distribution sector, festivals have virtually developed into a distribution circuit of its own. Festivals may indeed be taking over the fundamental role of introducing audiences to foreign cinematographies and to the European film heritage, previously performed by the arthouse cinemas.

In parallel with the increase in number of film festivals, one can also observe a certain, progressive institutionalisation of individual festivals on one side and of the festivals as a sector in its own right on a European and national level. The setting up of organisations aimed at promoting the interests of festivals at both national level (like the French Carrefour des Festivals created in 1992) and at European level (the European Coordination of Film Festivals and the European Fantasy Film Association is symptomatic of this development.

To analyse what could be labelled the "European Film Festival Phenomenon" and to try to quantify its relative importance within the audiovisual sector, a first step is to identify the existing, although very scarce, sources of information.

It is difficult to find "hard" and analytical data and information on film festivals. To the best of my knowledge and experience as Programme Director of the Norwegian Film Festival in Haugesund for 10 years, what is available is either journalistic accounts, often anecdotal, along with a few academic studies on individual festivals or on specific national frameworks. No attempts to map out the phenomenon on a broader European scale from a both quantitative and qualitative point of view have been undertaken.

However, on the basis of existing sources I will try to outline the main quantitative features of this phenomenon and explore some of the methodological issues involved.

Few statistical sources are available, and those sources which contain quantitative data, such as the pilot study on audiovisual services of Eurostat and the Statistical Yearbook of the European Audiovisual Observatory, do not include specific data on film festivals yet. Other sources have obvious flaws or gaps in their geographical and/ or thematical coverage.

It may therefore be foolhardy to try to pronounce oneself with too much certainty on the phenomenon of film festivals. Nevertheless, this is what I propose to do: to extract some quantifiable traits and parameters for film festivals in Europe from the scattered data available. I will stick to figures and numbers, and I will leave considerations like artistic sensibilities or cultural exchanges out of this particular discussion.

Basic Indicators

The most basic quantitative information will be those which give data about the number of film festivals, the number of people who visit them, and the number and types of films screened.

The most exhaustive source of European film festivals is, no doubt, the annual *Directory of Film Festivals* of the Carrefour des Festivals. Covering 27 countries in Europe, it counts 291 film festivals. The *Directory* is compiled from answers to questionnaires sent out by the Carrefour des Festivals to its network every two years. The current edition gives figures for 1996.

Quite a number of these festivals are also among the 220 festivals listed in the catalogue published by VIDEADOC in 1994. But there are also a fair number of festivals listed by VIDEADOC - mainly in the video and art field - which do not figure in the Carrefour *Directory*.

A further source is provided by two reports, issued by the European Commission/General Directorate X (Information, Communication, Culture, Audiovisual) in 1996 and 1997. In addition to providing analyses on a number of sectors of the European film industry, these reports also provide some figures for film festivals. As far as I understand, the Commission is basing its quantitative information on the Carrefour *Directory* and on information contained in applications for support received from film festivals by the Coordination of Festivals in DG X. Neither of the two reports quote sources for its estimates.

This paper is based on those three sources, with an emphasis on the Carrefour *Directory*, supplemented by the Commission's two reports.

Methodological Considerations

Both the quoted catalogues have methodological shortcomings. The Carrefour *Directory* explicitly - at this stage of its development - aims to be comprehensive for France only. It nevertheless seems to have a fairly good coverage of continental Western Europe - the EUR15 group of nations. Outside this area, coverage is at best haphazard.

Major festivals seem to figure in the *Directory*, while smaller, more recently established, specialised and/or infrequent festivals are not covered. This would tend to pull the averages of the statistics quoted upwards, as one may expect prominent festivals to have a larger audience, more extensive programming and higher cash turn-over.

The VIDEADOC catalogue is less extensive than the Carrefour one, and thus less liable to provide a comprehensive picture of European festivals. Yet it is useful in that it also transcends the traditional boundaries of film into the realm of the audiovisual, covering some festivals and events entirely devoted to video and new media.

However, this extended definition of criteria of coverage also poses a methodological problem in itself: What is, indeed, a "Film Festival" ? - For the purpose of this paper, I will take as my point of departure that a film festival is an event in which cinematographic works are exhibited to the public outside regular theatrical programming. I will, in other words, apply a rather restrictive and conservative definition, limiting the study to festivals which as their main activity screen photographic moving images on traditional film support (although they may also offer subsidiary screenings of videos, electronic art, etc.).

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As the concept of a festival would tend to be rather flexible - and flexibly applied by the editors of the sources, also - it is worth asking how representative are indeed the figures that are reported. After all, most festivals are dependent on public support to operate, and public support tends to be granted on the basis of the impact and importance of the event in terms of audience. While certainly not implying that there is deliberate falsification of figures, I will note that a number of festivals seem to be reporting figures which have a definite ring of approximation to them. This is particularly true for festivals which do not charge admittance, or which offer omnibus admission cards. Nevertheless, I have chosen here to include free admissions to screenings, and also to count admission in touring festivals. However, student and other group admissions have not be included in the tables.

As far as I have been able to establish, only Germany of the European states requires admittance in festivals to be monitored and reported precisely. Some other countries require reporting of income and/or admissions, depending on circumstances. The admissions figures should therefore be taken with a grain of salt in terms of their precision. I will therefore remind my readers that both the text and the statistics proposed here should be taken in the spirit of the sub-title to Louis Althusser's famous essay on state apparatuses: These are indeed "Notes towards an investigation".

Yet, with these reservations taken, it may be possible to specify at least some tentative figures to define film festivals in Europe.

The Number of Festivals

In 1996, the European Commission estimated that there were more than 600 film festivals in the EUR15. By 1997, this estimate had risen to 800 festivals.

On the other hand, the international film producers' association FIAPF only recognises a total of 67 film festivals around the world. 48 of those are in Europe. Obviously, the aim of the FIAPF is not to monitor all festivals, but rather to authorise those that are willing to accept the FIAPF "Regulations for International Film Festivals".

However, working from the EU estimate, the *very* round and approximate figure of one thousand film festivals for the whole of the European continent would not seem to be utterly improbable.

Audiences and Admissions

The European Commission rather broadly puts the figure of "audience" of the 600 festivals in the EU countries at 8 million in 1995. The report also notices that the number has doubled, from 4 million, in the three years since 1992. The 1997 up-date of the report increases this estimate to "around 10 million" for the 800 festivals estimated in the EUR15 in 1996. It also notes a growth of 66% in the audience for these festivals since 1992.

I have taken the liberty of working a little on the figures given in the Carrefour *Directory*, and the total number of admissions in 1996 for the 291 festivals listed there amount to nearly 5 million.

European Film Festivals 1996: Admissions

Where?	Number of admissions in Film Festivals	Average pr. festival
EUR15	2634.141.500	15.700
Other EUR (12)	28 815.900	29.100
Total EUR (27)	2914.957.400	17.000

Source: European Audiovisual Observatory 1997 - Carrefour des Festivals 1996

If these figures are representative, the 600 festivals estimated by the Commission would generate a total admission of 9 million in 1996. That is if we use the most conservative of the average admission figures in the table and "round it off downwards" to 15.000 admissions. Using the same average, the 800 festivals in the EUR15-area would then in 1997 generate 12 million admissions.

I am a little sceptical to this figure, as it would seem that the Carrefour has covered most of the bigger festivals, which would tend to bring the average up. The average admission figure for the remaining 300 or so festivals for which data are not available, I believe, would tend to be lower, probably significantly so, than the 15.000 used in my calculation. The Commission's figure of 8 million admissions in 600 festivals in 1996 gives an average of 13.500 admissions per festival, and this may be closer to the truth. The 1997 estimate for the EUR15-countries (10 million admissions in 800 festivals) is even more conservative, with an average of 12.500 admissions pr. festival.

There seems to be a marked difference in size between the festivals inside the European Union and those covered by the *Directory* which are outside the EUR15-area. Part of the reason is probably that the Carrefour des Festivals has a better coverage of the EUR15-area than the rest of Europe, and therefore will have more small festivals represented in the EUR15. As mentioned above, this bias would tend to bring the average admissions per festival down in the EUR15.

If we look at the figures presented by the Commission, it appears that the 73 festivals which received Commission support in 1995 had a total audience of 2 million people, which would translate into an average of 27.400 admissions for these festivals. This average rises to a 39.000 admissions average in 1996, being computed from 2.5 million admissions in 64 festivals.

If we apply the most conservative of the average admission figures to the estimated one thousand festivals across all of Europe, the number of spectators of films in festivals in Europe would be 12,5 million. This figure is on the level of the annual cinema admissions in countries like Austria, Greece or Norway - or roughly 10 per cent or more of the total EUR33 admissions.

Number of Films Screened

Again, working from the Carrefour figures, I have made a calculation of the programming of the 291 festivals in 1996, listed in the *Directory*. The number of films screened is impressive, if not awesome. To cite but one example, more than 3.300 feature films and probably more than 8.000 short films and documentaries were programmed in festivals in France alone in 1996. The total picture, such as it appears in the Carrefour *Directory*, however, shows the following results - which are by no means complete:

European Film Festivals 1996: Programmation

	Festivals	Number of Films programmed	
		Features	Shorts / Documentaries
Eur 15	263	8.226	15.114
Other Eur (12)	28	1.327	2.012
Total Eur (27)	291	9.553	17.126

Source: European Audiovisual Observatory 1997 - Carrefour des Festivals 1996

I am not sure if averages have any real significance in relation to films programmed, because some festivals are entirely devoted to short films, some screen only feature films. But when calculated, there is an average programmation volume of 33 feature films and 59 short films or documentaries per festival in the total, while the EUR-15 figures are 31 features and 58 shorts and documentaries.

It should be clearly remembered that these figures include retrospectives, hommages, special series etc. that often use archive or previously produced and/or imported films to make up their programmes. It should also be borne in mind that a number of the films will have been shown in a number of festivals. Still, the nearly ten thousand feature films and more than seventeen thousand short films and documentaries screened each year vastly outnumber the actual in-put of films into the European market.

In the course of a feasibility study on monitoring of admissions and box-office revenue on individual films across Europe, the Observatory has established that the total number of new features actually put into distribution during 1996 is somewhere in the region of 830 titles. 124 of these titles are from the US, while some 700 are European productions. Of those 700 European films, 570 are only distributed commercially in their countries of origin.

Annual European Film Production and Distribution 1996

	National films Production	National Domestic Distribution	films National films Distrib. in other EU country
Europe 15	520 ¹	590 ²	122
Rest of Europe (18)	180 ¹	n/a	8
Total Europe +33	700 ¹	n/a	130

Source: European Audiovisual Observatory 1997 Notes: 1 - estimate 2 - difference with production due to some co-productions counted as national in more than one country

The figures presented here should be taken as approximate and provisional, for reasons of the methodology of the underlying sources. Still, we believe that the Observatory study covers 85-90% of the total figures, and those presented here may therefore be considered as fairly indicative. If we compare them with the number of films available at one of the largest - and probably the most specialised - of the film markets in Europe, MIFED, the distribution figure

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given here is roughly comparable: at the 1996 MIFED a total of 406 feature film titles were presented to buyers.

During 1996, a total of 2.625 feature films were made available for distribution in the European market. Film festivals programme nearly four times this figure. Festival programming equals more than three times as many new films as enter the European cinema market annually. Obviously, this does not give a correct picture of the situation, but it does indicate a "festival circuit" of film screenings of considerable importance in terms of the inter-European exchange of films. It would be interesting indeed to know the real impact of festivals, both in terms of new films entering the commercial exhibition market by way of (or in parallel with) festivals, and on the role of festivals as an "alternative" means of distribution.

Conclusions

It must be safe to say that available data about European film festivals are highly incomplete. Yet some salient trends would seem to emerge even from this rather feeble base.

The number of festivals in Europe is large, and it has been growing fast for the last years. The 200 new festivals added to the estimates made by the European Commission between 1996 and 1997 testify to this fact. Across Europe there may annually be as many as 1.000 film festivals.

The festival audience in Europe is an important one, maybe reaching as high as to be comparable with a 10-per cent share of the regular cinema audience in Europe. Even if patrons of film festivals tend to see not only one, but a number of films during a short span of time, the number of individuals enjoying what is on offer in film festivals is impressive, maybe 3-4 million.

Even if a large part of festival programmes must be made up of "old" films, and even if festivals more often than not also programme non-European films old and new, it would seem obvious that the festival circuit is indeed also an important arena for the circulation of new European films.

The sheer size and volume of European film festivals would seem to merit an effort at closer monitoring of key parameters of these festivals. The many unanswered methodological and other questions would also require a closer look at how data are aggregated and collected centrally. It would indeed be useful to know more precisely how large the audience for European films in European film festivals is, or how many new European films find their way into the festival circuit, and how many of them eventually are also released commercially. To provide answers to these questions is a challenge to those responsible for festivals across Europe.

European Film Festivals 1996 : Key parameters

Country	No. of festivals	Number of admissions	No info	No. of features programmed	No. of shorts/doc programmed
Austria	4	78.800		238	174
Belgium	12	284.100		505	607
Croatia	1	30.000		4	200
Czech Republic	2	2.400		194	89
Denmark	3	86.000		185	100
Estonia	1	3.500		60	
Finland	4	74.000		182	498
France	166	1.781.500	30	3.273*	7.865*
Germany	20	604.900	3	674*	1.145*
Greece	2	49.900		166	72
Ireland	3	54.500		214	300
Italy	17	196.000	7	1.092*	1.074*
Latvia	1	31.900		201	165
Malta	1	900			110
Netherlands	4	326.000		287	278
Norway	1*	15.000*	(2)	70*	*
Poland	3	47.000	1	30	321
Portugal	5	86.000	2	220	591
Romania	1	5.000		15	85
Russia	1			113	
Slovak Republic	1	187.000		18	125
Spain	13	198.800	4	420*	1.051*
Sweden	4	158.900		310	503
Switzerland	12	232.100	3	357*	516*
Turkey	2	141.000		209	263
Ukraine	1	152.000		56	138
United Kingdom	6	162.100	1	460*	856
Total Eur 27	291	4.957.400	46	9.553	17.126
Average Eur 27		17.000			
Total Eur 15	263	4.141.500		8.226	15.114
Average Eur 15		15.700			

Source: European Audiovisual Observatory 1997 - Carrefour des Festivals 1996

Notes: Admissions including tour screenings and free tickets/entry; excluding students. Films including retrospectives; excluding video.

* - incomplete information.

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Useful Contacts

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Articles published by
the Observatory's experts in various scientific and professional publications

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“Flickering Shadow – Quantifying the European
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http://www.obs.coe.int/online_publication/expert/00001262.html, 2000

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