

Film Festivals in Oregon: Impacts and Marketing Strategies



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Community Service Center
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About the Community Service Center

The Community Service Center (CSC) is a research center affiliated with the Department of Planning, Public Policy, and Management at the University of Oregon. It is an interdisciplinary organization that assists Oregon communities by providing planning and technical assistance to help solve local issues and improve the quality of life for Oregon residents. The role of the CSC is to link the skills, expertise, and innovation of higher education with the transportation, economic development, and environmental needs of communities and regions in the State of Oregon, thereby providing service to Oregon and learning opportunities to the students involved.

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EXECUTIVE SUMMARY

Film festivals are sources of entertainment, cultural amenities, and for some, a travel destination. Prior to this study, little was known about Oregon film festivals and their patrons beyond a working list of festivals compiled by Oregon Film. This report presents (1) an inventory of film festivals in Oregon, (2) a description of the characteristics of film festivals, (3) a profile of film festival patrons, and (4) potential marketing strategies to promote film festivals. The focus is on promoting film festivals as part of the portfolio of travel destinations in Oregon.

Overview and Methods

The film industry makes substantial contributions to Oregon's economy. A 2011 study by the Northwest Economic Research Center at Portland State University, estimated that the total annual economic output from the Oregon film industry is \$1.4 billion. Oregon Film has several incentive programs aimed at spurring development in the industry; directly incentivized projects in Oregon had an overall economic output of \$540M in 2015. A vital subset of the film industry is film viewing, including film festivals. Film festivals are platforms for the film industry to promote local and international films, connect filmmakers to audiences, and provide insight to film productions. Prior to this study, however, little was known about the nature of film festivals and their patrons.

A key first step in this project was to inventory film festivals. Building from a list provided by Oregon Film, the Community Service Center, CSC, inventoried 77 film festivals. The inventory identified festivals in every region of Oregon, with a broad range of missions, covering every genre of film. Together, these events attract tens of thousands of visitors. Whether local residents or tourists, both festival and patron activities generate economic activity. Film festivals frequently partner with local screening venues, hotels, restaurants, and a variety of business sponsors.

While Oregon Film and Travel Oregon have experience working with individual festivals, this report contributes a more comprehensive examination film festivals across the state. Little is known about the extent of the economic, cultural, and educational impacts of these events in Oregon. Moreover, reliable data about how many film festivals exist, when they occur, their size, and who attends them is lacking. This research bridges these knowledge gaps.

Research Methods

Inventory. CSC developed a comprehensive inventory of film festivals in Oregon.

Interviews. CSC conducted interviews with festival organizers to supplement internet research and develop a deeper understanding of film festivals and their impacts,

Film Festival Organizer Survey. CSC developed an online survey which we administered to the 54 festivals with 35 festivals providing information.

Film Festival Patron Survey. CSC surveyed patrons of 11 festivals and received 900 complete responses.

Focus Group Meeting. CSC held a focus group meeting with representatives of film festivals, destination marketing organizations, Oregon Film, and Travel Oregon.

Film Festivals in Oregon

The first step in the project was to create an inventory of film festivals. This study defines film festivals as follows: **Film festivals are events that show films that have not yet been released commercially. The films are obtained through submission, solicitation, or selected from other**

Festival Fast Facts

79 film festivals

47% in the Portland Metro region

Tickets sold: **175,000**

80,000 unique patrons; **11,000** traveled more than **50 miles**

63% hosted by **historic theaters**

20,000 films submitted; **1,500** produced in Oregon

Revenue: **\$2.4 million**

Total employment: 240

film festivals. CSC developed a set of criteria to screen potential events and determine whether each event met the definition of a film festival. The criteria include: (1) films not in pre-commercial release, and (2) films obtained through submission, solicitation or shown at other film festivals.

CSC inventoried 79 film festivals that met our criteria. While these festivals were in every region of the state, nearly half are hosted in the Portland Metropolitan area. With respect to venues, 63% are held in historic theaters. Festival organizers receive an estimated 20,000 films for consideration; 1,500 of these are produced in Oregon.

Based on survey data, the CSC estimates Oregon Film Festivals have between 75,000 and 85,000 unique patrons annually at their events and between 170,000 and 180,000 total patrons for all festivals in Oregon. Of those patrons, CSC estimates that 10,000 and 12,000 traveled more than 50 miles from their homes.

Film festivals have a range of economic impacts on communities—starting with festival operations. Data from the festival organizer survey indicates there is

considerable diversity in the size and organizational structure of film festivals. Many are fully non-profit events run by volunteers. Following is a set of estimates of the economic impacts of film festivals:

- **Total Revenue** is between **\$1.93 million and \$2.82 million.**
- **Total Expense** is between **\$1.84 million and \$2.30 million.** The results suggest expenses exceed revenues for some festivals. This result also suggests that festivals are relying on reserves or other funding sources to support festival operations.
- Expenses supporting **local firms** is between **\$526,000 and \$631,000.**
- **Employment** is between **40 and 80 full-time** employees and **90 and 270 part-time** employees.
- **Volunteer participation** is between **440 and 620 persons for activities prior to the festival,** and between **2,060 and 4,540 persons during the festival.**
- The **estimated value** of volunteer efforts is between **\$680,000 and \$840,000.**

Patron Profile

A key objective of this study was to identify the extent to which Oregon film festivals are attracting destination patrons. Destination patrons exhibit different travel and expenditure patterns than local patrons. **Local patrons** are defined as patrons who traveled less than 50 miles to attend, or commuted daily from their permanent residence to attend a festival. **Destination patrons** are defined as patrons who traveled 50 or more miles, or stayed away from their permanent residence for 1 or more nights to attend the festival.

Demographics

The survey results show the largest group of patrons were baby boomers. More Local patrons (50%) were baby boomer than destination patrons (39%). Local patrons' average age was 54, compared to the slightly younger average age of 50 for destination patrons.

A significant percentage of local patrons have educational attainment level above a Bachelor's degree (52%). Destination patrons were slightly less well educated with 40% holding Bachelor's degree (40%) or graduate degree (39%).

With respect to income, patrons tend to be relatively affluent. Forty-five percent of destination patrons

report incomes of \$100,000 or more, as do 35% of local patrons. In fact, more than 70% of all patrons reported incomes of \$50,000 or more.

Key Patron Characteristics

Characteristic	Local	Destination
Demographics		
Age		
Greatest Generation	8%	6%
Baby Boomers	50%	39%
Gen X	28%	34%
Millenials	13%	20%
Average Age	54	50
Educational Attainment		
% with Bachelor's Degree	35%	40%
Graduate or Professional Degree	52%	39%
Household Income		
< \$50,000	29%	26%
\$50,000 - \$99,999	36%	29%
\$100,000 or more	35%	45%
Travel Patterns		
Average Party Size	2.15	2.47
Returning Patrons	74%	52%
Average times returning	6	6.5
Distance Traveled	Less than 50 Miles	50 miles or Greater
Overnight Stays		
% day trip only	97%	14%
% 2 nights or more	3%	75%
Average # of nights spent	0.3	5
Film festival was the primary reason for trip		81%
Additional Traveling		
% who visited another city	NA	80%
% who visited another state	0	30%
Patron Expenditures		
	Average	Average
Total Spending Per Party	\$107.15	\$802.93
Spending Per Person	\$49.77	\$325.44
Spending Per Person Per Day	\$19.14	\$121.89

Travel Patterns

Destination patrons had a slightly higher number of 2.47 people per party, compared to the local patron party size of 2.15. For both local and destination patrons, more than half of the patrons indicated they had been to the festival where they completed the survey prior to this year. For local patrons, almost 75% of patrons were returning to the festival, many for an average of 6 times or a median of 4 times. Destination patrons were returning for an average of 6.5 times.

Not surprisingly, most local patrons (97%) indicated they were day trip travelers. Although they may have attended the festival for multiple days, they stayed at their primary residence. In comparison, 75% of destination patrons indicated they stayed two nights or more while attending the festival. Approximately 81% of destination patrons were traveling primarily for the festival. Finally, destination patrons travel elsewhere during their trip; about 80% traveled to a different Oregon city besides the festival's host city, and 30% traveled to a different state.



Some destination patrons also enjoyed other activities besides attending the festival; 28% visited friends or family, 14% visited a museum, zoo, or cultural center, and 13% specified other activities such as going to the theater, a jazz festival, or another cultural festival.

Expenditures

Festival patrons spend a lot of money at festivals; destination patrons spend a lot more than local patrons. Destination patrons reported spending an average of \$803 related to their trip—not including airfare. This equates to \$122 per person per day. Local patrons averaged about \$107 per party or about \$19 per day.

Recommended Marketing Strategies

While the economic impacts are relatively modest, film festivals add immense value to their communities and increasing the number of patrons has benefits for those communities and for Oregon. Moreover, there is substantial opportunity for growth. Regional destination management organizations, Travel Oregon, Oregon film and the film festivals themselves can all take actions that will help to increase attendance and raise the profile of Oregon as an amazing place to see films.

The following recommendations are organized thematically. While some of the actions apply to specific organizations, the themes help to organize sets of specific actions that will not necessarily apply to everyone involved in the film festival ecosystem. The following ideas were developed through our research, interviews with festival organizers, the focus group meeting, and the festival organizer and patron surveys.

Strategy 1: Share Information. At the focus group meeting, several film festival organizers reported that they work with their Regional Destination Marketing Organization, DMO, and Travel Oregon to promote their festival, while others had no knowledge of the resources for destination travel marketing. Some film festival organizers didn't have enough information about local hotels and restaurants to share with their patrons and film makers that come from out of town. Several travel professionals noted that they didn't know when all the film festivals were occurring, even if they knew that many existed. To promote a more robust exchange of information, the CSC suggests the following actions:

- RDMOs: Develop a package of local information for film festivals.
- Travel Oregon: Host a 'Travel Oregon 101' specifically for film festivals.
- Film festival organizers: Submit festival information to Travel Oregon and DMOs regularly.

Strategy 2: Increase and Leverage Partnerships. Throughout this research, film festival organizers continually mentioned how important their partnerships with other organizations and groups were. No matter the size of the festival, partnerships are essential to running a film festival. Organizers responded that they provided sponsorships, access to facilities like movie theaters, and that they are vital sources of patrons.

- Film festival organizers: Leverage partners in marketing.
- Film festival organizers: Partner with local universities.
- RDMOs and Travel Oregon: Use film festival assets for promotion.
- All parties: Promote festivals at other festivals.

Strategy 3: Official Support. State agencies are already running programs that promote travel in Oregon. Travel Oregon and RDMOs already work with some festivals to market. Some festival organizers felt that they benefited from having official state recognition.

- Travel Oregon and Oregon Film: Create a seal of approval.
- Travel Oregon and film festivals: Create a film festival profile book.

Strategy 4: Target Selected Patrons. Travel Oregon has a targeted patron demographic of 25- to 64-year old's who spend \$1,000 or more on vacations. Travel Oregon targets "culinary enthusiasts" for a Fall campaign, and "active or outdoor enthusiasts" for their Spring campaign¹. These groups have significant overlap with many of the film festival patrons – who are affluent and well-educated. By working together, festivals and Travel Oregon can attract new tourists and patrons.

- Travel Oregon: Use festivals in existing marketing campaigns.
- Film Festivals: Use data to find your audience.

¹ <http://industry.traveloregon.com/industry-resources/oregons-target-markets/the-americas/>

CHAPTER I: INTRODUCTION

Film festivals are sources of entertainment, cultural amenities, and for some, a travel destination. Prior to this study, little was known about Oregon film festivals and their patrons beyond a working list of festivals compiled by Oregon Film. This report presents (1) an inventory of film festivals in Oregon, (2) a description of the characteristics of film festivals, (3) a profile of film festival patrons, and (4) potential marketing strategies to promote film festivals. The focus is on promoting film festivals as part of the portfolio of travel destinations in Oregon. This study, conducted by the University of Oregon Community Service Center (CSC), was funded by Travel Oregon (through the Matching Grant Program) and the U.S. Economic Development Administration (through the EDA's University Center grant program).

Background

The film industry makes substantial contributions to Oregon's economy. A 2011 study by the Northwest Economic Research Center at Portland State University, estimated that the total annual economic output from the Oregon film industry is \$1.4 billion.² Oregon Film has several incentive programs aimed at spurring development in the industry; directly incentivized projects in Oregon had an overall economic output of \$540M in 2015.³ A vital subset of the film industry is film viewing, including film festivals. Film festivals are platforms for the film industry to promote local and international films, connect filmmakers to audiences, and provide insight to film productions. Prior to this study, however, little was known about the nature of film festivals and their patrons. Oregon Film and Travel Oregon are interested in better understanding film festivals to identify opportunities to further cultivate Oregon's tourism and film industries.

A key first step in this project was to inventory film festivals. Building from a list provided by Oregon Film, the CSC inventoried 79 film festivals. The inventory identified festivals in every region of Oregon, with a broad range of missions, covering every genre of film. Together, these events attract tens of thousands of visitors. Whether local residents or tourists, both festival and patron activities generate economic activity. Film festivals frequently partner with local screening venues, hotels, restaurants, and a variety of business sponsors. Additionally, film festivals contribute to destination tourism and attract attendees that make Oregon a destination.

As the CSC deepened its research, an underlying theme emerged. Beyond providing exposure to the film industry or enhancing economic benefits, film festivals are artistic and cultural experiences. They often include events designed to foster conversation among patrons and filmmakers about the art, and craft of filmmaking.

Individually, film festivals feature a unique and compelling charm. Each has a "brand," often based on niche film genres, audience interests, or a special locale. Moreover, many festivals are nonprofit organizations, and the majority are operated primarily by dedicated volunteers. Many

² Northwest Economic Research Center 2011, Portland State University.

³ Northwest Economic Research Center 2016, Portland State University.

have limited resources for marketing and expansion, but diligently continue year after year. With even more dedicated partners and greater marketing assistance, Oregon film festivals can expand their contributions to Oregon's reputation as a vibrant tourist destination, a hub of art and culture, with a thriving media community.

While Oregon Film and Travel Oregon have experience working with individual festivals, this report contributes a more comprehensive examination film festivals across the state. Despite the benefits of film festivals, little is known about the extent of the economic, cultural, and educational impacts of these events in Oregon. Reliable data about how many film festivals exist, when they occur, and their size is lacking. Moreover, no data exist on film festival patrons or what kinds of activities they engage in because of attending a film festivals. Thus, the purpose of this research is to bridge these knowledge gaps.

Methods

The CSC research team used several methods in collecting data on Oregon Film Festivals:

- **Inventory.** CSC developed a comprehensive inventory of film festivals in Oregon. CSC started with a list of about 50 festivals provided by Oregon Film and supplemented that list through internet research. Each festival was screened against a set of criteria to determine whether it was a film festival or a different type of event that included films. The complete inventory of festivals is included in **Appendix A**.
- **Interviews.** CSC conducted key interviews with individuals from seven film festivals to supplement internet research and develop a deeper understanding of film festivals and their impacts. The research team also interviewed representatives from Travel Oregon and Oregon Film.
- **Film Festival Organizer Survey.** CSC developed an online survey which we administered to the 54 festivals for which we had contact information. We received 35 partial responses and 20 complete responses to the survey. The festival organizer survey asked detailed questions about the nature of festivals, marketing strategies, fee structures and other topics. The results show considerable variation among festivals in terms of patronage, number of films, genre of films and other dimensions. Additional details on the organizer survey methods and results are presented in **Appendix B**.
- **Film Festival Patron Survey.** CSC developed an online survey instrument to collect data on festival patrons. A core objective of this study was to develop a profile of film festival patrons. We surveyed patrons of 11 festivals and received 900 complete responses. Additional details on the patron survey methods and results are included on **Appendix C**.
- **Focus Group Meeting.** CSC organized and facilitated a focus group meeting with representatives of film festivals, destination marketing organizations, Oregon Film, and Travel Oregon. The focus group meeting had several objectives: (1) to create connections between travel and media promotion organizations and festival organizers, (2) to identify barriers and opportunities to expanding film festivals, and (3) to identify opportunities for collaboration on specific projects.

Organization of this Report

The remainder of this report is organized as follows:

Chapter 2: Film Festivals and Destination Tourism provides an overview of the impact of film as entertainment, the research team’s working definition of a film festival, and the relationship between film festivals and destination travel.

Chapter 3: Characteristics of Oregon Film Festivals presents the results of an online survey completed by 35 festival organizers.⁴ It describes key operational and financial characteristics of festivals, marketing strategies, as well as opportunities and barriers to further growth of festivals.

Chapter 4: Profile of Film Festival Patrons presents the results of an online survey of 900 patrons at 9 Oregon film festivals. It includes data on patron experience, travel and expenditure patterns, and demographics.

Chapter 5: Patron Profiles provides a deeper look at patron characteristics and identifies key differences based on dimensions such as region, type of festival, location of residence and other characteristics.

Chapter 6: Economic Impact of Film Festivals presents the research team’s estimates of total film festival patronage and the direct economic impacts film festivals and festival patrons.

Chapter 6: Conclusions and Recommended Marketing Strategies summarizes key conclusions and presents a set of marketing strategies directed at festival organizers and destination marketing organizations, including Travel Oregon.

This report also includes several appendices:

Appendix A: Film Festival Inventory includes information on the 77 festivals inventoried by the CSC research team.

Appendix B: Organizer Survey Methods provides an overview of the methods used to develop and administer the survey of film festival organizers. It also includes the survey instrument.

Appendix C: Patron Survey Methods provides an overview of the methods used to develop and administer the film festival patron survey. It also includes the survey instrument.

⁴ Not all individuals that started the survey answered all questions. CSC received 20 complete responses and 15 partial responses. Throughout the report, we include the number of respondents to each question.

CHAPTER 2: FILM FESTIVALS AND DESTINATION TOURISM

This chapter provides context for this study by describing how film festivals connect to the larger film and media industry and to destination tourism. Film festivals are a valuable part of the multi-billion-dollar film industry that has benefits both in revenue and employment. Moreover, film festivals contribute to community arts and culture and help define the sense of place for host communities across the State of Oregon. The chapter starts with a discussion of the film and media sector, then provides the definition of film festivals CSC used in the inventory. It concludes with a discussion of destination travel and how film festivals can contribute to Oregon's tourism economy.

Impact of Films and Media

Movie going is a great American pastime that is deeply ingrained in our culture. Film is about more than entertainment, it reflects culture and is an artistic medium. Globally, the media and entertainment industry (M&E) generated \$632 billion in 2015; a figure that is expected to reach \$771 billion in 2019 (2014-2019 M&E Outlook by Price Waterhouse Cooper).⁵ Broadly, the M&E sector includes businesses that distribute: movies, television programming and commercials, streaming content, music recordings, broadcast, books and video games. The M&E industry in the U.S. represents a third of the global market. Box office receipts for motion pictures shown in the U.S. are projected to grow from \$9.9 billion in 2015 to \$10.9 billion in 2020.⁶ Based on these figures, CSC estimates box office spending in Oregon could be as much as \$140.6 million in 2020.⁷

The production of movies and video is an important component of the overall media sector. IBISWorld estimates that movie and video production generated global revenues of \$43.9 billion through 9,300 businesses in 2017. Moreover, the industry is forecast to grow 2.0% annually between 2017 and 2022.⁸ Movie theaters are a fixture in communities all over the globe, and provide the primary means of movie viewing. IBISWorld estimates movie theaters generated \$16.7 billion in revenue in 2017.

In 2007⁹ and 2011¹⁰, the Governor's Office of Film and Television (known as Oregon Film) commissioned studies of the Oregon media and film sector. The Northwest Economic Research Center estimated that the media sector contributed \$1.4 billion and more than 12,500 jobs to

⁵ <https://www.selectusa.gov/media-entertainment-industry-united-states>

⁶ <https://www.selectusa.gov/media-entertainment-industry-united-states>

⁷ Calculated by dividing estimated gross sales in 2020 by US population projections in 2020 then multiplying by the estimated 2020 population of Oregon.

⁸ IBISWorld Industry Report 51211a, Movie & Video Production in the US

⁹ ECONorthwest_Economic-Impacts-Film-Industry-Oregon_2008.pdf

¹⁰ Contribution of the Film & Television Industry to the Economies o.pdf

the state economy in 2011. Comparing the 2007 and 2011 studies shows total economic activity grew 24% over the four-year period.

The impact of film and media extends beyond dollars and jobs. Movie theaters are key community facilities and social gathering places. Film arts contribute to community culture and image. The buildings they are housed in are often examples of period architecture that served as key community anchors. A 2015 study of historic theaters in Oregon by the CSC concluded:

The value of theaters can be described in three simple ideas: they are **social spaces, economic catalysts, and cultural ambassadors**. Theaters can provide opportunities for recreation and gathering, economic development, community interactions, and promote tourism. By taking advantage of their prime downtown location, theaters are able to draw in visitors from surrounding areas, increase revenue at nearby businesses, and create new opportunities for tourism. Additionally, theaters can leverage their position as community assets to instill a palpable sense of pride amongst community members, business owners, and theater enthusiasts.¹¹

In short, the act of movie going and the facilities they are displayed in have broad cultural impacts on communities.

Film festivals play an important role within communities as they serve to define the personality of the people, place, and region. There are numerous examples of world famous film festivals defining the locations where they are hosted, however, it is important to consider the benefits of lesser known film festivals within communities across the state. Film festivals highlight the attributes of a community and display community values.



In this way film festivals act as cultural placemakers. Cultural or creative placemaking, as defined by the National Endowment for the Arts, includes utilizing arts and cultural events to shape and define spaces improving visibility and to boost local economies.¹²

A film festival is also an opportunity to bring a community together, either through viewing films or by way of volunteering during a festival. As a festival volunteer, individuals are afforded the experience of providing a cultural experience and representing the community hosting the festival. Viewing films is also a cultural experience that can cross political, social, and economic lines, sparking conversations and new relationships.

According to data posted on film-festival.org, on average, 46.5 feature-length films are screened at a festival, and as many as 13,000 unique feature films are shown each year in the United States. Moreover, film festivals in the U.S. generate an estimated \$89 million in patron

¹¹ Oregon Historic Theaters: Statewide Survey and Needs Assessment, Community Service Center, September 2015.

¹² <https://www.arts.gov/sites/default/files/CreativePlacemaking-Paper.pdf>

spending, and another \$55 million through in-kind merchandise and services (www.film-festival.org).

Over the course of a year, approximately two million people will attend a film festival across the United States. On average, a festival fills 11,900 seats throughout the duration of the festival, and audience members will see approximately 2 films while at the festival. Visitors primarily learn about festivals through friends and word-of-mouth.

In reviewing the literature on film festivals, the CSC was unable to find any studies that document the economic impact of film festivals in Oregon. Some studies of specific festivals exist, but none address the broad impact of festivals. For example, a 2013 study of the Sundance Film Festival estimated nearly 46,000 people attended the festival spending a total of \$56.7 million.¹³ A 2007 study of the Eugene International Film Festival estimated 850 visitors contributed \$456,000 to the Eugene Economy.¹⁴ CSC found several other similar studies, but none looked at film festivals in the U.S. or at the statewide level.

What is a Film Festival? Establishing a Working Film Festival Definition

“What is a film festival” is a seemingly simply answered question that is deceptively tricky in practice. The variety among film festivals presents a challenge in defining the events. Both scholars and film professionals define film festivals, but focus on different elements of the festivals. Scholars emphasize the cultural impacts of film festivals, and study how they can be used to foster the emergence of new businesses, ideas, and markets centered around film. Those in the film industry define film festivals by their practical purpose, and look to them as vehicles to gain exposure and distribution deals.

The success of major film festivals like Utah’s Sundance Film Festival and Colorado’s Telluride Film Festival have sparked the emergence of film festivals as major cultural events in North America. Prestigious festivals like these generate the most buzz, but represent just one type of film festival. Film journalist Mark Peranson created the following two models of film festivals that capture the nature of the events:

- **Business Model Festivals:** Major festivals with established markets, high budgets, large staffs, corporate sponsors and Hollywood studio involvement. Business festivals are premiere-oriented, include prestigious award competitions, and films are submitted directly to the festivals. They generally do not rely on ticket sales or attendance to generate revenue.
- **Audience Festivals:** These festivals have a smaller operating budget, and have limited sponsorship and business presence. They do not have as much of a focus on award

¹³ The Economic Impacts of the 2913 Sundance Film Festival, Jan Elise Stambro, Bureau of Economic and Business Research, University of Utah, April 2013.

¹⁴ Economic Impact and Visitor Study of the Eugene International Film Festival, The University of Northern Iowa Sustainable Tourism and the Environment Program (STEP), December 2007.

competition, and often receive films from other festivals or via solicitation. Audience festivals tend to have small staffs, and rely on ticket sales for revenue.

Peranson's models serve as umbrella prototypes, as many film festivals fall somewhere between the two models. For example, most large cities host film festivals that are well funded and well attended, while many film festivals are often organized by volunteers and tend to be much smaller in scale. In between business and audience festivals lie genre fests, which vary in scale and focus on a specific genre of film, and festivals held in resort towns, which also vary in scale and funds.

After initiating the inventory process, it was clear that a defined set of functional criteria is necessary to determine whether events should be included in the inventory. The criteria are modeled on the practitioner definition of:

Film festivals are events that show films that have not yet been released commercially. The films are obtained through submission, solicitation, or selected from other film festivals.

For this study, CSC developed a set of criteria to screen potential events and determine whether each event met the definition of a film festival. The CSC's criteria include:

- Films not in pre-commercial release
- Films obtained through submission, solicitation or shown at other film festivals.

The CSC acknowledges that there are many cultural events throughout Oregon that are driven by film, such as film series or special film screenings, but this analysis focuses on events that meet the above stated definition to properly gauge the economic impacts of Oregon's film festivals.



Destination Travel and Film Festivals

Destination travel is a \$11.3 billion industry in Oregon that directly supports more than 109,000 jobs. Tourism has long been a fundamental element of Oregon’s economic development strategy. At the state level, development of the industry is led by Travel Oregon, a semi-independent agency created by the Oregon Legislature in 2003 to enhance the quality of life for Oregonians by strengthening economic impacts of the state’s tourism industry. Travel Oregon’s vision is to create “a better life for all Oregonians through strong, sustainable local economies.”¹⁵ The destination tourism industry has substantial growth opportunity.

Existing studies suggest that film festivals are attractions for destination travelers. One of the objectives of this project is to determine how Oregon Film Festivals contribute to the destination travel industry, and how efforts of organizations like Travel Oregon and Destination Marketing Organizations (DMOs) can leverage the impacts of events that are attracting destination travelers to the state.

For every ticket purchased to an arts event an additional \$24.24 in arts related spending supports local businesses, including restaurants, parking structures, and retail outlets. Hotels, restaurants, and retailers also benefit from tourism generated by a thriving and energetic arts scene.

The Regional Arts and Culture Council (RACC).

¹⁵ Travel Oregon Strategic Plan--Activating Explorers 2017–2019.

CHAPTER 3: CHARACTERISTICS OF OREGON FILM FESTIVALS

This chapter presents the results of a statewide survey of film festival organizers. To better understand the focus and operational aspects of film festivals, the research team developed and administered an online survey to film festival organizers. The CSC obtained contact information for 54 of the 79 film festivals identified in the inventory and sent a solicitation to complete the survey to the 54 festivals. We received 35 responses to the survey, 20 that were fully complete and 15 that were partially complete.

One of the difficulties in developing a profile of festivals and administering a survey is that festivals are dynamic; festivals may be active one year and not the next, and new festivals form while older festivals dissolve. Developing a comprehensive inventory is challenging, and represents a snapshot of festivals in Oregon at the time of the study.

The inventory and survey results show a deep, rich, and diverse set of festivals existing in Oregon. Festivals exist in every region of the state, but are concentrated in urban areas (particularly the Portland metropolitan region and the Willamette Valley). Festivals occur in every season, and are somewhat evenly distributed throughout the year. Most festivals are relatively small and attract a few hundred patrons, and a few festivals are very large, attracting tens of thousands of patrons.

The diversity makes it challenging to generalize about the characteristics of film festivals. We believe the survey results have great value in understanding the dynamics of film festivals, but we urge readers to apply caution in generalizing the results. While festivals all share common elements, each is unique in important ways. In short, the results represent the responding festivals, but cannot be accurately extrapolated to all film festivals.

The remainder of this chapter is organized around four key themes: (1) characteristics of festival events; (2) their mission; (3) operational characteristics; and (4) the needs of film festivals. A detailed discussion of the survey methodology, and a copy of the survey instrument are included in Appendix B.

Event Characteristics

The festival organizer survey started with a series of questions about the structure of festivals including: location, length of the event, number of films submitted and screened, when the festival was established, and other characteristics. These questions underscore the diversity of festivals as events.

The CSC inventoried 79 film festivals in every region of the state. **Figure 3-1** shows the number of festivals by regions as defined by Travel Oregon. Not surprisingly, most festivals (68%) are in the more urban areas of the state (the Portland metropolitan region and the Willamette Valley). The Portland region has 47% (37 festivals) of the 79 film festivals; 36 of which take place in the city of Portland itself. The Willamette Valley region hosts the next largest proportion of Oregon's film festivals, with 22% (17 festivals). The city of Eugene, which is in the Willamette Valley region, hosts nine (53%) of those festivals.

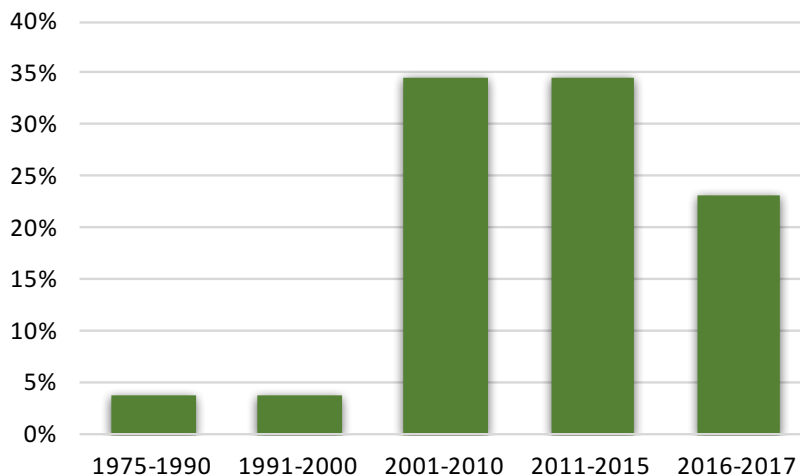
Figure 3-1: Festivals by Travel Oregon Region

Region	Number of Festivals	Percent of Total
Northeastern Oregon	3	4%
Southern Oregon	5	6%
Columbia Gorge	5	6%
Central Oregon	6	8%
Oregon Coast	6	8%
Willamete Valley	17	22%
Portland Metro Area	37	47%
Total	79	100%

Thirty respondents listed the cities where they held screenings. Fifty-six percent of festivals were screened in Portland, while 16% of the festivals held screenings in Eugene. Eighty percent of the festivals that screened in Eugene reported they were also screened in Portland. The majority (77%) of organizers surveyed reported that their festivals were held in one Oregon city. Seventeen percent screened their films in two cities in Oregon, and 6% held their event in three or more cities. One festival screened in eight cities—the highest number reported.

The CSC asked organizers to indicate the year that their festival was established. **Figure 3-2** shows that most the festivals represented (58%) were founded after 2010, and 34% reported establishment between 2001 and 2010. Less than 10% listed dates before 2000. These results suggest that festivals are actively forming and that there is potentially room for more festivals to be established around the state.

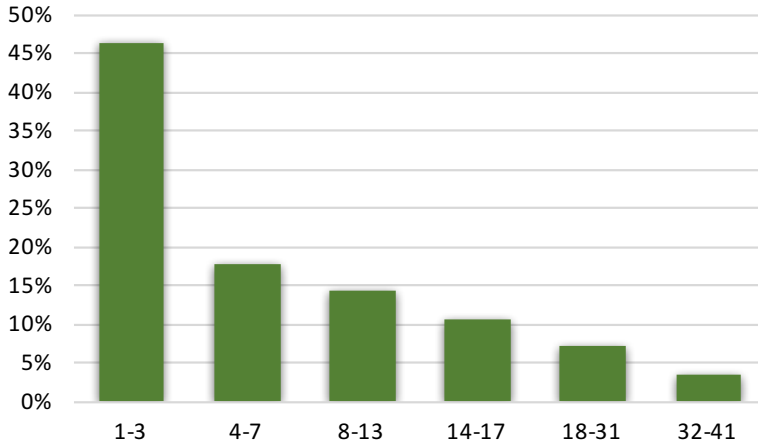
Figure 3-2: Year Festivals Were Established (n=26)



The CSC asked organizers how many times their festival will have been held by the end of 2017. **Figure 3-3** shows that 46% of festivals reported having been held three or fewer times. The oldest film festival reported being held annually for 40 years, and the median was 4.5 times.

These results are consistent with the results of when festivals were established and indicate that many festivals are relatively new.

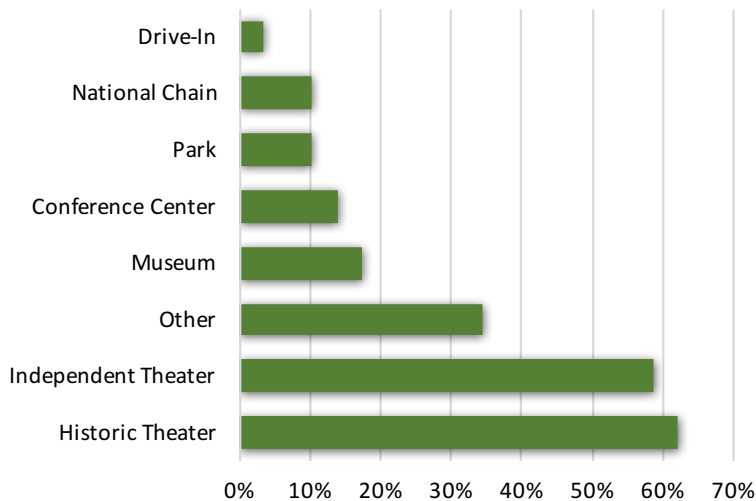
Figure 3-3: Number of Annual Editions (n=28)



Note: The term editions is used to indicate the number of unique annual events held by individual festivals.

Figure 3-4 shows the types of venues used to screen films at festivals. Organizers were asked to select all answers that apply to their events. Festival venues may be counted in two categories (e.g. many historic theaters are also independent movie theaters). The results show that historic theaters (62%) and independent theaters (58%) are preferred venues for many festivals. The “Other” types of venues include breweries, bike shops, libraries, ballrooms, and auditoriums. Many festivals choose to screen in venues that are already equipped to screen films.

Figure 3-4: Types of Venues Used by Film Festivals (n=29)



Note: Respondents could indicate more than one type of venue.

We also asked if festivals show films concurrently. Twenty-one percent of respondents reported that their festivals screen multiple films at the same time.

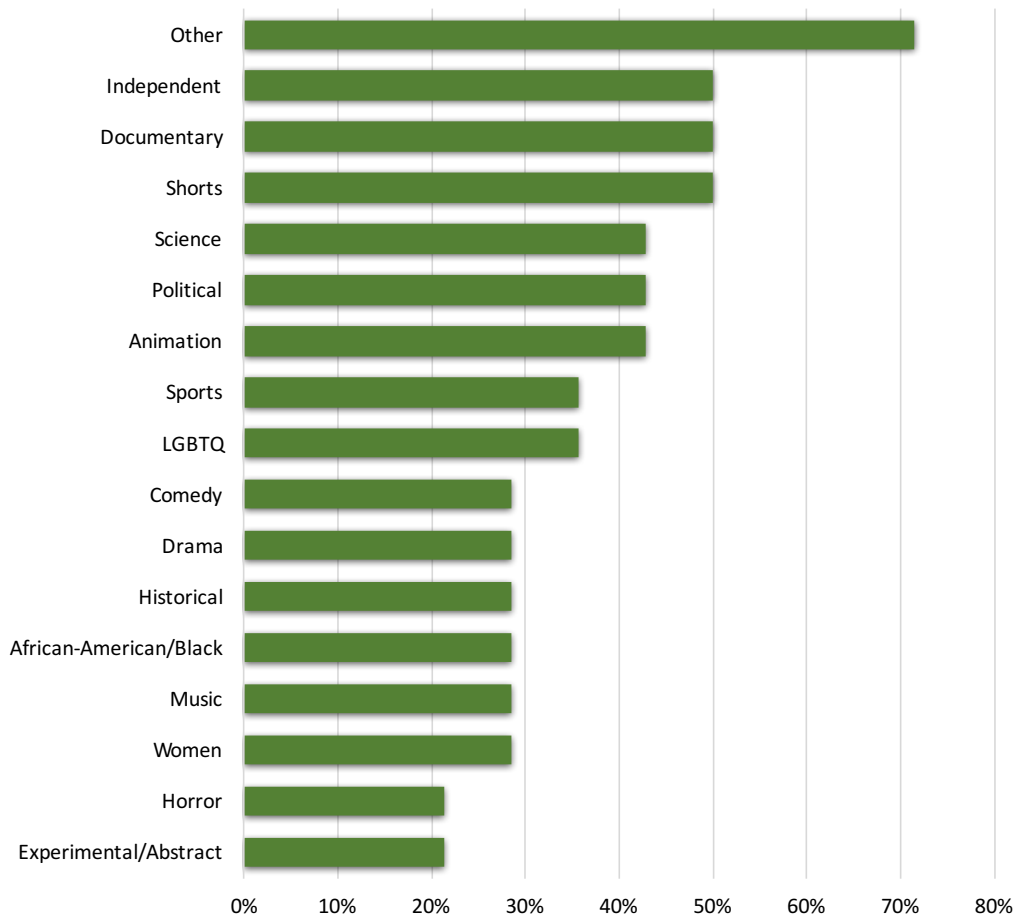
We asked film festival organizers to indicate what formats they accept for entry. **Figure 3-5** shows that 59% of festivals covered showed both short films and feature length films, while 38% solely screened short films. Four percent of organizers reported that their festivals exclusively showed feature length films.

Figure 3-5: Format of Films Accepted (n=29)

Format of Films	Number	Percent
Feature length (Greater than 40 minutes)	1	3%
Shorts (40 minutes or less, including credits)	11	38%
Both	17	59%

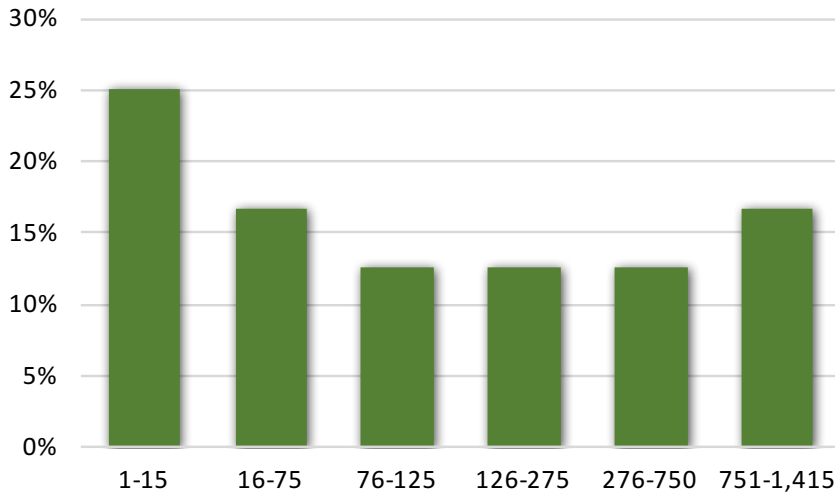
In addition to the format of films, we asked organizers about the types of films they screen. Twenty-eight organizers provided a response to this question. The results show that 57% of festivals focus on a specific film genre, and 43% percent of the festivals welcomed all film genres. **Figure 3-6** shows the specific genres that were selected, as well as how often genres were selected. Other write-in genres included dance, Loch Ness Monster themed films, bicycle themed films, pornography, snow sports and outdoor stories.

Figure 3-6: Genre of Films Screened (n=17)



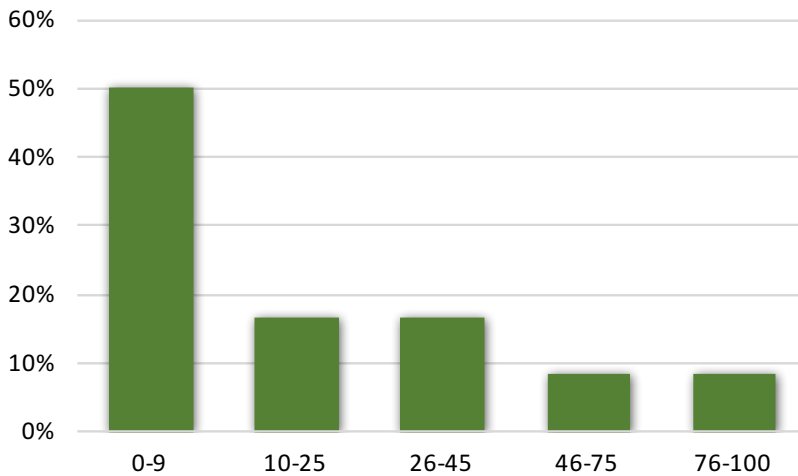
Film submission is a major component of festival operations. Twenty-five respondents provided data for their most recent festival edition. **Figure 3-7** shows a broad range in the number of films submitted, with an average of 307 films. Twenty-five percent of the respondents indicated they received between 1 and 15 entries, with 54% receiving 125 or fewer entries. Remarkably, 17% of the festivals reported they received more than 750 entries with one festival reporting 1,415 films submitted.

Figure 3-7: Number of Films Submitted (n=24)



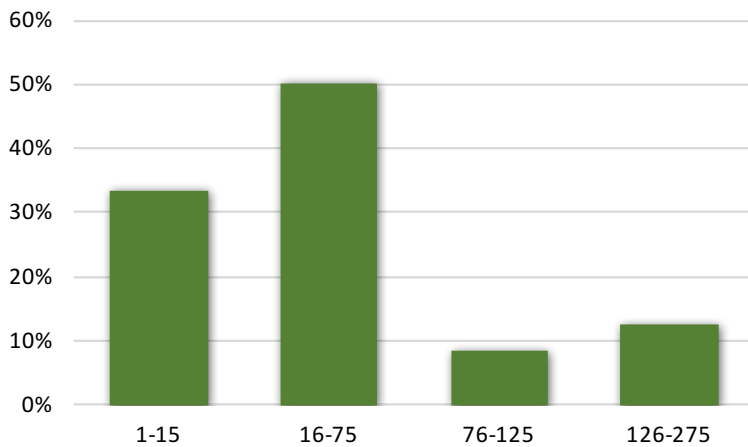
Additionally, we asked how many films submitted to screen at festivals in Oregon were produced in Oregon. **Figure 3-8** shows that half of the respondents reported receiving fewer than 10 Oregon-produced films. The average was 23, and one festival had almost 100 Oregon made films submitted.

Figure 3-8: Oregon-Produced Films Submitted (n=24)



To gauge the relationship between the number of films submitted and the number of films shown, the survey asked organizers how many films they showed at their most recent festival. **Figure 3-9** shows that one-third of respondents reported screening less than 15 films, and 50% between 16 and 75 films; the average number of films was 47. One festival reported screening 212 films at a single edition.

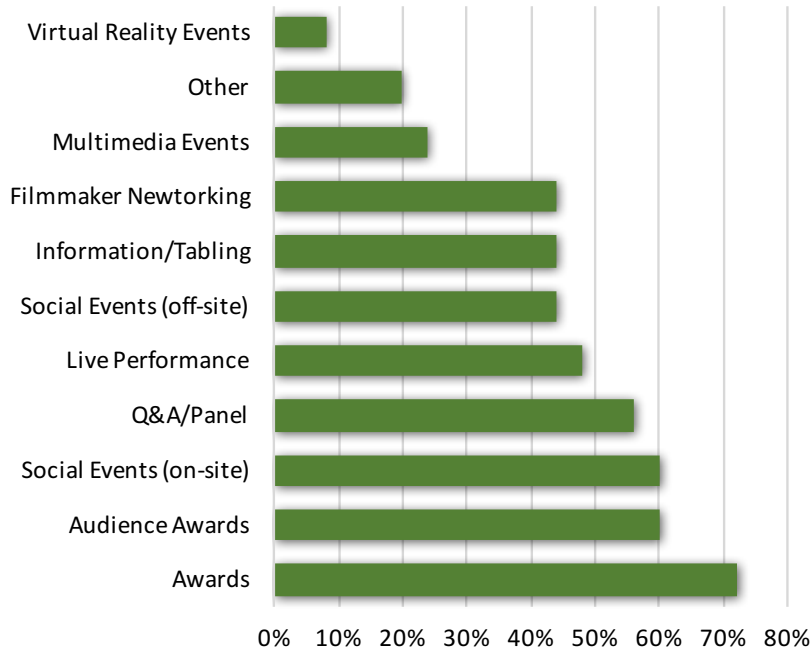
Figure 3-9: Number of Films Shown (n=24)



To better understand the scope of festival activities, we asked organizers to indicate other related activities associated with their events. **Figure 3-10** shows that awards are the most frequent non-screening activity during film festivals (72%). This finding is consistent with data on the number of films submitted and suggests a level of competitiveness between films showcased at Oregon’s film festivals. Audience awards were also indicated as a frequent non-screening event, with 60% of respondents indicating their festival features them. Audience awards both measure the popularity of a film, and actively engage festival attendees.

Film festivals frequently host social networking events of some form. Sixty percent of the festivals offer at least one social event on site, 44% hold an off-site social event, and 44% hold a networking event for filmmakers. Other popular events at film festivals include: question and answer panels (56%), live performances (48%), and information distribution or tabling (44%). Multimedia and virtual reality events were less common. Other events indicated by respondents include: art displays, sports exhibitions, political action organization, speakers, and live music.

Figure 3-10: Related Activities Associated with Film Festivals (n=25)



We asked respondents to indicate the number of non-screening activities held at their events. Notably, 45% of the 22 respondents indicated their festivals did not include any non-screening activities. **Figure 3-11** shows that 33% of the respondents reported including three to five activities, with 14% including six or more. The 55% of film festivals host non-screening activities had an average of six non-screening events, with a range of one to 18 events.

Figure 3-11: Number Non-Screening Activities (n=22)

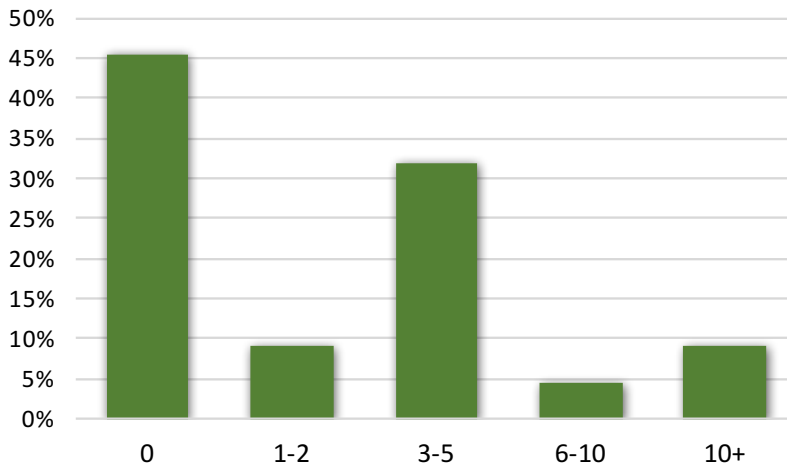
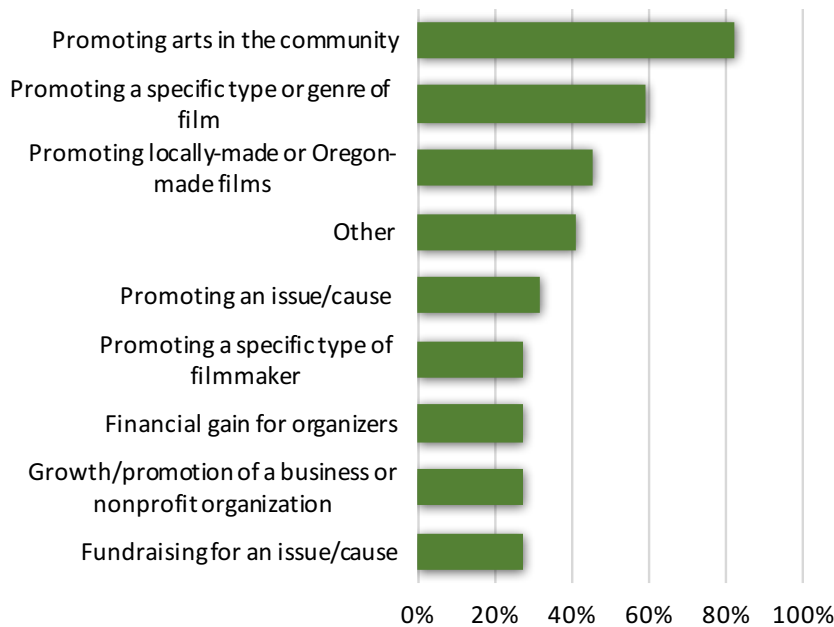


Figure 3-13: Objectives of Oregon Film Festivals (n=22)



Festival Organization and Operations

We asked respondents about organizational and operational aspects of their festivals. This included their legal structure, questions about revenues and expenses, patronage, use of employees and volunteers, and other support.

Figure 3-14 shows that 69% of the festivals were nonprofit organizations, and 46% of the 26 respondents indicated they are *entirely* volunteer run organizations. Thirty-one percent of the festivals reported a for-profit structure, and 27% of the respondents are incorporated in Oregon.

Figure 3-14: Organizational Structure (n=26)

Organizational Structure	Number	Percent
Nonprofit, all volunteers	12	46%
Nonprofit, with paid employees and volunteers	6	23%
For-profit, incorporated in Oregon	7	27%
For-profit, incorporated elsewhere	1	4%

We asked a series of specific questions about staffing and use of volunteers. Forty-six percent (12 of 26 respondents) have one or more paid employees. Forty-percent of the festivals with employees indicated they have one or two employees; 40% three to five, and 20% six to 12. Six festivals indicated that they employ both full time and part time staff. Among the 12 festivals with employees, the number of full time employees range from one to 12 employees, while the number of part time employees range from one to 30 employees.

Film festivals are generally operated through volunteers. Twenty-two festivals (92%) indicated they recruit volunteers to work for the film festival prior to the event, and 23 festivals (96%) indicated they have volunteers during the film festival. Respondents indicated that more than 1,800 volunteers assist with film festivals, with about 400 volunteers working prior to film festivals, and 1,400 volunteers working during film festivals.

The twenty-two responding festivals estimate that more than 72,500 volunteer hours are contributed to organizing and operating film festivals across the state. The number of volunteer hours reported ranged from 36 to 50,000. The median volunteer hours contributed to a festival is 450 hours.

Revenue and Expenses

We asked respondents a series of questions about attendance, revenue, and expenses. The results highlight the diverse nature of film festivals. We grouped the festivals into three categories, based on indicated attendance. Festivals with attendance indicated at less than 500 were considered small; between 500 and 1,000, medium; and over 1,000, large. We used these size categories to organize data on revenue and expenditures.

Film festivals indicated a range of patronage. The festival surveyed with the largest patronage sold nearly 20,000 tickets at its most recent festival, while the smallest festival had a patronage of 10. The average number of unique patrons for the 22 festivals responding was 1,000 with an average of 2,600 tickets sold.

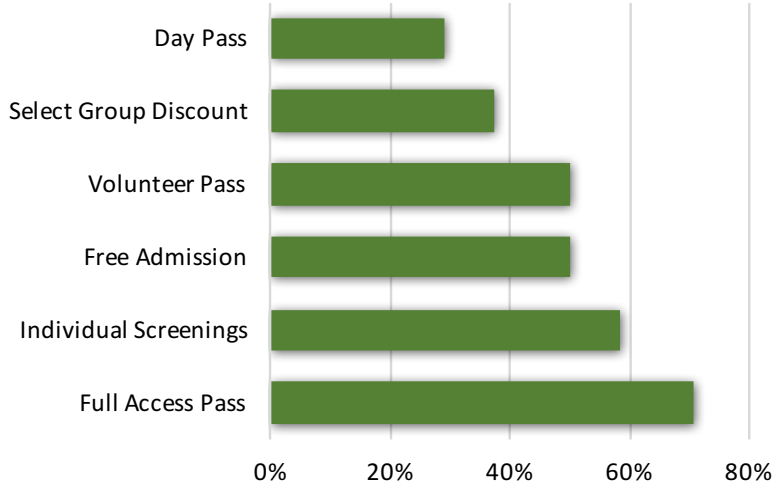
Figure 3-15 shows revenues and expenses of respondent festivals by size. The results show that the 32 responding festivals generated about \$830,000 in revenue and spent nearly \$900,000. Indicated expenses exceeding revenue suggests that festivals have other sources of funds that are not considered revenues. Festivals indicated that they spent nearly \$275,000 in Oregon.

Figure 3-15: Total Revenues and Expenditures Reported by Survey Respondents

Size Class	Number of Respondents	Revenue		Expenses		Expenses in Oregon	
		Total	Average	Total	Average	Total	Average
Large	8	\$719,699	\$89,962	\$809,445	\$101,181	\$231,000	\$28,875
Medium	6	\$52,239	\$8,707	\$25,073	\$4,179	\$12,223	\$2,037
Small	18	\$58,294	\$3,239	\$63,814	\$3,545	\$30,562	\$1,698
Total	32	\$830,232	\$25,945	\$898,332	\$28,073	\$273,785	\$8,556

Figure 3-16 shows the types of festival passes offered by responding festivals. Most festivals indicated that they offer full access pass tickets. Other than full access passes and tickets for individual screenings, festivals most commonly offered volunteer passes (50%) and free admission (46%). The least commonly indicated ticketing structures were discounted rates for select groups (e.g. seniors, students) at 38%, and day passes (29% of respondents).

Figure 3-16: Types of Festival Passes Offered (n=24)



Festival Marketing

Marketing and promotion are important for the success of any event. Because this study focuses on how to promote film festivals as a travel destination, we asked festival organizers a series of questions about how they market and promote their event.

Festivals indicated that they spend between \$10 and \$50,000 on marketing, with an average marketing budget of \$9,000. The marketing budgets track closely with festival patronage; smaller festivals have smaller budgets. **Figure 3-17** shows that 40% of the festivals have marketing budgets of less than \$500, and 25% have budgets of more than \$10,000.

Figure 3-17: Total Marketing Budget (n=23)

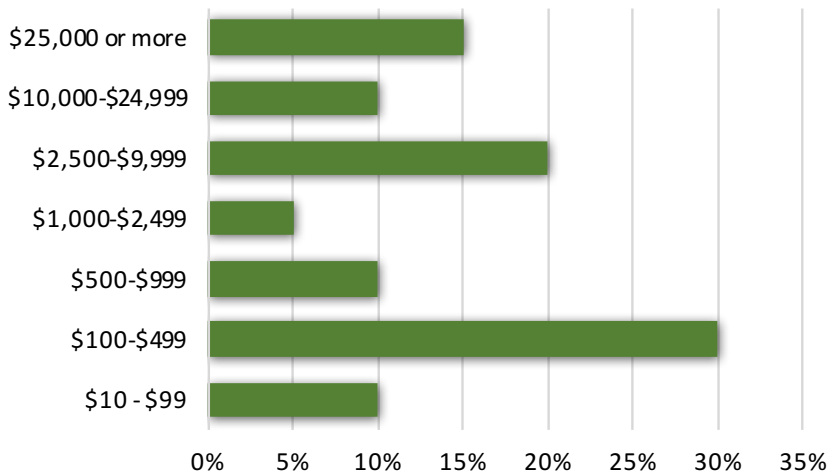


Figure 3-18 shows the type of marketing media used by responding festival organizers. The results show that every respondent uses Facebook events or free Facebook page promotion. Nearly all (96%) indicated that they use websites, word-of-mouth, and local media. Three-quarters of all respondents indicated they promote by email or listservs. More than half of film festivals use Twitter and/or Instagram for marketing, while only 22% use online search engine optimization. Comparatively fewer festivals advertised in local news (35%), or at other film festivals (26%). Other types of marketing that respondents use include: posters, email lists, radio Pandora/Google advertising, TV, movie theaters, and advertising in a statewide magazine.

Figure 3-18: Types of Marketing Media Employed (n=23)

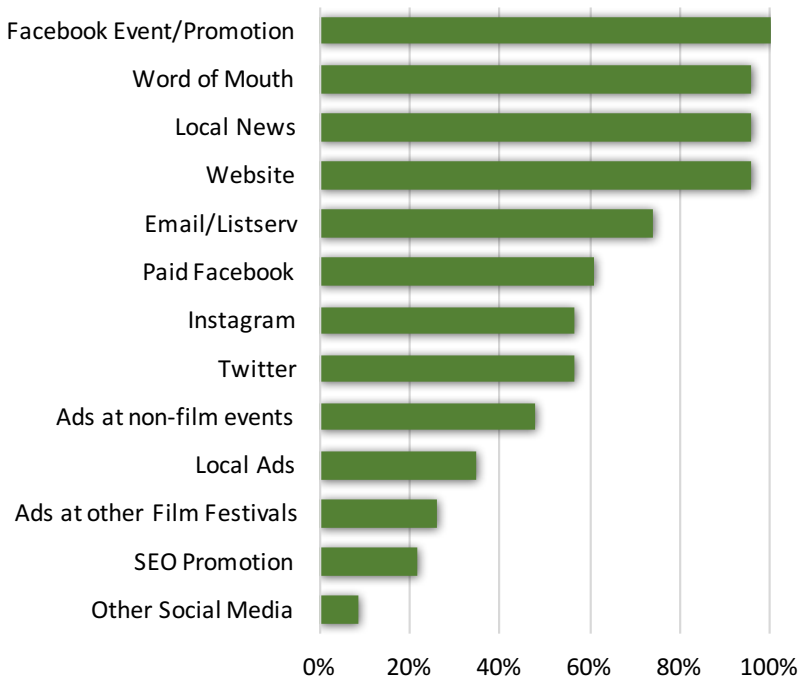
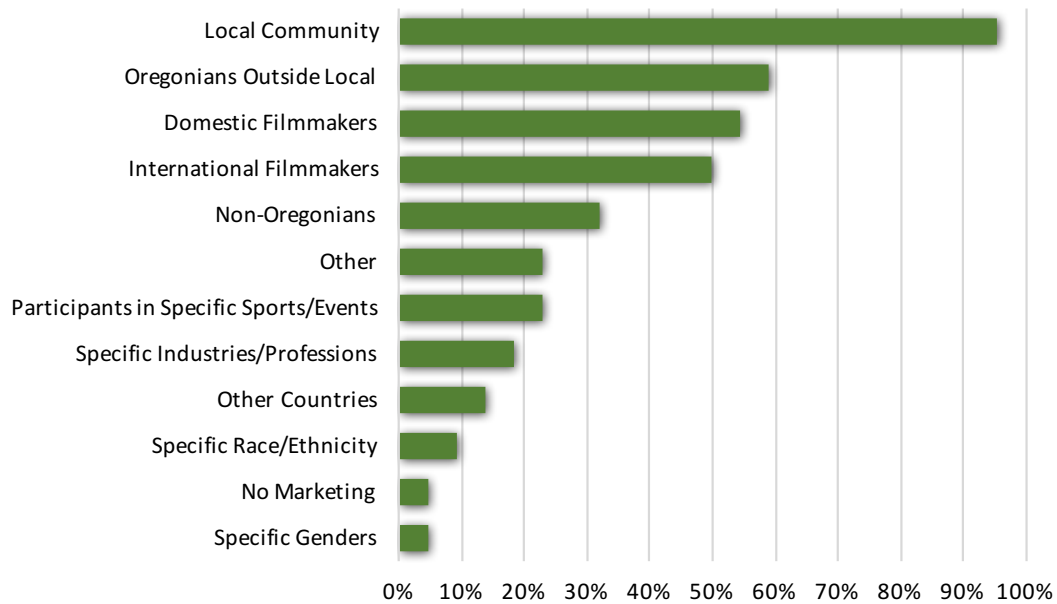


Figure 3-19 shows target markets as reported by survey respondents. Unsurprisingly, most respondents (91%) target the local community, and 57% target Oregonians outside of the local community. Nearly half (49%) target international filmmakers, and 43% target domestic filmmakers. Thirty percent of film festivals target non-Oregonians, with 13% of respondents targeting residents of other countries. Seventeen percent reported targeting specific age groups, 4% specific genders, and 9% members of a specific race/ethnic group. Seventeen percent of festivals market to participants of an activity or sport, and 17% to specific professions. Other responses provided include: LGBTQ+, students, parents and families, and snow sport enthusiasts. Five percent of the festivals reported that they engage in no marketing activities.

Figure 3-19: Targeted Demographics (n=22)



To provide insight from the perspective of festival organizers, we asked respondents to indicate their perceptions of how effective various marketing strategies are. **Figure 3-20** shows that word of mouth was perceived as effective or very effective by more respondents (92%) than any other strategy. Other strategies that respondents perceive as effective or very effective include: email (74%), ads at other non-film festivals (67%) and websites (65%). Interestingly, only 10% of festival organizers perceive social media to be an effective marketing strategy.

Figure 3-20: Perceived Effectiveness of Promotion Strategies (n=23)

Marketing Strategy	Not Used	Not Effective	Slightly Effective	Effective	Very Effective
Website/Internet	4%	0%	30%	48%	17%
Word of Mouth	0%	0%	9%	35%	57%
Email	0%	0%	26%	39%	35%
Ads at other Film Festivals	13%	4%	39%	35%	9%
Ads at non-Film Festivals	13%	5%	14%	48%	19%
Social Media	14%	5%	29%	10%	0%
Other Media	57%	5%	38%	5%	0%

We asked respondents to indicate their level of agreement or disagreement around a series of statements related to marketing their festival. **Figure 3-21** shows that most respondents (96%) think that marketing is important to the success of film festivals. A sizable proportion (78%) agreed that their festival is not marketed as effectively as it could be. Financial resources appear to be a limitation for festivals, 75% of respondents agreed that financial resources are their biggest limitation. Slightly less than half (48%) of respondents identified knowledge of marketing

as a limitation. This is likely associated with smaller festivals. Finally, most respondents disagreed that patrons would attend without marketing.

Figure 3-21: Respondent Perceptions of their Festival’s Marketing Program and Needs(n=23)

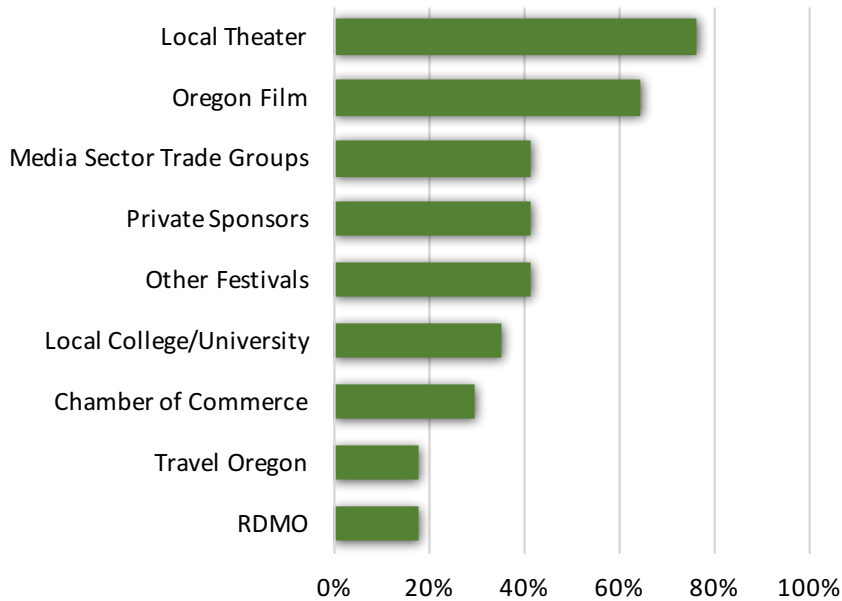
Statement	Neither				
	Strongly Agree	Somewhat Agree	Agree Nor Disagree	Somewhat Disagree	Strongly Disagree
Marketing is important to the success of the film festival	87%	9%	4%	0%	0%
The festival is not marketed as effectively as it could be	43%	35%	22%	0%	0%
Financial resources are the biggest limitation when it comes to marketing the festival	48%	26%	13%	9%	4%
Marketing knowledge/expertise is the biggest limitation when it comes to marketing the festival	9%	39%	26%	17%	9%
The majority of patrons will attend the film festival regardless of the degree of marketing and outreach	0%	30%	17%	30%	22%

Festival Support, Barriers to Expansion, and Needs

Festivals are events run by organizations, they require support and resources to run smoothly and effectively. To better understand partnerships and support, we asked respondents about the types of support they receive from various organizations. The data suggests that festivals rely on support from a wide variety of organizations.

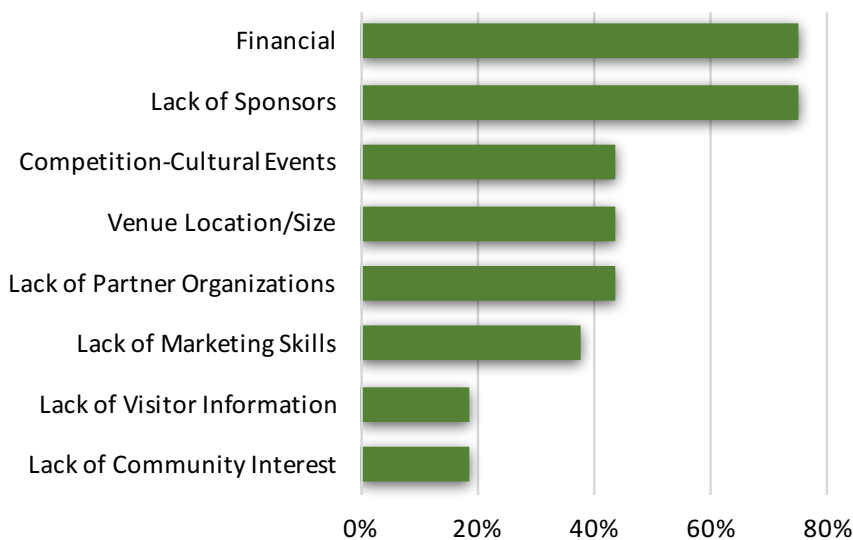
Figure 3-22 shows that 76% of festivals receive support from local theaters, and 63% receive support from Oregon Film. Forty-one percent of respondents reported support from media sector trade groups, private sponsors, or other festivals. Notably, less than 20% of festivals reported receiving support from Travel Oregon or their Destination Marketing Organization, DMO/RDMO. This result is consistent with previous results that show festivals focus their marketing efforts locally. It does suggest, however, potential to partner with travel marketing agencies to support festivals that could be a travel attraction.

Figure 3-22: Sources of Festival Support (n=17)



Not surprisingly, most film festival organizers (87%) wish to increase the attendance at their festival. **Figure 3-23** shows barriers to expansion as indicated by survey respondents. The most frequently indicated statement was business or other organizational partners (83%), followed by marketing assistance (74%), and fundraising assistance (65%).

Figure 3-23: Barriers to Expansion (n=16)



CHAPTER 4: CHARACTERISTICS OF OREGON FILM FESTIVAL PATRONS

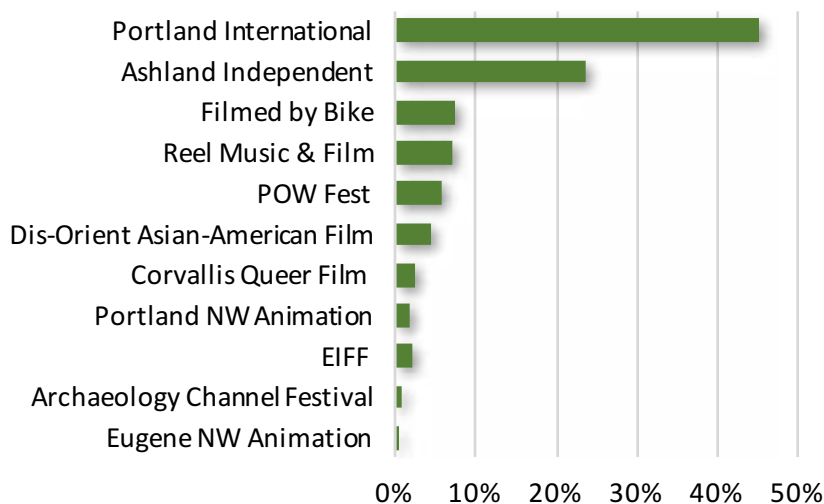
To better understand the direct economic impact and cultural interest of Oregon Film Festivals, the CSC partnered with 11 film festivals across the state to collect patron email addresses to distribute an online survey. A total of 964 patrons participated (see Appendix C for a more detailed discussion of the survey methods). The purpose of the patron survey is to inform project collaborators and stakeholders of film festival attendees. The survey includes information about patron demographics, travel patterns, economic trends, and other feedback about their festival experience.

This chapter assesses the survey results and could be utilized to influence marketing strategies, incentivize collaboration among related agencies or governments, and to develop improvements for the film festival industry’s future growth.

Sample Characteristics

Before presenting the results, it is useful to explore the respondent pool in more detail. We sampled at 11 of the 79 film festivals and received 986 responses. We conducted the survey using Qualtrics, an online survey instrument. For some festivals, we collected email addresses of patrons and then sent them a link; the larger festivals (Portland and Ashland) distributed an email solicitation through their patron lists. **Figure 4-1** shows the percentage of responses by festival.

Figure 4-1: Percentage of Patron Surveys by Festival



A key concern of organizations that conduct surveys is statistical validity. We estimate that Oregon film festivals attract about 80,000 unique patrons each year. If one were to assume that the sample was perfectly random *and* that there was no response bias, then the survey would

have a margin of error of $\pm 3.1\%$ at the 95% confidence level. This means that if a survey were conducted 100 times, the results would end up within $\pm 3.1\%$ of those presented in this report.

The sampling methodology, however, targeted specific festivals. In that sense, it was not a random sample and does not include responses from all festivals in Oregon. A key question, then, is whether film festival patrons share similar characteristics. We think that in some respect they do, the analysis of key characteristics such as income and education is similar across different festivals.

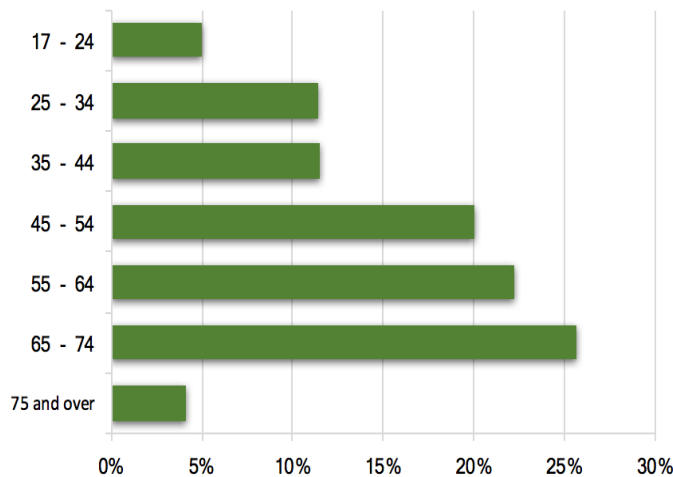
In summary, we urge readers caution in interpreting the patron survey data. While the sample was not random and cannot be extrapolated to the entire population of Oregon film festival patrons, the responses provide insight into key characteristics of patrons on key dimensions important for marketing.

Patron Demographics

This section provides demographic information on survey respondents, including: age, gender, and income. The data is useful for understanding the nature of the sample, and the characteristics of festival goers. Where appropriate, we comment on characteristics of the sample that may suggest sample bias.

As shown in **Figure 4-1**, Oregon film festivals attract people of all ages. The survey results show a minimum age of 17 and maximum age of 88. The average age of patrons is 53 years old, 68% are ages 45 to 74 years old, and the largest proportion of patrons are age 65 to 74 years old (26%).

Figure 4-1: Age Distribution of Patron Survey Respondents

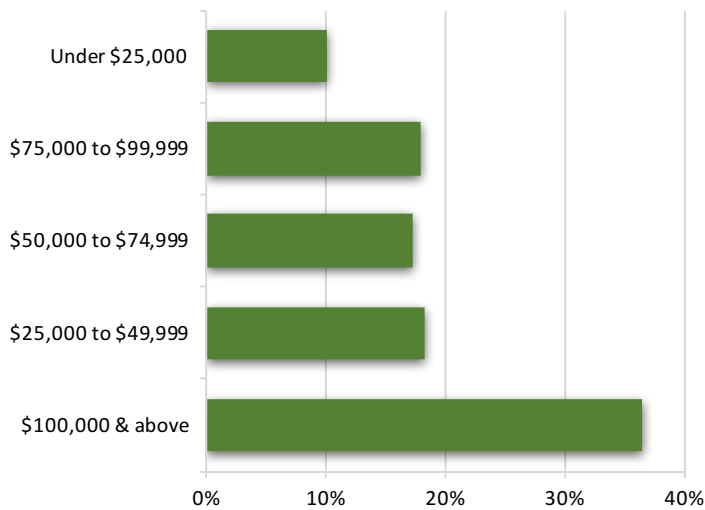


Sixty-four percent of survey respondents were female, while 33% were male. A small percentage (2%) identified as a different gender, or preferred not to answer (1%). CSC consistently gets higher response rates from females in our surveys, including random sample surveys. We think this result is a function of who is more likely to fill out a survey, but it is likely not representative of the gender distribution of film festival patrons. We would expect that to look more like the general population's equal gender distribution. Nearly all the survey respondents indicated an

education level above a high school degree (97%). The largest percentages of patrons have a Bachelor's degree (36%) or Master's degree (31%). We find this an interesting, but plausible result.

Figure 4-3 shows the distribution of household income as reported by survey respondents. Educational attainment often reflects the income levels of individuals. For that reason, it is unsurprising that 37% of patrons indicated a household income of \$100,000 or more per year. There is a relatively consistent percentage distribution of 17% to 18% among income groups between \$25,000 and \$99,000. Only 10% of patrons have a household income of \$25,000 or less.

Figure 4-3: Household Income of Survey Respondents



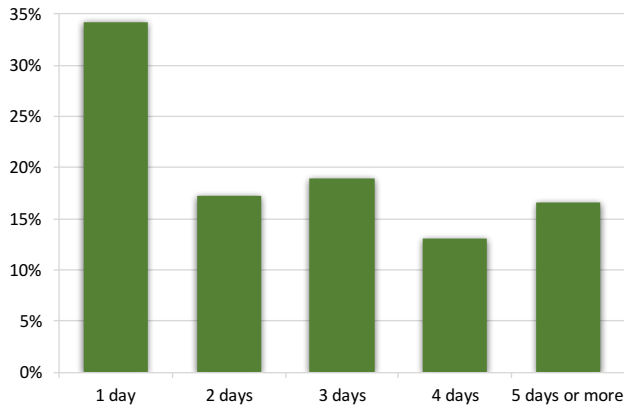
Patron Travel Patterns

We asked a series of questions regarding patron travel patterns. The intent of the questions, in part, was to identify how many Oregon Film Festival patrons were attending festivals as tourist destinations. Survey data such as trip duration, distance traveled, size of their travel party, and other activities patrons participated in outside of the festival are intended to inform impacts and correlations with the tourist economy.

We asked respondents to provide the size of the party, including themselves, who attended the festival. The survey results show a minimum party of one person, and a maximum of 41 people. The data distribution indicated an average party size of 2.2 people.

Figure 4-3 shows the distribution of number of days patrons attended a film festival. A large percentage of patrons attended a film festival for a single day (34%), and 66% of respondents attended the festival for 2 days or more.

Figure 4-3: Number of days attended

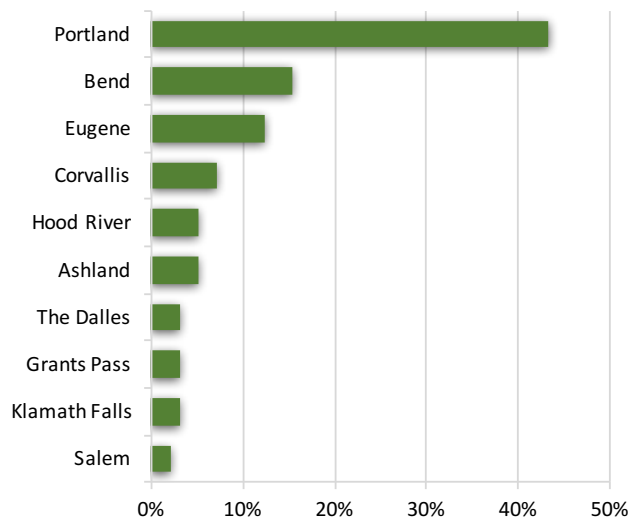


We asked how many nights the patron spent away from their primary residence while attending the festival. Eight-five percent of all respondents reported they did not spend any nights away from their primary residence and 86% traveled less than 50 miles away from their residence.

We asked patrons if attending the festival was the primary reason for taking their trip. Eighty-one percent of respondents stated “yes,” and 98% of respondents indicated they did not attend any other festivals on the trip. This suggests that most patrons are unique travelers to a single festival.

Figure 4-4 shows that despite the low attendance to multiple film festivals in one trip, some patrons traveled to other cities during their visit. In addition to visiting the location of film festivals, nearly half of patrons (43%) also traveled to Portland, 15% traveled to Bend, and 12% travelled to Eugene, even though the festival they attended was not hosted in the cities.

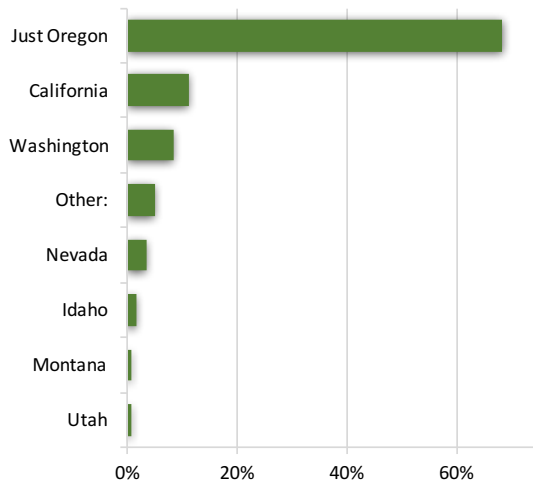
Figure 4-4: Other Cities Visited



Approximately 70% of survey respondents indicated previous attendance to the film festival where they received the survey, while 30% of patrons indicated they were experiencing the film festival for the first time. Returning patrons have attended the festival an average of six times, and a median of four times. Moreover, 54% of patrons indicated this was not their first visit to Oregon, a moderate proportion of patrons (34%) are Oregon residents, and the smallest proportion of patrons (12%) were first time visitors.

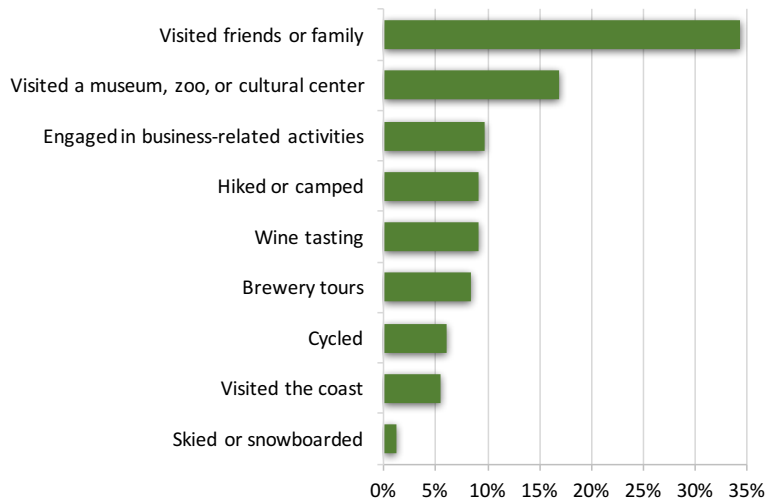
Overall, most patrons (68%) only visit Oregon when they travel to an Oregon Film Festival. **Figure 4-5** shows the distribution of bordering states that are common destinations for Oregon film festival patrons such as California (13%) and Washington (9%).

Figure 4-5: States Visited by Patrons



We are interested in additional activities that patrons enjoy while attending a film festival. This information provides insight to local businesses or activities that are likely influenced by the number of festival goers in the area. This information can inform Destination Marketing Organizations, DMOs, of potential activities to promote at film festivals, or activities that might attract film festival patrons. **Figure 4-6** shows that other than attending a film festival, most patrons visited: friends or family (34%), a museum, zoo, or cultural center (17%), and/or engaged in business-related activities (10%).

Figure 4-6: Other Activities Patrons Reported Engaging in While Attending a Film Festival



Patron Expenditures

We asked patrons to estimate the total amount of dollars spent while at the film festival. **Figure 4-7** shows patron expenditures by category per day per party and per person. The results show that the average party spent just over \$200 related to the film festival, or about \$93 per person. The results show that about 30% of expenditures are at the festival, 33% on food and drink, and 29% on lodging. A breakout of expenditures by local and destination visitors is included in **Chapter 6**.

Table 4-7: Patron Expenditures Per Day by Category, Per Party and Per Person

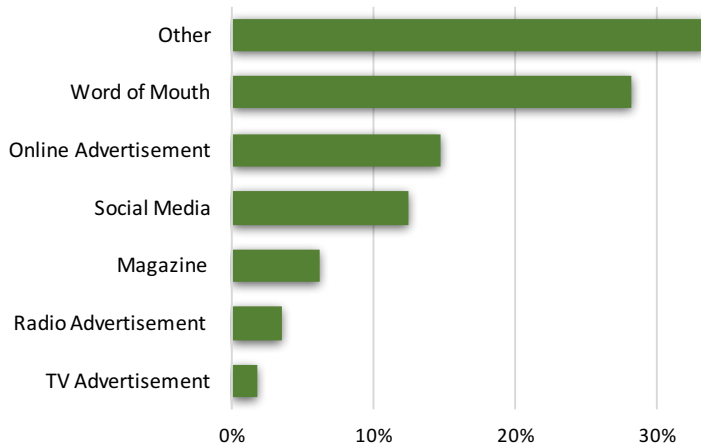
Expenditure	Per Party	Per Person
Food and drink	\$66.34	\$30.19
Lodging	\$44.66	\$20.33
Film festivals	\$58.58	\$26.66
Other entertainment	\$5.68	\$2.58
Souvenirs	\$2.54	\$1.16
Other shopping	\$12.72	\$5.79
Transportation	\$10.96	\$4.99
Other	\$1.90	\$0.86
Total	\$203.37	\$92.56

Festival Experience

The survey included a series of questions about patron’s experience at the festival they attended. The questions included: how patrons learned about the festival, patron satisfaction with various elements of the festival, and their overall satisfaction with the event.

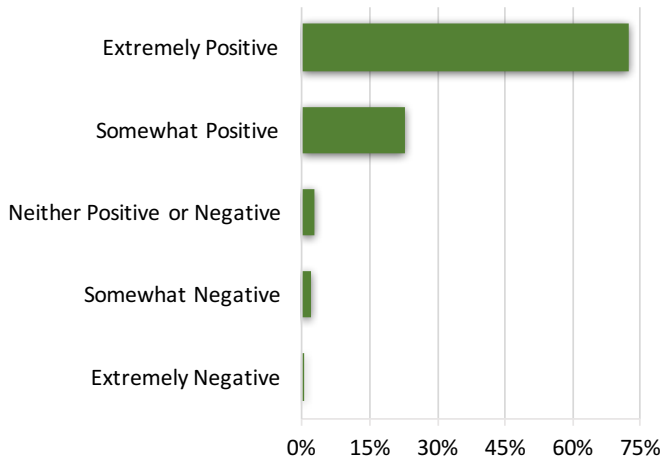
Figure 4-8 shows how patrons learned about the festival they attended. Thirty-three percent indicated “other” (a review of open ended responses to “other” shows that many of the responses fell into the given categories). More than a quarter of patrons learned about the festival through word of mouth (28%), 15% through an online advertisement, and 12% from social media. The smallest proportion of patrons learned about the festival through television advertisement (3%) and radio advertisement (5%)

Figure 4-8: How Patrons Learned About the Festival



We asked patrons to rate their festival experience. **Figure 4-9** shows that a majority (74%) indicated having an extremely positive experience, and 23% a somewhat positive experience. Responses suggests that film festivals are meeting patron expectations.

Figure 4-9: Overall Festival Experience



We asked patrons to indicate their level of satisfaction with various aspects of the festival they attended. **Figure 4-10** shows a high level of satisfaction across all aspects of the festival. The films shown (63%), festival atmosphere (66%), and location (69%) received the highest levels of

satisfaction from patrons. A very minimal percentage of patrons (2% or less) were “very dissatisfied” with any component of the festival they attended.

Figure 4-10: Patron Satisfaction with Festival Components

Aspect	Very	Satisfied	Neither		Very
	Satisfied		Dissatisfied	Dissatisfied	Dissatisfied
Location	69%	24%	3%	3%	1%
Atmosphere	66%	28%	4%	1%	1%
Films Shown	63%	29%	4%	3%	2%
Process of purchasing tickets	54%	34%	7%	3%	1%
Cost of tickets	47%	38%	10%	4%	1%
Size of Crowd	44%	38%	13%	3%	1%
Interact with film casts and crew	44%	25%	27%	3%	1%
Interact with other patrons	40%	35%	22%	3%	1%
Learn about filmmaking	28%	26%	41%	4%	1%

CHAPTER 5: PATRON PROFILES

This chapter presents profiles of segmented groups of patrons. The profiles extrapolate the patron survey data into pools of patrons; we call the resulting analysis Patron Profiles. The intent is to provide useful data for Travel Oregon, DMOs, and film festival organizers that isolate key patron characteristics and/or identify patrons that suit a festival brand. The data should assist with enhancing marketing strategies and attracting potential patrons for the future. Patron Profiles featured in this chapter include:

- Local and Destination Patrons
- Patrons by Festival Region
- Patrons Festival Sizes: Small, Medium, and Large

The CSC developed a set of comparative tables with key indicators that allow easy comparisons across different patron segments.

Local and Destination Patrons

A key objective of this study was to identify the extent to which Oregon film festivals are attracting destination patrons. Destination patrons exhibit different travel and expenditure patterns than local patrons. This profile divides the general patron survey results by destination patrons and local patrons.

- **Local patrons** are defined as patrons who traveled less than 50 miles to attend, or commuted daily from their permanent residence to attend the festival.
- **Destination patrons** are defined as patrons who traveled 50 miles or more, or stayed away from their permanent residence for 1 night or more to attend the festival.

Figure 5-1 summarizes key local and destination patron characteristics.

Demographics

The survey results show baby boomers accounted for the largest percentage of patrons. Local patrons had a higher percentage of baby boomers (50%) than destination patrons (39%). The average age of local patrons was 54, compared to 50 years for destination patrons. Additionally, 20% of destination patrons were millennials, compared to 13% of local patrons.

Fifty-two percent of local patrons have an educational attainment level above a Bachelor's degree (52%), while 40% of destination patrons hold a Bachelor's degree (40%). With respect to income, patrons tend to be relatively affluent. Forty-five percent of destination patrons report incomes of \$100,000 or more, as do 35% of local patrons. In fact, more than 70% of all patrons reported incomes of \$50,000 or more.

Travel Patterns

Destination patrons averaged 2.47 people per party, compared to 2.15 persons for local patrons. More than 50% of both local and destination patrons indicated they had previously attended the

festival. For local patrons, almost 75% of patrons were returning to the festival. Notably, 52% of destination visitors had previously attended the festival. This indicates considerable repeat visitation, which in turn creates opportunities for destination travel marketing.

Not surprisingly, most local patrons (97%) indicated they were day trip travelers. Although they may have attended the festival for multiple days, they stayed at their primary residence. By comparison, 75% of destination patrons indicated they stayed two or more nights while attending the festival. Approximately 81% of destination patrons indicated the festival was the primary reason for their visit. Finally, most destination patrons travel elsewhere during their trip. About 80% of respondents traveled to a different Oregon city besides the festival's host city, and 30% traveled to a different state.

Some destination patrons also enjoyed other activities besides attending the festival. Twenty-eight percent visited friends or family, 14% visited a museum, zoo, or cultural center, and 13% specified other activities, such as: going to the theater, a jazz festival, or another cultural festival.

Expenditures

Festival patrons spend a lot of money at festivals. Destination patrons spend more than local patrons. Destination patrons reported spending an average of \$803 related to their trip (not including airfare). This equates to \$122 per person per day. Local patrons averaged about \$107 per party or about \$19 per day.

Figure 5-1: Key Characteristics of Local and Destination Patrons

Characteristic	Local Patrons	Destination Patrons
Demographics		
Age		
Greatest Generation	8%	6%
Baby Boomers	50%	39%
Gen X	28%	34%
Millenials	13%	20%
Average Age	54	50
Educational Attainment		
% < Bachelor's Degree	12%	20%
% with Bachelor's Degree	35%	40%
Graduate or Professional Degree	52%	39%
Household Income		
< \$50,000	29%	26%
\$50,000 - \$99,999	36%	29%
\$100,000 or more	35%	45%
Travel Patterns		
Average Party Size	2.15	2.47
Returning Patrons		
Returning Patrons	74%	52%
Average times returning	6	6.5
Median times	4	5
First time at Film Festival	26%	48%
Distance Traveled	Less than 50 Miles	50 miles or Greater
Overnight Stays		
% day trip only	97%	14%
% spent 1 night	0.3%	11%
% 2 nights or more	3%	75%
Average # of nights spent	0.3	5
Film festival was the primary reason for trip		
Yes	N/A	81%
No		19%
Additional Traveling		
% who visited another city	NA	80%
% who visited another state		30%
Patron Expenditures		
	Average	Average
Total Spending Per Party	\$107.15	\$802.93
Spending Per Person	\$49.77	\$325.44
Spending Per Person Per Day	\$19.14	\$121.89

Patrons by Festival Region

Festivals exist in every region of the state. For this analysis, we broke patrons into groups based on four regions: Greater Portland, Willamette Valley, Central and Eastern Oregon, and Southern Oregon. We did not receive enough surveys to include results from the other Travel Oregon regions. **Figure 5-2** summarizes key patron characteristics by region.

Demographics

Unsurprisingly, responses show that different festivals attract different age groups. Southern Oregon patrons indicated a higher average age (61 years) and a significantly higher percentage of baby boomer patrons (71%) than other regions. The Willamette Valley and Central Oregon patrons had the youngest average age at 46 years. The Willamette Valley had the highest percentage of millennials (32%), while Southern Oregon had the smallest percentage (2%).

All regions showed highly educated and affluent patrons. Portland Metro (40%) or Southern Oregon (40%) had the highest percentage of patrons with a household income of \$100,000 or more. Almost 50% of the patrons had a household income under \$50,000 in the Willamette Valley region. This is likely due to surveying at festivals hosted by universities.

Travel Patterns

All regions had similar travel party size averages, ranging from 2.3 to 2.5 persons. Southern Oregon shows the highest percentage of returning patrons (83%), while the Willamette Valley had most patrons (67%) who experienced the festival for the first time.

Portland Metro shows the highest percentage of local patrons across all regions (90%). A significant majority (more than 75%) of patrons for all regions were day trip patrons, and 10% to 17% of patrons spent two or more nights away from home.

Portland Metro also had a low percentage of patrons who travel to other cities (0.1%) or travel to other states (8%). Patrons who attended a festival in Willamette Valley had the highest percentage of the four regions who visited another city (19%) or another state (23%). The most common activity patrons engaged in, which was consistent across all regions, was visiting friends or family.

Patron Expenditures

Southern Oregon patrons stand out as having the highest expenditure patterns, more than \$206 per person or \$107 per person per day. This is consistent with large numbers of destination patrons visiting Southern Oregon.

Table 5-2: Patron Characteristics by Region

	Portland Metro	Willamette Valley	Central Oregon	Southern Oregon
Demographics				
Age				
Greater Generation	8%	4%	0%	11%
Baby Boomers	45%	38%	31%	71%
Gen X	31%	27%	59%	15%
Millenials	16%	32%	10%	2%
Average Age	52	46	46	61
Educational Attainment				
% < Bachelor's Degree	11%	22%	12%	17%
% with Bachelor's Degree	36%	33%	36%	36%
Graduate or Professional Degree	53%	44%	50%	46%
Household Income				
< \$50,000	28%	49%	27%	19%
\$50,000 - \$99,999	32%	41%	39%	41%
\$100,000 or more	40%	10%	34%	40%
Travel Patterns				
Average Party Size	2.1	2.2	2.5	2.3
Returning Patrons				
Average times returning	7	4	4	6
Median	4	2	3	6
First time at Film Festival	27%	67%	40%	17%
Distance Traveled				
% traveled less than 50 miles	90%	78%	79%	80%
% traveled 50 miles or greater	10%	22%	21%	20%
Day v. Overnight Patrons				
% day trip only	89%	79%	82%	77%
% spent 1 night	1%	6%	2%	2%
% 2 nights or more	10%	15%	17%	16%
Average # of nights spent	0.93	1.21	2	5
Film festival was the primary reason for trip				
Yes	65%	95%	85%	93%
No	35%	5%	15%	8%
Additional Traveling				
% who visited another city	0.10%	19%	18%	14%
% who visited another state	8%	23%	20%	17%
Patron Expenditures				
	Average	Average	Average	Average
Spending Per Person	\$79.84	\$91.67	\$81.84	\$206.17
Spending Per Person Per Day	\$37.16	\$44.68	\$34.68	\$106.69

Patrons by Festival Attendance

We divided festivals into three categories based on attendance (size): festivals with reported attendance of less than 500 were considered small; between 500 and 1,000, medium; and over 1,000, large. **Figure 5-3** summarizes key patron characteristics by festival size.

Demographics

Millennials are the largest age group among small festival patrons (39%), while baby boomers are the highest percentage of patrons for medium (46%) and large festivals (50%). Moreover, the average age of small festival patrons was younger (43 years) than medium and large festival patrons, which show average ages of 49 years and 54 years respectively.

Large and small festivals had about the same percentage of patrons with Bachelor's degrees (~50%). Notably, small and medium festival patrons had large percentages of people who indicated their household income was below \$50,000.

Travel Patterns

The average party size for all festival sizes was slightly more than two persons. Fifty-five percent of medium festival patrons were return patrons, while 75% of large festival patrons were return patrons. Interestingly, 14% of small festival patrons report having attended the festival more than once. This is consistent with the finding that many small festivals are relatively new and are still building audiences.

Medium festivals show a significant percentage of destination patrons (37%), while small festivals had 13% and large had 8%. Small festivals had the highest percentage of patrons who attended the festival as a day trip (92%), and large festivals had 85%. Fifteen percent of large festival patrons were overnight visitors.

One-hundred percent of small festival patrons indicated the festival was the primary reason for their trip. In comparison, 93% of medium festival patrons and 78% of large festival patrons traveled primarily for the festival. Thirty-nine percent of medium festival patrons visited another city besides the festival host city, and 54% of medium festival patrons visited another state while on their trip.

Other activities varied by festival size. While visiting family and friends remained the most common activity for medium (36%) and large festival (27%) patrons, small festival patrons did not indicate this as an activity.

Patron Expenditures

Medium festival patrons reported indicated higher expenditures per party (\$132), than large (\$113), or small festival patrons (\$61).

Table 5-3: Patron Characteristics by Festival Size

	Small	Medium	Large
Demographics			
Age			
Greater Generation	4%	3%	8%
Baby Boomers	30%	46%	50%
Gen X	26%	28%	29%
Millenials	39%	23%	12%
Average Age	43	49	54
Educational Attainment			
% < Bachelor's Degree	19%	26%	12%
% with Bachelor's Degree	31%	36%	36%
% < Bachelor's Degree	50%	36%	51%
Household Income			
< \$50,000	56%	42%	26%
\$50,000 - \$99,999	42%	39%	35%
\$100,000 or >	2%	19%	40%
Travel Patterns			
Average Party Size	2.27	2.11	2.19
Returning Patrons	14%	55%	75%
Average times returning	3	4	6
Median	2	4	5
First time at Film Festival	86%	45%	25%
Distance Traveled			
% traveled less than 50 miles	92%	63%	87%
% traveled 50 miles or greater	8%	38%	13%
Overnight Patrons			
% day trip only	92%	63%	85%
% spent 1 night	0%	13%	2%
% 2 nights or >	8%	24%	13%
Average # of nights spent	1	3.5	1
Film festival was the primary reason for trip			
Yes	100%	93%	78%
No	0%	7%	22%
Additional Traveling			
% who visited another city	2%	39%	10%
% who visited another state	16%	0%	11%
Patron Expenditures			
	Average	Average	Average
Spending Per Person	\$61.06	\$131.84	\$112.50
Spending Per Person Per Day	\$15.98	\$82.34	\$54.98

CHAPTER 6: ECONOMIC IMPACTS

Destination tourism, such as travel for film festivals, has significant economic impacts in Oregon. Cultural tourism is one piece of this large economic sector. The Regional Arts and Culture Council (RACC) states that, “for every ticket purchased to an arts event an additional \$24.24 in arts related spending supports local businesses, including restaurants, parking structures, and retail outlets. Hotels, restaurants, and retailers also benefit from tourism generated by a thriving and energetic arts scene.”¹⁶ In total, that is equal to over \$150 million spent by arts and culture consumers per year, above the cost of admission.

The patron survey results indicate that about 14% of film festival patrons engage in travel to and around the state as part of their festival experience. Tourism helps to bring money in from outside of the state and supports a wide range of businesses, such as: hotels, restaurants, and a variety of other attractions. Even film festival patrons who don’t leave their home area engage in other activities that promote economic activities around the festivals, such as visiting restaurants or bars before and after the festival.

To better understand the economic impacts of festivals in communities, the CSC developed models to estimate direct economic activity generated by the film festivals.¹⁷ The estimates include economic activities of the festival operations (e.g., employment and revenue), and patron expenditures. CSC also developed estimates of expenditures for patrons, both in total and for those patrons that were destination travelers. These models rely primarily on data gathered from surveys of film festival organizers and film festival patrons.

Tourism in Oregon

Tourists spent more than \$11.3 billion in Oregon in 2016 alone. Travel Oregon estimates that tourism supports more than 100,000 jobs, a number that is growing quickly.

Source: Dean Runyan and Associates (2017). Oregon Travel Impacts 1992-2016.

Direct Economic Impact of Festival Operations

Film festivals have a range of economic impacts on communities—starting with festival operations. Data from the festival organizer survey indicates there is considerable diversity in the size and organizational structure of film festivals. Many are fully non-profit events run by volunteers.

Figure 6-1 shows the estimated economic impact of all film festivals in Oregon. The estimates are extrapolated from the film festival organizer survey results. To reflect uncertainty of the assumptions used to develop the estimates, CSC developed low-, medium-, and high-range

¹⁶ Bureau of Planning and Sustainability and the City of Portland, Oregon. *Portland Background Plan Report: Arts and Culture*. Portland: City of Portland, Oregon, 2011.

¹⁷ CSC did not estimate indirect and induced economic impacts—sometimes called multipliers. These impacts estimate jobs and revenue that is generated by dollars spent by festivals and patrons through other sectors of the economy.

estimates for each impact category. Following is a summary of the results for all 79 known film festivals:

- **Total Revenue** is between **\$1.93 million and \$2.82 million**.
- **Total Expense** is between **\$1.84 million and \$2.30 million**. The results suggest expenses exceed revenues for some festivals. This result also suggests that festivals are relying on reserves or other funding sources to support festival operations.
- Expenses supporting **local firms** is between **\$526,000 and \$631,000**.
- **Employment** is between **40 and 80 full-time** employees and **90 and 270 part-time** employees.
- **Volunteer participation** is between **440 and 620 persons for activities prior** to the festival, and between **2,060 and 4,540 persons during** the festival.
- The **estimated value** of volunteer efforts is between **\$680,000 and \$840,000**.

Figure 6-1. Estimated Impact of Film Festivals

Category	Low Estimate	Medium Estimate	High Estimate
Revenue	\$1,927,000	\$2,396,000	\$2,864,000
Expenses	\$1,844,000	\$2,072,000	\$2,299,000
Local Expenses	\$526,000	\$579,000	\$631,000
Total FTE	40	60	80
Part-time FTE	90	180	270
Volunteers - Before	440	530	620
Volunteers - During	2,060	3,300	4,540
Volunteer - Hours	34,000	38,000	42,000
Est \$ Value of Volunteers	\$680,000	\$760,000	\$840,000

Source: Film festival organizer survey; estimates by CSC

Economic Impact of Festival Patrons

The economic impact of festival patrons on the surrounding area is a second area of interest. Prior to this study, little was known about the characteristics of patrons, including basic characteristics such as: total patronage, destination patrons, and patron expenditure patterns. This section builds from data collected from the over 900 responses to the patron survey to develop estimates of patron impacts.

To set a baseline, we developed an estimate of total festival patronage. Sixteen festivals reported a total of 17,200 unique patrons and a total attendance of 38,790, this equates to about 2.25 attendances per unique patron.

Using this data, the CSC estimates Oregon Film Festivals have between 75,000 and 85,000 unique patrons at their events, and total attendance for all festivals is between 170,000 and 180,000.

Many patrons are local to the events they attend, and about 14% of respondents to the patron survey indicated that they traveled 50 miles or more to attend a festival. Of the traveling patrons, we estimate that 10,000 to 12,000 traveled more than 50 miles from their homes.

Figure 6-2. Estimated Visitation, Oregon Film Festivals

Category	Low Estimate	Medium Estimate	High Estimate
Total Attendance	170,000	175,000	180,000
Unique Patrons	75,000	80,000	85,000
Patrons Traveling 50+ miles	10,000	11,000	12,000

Source: Film festival organizer and patron surveys; estimates by CSC

Patron Expenditures

Travel behavior is a key interest to tourism marketing organizations and economic development professionals. As part of the patron profile, we asked survey respondents to provide data on their festival expenditures and related activities. **Figure 6-3** shows that the average amount spent per party for all survey respondents (not including airfare) is just over \$200. This equates to about \$35 per person, per day.

Survey results are clear that destination visitors have a different expenditure profile than local visitors. The average amount spent by destination patrons (those that traveled more than 50 miles) was just over \$800 per party, with a high of \$8,000. This equates to about \$122 per person per day. In contrast, local patrons spent an average of \$107 per party, or about \$19 per person, per day.

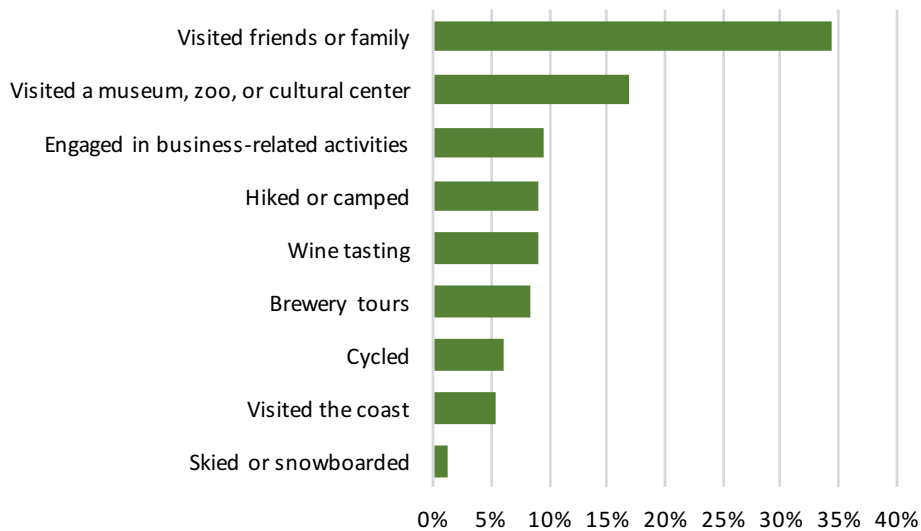
We asked respondents to estimate their festival expenditures as well as broad categories of expenses including food, lodging, transportation, souvenirs, entertainment, and other miscellaneous expenses. Unsurprisingly, lodging was the largest expense for destination patrons, (\$265 per party), while festival expenses were the largest expense category for local patrons (\$50 per party). It is important to note that these expenditures occur at an array of Oregon businesses.

Figure 6-3: Average Patron Expenditures, by Travel Status and Expenditure Category

Expenditure	Traveled >50 Miles		Traveled <50 Miles		All Respondents	
	Party	Per Person, Per Day	Party	Per Person, Per Day	Party	Per Person, Per Day
Food and drink	\$239.66	\$36.38	\$38.57	\$6.89	\$66.34	\$11.57
Lodging	\$264.49	\$40.15	\$8.92	\$1.59	\$44.66	\$7.79
Film festivals	\$115.59	\$17.55	\$49.98	\$8.93	\$58.58	\$10.22
Other entertainment	\$26.74	\$4.06	\$2.27	\$0.41	\$5.68	\$0.99
Souvenirs	\$11.59	\$1.76	\$1.12	\$0.20	\$2.54	\$0.44
Other shopping	\$78.27	\$11.88	\$2.14	\$0.38	\$12.72	\$2.22
Transportation	\$64.22	\$9.75	\$2.30	\$0.41	\$10.96	\$1.91
Other	\$2.37	\$0.36	\$1.85	\$0.33	\$1.90	\$0.33
Total	\$802.93	\$121.89	\$107.15	\$19.14	\$203.37	\$35.47

We are interested in what activities destination patrons engaged in on their trip while in Oregon. **Figure 6-4** shows that more than one-third of patrons reported visiting friends or family, with museums and other cultural centers being the second most frequently selected destination.

Figure 6-4. Other Activities Destination Patrons Engaged in While in Oregon



In short, sizeable percentages of traveling film festival patrons engage in other activities that generate economic activity while in Oregon. Many of these activities, such as touring wineries, breweries, the Oregon coast, cycling, and skiing are activities promoted by DMOs and Travel Oregon. These activities account for a sizeable percentage of spending by tourists, and finding ways to link tourists to these and other activities may increase the economic impact of film festival tourism, as well as expose tourists to other positive aspects of Oregon. Given that many

festival attendees who were traveling away from home indicated that they had been to Oregon before, these amenities may be a reason they continue to come back to visit film festivals in the state.

Film Festival Benefits

Film festivals provide much more than just economic benefits to local communities. In fact, only 7% of film festivals surveyed by the CSC stated that part of their festival's mission was to make money. Film festivals are much more likely exist to promote: art in the community, Oregon film makers, specific genres of film, or provide advocacy for an issue or cause. Oregon is host to several festivals focused on: children and youth filmmakers, LGBTQ films and issues, environmental films, and many others that don't focus on the promotion of films commercially.

Festival mission statements frequently featured words like: art, community, inspire, and educate. Many festivals stated that their mission was to show art to their local community and promote film making as an art. Others focused on celebrating specific genres of film.

The community driven aspect of festivals is also apparent in the number of volunteers and the number of employees at film festivals. About half of all festivals don't have any paid staff and those that do are usually run by one or two full time staffers and a couple of part-time employees. In contrast, even small festivals typically require 10 or more volunteers, while larger festivals can have well over 100 volunteers.

It shouldn't be surprising that cultural events like these are largely community focused. The benefits of showing film and promoting local film makers contributes to a vibrant community and arts scene. This likely has spillover effects into other aspects of Oregon's media industry. Oregon has a robust film industry that Oregon Film works to bolster. No doubt, film festivals that showcase local work help grow this and other artistic pursuits around the state.

We used survey data to estimate overall economic activity generated by patrons. **Figure 6-5** shows estimated patron expenditures related to film festival attendance. Responses show that the 75,000 to 85,000 estimated patrons spend between \$6.9 million and \$7.9 million. Taken in aggregate, about 40% of patron expenditures on directly related to the film festival (tickets, etc.) contributing approximately \$3 million in expenditures.

Looking at local and destination patrons shows a different picture. The 65,000 to 73,000 local patrons spend an estimated \$3.2 to \$3.6 million. Forty-six percent of local patron expenditures (about \$1.6 million) are made directly at festivals, and \$1.8 million on festival related expenses.

Destination patrons contribute an estimated \$3.3 to \$3.9 million in expenditures. Their expenditure patterns are different than local patrons, with 14% of the expenditures being at the festival. Destination patrons contribute an estimated \$2.8 to \$3.3 million to local economies during their visits to Oregon.

Figure 6-5. Estimated Film Festival Related Patron Expenditures in Oregon

Category	Low Estimate	Medium Estimate	High Estimate
Unique Patrons	75,000	80,000	85,000
Total Patron Expenditures			
Festival	\$2,750,000	\$2,930,000	\$3,120,000
Other	\$4,190,000	\$4,470,000	\$4,750,000
Total	\$6,940,000	\$7,400,000	\$7,870,000
Local Patron Expenditures			
Unique Patrons	65,000	69,000	73,000
Festival	\$1,509,300	\$1,602,180	\$1,695,060
Other	\$1,725,750	\$1,831,950	\$1,938,150
Total	\$3,235,050	\$3,434,130	\$3,633,210
Destination Patron Expenditures			
Unique Patrons	10,000	11,000	12,000
Festival	\$468,500	\$515,350	\$562,200
Other	\$2,785,900	\$3,064,490	\$3,343,080
Total	\$3,254,400	\$3,579,840	\$3,905,280

Regional Impacts

Film festivals are hosted in every region of the state. **Figure 6-6** shows an estimate of the number of unique visitors by region. Not surprisingly, CSC estimates that about two-thirds of all patronage occurs in the Portland Metro Region (50,000 to 56,600 unique patrons). The Willamette Valley accounts for about 11% of estimated patronage, Central and Southern Oregon about 6% each, and the remaining regions account for 3% to 4%.

Figure 6-6. Estimated Unique Patronage by Region

Region	Low Estimate	Medium Estimate	High Estimate
Central Oregon	4,500	4,800	5,100
Eastern Oregon	2,000	2,100	2,200
Gorge	3,000	3,300	3,500
Oregon Coast	2,400	2,600	2,800
Portland	50,000	53,300	56,600
Southern Oregon	4,500	4,800	5,100
Willamette Valley	8,600	9,100	9,700
Total	75,000	80,000	85,000

The high proportion of Portland festival patronage does not mean the economic benefits are entirely concentrated in Portland. Film festival attendees frequently make trips to other areas, engaging in tourist activities, and spending money in a variety of ways. Overall, 42% of patrons who traveled to attend a film festival visited a city outside of the festival location. About one third of patrons who traveled to a festival also visited Portland, a smaller proportion of patrons also visited other cities. When patrons travel away from the location of the festival, they're potentially extending their trip and induce spending on other activities.

Conclusion

About 75,000 Oregon residents can be considered film festival patrons. These patrons spend considerable sums of money when attending festivals. The \$7 to \$8 million patrons spend each year while attending film festivals supports both the festivals, and the local economy. Festival patrons frequent: hotels, restaurants, local theaters, transportation, local stores, and other types of entertainment. Notably, patrons who travel farther from home spend significantly more in the local economy.

Festivals also spend large sums on a variety of goods and services that make the events possible. Film festivals spend about \$2.4 million each year to promote and hold their festivals, about one-third of this (\$575,000) is spent at locally owned businesses. Growing the film festival sector can mean additional tourist dollars and additional economic activity for Oregon cities.

In addition to economic activity, having cultural events in Oregon communities provides many benefits. While these benefits are harder to estimate and quantify, it is obvious from the mission statements of festivals, and the responses of patrons to our survey that these programs provide enormous benefits to local communities and the film ecosystem in Oregon.

CHAPTER 7: POTENTIAL MARKETING STRATEGIES

Film festivals add immense value to local communities. While the economic impacts are relatively modest, our data suggest substantial potential for growth. Increasing the number of patrons has benefits for local communities and for Oregon. Moreover, there is substantial opportunity for growth. RDMOs, Travel Oregon, Oregon Film and film festival organizers can all take actions that will help to increase attendance and raise the profile of Oregon as a destination to view films.

The following recommendations are organized thematically. Although some of the actions apply to specific organizations, the themes help to organize sets of specific actions that do not necessarily apply to everyone involved in the film festival ecosystem. The following ideas were developed through our research, interviews with festival organizers, the focus group meeting, and the festival organizer and patron surveys.

Strategy I: Share Information

At the focus group meeting, several film festival organizers reported that they work with their RDMO and Travel Oregon to promote their festival. Others had no idea about resources for destination travel marketing. Some film festival organizers didn't have enough information about local hotels and restaurants to share with their patrons and film makers that come from out of town. Several travel professionals noted that they did not know the exact dates of all the film festivals, even if they knew that many existed.

To promote a more robust exchange of information, the CSC suggests the following actions:

- **RDMOs: Develop a package of local information for film festivals.** Using the demographic information about film festival patrons contained in this report and other information already known about cultural tourists, develop a package of hotel options, restaurants, and local attractions that can be provided to film festival organizers when requested. This packet could include digital copies of information about local attractions for festival organizers to use in their own materials, or it could also be pamphlets and handouts produced by RDMOs that provide relevant information to film festival patrons.

This material will help film festivals to provide information for patrons eager to visit the local community, and to highlight the other amazing aspects of the community. Materials can also help film festival organizers attract new patrons from out of town by making it easier to understand the local community. Survey data shows that film festival patrons who travel, almost always visit other local attractions. Having a set of standardized information about the local community can be a resource for other similar types of events as well.

The reverse relationship also exists. RDMOs regularly distribute information about what's going on in communities to hotels, convention centers, and other areas likely to attract tourists. Film festival dates and information could be added to these materials

when they are distributed.

- **Travel Oregon: Host a ‘Travel Oregon 101’ specifically for film festivals.** Some film festivals already partner with Travel Oregon to showcase their events. However, many were unaware of the resources that Travel Oregon offers to events in the state. The most efficient way to communicate with all the interested parties would likely be to host an event, perhaps even annually, that would allow festival organizers to meet with Travel Oregon staff and learn about resources they can use that already exist.

Hosting an event specifically for film festivals will allow Travel Oregon and film festival organizers to network in ways that are not possible at the larger regional events. Film festivals are a unique niche in Oregon’s tourist economy, as such, there are likely specialized materials and information that Travel Oregon can provide that will have a greater influence than the more general events.

- **Film festival organizers: Submit festival information to Travel Oregon and RDMOs regularly.** Travel Oregon and RDMOs regularly promote events with marketing they are already doing. Without knowledge of when film festivals occur, who goes to them, and what is going to happen at them, these organizations cannot effectively include festivals in their campaigns. Submitting dates and special events, as well as photos and other material that will help RDMOs and Travel Oregon to market the events will provide greater exposure for the film festivals and give the organizations valuable materials to use in their campaigns.

Strategy 2: Increase and Leverage Partnerships

Throughout this research, film festival organizers continually mentioned how important their partnerships with other organizations and groups were. Partnerships are essential to running a film festival no matter the size. Organizers responded that they provided sponsorships, access to facilities like movie theaters, and that partnerships are vital sources of patrons.

- **Film festival organizers: Leverage partners in marketing.** Film festival organizers should creatively leverage their existing partnerships to maximize the effect of their marketing budgets. Several film festivals provided examples of how to do this at the CSC’s focus group:
 - A ski and snowboard focused festival noted that they worked with a local youth ski club to sell tickets as a fundraiser for the club. The film festival got enthusiastic promotion through extensive word of mouth. Not only was this marketing highly targeted – the ski club could tap into networks of people who are ski enthusiasts – but it was also highly effective. This kind of partnership also highlights how film festivals provide many benefits to their local communities.
 - Another festival shared that Facebook marketing was one major way that they advertised, but paying to share their events wasn’t nearly as effective as tapping into their partners’ social media presences. The film festival asked their partners to share the event and some even paid to promote it to their networks. This was highly effective; the same group of people who are most

likely to come are the same ones who follow the festival on Facebook. There were many potentially interested Facebook users who followed the festival's partners who would never have seen the posts if the festival had been the one to promote the event on social media.

- **Film festival organizers: Partner with local universities.** The surveys conducted by the CSC showed that universities were underutilized by festivals. While some festivals are attached to universities in some way (i.e. they are organized by faculty or students) many seemed unconnected with a large potential market. All of Oregon's larger cities are host to universities and colleges. Many festivals are also located in these cities. Festivals should connect with cinema studies departments, but also be creative. Asian studies, African studies, Women's studies, History, English, and other departments are also possible partners. Outdoor and sport festivals could connect with clubs and sports teams. Students and faculty are not just likely patrons, but they're also a potential source for volunteers or sponsors.
- **RDMOs and Travel Oregon: Use film festival assets for promotion.** Film festivals regularly attract celebrities, film makers, in addition to hosting events that could be used in marketing campaigns. DMOs and Travel Oregon should utilize these assets in partnership with the film festivals. Directors, actors, and others may prove to be a tourist draw if used in campaigns. This may take the form of the celebrity participating in advertising or as simply as promoting that the celebrity will attend the festival. Photos or videos taken at festival events can showcase the vibrant nature of these events.
- **All parties: Promote festivals at other festivals.** Patrons of film festivals are the most likely potential patrons at other festivals (including music and other festivals). Festivals should partner with other festivals and 'share' patrons. Travel Oregon, RDMOs, and Oregon Film can all partner with festivals to help market themselves, market festivals, and market tourism destinations around Oregon. Existing marketing materials can be used and if effective, new materials can be developed specifically for promoting Oregon attractions at festivals.

Strategy 3: Official Support

State agencies are already running programs that promote travel in Oregon. Travel Oregon and RDMOs already work with some festivals to market. Some festival organizers felt that they benefited from having official state recognition that their festival was credible.

- **Travel Oregon and Oregon Film: Create a seal of approval.** Festivals may be able to attract additional sponsors and partners with state approval from Travel Oregon and Oregon Film as state agencies. Oregon Film staff already know and work with many festivals in the state. The relationships they form help to build connections between many groups that work in media and travel throughout the state. Oregon Film could vet film festivals as legitimate partners and determine if film festivals are eligible for state recognition. This official recognition would serve as a 'badge' of sorts that festivals could use when working with potential partners and sponsors.

- **Travel Oregon and film festivals: Create a film festival profile book.** Using information submitted by film festivals, create a profile book. This would provide potential patrons and travelers with a resource to check when they are considering traveling to Oregon and plan film festivals into their trip. This would also serve the function of promoting cultural amenities throughout the state.

Strategy 4: Target Selected Patrons

Travel Oregon has a targeted patron demographic of 25-64 year olds who spend \$1,000 or more on vacations. Travel Oregon targets ‘culinary enthusiasts’ for a Fall campaign, and active or outdoor enthusiasts for their Spring campaign¹⁸. These groups have significant overlap with many of the film festival patrons—who are affluent and well-educated. By working together, festivals and Travel Oregon can attract new tourists and patrons.

- **Travel Oregon: Use festivals in existing marketing campaigns.** Travel Oregon already runs national marketing campaigns targeting likely visitors to Oregon. Travel Oregon can weave festivals into their existing marketing campaigns, as festivals are a likely draw for these potential visitors. Festivals can be marketed as an add on to other types of trips. For instance, Travel Oregon’s Spring campaign can incorporate festivals that are geared towards sports and the outdoors. The Fall campaign can incorporate festivals that focus on local film makers and the more artistic aspects of festivals.
- **Film Festivals: Use data to find your audience.** Travel Oregon, DMOs, and this study have information about who may be likely to attend festivals. Marketing should be targeted to attract people that are most likely to be patrons at the festival. Shift marketing resources if possible to better align marketing with your market.

¹⁸ <http://industry.traveloregon.com/industry-resources/oregons-target-markets/the-americas/>

APPENDIX A: FILM FESTIVAL INVENTORY

This appendix presents an inventory of Film Festivals in Oregon. We started the inventory with a list provided by Oregon film. That work was supplemented with internet searches. The CSC searched for 400 cities and towns taken from the Travel Oregon website. Additionally, the CSC team noted theaters that are used for film festivals.

To validate the inventory, the CSC shared the inventory with select film festival organizers, who checked the list against their knowledge of existing festivals. This approach of internet searches, combined with data provided by Oregon Film and the Oregon Media Production Association, provided a comprehensive list of film festivals.

Using the list of festivals, the CSC team checked that each festival recorded was still active and that it met the definition of film festivals established in the previous chapter.

Figure A-1 presents a list of Oregon film festival.

Table A-1: Film Festival Inventory

Festival Name	Festival City	Venue	Season	# Days	Website
ArchaeologyFest	Bend	Central Oregon Community College	Winter	4	http://www.archaeologychannel.org/events-guide/archaeologyfest-film-series-guide
Ashland Independent Film Festival	Ashland	Varsity Theatre, Historic Ashland Armory, Ashland Street Cinema	Spring	5	http://www.ashlandfilm.org/index.asp
Astoria International Film Festival	Astoria	Liberty Theater	Fall	3	http://www.goaiff.com/section.cfm?wSectionID=613
Bend Film Festival	Bend	Multiple	Fall	4	http://www.bendfilm.org/festival/
Corvallis Queer Film Festival	Corvallis	Darkside Cinema	Winter	4	https://filmfreeway.com/festival/CorvallisQueerFilmFestival
Dis-Orient Asian American Film Festival	Eugene	Bijou Art Cinema, Broadway Metro	Spring	3	http://www.hosteugene.com/disorient/
Eastern Oregon Film Festival	La Grande	N/A	Fall	3	http://eofilmfest.com/
Eugene Children's Film Festival	Eugene/Springfield	The Richard E. Wildish Community Theater	Fall	1	http://www.aacfoundation.org/
Eugene International Film Festival	Eugene/Cottage Grove	Regal, Broadway Metro, Cottage Grove Armory	Fall	N/A	http://www.eugenefilmfest.org/
Italian Film Festival USA	Portland	Fifth Avenue Cinema	Spring	3	http://www.italianfilmfests.org/index.html
Killer Valley Horror Film Festival	Ashland	Ashland Hills Hotel & Suites	Fall	1	http://killervalleyhorrorfilmfestival.com/
Klamath Independent Film Festival	Klamath Falls	Ross Ragland Theater	Fall	3	http://www.klamathfilm.org/festival.php
Magbas Entertainment International Film Festival	Eugene	Broadway Metro	N/A	4	http://www.magbasentertainment.com/node/2
Snowvana	Portland	N/A	Fall	2	http://snowvana.com/about
Northwest Filmmakers Festival	Portland	N/A	Fall	6	https://nwfilm.org/festivals/nwff43/
NW Animation Film Festival (Eugene)	Eugene	Bijou Art Cinema	Spring	3	http://www.nwanimationfest.com/
Oregon Coast Film Festival	Coos Bay	Egyptian Theatre	Fall	1	http://www.oregoncoastfilmfestival.org/
Oregon Independent Film Festival	Portland	Seven+	Fall	15	http://www.oregonindependentfilmfest.com/
Oregon Independent Film Festival (Eugene)	Eugene	Bijou Art Cinemas, Broadway Metro	Fall	5	http://www.oregonindependentfilmfest.com/
PDXtreme Fest	Portland	Laurelhurst Theater	Winter	3	http://www.pdxtremefest.com/ , https://filmfreeway.com/festival/PDXtremePortlandUndergroundFilmFestival

Festival Name	Festival City	Venue	Season	# Days	Website
Portland Eco Film Fest	Portland	N/A	N/A	4	http://www.portlandecofilmfest.org/submit/
Portland Film Festival	Portland	Laurelhurst Theater	Summer	7	http://portlandfilmfestival.com/
Portland International Film Festival	Portland	Regal Fox, Laurelhurst, NW File Whitsell, Cinema 21, Valley Cinema, Empirical, Bagdad.	Winter	16	https://nwfilm.org/festivals/piff40/
Portland Queer Film Festival	Portland	Cinema 21	Fall	7	http://www.pdxqueerfilm.com
POWfest The Portland Oregon Women's Film Festival	Portland	Hollywood Theater	Spring	4	http://powfest.com/
QDOC: Portland Queer Documentary Film Festival	Portland	Hollywood Theater	Spring	4	http://www.queerdocfest.org
Reelabilities Film Festival	Portland	Alberta Rose Theater	Spring	3	http://portland.reelabilities.org
Signal to Noise	Beaverton	Sunset Presbyterian Church	N/A	N/A	http://www.signaltonoisefestival.com/about/
Sprout Film Festival	Salem	Northern Lights Theater & Pub	Winter	1	http://www.resourceconnections.org/
The Archaeology Channel International Film and Video Festival	Eugene	Broadway Metro, Shedd Institute Recital Hall	Spring	4	https://www.archaeologychannel.org/
The Overlook Film Festival	Mt. Hood	N/A	N/A	N/A	http://www.overlookfilmfest.com
Up Up Farm Film Festival	Silverton	Silverton Grange Hall	Winter	1	http://www.thegreenhorns.net/up-up-farm-film-festival/about-the-festival/
Eco Film Fest (Corvallis)	Corvallis	Odd Fellows Hall	Winter	4	http://sustainablecorvallis.org/2017/01/annual-corvallis-festival/
Portland Jewish Film Festival	Portland	NW Film Center	Summer	15	http://pdxjff.org/index.html
48 Hour Film Project	Portland	N/A	Summer	2	http://www.48hourfilm.com/portland-or
90-Second Newbery Film Festival	Portland	Hollywood Theater	Winter	1	https://www.eventbrite.com/e/90-second-newbery-film-festival-2017-portland-screening-tickets-29922034611
Backcountry Film Festival	Sisters and Bend	Sisters Movie House and Volcanic Theatre Pub	Winter	2	http://www.cascadeae.com/backcountry-film-festival-returns-central-oregon-tickets-sale/
Banff Film Festival	Salem	Salem's Historic Grand Theatre 191	Winter	1	http://www.awloutdoors.org/banffsalem
Bend Bicycle Film Festival	Bend	The Tower Theatre	Spring	1	http://bendbicyclefilmfestival.com
Bow Wow Film Festival	Portland	Hollywood Theater	Fall	1	http://www.bowwowfilmfest.com/
Central Oregon Film Festival	Madras	Madras Performing Arts Center	Spring	1	http://www.centraloregonshowcase.com/COFF.html
Hatfield Marine Science Center Film Festival	Newport	Visitor Center Auditorium, HMSC	Fall	1	hmsc.oregonstate.edu/events

Festival Name	Festival City	Venue	Season	# Days	Website
HUMP!	Eugene	Bijou Art Cinemas	Spring	2	http://humpfilmfest.boldtypetickets.com/events/39266175/dan-savages-hump-film-festival
International Youth Silent Film Festival	Portland	N/A	Spring	N/A	http://www.makesilentfilm.com/
Loch Ness Monster Film Festival	Coos Bay	Egyptian Theatre	Spring	1	https://www.facebook.com/events/1980069672217157/
LunaFest	Portland	Melody Ballroom	Winter	1	http://www.lunafest.org/portland0202
Manhattan Short	Salem	Salem Cinema	Fall	7	http://www.manhattanshort.com/film-entry.html , http://www.salemcinema.com/manhattanshort.html
McMinnville Short Film Festival	McMinnville	McMinnville Theater	Fall	2	http://mcminnvillefilmfest.org/
McMinnville UFO/Sci-Fi Film Festival	McMinnville	, Moonlight Theater	Spring	3	https://www.facebook.com/McMinnville-UFO-Film-Festival-186753631358311/
Full Sail Film Festival	Mt. Hood	N/A	Spring	1	https://www.skihood.com/schedule-events/april1/film-fest
North Portland Unknown Film Festival	Portland	Disjecta	Fall	2	http://www.northportlandunknown.com/
Oregon Short Film Festival	Portland	Avalon Theater	Spring	1	https://oregonshortfilmfestival.blogspot.com/
Portland Motorcycle Film Festival	Portland	Hollywood Theater PDX	Winter	2	http://www.pdxmotorcyclefilms.com
Ruby Peak Film Festival	Enterprise	OK Theatre	Winter	3	http://www.rubypeakfilmfest.com/contact
The Best of the 43rd Northwest Film Festival	Manzanita	Hoffman Center for the Arts	Winter	1	http://hoffmanblog.org/http://hoffmanblog.org/category/film-series
Wandering Reel Film Festival	Florence, Lincoln City, Newport, Manzanita	Varies	Fall	1 in each location	https://www.wanderingreel.org/
We Like 'Em Short	Baker City	N/A	Fall	4	http://www.welikeemshort.com/
Wild & Scenic Film Festival	Ashland	SOU Music Recital Hall	Fall	1	http://rogueriverkeeper.org/ , https://www.wildandscenicfilmfestival.org/about/
Cascade Festival of African Films	Portland	Hollywood Theater PDX, PCC Cascade	Winter	4	https://www.africanfilmfestival.org
Filmed by Bike	Portland	N/A	Spring	N/A	
Gorge Wind Festival	Portland	N/A	Fall	N/A	https://filmfreeway.com/festival/GorgeWindFestival
HP Lovecraft Film Festival	Portland	N/A	Fall	N/A	http://www.hplfilmfestival.com/
NW Animation Film Festival (Portland)	Portland	N/A	Spring	N/A	
One Flaming Arrow	Portland	N/A	N/A	N/A	http://www.oneflamingarrow.com/
OutFound Series	Hood River	N/A	Summer	3	http://outfoundseries.com

Festival Name	Festival City	Venue	Season	# Days	Website
Portland Black Film Festival	Portland	Hollywood Theater PDX	Winter	13	https://hollywoodtheatre.org/programs/series/portland-black-film-festival/
Portland Asian Film Festival	Portland	N/A	Fall	N/A	https://filmfreeway.com/festival/InternationalFilmExchangeofOregonAsianFilmFestival
Portland Comedy Film Festival	Portland	N/A	Spring	N/A	https://filmfreeway.com/festival/PortlandComedyFilmFestival?utm_campaign=Submission+Button&utm_medium=External&utm_source=Submission+Button
Portland Dance Film Festival	Portland	N/A	Fall	N/A	https://filmfreeway.com/festival/PortlandDanceFilmFest
Portland German Film Festival	Portland	N/A	N/A	N/A	
Portland Horror Film Festival	Portland	N/A	Summer	N/A	https://portlandhorrorfilmfestival.com/
Reel Music Film Festival	Portland	N/A	Winter	N/A	https://nwfilm.org/festivals/34th-reel-music-festival/
Reel Paddling Film Festival	Bend	The Tower Theatre	Summer	1	http://tumalocreek.com/reel-paddling-film-festival/
Rose City Hero	Portland	N/A	N/A	N/A	http://rosecityhero.com/ , https://filmfreeway.com/festival/RoseCityHero2016
Siskiyou Film Festival	Ashland	Grants Pass High School	Winter	1	http://www.siskiyoufilmfest.org
Stories of Our Watersheds	Portland	N/A	Spring	N/A	https://filmfreeway.com/festival/StoriesofOurWatershed?utm_campaign=Submission+Button&utm_medium=External&utm_source=Submission+Button
Wild & Scenic Film Festival	Corvallis	Avery House Nature Center	Fall	1	http://www.corvallisenvironmentalcenter.org/wild-scenic-film-festival/

APPENDIX B: FESTIVAL ORGANIZER SURVEY

This section presents methods used to collect information from organizers in a survey distributed by the Community Service Center. This information was used to understand film festivals as a group and trends within the festivals surveyed.

As part of the inventory process, the CSC collected email addresses and contact information for as many festival organizers as possible. In total, contact information for 54 organizers. The CSC used the online survey software Qualtrics to distribute a survey to the identified organizers in March 2017. Thirty-five organizers responded for a response rate of 65%.

The survey contained a total of 45 questions designed to help CSC researchers understand aspects of film festivals and how they operate. Some of the topics covered by questions include:

- Basic information about festival (dates, years held, location, etc.)
- Venues used
- Types of partners and support received
- Information on volunteers and employees
- Number and types of film shown
- Number of patrons and tickets sold
- Festival mission
- Current marketing strategies
- Revenues and expenses

Though the CSC surveyed nearly half of festival organizers in the state, the survey cannot be said to be representative of all festivals and organizers. The research team attempted to survey all festival organizers they could, however these results represent only the organizers who took the survey.

Film Festival Organizer Survey



Oregon communities host more than 80 film festivals each year. However, the nature of the festivals, the characteristics of people that visit them, and their impacts on the communities that host them are not well studied. To better understand these impacts, the University of Oregon's Community Service Center (CSC), in partnership with Oregon Film and Travel Oregon, is studying film festivals. Our study will result in a comprehensive inventory of film festivals in Oregon, a profile of film festival patrons, and strategies to support film festivals.

A key part of our research is this survey of film festival organizers. This survey will help us better understand the nature and scope of film festivals. We will analyze the results in aggregate, which will provide a detailed picture of film festivals in Oregon. The study results will be publicly available in fall 2017. As a festival organizer, we will email you a copy of the final report when it is complete.

Please answer based on your most recent festival. If you are the organizer of multiple film festivals, please complete the survey on behalf of the largest festival. If necessary, please provide your best estimate for questions. If you have any questions about the survey, please contact Bob Parker, Executive Director of the Community Service Center (541.346.3801 or rgp@uoregon.edu).

Q2 First, please tell us about your festival

Q3 Please provide the name of your festival:

Q4 What type of venue does the festival use to screen films? *Please check all that apply.*

- Historic theatre
- Independent movie theatre
- National chain movie theatre
- Park
- Museum
- Drive-in
- Conference center
- Other _____

Q5 Does the festival screen on multiple screens simultaneously?

- Yes
- No

Q7 Please answer the following questions.

- How many Oregon cities does the festival screen in? _____
- How many non-Oregon cities does the festival screen in? _____
- Please list all the Oregon cities. _____

Q7 At the end of 2017, how many annual editions of your festival will have taken place?

Q9 What year was the festival first held?

Q9 What length of films are accepted at the festival?

- Feature length (Greater than 40 minutes)
- Shorts (40 minutes or less, including credits)
- Both

Q10 Is the mission of your festival to focus on a specific genre of film?

- No, the festival showcases films of all kinds
- Yes, the festival exists to promote a particular genre of film

Q11 What genres does the festival show? Please check all that apply.

- Animation
- Shorts
- Comedy
- Documentary
- Drama
- Historical
- Independent
- Political
- Science
- Horror
- Sports
- Women
- Experimental/Abstract
- Music
- LGBTQ
- African-American/Black
- Other (please specify) _____

Q12 Please answer the following for your most recent festival. If you are unsure, please provide your best estimate.

- How many films were submitted to the festival for consideration? _____
- How many of the submitted films were shot, produced, or otherwise made in Oregon? _____
- How many films did you show at the festival?

Q13 Does your festival include any of the following activities? Please check all that apply.

- Awards
- Audience award(s)
- Social events in the same venue (e.g. happy hour)
- Social events off site
- Information distribution/tabling by an organization
- Networking events for filmmakers
- Q&A or panel events
- Live performance
- Multimedia events
- Virtual reality events
- Other (please specify) _____

Q14 How many non-screening events does your festival include?

Q15 What best describes the festival's mission? Please check all that apply.

- Promoting an issue/cause (please indicate cause)

- Fundraising for an issue/cause (please indicate cause)

- Growth/promotion of a business or nonprofit organization
- Financial gain for organizers
- Promoting arts in the community
- Promoting locally-made or Oregon-made films
- Promoting a specific type or genre of film (please indicate type/genre)

- Promoting a specific type of filmmaker (please indicate type)

- Other _____

Q16 Does the beneficiary of the festival operate locally, statewide, nationally or internationally?

- Locally (within 50 miles of festival location)
- Regionally
- Statewide
- Nationally
- Internationally

Q17 If your festival has a mission statement, please enter it below.

Q18 Next, we're interested in organizational and operational details of your festival.

Q19 Please select the organizational structure of your festival:

- Nonprofit, all volunteers
- Nonprofit, with paid employees and volunteers
- For-profit, incorporated in Oregon
- For-profit, incorporated elsewhere

Q20 Does your organization have paid employees?

- Yes
- No

Q21 Please indicate the number of employees.

- Full-Time _____
- Part-Time _____

Q22 How many unpaid volunteers contribute to the film festival?

- Prior to the start of the festival _____
- During the festival _____

Q23 Please estimate the total number of volunteer hours contributed to the film festival.

Q24 Please provide your best estimate for your most recent festival in the following categories.

- Total revenues (ticket sales, film submissions, etc.) _____
- Total expenses _____
- Total expenses at locally-owned businesses _____

Q25 Does the festival receive support (including financial, volunteer, in-kind, collaborative, or other supportive contributions) from the following groups?

	Yes	No
Film houses/studios/theaters	<input type="checkbox"/>	<input type="checkbox"/>
Other film festivals	<input type="checkbox"/>	<input type="checkbox"/>
Businesses and nonprofits	<input type="checkbox"/>	<input type="checkbox"/>
Local news and media outlets	<input type="checkbox"/>	<input type="checkbox"/>
Other local events or organizations	<input type="checkbox"/>	<input type="checkbox"/>
Community members	<input type="checkbox"/>	<input type="checkbox"/>
Local government officials or government agencies	<input type="checkbox"/>	<input type="checkbox"/>
Statewide government officials or government agencies	<input type="checkbox"/>	<input type="checkbox"/>

Q26 Please estimate the total number of patrons and tickets sold at your most recent festival.

- Total number of tickets sold _____
- Total attendance (including guest list, volunteers, guest film makers, etc.) _____
- Number of unique patrons _____

Q27 Now we'd like to ask you some questions about how you promote the film festival.

Q28 What type of ticket packages do you offer? Please check all that apply.

- Full access pass
- Day passes
- Tickets for individual screenings
- Volunteer passes
- Discounted rates for select groups (e.g. seniors, students)
- Free admission

Q29 What was your marketing budget for your most recent festival?

Q30 Please indicate all of the ways the festival is marketed. Please check all that apply.

- Website
- SEO promotion
- Emails to festival mailing list or listserv
- Local news articles
- Local news advertisements
- Word of mouth
- Advertisements at other film festivals
- Advertisements at related (non-film) events
- Facebook event or free Facebook page promotion
- Twitter
- Instagram
- Paid Facebook advertisements
- Other social media (*please specify*) _____
- Other (*please specify*) _____

Q31 Do you partner with any of the following organizations to promote the festival? Please check all that apply.

- Travel Oregon
- Local Chamber of Commerce
- Local/regional travel marketing organization
- Oregon Film
- Media sector trade groups (e.g. OMPA)
- Private sector sponsors
- Local theater
- Local college/university
- Other festivals

Q32 Do you collect marketing-related information from patrons (e.g. where they heard about the festival, demographic information, contact information, etc.)?

- Yes
- No

Q33 Please indicate which demographics your advertising targets. Please check all that apply.

- We don't market
- Local community
- Oregonians outside of local community
- Residents of other states (non-Oregonians)
- Residents of other countries
- Domestic filmmakers
- International filmmakers
- Specific age groups
- Specific genders
- Members of a specific race/ethnic group
- Participants of an activity or sport
- Specific industries or professions
- Other: _____

Q34 Please indicate which of the following strategies you use to promote your festival. For strategies you use, please rate the effectiveness of marketing to patrons for the following strategies:

	Not Used	Not Effective	Slightly Effective	Effective	Very Effective
Festival website/internet search	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Word of mouth	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Sending emails to an email list	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Advertisements at other film festivals	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Advertisements at non-film events	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Social media	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Media advertisements other than social media (newspapers, newsletters, handouts, radio)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Q35 Next, we're interested in your future plans for your festival

Q36 Do you want to increase attendance at your festival?

- Yes
- No

Q37 Do you experience barriers in trying to grow your attendance?

- Yes
- No

Q38 What are barriers to growing attendance at your festival? Please check all that apply.

- Financial barriers
- Lack of community interest
- Lack of visitor information
- Lack of marketing skills
- Lack of partner organizations
- Lack of sponsors
- Venue/Location size
- Competition from other cultural events

Q39 Please provide more detail about barriers you face:

Q40 Please indicate your level of agreement or disagreement with the following statements:

	Strongly agree	Somewhat agree	Neither agree nor disagree	Somewhat disagree	Strongly disagree
Marketing is important to the success of the film festival.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
The festival is not marketed as effectively as it could be.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Financial resources are the biggest limitation when it comes to marketing the festival.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Marketing knowledge/expertise is the biggest limitation when it comes to marketing the festival.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
The majority of patrons will attend the film festival regardless of the degree of marketing and outreach.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Q41 What kind of support would best benefit your film festival? Please check all that apply.

- Business/organization partners
- Partnerships with other festivals
- Opportunities for festival organizers to network
- Marketing strategy development assistance
- Fundraising strategy development assistance
- Other technical assistance
- Other _____

Q46 Tell us about the one thing that would most benefit your festival.

Q47 Finally, please provide contact information for our inventory

- Name _____
- Email Address _____
- Phone Number _____

Q44 We may conduct follow up interviews after reviewing the results of the survey to further our understanding of film festivals in the state. May we follow up with you at a later date?

- Yes
- No

Q49 Is there anything else you would like to share with us and our project sponsors (Oregon Film and Travel Oregon) about your experience organizing a film festival in Oregon?

Q46 Thank you for your response! Please press >> to record your response.

APPENDIX C: PATRON SURVEY

The CSC distributed a convenience sample survey to patrons at 11 film festivals in Oregon from November 2016 through May 2017. Patrons were intercepted at the festivals by CSC researchers, or alternately, a list of email addresses for patrons was provided by the festival. The results indicate trends in festival demographics, travel patterns, and enjoyment of aspects of festivals. Results from the survey follow below.

Methods

The Community Service Center distributed a convenience sample survey to patrons of film festivals in Oregon. The purpose of the survey was to create a demographic profile of film festival patrons, understand their travel and spending patterns, and collect additional data that would feed into marketing recommendations for film festivals and destination management organizations. Patrons were asked about:

- Demographic information
- Travel patterns
- Activities while on the trip
- Spending while on the trip
- Purpose of their trip
- Aspects of their festival experience

The CSC partnered with 11 festivals occurring during the study period to distribute the survey to their patrons via email through the survey software Qualtrics. Several festivals already collected email addresses and provided the lists to the CSC to distribute the survey to their patrons. At other festivals, the CSC intercepted patrons as they were entering the festival and collected email addresses. Patrons did not receive surveys until after the festival had concluded. In one instance, a festival distributed a generic link to their email list approximately one month after the festival date so that the CSC's survey did not conflict with a survey distributed by the festival.

A total of 964 respondents answered the survey. The CSC directly emailed 4048 patrons. The survey was distributed to an additional several thousand patrons through a festival's email list. The exact number is unknown. The CSC received 748 responses out of 4048 emails sent, for a response rate of 18.5%.

The survey was not randomly distributed, and thus, we cannot say that it is fully representative of all patrons who attend film festivals in Oregon. The research team does believe that the results are likely close to representative based on the sample size. Given an estimate of 75,000 unique patrons, 968 responses would produce results with a margin of error of +/- 3.13%. The survey results are likely close to this margin of error.

Film Festival Patron Survey



The Community Service Center at the University of Oregon has partnered with Travel Oregon and Oregon Film to analyze the impacts of film festivals in Oregon. As part of the effort, we are surveying patrons who have recently attended a film festival in Oregon. Our objective is to learn more about who is attending festivals, their experience at the festival, and whether patrons are engaged in other tourism activities.

As a recent patron of a film festival in Oregon, we value your opinions. We anticipate that this survey will take 10-15 minutes.

If you are unsure about any of your answers, please estimate to the best of your ability.

Should you have any questions about this survey or how the information will be used, please contact Robert Parker at the University of Oregon at rgp@uoregon.edu or 541-346-3801.

Please click **Next>>** to continue.

Q2 Which Oregon film festival did you attend most recently?

- POW Fest
- Portland International Film Festival
- Dis-Orient Asian-American Film Festival
- Filmed By Bike
- NW Animation Film Festival - Portland
- NW Animation Film Festival - Eugene
- Ashland Independent Film Festival
- The Archaeology Channel Festival
- Reel Music Film Festival
- Corvallis Queer Film Festival
- Ashland Independent Film Festival
- Eugene International Film Festival

Q3 Please answer the following questions based on the most recent film festival you have attended.

Q35 Which films did you watch?

Q4 How did you hear about the festival? (Select all that apply)

- Online advertisement
- Social media
- TV advertisement
- Radio advertisement
- Magazine
- Word of mouth
- Other: _____

Q5 Have you previously attended this festival before? If so, how many times?

- Yes - Number of times: _____
- No

Q6 How many days did you attend the festival?

- 1
- 2
- 3
- 4
- 5+

Q7 Overall, how would you rate your festival experience?

- Extremely negative
- Somewhat negative
- Neither positive nor negative
- Somewhat positive
- Extremely positive

Q8 Please rate your satisfaction with the following aspects of the festival:

	Very dissatisfied	Dissatisfied	Neither satisfied nor dissatisfied	Satisfied	Very satisfied	Not applicable
The location	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
The cost of tickets	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
The process of purchasing tickets	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
The films shown	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
The size of the crowd	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Ability to interact with film casts and crews	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Ability to learn about filmmaking	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Interaction with other festival patrons	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
The overall atmosphere	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Q9 How many film festivals do you attend in a typical year?

In Oregon : _____

Outside Oregon : _____

Total : _____

Q10 How many people were your travel party, including yourself?

Q12 How many nights you spend away from your primary residence, while in Oregon?
Enter "0" if this was a day trip.

Q11 Did you travel more than 50 miles to attend the festival?

Yes

No

Q13 Was the festival the primary reason for taking the trip?

Yes

No

Q14 Did you attend other film festivals on this trip?

Yes

No

Q15 Which other film festivals did you attend on this trip? (Please write in all that apply)

Q16 Which cities, other than the location of the film festival, did you visit?

- Portland
- Salem
- Eugene
- Bend
- Corvallis
- Ashland
- Klamath Falls
- Grants Pass
- Hood River
- The Dalles
- Pendleton
- Burns

Q17 While on this trip, what other activities did you engage in while in Oregon? (Select all that apply)

- Visited friends or family
- Engaged in business-related activities
- Wine tasting
- Brewery tours
- Visited the coast
- Skied or snowboarded
- Hiked or camped
- Cycled
- Fished
- Visited a museum, zoo, or cultural center
- Attended other cultural events: (please specify)

- Other: (specify) _____

Q18 Is this your first visit to Oregon?

- I'm an Oregon resident
- Yes
- No

Q19 Are you visiting other states before or after your visit to Oregon? (Select all that apply)

- No, just Oregon
- Washington
- California
- Utah
- Idaho
- Montana
- Nevada
- Other: _____

Q20 Excluding airfare, but including all other travel expenses (lodging, fuel, food, entertainment, etc.), please estimate how much your travel party spent for the portion of your trip which was in Oregon.

Q21 Please estimate your expenses in the following categories for your entire travel party while in Oregon. Enter 0 if none.

- Food and drink : _____
- Lodging : _____
- Film festivals : _____
- Other entertainment : _____
- Souvenirs : _____
- Other shopping (clothing, etc.) : _____
- Transportation (taxi, car rental, etc.) : _____
- Other : _____
- Total : _____

Q22 Now, please tell us a little bit about yourself.

Q23 Age: _____

Q24 Home Zip/postal code: _____

Q25 Gender:

- Male
- Female
- Something else
- Prefer not to say

Q26 Select your highest level of education completed.

- Some high school
- High school graduate
- Some college
- Bachelor's degree
- Master's degree
- Professional degree
- Doctorate degree
- Technical school
- Other: _____

Q27 What was your household income in 2015?

- Under \$25,000
- \$25,000 - \$49,999
- \$50,000 - \$74,999
- \$75,000 - \$99,999
- \$100,000 or more

Q28 Please share any other thoughts you have about your experience with film festivals in Oregon.

Q29 Click next to submit your survey.

Thank you for your participation!