

1–5 MAR 2021



Reflecting, Rethinking and Resetting: The Industry in Flux.

Introduction

The European Film Market (EFM), the business platform of the Berlin International Film Festival, which ran digitally for the first time, held three invitation-only Think Tanks on March 3 and 4, 2021, welcoming industry experts, stakeholders and professionals from around the globe to reflect and brainstorm about three key topics facing the international film industry.

The intimate, closed-door discussions concentrated on the ever-increasing **digitisation** of the industry, heightened to never-before-seen levels during the pandemic; the current and future **roles and responsibilities of festivals and markets**; and expanded **access and inclusion** in a business still controlled by a few. In its first virtual incarnation, the EFM was happy to welcome a very international and diverse body of creatives and professionals to discuss these topics in highly focused, working-session formats. Each session welcomed about 30 participants, who were assured a safe space to share their experiences, ideas and potential steps forward.

Digitising the Business

The film industry is undergoing rapid change, including the use of artificial intelligence in screenwriting; virtual production; predictive audience analytics in release campaigns; and evolving digital marketing tools. As the global pandemic has accelerated the use of many technologies in the past 12 months, EFM wanted to examine the increasing digitisation of the film business as one of the key talking points across several EFM sessions.

A Think Tank towards Digitising the Business, presented by Creative Europe MEDIA, concentrated on three areas of digitisation: technology in production; digitalisation and new strategies in marketing and promotion; and social sustainability and the reorganization of workflow.

The **technology in production** conversation identified several **challenges**: producers' lack of access to data (and tools to analyse and use it effectively); the lack of existing bridges between the tech and film worlds; potential bias in technologies such as AI; traditional funding restrictions limiting innovation; fear of change or misunderstanding of new technologies; and prohibitively high costs of some new technologies for independent producers.

The **opportunities** identified with technology in production include virtual production offering streamlined workflows, remote working and welcoming new and more inclusive entrants to the industry; technology enabling more or new ways to tell stories; the benefit of merging technologies used in the gaming and film worlds; and the possibility of gathering more data (especially in regards to film financing and reaching audiences), in return helping the film world to function in smarter ways.

Technology in production, steps forward:

- Embrace change and innovation
- Encourage more networking between the film and tech worlds
- Introduce education and training that crosses between film and tech; for instance, training for producers to learn about new technologies (and how to code for filmmakers?)
- Encourage more small pilot projects
- Offer incubator funding for film-related tech start-ups
- Update film funding with fewer restrictions and encourage more innovation
- Share more data across the industry
- Be mindful of ethics and inclusivity in tech
- While embracing tech, also preserve the human touch in creation and ideation

1–5 MAR 2021



The **marketing** conversation recognized the huge shift in the film world in the past 20 years, moving from a supply-driven model to a demand-driven model where the audience watches what they want, how and when they want it. **Challenges** identified in digital-driven marketing included: lack of audience data or shared insight to best understand data; accessibility issues in marginalised communities or entire geographic areas; a history of single-film marketing rather than long-term audience development; the industry's fragmentation across sectors, or even a fragmented approach across a single project; the creative dangers of just 'following the algorithms'; and some people's aversion to change or exploration of new digital marketing approaches.

Opportunities identified for digital-led marketing include: better ways to reach (and monetize) currently underserved audiences; better targeting passionate, core audiences and connecting to them in new ways; working towards sustained audience development; the affordability of digital compared to print and physical; potential experimentation with innovative new digital; and increased opportunities to communicate with audiences at all stages of a project.

Marketing, steps forward:

- Gather more data on audiences and develop new insights to best analyse that data
- Become more precise when targeting audiences
- Work towards continual audience development
- Adopt 360-degree marketing perspective from the inception of a film, across all stakeholders
- Create an internal post-mortem for every release; what were the lessons learned?
- Widely share more industry case studies of successes and failures
- Combine human creativity with new tools such as algorithms
- Engage audiences throughout the filmmaking process, such as with 'making-of' stories

The **social sustainability and new ways of working** conversation started with the point that the pandemic year has meant, for nearly everyone, less traveling and more time at home, helping people to reconsider the balance between their private and professional lives. The time to reflect has also led some to become more aware of the imbalances across society.

Some **challenges** identified around social sustainability and ways of working in the film industry include: different working styles and ethics amongst companies, collaborators and crews; the need for re-educating people about how best to work together and build trust, especially remotely or in hybrid situations; the need to reorganize traditional resources; and lack of inclusion and representation on screen and off.

Opportunities identified around social sustainability and ways of working are that the pandemic year has already sped up some positive changes, and started important discussions; embracing new tools of communication and collaboration; recognizing what work can be done well remotely; and using the film industry's unique communication powers to improve representation of society and offer more anti-racism education.

Social sustainability and ways of working, steps forward:

- Honestly acknowledge the status quo to progress towards change
- Reorganise resources to address updated needs and values
- Improve infrastructure and working environments, both physically and digitally
- Actively promote inclusion and anti-racism on-screen and off with work championed by everyone, not just traditionally marginalised groups
- Educate individuals, teams and companies, so that systems and institutions can change
- Create lasting change, not just short-term fixes

1–5 MAR 2021



The Role and Responsibilities of Festivals and Markets

EFM joined forces with International Film Festival Rotterdam (IFFR) to examine the current and future role and responsibilities of festivals and markets. IFFR has been running its Reality Check initiative since 2018 to reflect on and discuss current issues in the film industry from multiple angles; Reality Check collaborated with EFM for the first time in 2021 for this Think Tank to share experiences across the film value chain and brainstorm future ideas.

Looking at festivals and markets, after a year of great change with mostly online and hybrid events, the Think Tank examined best practices for hybrid and digital events; how festivals can better work towards inclusion; and how festivals can contribute to the overall sustainability of the independent film industry.

For **hybrid and online events**, some of the **challenges** identified include: filmmakers, audiences and industry missing the communal, in-person experience; the loss of serendipitous moments and making meaningful new connections; costs of building digital infrastructure; lack of digital expertise and experience; some sponsors being less interested in online events; inequality of online access; lack of must-attend impulse from audiences who have too many digital choices; and too many industry events, including co-production markets, fighting for professionals' attention.

Opportunities identified for digital and hybrid events include: offering greater flexibility and the chance to reinvent; the chance to reach new, different or larger audiences; online ticket sales potentially boosting a festival's financial stability; creating efficient ways to do business online; keeping people connected online when physically apart; and the beneficial environmental impact of less travel.

Hybrid and online festivals, steps forward:

- Rethink *why* any festival or market exists and *how* it should move into the future (some festivals can or should remain physical only)
- Create online ticketing solutions that can streamline physical queues and frustrations (both for public audiences and industry)
- Differentiate online and physical accreditations
- Develop better technology platforms to improve user experiences
- Encourage stronger collaboration between festivals and markets
- Develop better market access strategies online, especially for industry newcomers
- Support arthouse cinemas even when delivering hybrid and online events
- Educate and train physical festival organizers on how to work smarter digitally
- Keep festivals open to many voices and styles of cinema; ensure that slimmed-down programmes don't only concentrate on the most mainstream film selections
- Develop unique personalities for online and hybrid festivals and markets better reflecting their event's physical identity

For festivals and markets **supporting the sustainability of the independent film ecosystem**, **challenges** identified include: the lack of understanding about audiences' changing viewing habits; the lack of definition of what an online festival is or who it serves; struggling on a personal or institutional level to keep up with rapid change; film professionals and filmmakers feeling less community when working online; and filmmakers and film industry worrying about unpredictability in their careers because of the pandemic.

Opportunities identified around **sustainability** include: less travel improving physical and mental wellbeing, as well as positive environmental impact; concentrating on fewer titles can also allow for more careful consideration and planning; and the cost benefits of digital marketing and outreach.

1–5 MAR 2021



Festivals and sustainability, steps forward:

- Think quality instead of quantity in terms of workload, projects and travel
- Use more digital products, also in marketing and outreach
- Festivals – physical, hybrid or digital – should think about how to better connect with filmmakers and audience
- Foster community around films and festivals
- Offer recorded sessions when relevant to allow for viewers' different schedules
- Offer filmmakers financial incentives for digital sessions, instead of offering physical flight and hotel
- Create smarter connections and collaborations between festivals, distribution and exhibition

Challenges around festivals and **inclusion** identified include: lack of diverse festival staff and volunteers; some programmes 'segregating' films or filmmakers according to region or ethnicity; festivals being expensive to attend physically (or even challenging to attend digitally); and pandemic travel restrictions preventing true cross-cultural understanding and learning.

Opportunities identified for **inclusion** include: festivals' unique position to help filmmakers reach audiences across borders; festivals' power to champion new voices; online and hybrid festivals' potential to help films reach even more audiences.

Festivals and inclusion, steps forward:

- Question yourself and listen to and learn from others; break out of your comfort zone
- Hire inclusive staff for festival teams, not only in terms of race and gender but also socio-economic backgrounds
- Listen more to local organizations and communities
- Recruit inclusive programming committees and juries
- Commit to inclusion as a long-term priority
- Use festival labs, funds and workshops to introduce emerging filmmakers into the wider film industry
- Ensure funding continues for not just the A-festivals but also smaller markets, labs and festivals, which are important meeting places especially for emerging filmmakers
- Even when physical events resume, offer talent development programmes online or hybrid to allow greater access
- Programmers and industry experts should travel to the places where films are produced to foster greater cultural understanding and develop local connections

Diversifying the Business

In recent decades, numerous initiatives, policies and task forces as well as diversity, equity and inclusion positions, funding streams for specific societal groups and capacity-building programmes have been created in order to ensure that organizations, companies, selection processes, decision-making procedures and decision-makers themselves strive towards greater inclusion in the film sector.

Yet, despite all these measures to ensure that the people who comprise the film industry itself are truly reflective of the world's demographics, film industry professionals belonging to marginalized groups continue to grapple with structural, systemic and institutional barriers and exclusions as well as mechanisms of marginalization that hinder their progression, deeply affect their wellbeing and place limitations on their economic standing. Inequity, inequalities and differential treatment continue to characterize the experiences of film professionals who are non-white, dark-skinned, women, non-binary and gender non-conforming, TSLGTQIA+, people with disabilities or those who hail from disenfranchised socio-economic backgrounds.

EFM sought to discuss sustainable solutions to these issues by organizing **A Think Tank towards Diversifying the Business**, held on March 4 presented by Creative Europe MEDIA. The Think Tank explored inclusion through three specific topics: selection processes, decision-making and biases; career sustainability of BIPOC film creatives and professionals; and strategies for anti-racism. The following ideas and solutions were brainstormed as action points, goals and solutions for moving forward.

1–5 MAR 2021



EUROPEAN
FILM MARKET
eFm
ONLINE

Selection processes, decision-making and biases, steps forward:

- Hire more diverse teams, freelancers and recruit more diverse juries and funding panels
- Funding bodies and industry organizations should mandate change through published and accountable policies
- Offer continual training and education in bias and anti-racism to all stakeholders
- Work with more community partners, civil society organizations, researchers and inclusion advocates to build trust within local, regional and national ecosystems
- Utilize resources available to seek out diverse talent, there are no excuses for “we don’t know them”
- Make application processes for jobs and funding more transparent and welcoming not just to the “usual suspects”
- Understand the challenge of access into programmes, funds and film schools by understanding the barriers to entry that are embedded within them
- Introduce policies and practices to incentivize and require producers/broadcasters to create more diverse projects
- Invest in research and training to change film culture and build capacities, not just investments in single productions
- Collect more data and more specific, meaningful data, and publish it
- Recognize biases from who is collecting data

Career sustainability of BIPOC film creatives and professionals, steps forward:

- Create mentorship programmes and advocacy groups to develop talent and create pathways for career progression
- Change who is in charge at the top and diversify the C-suite to make room for different voices
- Offer continued training and education on systemic racism in the workplace, coupled with actionable items on how to move forward and correct
- Allow grant money to be used to sustain salaries of people working on inclusion projects
- Develop authorship criteria on funding applications to ensure ownership in storytelling
- Funders and gatekeepers should improve outreach efforts
- Discuss enacting change from the top *and* bottom of organizations
- Institutions should develop new actions to ensure the mental health, wellbeing and belonging of marginalized film professionals by working with experts in mental health

Strategies for anti-racism, steps forward:

- Acknowledge there is a problem before creating clear action plans and publishing them
- Think long-term: one-off measures, standalone acts or instances of virtue-signalling are not enough
- Ask every company you deal with about their inclusion work and policies
- Create safe spaces for reporting racism, harassment and bullying
- Hire effective leaders who can implement anti-racism strategies in the workplace
- Create a resource guide for leaders who are new to anti-racism work
- Think of inclusion in an intersectional way
- Funding should be allocated to anti-racism work, including salaries for personnel
- Organisations, especially those who receive public funding, need to stand up specifically for anti-racism, not just inclusion

Conclusion

EFM recognizes that there are no quick fixes for such complex topics revolutionising our industry, but hopes the ideas discussed at these three 2021 Think Tanks will inspire deeper conversations and collaborations, and lead to actions.

EFM welcomes feedback on the ideas in this document; please contact the EFM Director’s Office: EFM-Director@berlinale.de.

1–5 MAR 2021



Credits and Acknowledgements

EFM Director: Dennis Ruh

EFM Think Tanks 2021 Staff: Themba Bhebe, Clara Föhres, Manu Guddait, Kathrin Kuna, Yvonne Okunewa, Marie-Katharina Oßner, Maximilian Reich

Report Author: Wendy Mitchell

Global Facilitator: Andrew Houchens

Global Moderators: AC Coppens, Wendy Mitchell, Scott Roxborough

Curation consultants on "A Think Tank towards Diversifying the Business": Charlotte Reekers and Kia Brooks (The Gotham Film & Media Institute); and for "A Renewed Future: The Role and Responsibilities of Festivals and Markets": Marit van den Elshout (IFFR).
Coordination and consulting support for "A Think Tank towards Digitising the Business": Jean Philippe Colas (McKinsey & Company).

Social sustainability consultant: Katherine Dennis Gonzalez

Breakout room facilitators, moderators and note-takers: Alessia Acone, Marjorie Bendeck, Dr. Julia Borggräfe, Yolonda Brinkley, Michelle Carey, Rodney Charles, Jean Philippe Colas, AC Coppens, Tamara Dawit, Manu Guddait, Patrick Harrison, Roland Hess, Jim Kolmar, Kathrin Kuna, Facundo Lema, Wendy Mitchell, Nikolas Montaldi, Janaina Oliveira, Alex Pumfrey, Esther Schmidt, Marcin J. Sobczak, Paula Vaccaro, Inke Van Loocke, Moritz Viehweger and Aleksandra Zakharchenko.

The EFM wishes to say a special thank you to all participants of the 2021 Think Tanks.

Imprint

Berlin International Film Festival
EUROPEAN FILM MARKET
Potsdamer Platz 11
10785 Berlin
Germany
phone: +49 30 259 20 666
fax: +49 30 259 20 699
efm@berlinale.de

Responsible according to § 55 Abs. 2 RStV:
Dennis Ruh