

Available Light Film Festival Economic Profile

Submitted to:

George Marchewa
Senior Econometric Analyst
Yukon Economic Development
Box 2703
Whitehorse, Yukon Y1A 2C6

Submitted by:

Paul Kishchuk, MA

Vector Research

203 – 301 Hawkins Street
Whitehorse, Yukon Y1A 1X5
www.vectorresearch.ca
paul@vectorresearch.ca
867.668.3164

In association with:

John Glynn-Morris
Whitehorse, Yukon

15 August 2016

Available Light Film Festival Economic Profile

Table of Contents

Introduction 1

ALFF 2016 Participants 2

ALFF Industry Conference 3

ALFF Talent Lab 4

ALFF 2016 Economic Effects 5

ALFF 2016 Audience Perceptions 8

Conclusion 10

Introduction

The Available Light Film Festival (ALFF) is Canada's largest feature film festival north of 60 degrees latitude. The festival, a celebration of northern, Canadian and international cinema, takes place in the heart of winter in Whitehorse, Yukon. The 14th Available Light Film Festival ran February 7 – 14, 2016 and showcased 34 fiction and documentary films. Four multi-disciplinary and music performances were also presented at ALFF 2016.

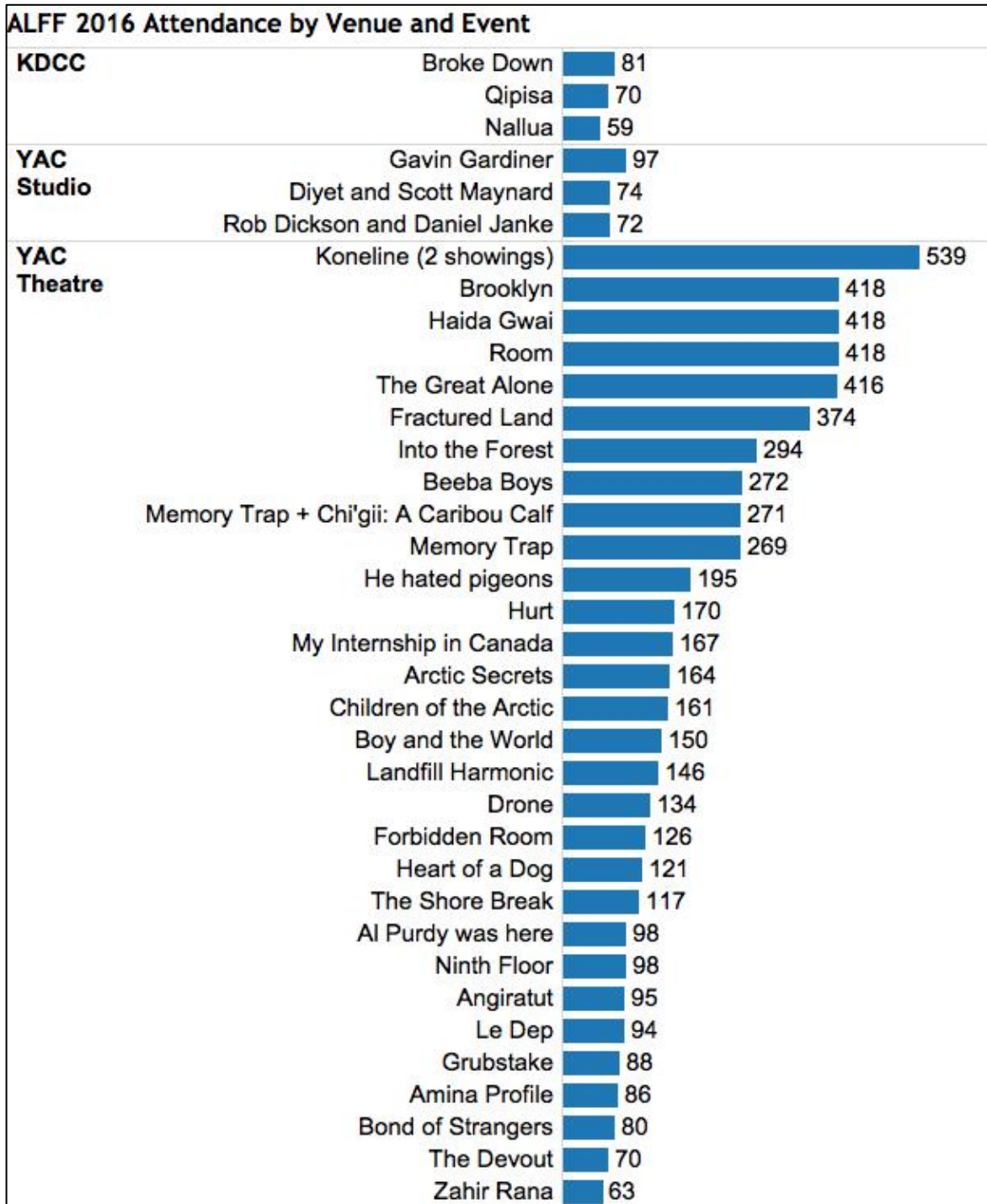
A five-day ALFF Industry Conference with filmmakers and industry delegates was also hosted during the festival week. The 2016 ALFF included for the first time the Available Light Talent Lab, a specialized development program for independent Yukon filmmakers.

This synthesis report presents a comprehensive economic profile of the 2016 Available Light Film Festival. Data to inform the economic profile was collected via several channels including:

- ALFF Participant Survey (web-based, implemented in the lobbies of the Yukon Arts Centre and the Kwanlin Dun Cultural Centre [n=351], also with a limited-time Facebook link on the ALFF website [n=6]);
- A focus group with ALFF Industry Conference Participants [n=9];
- Poll Everywhere (an audience-interactive text-based poll implemented at selected film screenings [n=263]);
- Candy Chang installation (on a flip chart in the lobby of the Yukon Arts Centre); and,
- Off-Site Intercept Survey (web-based, implemented at the Canada Games Centre [n=52]).

ALFF 2016 Participants

Thirty-one of the film screenings were held in the Theatre at the Yukon Arts Centre (YAC) at times ranging from 10:00 am to 9:30 pm. Five of the YAC screenings (16%) were sold out. Three film screenings were held at the Kwanlin Dun Cultural Centre (FDCC) at 12:00 noon. The three live music performances were presented in the Studio Box at the Yukon Arts Centre at 9:00 pm.

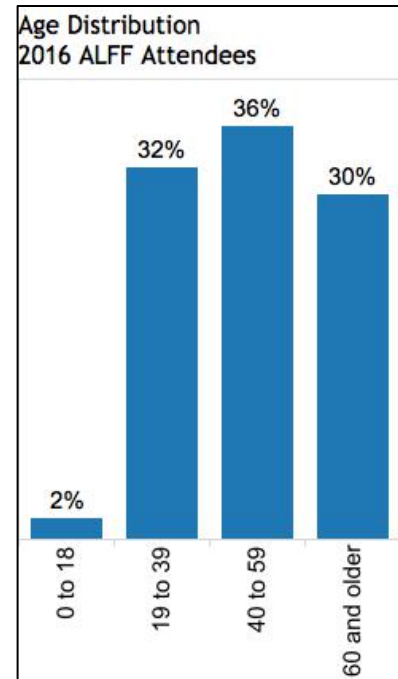


Available Light Film Festival Economic Profile

More than four-fifths of ALFF 2016 attendees (82%) reside in Whitehorse and 18% of attendees traveled to Whitehorse for the event. With 8% of attendees resident in Yukon outside of Whitehorse, 90% of 2016 attendees were Yukoners. Out of the remaining 10% of attendees, 7% hailed from parts of Canada outside the Yukon, 1% were from the United States and 2% were from places outside of Canada and the United States.

ALFF 2016 Attendee Residency	
Whitehorse	82%
Yukon, outside of Whitehorse	8%
Canada, outside of Yukon	7%
United States	1%
Outside of Canada and USA	2%
	100%

Source: 2016 ALFF Participant Survey (n=338).



In terms of age, responses from the ALFF participant survey indicate that ALFF film audiences are generally older than 40 years of age. Two-thirds (66%) of respondents were forty years and older. One third of survey respondents indicated they were 19 to 39 years of age. Only 2% of ALFF attendees reported they were less than 19 years old.

ALFF Industry Conference

The seventh annual ALFF Industry Conference was held in conjunction with the 14th Available Light Film Festival and ran from February 7th to 11th. A total of seventeen workshops and events were held over the five day Industry Conference.

A total of 41 film industry producers, instructors and professionals were invited to participate in the 2016 ALFF Industry Conference. Approximately half (22) of the Industry Conference participants travelled to Whitehorse, including three executive producers, five master class and workshop instructors and 14 industry professionals. The Industry Conference events were also open to members of the general public.

To better understand the perspectives of industry representatives at the ALFF, nine Industry Conference participants were brought together for a facilitated focus group on the first Sunday of the festival. Focus group participants represented a wide variety of film industry agencies and organizations from across Canada. Several participants were making a return trip to Whitehorse for the Film Festival and Industry Conference.

Participants in the focus group expressed great appreciation for how well they are looked after by their ALFF hosts and Yukon friendliness: *“people here are nice and open, they look you in the eye and they want to talk to you.”*

A participant noted that part of what makes the Available Light event special for them is the northern setting. For them, to be able listen, teach and learn about film in such a setting is powerful. Along the same lines, there was a feeling expressed by focus group participants that the Canadian north has a lot of stories yet to be told on film, so to attend a festival and forum in a place with such great filming potential is exciting.

Another focus group participant noted they particularly liked the intimacy of ALFF Industry Conference stating *"because the forum is small, you don't feel like session panelists are talking heads, there is more of a dialogue with participants, that's helpful."*

Others noted that they like the Available Light Forum because of the caliber of industry professionals brought in for the event in combination with the intimacy of the event:

"Not only is the ALFF setting conducive to meeting higher profile industry people, after getting to know them in Whitehorse, it's possible to follow-up with them at higher profile festival like Sundance or the Toronto International Film Festival."

Focus group participants who had travelled to Whitehorse in previous years noted that the number of offerings at the Industry Conference and film festival has grown. While such growth is good on one level, participants also pointed out that ALFF organizers should be careful what they wish for noting that for the first time there is overlap between the event offerings:

"I wonder if there is too much being jammed into available time...it's all good, I love the films and panels, but don't like the dilemma of having to choose between events, not having to choose is part of what makes ALFF a unique event."

In terms of benefits brought to Yukon as a result of the festival, focus group participants noted that the festival provides a cultural boost to the community, for example to have the world premiere of the Nettie Wild film a remote place like Whitehorse, *"that's a big deal"*. Others noted that based on experience in previous years, *"there is very strong community representation at film screenings"*. Exposure to non-mainstream films whets the appetite for similar fare through the year between festivals and can inspire local people to make films. In a small place like Whitehorse, *"inspiring just a few people can have a large impact."*

ALFF Talent Lab

The 2016 Available Light Film Festival included for the first time the Available Light Talent Lab which operated in advance of the festival on February 5 and 6. The Talent Lab was a specialized development program for independent Yukon filmmakers which aimed to provide real-world skills and a thorough understanding of the contemporary media and production landscape. A total of nine emerging Yukon film-makers were invited to participate in the Available Light Talent Lab.

Available Light Film Festival Economic Profile

ALFF 2016 Economic Effects

Entry to all film viewing venues required a ticket issued through the Yukon Arts Centre's box office ticketing system, Theatre Manager software. Box office data for the Available Light Film Festival was extracted from a database generated by the Theatre Manager software and analysed to calculate the attendance statistics presented in the table below.

2016 Available Light Film Festival – Attendance Summary

	Total Patrons	% Paid	% Comp	Occupied Capacity	Paid Capacity
KDCC - film	210	57%	43%	44%	25%
YAC Theatre - film	6,112	74%	26%	47%	34%
YAC Studio Box - music	243	47%	53%	81%	38%
Total	6,565				

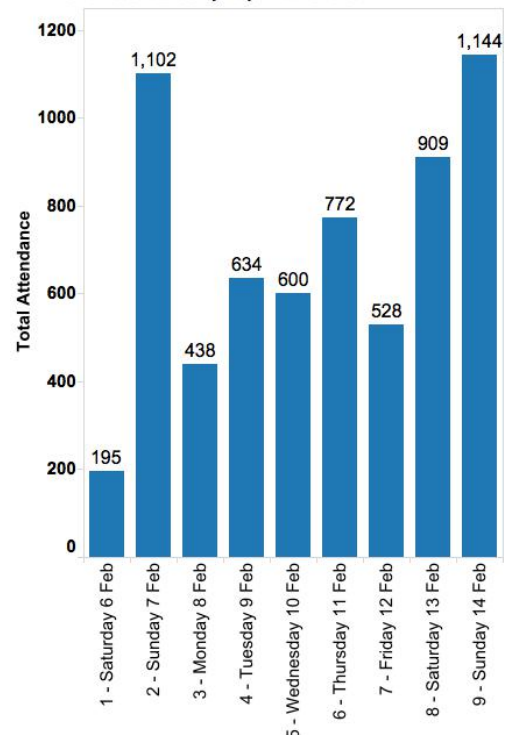
The total number of patrons viewing films at the Kwanlin Dun Cultural Centre, including paid and complementary seats, was 210. Paid attendance accounted for 57% of the total number of patrons, with 43% of patrons attending with complementary tickets. In terms of attendance relative to venue capacity, the three KDCC noon-hour film screenings were, on average, 44% full. Paid attendance at the KDCC film screenings represented 25% of full venue capacity.

At the YAC Theatre, the number of patrons viewing films totaled 6,112. Paid attendance accounted for 74% of the total number of patrons, with 26% of patrons attending with complementary tickets. In terms of attendance relative to venue capacity, the 31 YAC Theatre film screenings were, on average, 47% full.

The total number of patrons who took in musical offerings at the YAC Studio Box was 243. Paid attendance accounted for 47% of the total number of patrons, with 53% of patrons attending with complementary tickets. The three YAC Studio Box musical offerings were, on average, 81% full. Paid attendance at the YAC Studio Box musical offerings represented 38% of full venue capacity.

The chart to the right presents attendance at ALFF 2016 by day at all venues. Festival attendance was highest on weekend days and reached a peak of 1,144 on the final day of the festival, Sunday 14 February. During the workweek attendance was highest on Thursday 11 February, bolstered by the 271 attendees at the school screenings of *Memory Trap* and *Chi'gii: A Caribou Calf*.

ALFF 2016 Attendance by Day - All Venues



Available Light Film Festival Economic Profile

To accurately calculate the economic impact of the Available Light Film Festival in 2016, it is necessary to know how many ALFF patrons are 'repeat customers' who attend more than one film viewing. In other words, it is necessary to know the number of unique individuals who participated in ALFF 2016.

ALFF participant survey respondents were asked to indicate the number of films they expected to see at the 2016 festival. On the basis of aggregate participant survey responses, 37% of ALFF film viewers were found to be unique. As the participant survey data is statistically representative of the complete ALFF audience, by inference, a total of 2,350 unique individuals were estimated to have attended the 2016 Available Light Film Festival (exclusive of school children).

By inference, 1,927 of the 2,350 unique attendees were from Whitehorse, and 423 were from outside of Whitehorse, including 235 from outside of Yukon. Note, however, that it is not known how many ALFF attendees from outside of Whitehorse were in Whitehorse for the exclusive purpose of participating in ALFF 2016 events.

The table below presents expenditures at the 2016 Available Light Film Festival by component. The figures in the table include only exogenous expenditures, that is, spending that would not have occurred in the absence of ALFF 2016. Film festival attendees reported expenditures on food and beverages, entertainment and recreation, transportation within Whitehorse, shopping and 'other'. Expenditures associated with air travel to Whitehorse from outside Yukon and fees paid to event delegates not resident in Yukon were filtered out from the exogenous expenditure amounts. Total exogenous expenditures by film festival attendees includes actual expenditures on ticket sales sourced from YFS financial records. Ticket sales accounted for 42% of exogenous expenditures made by film festival attendees.

2016 Available Light Film Festival Exogenous Expenditures

ALFF Component	Exogenous Expenditures
Film Festival Attendees ¹	\$82,083
Film Festival Production ²	\$149,332
Industry Conference and Talent Lab ²	\$28,407
Total	\$259,822

Sources: ¹ ALFF 2016 Participant Survey,

² Yukon Film Society financial accounts.

Economic impact analysis was performed using Input / Output multipliers for the Yukon published by Statistics Canada for 2010, the most recent year for which multipliers are available. Economic impacts arising from exogenous expenditures made by film festival attendees were estimated by applying multipliers for the arts, entertainment and recreation industries. Economic impacts arising from exogenous expenditures made by the Yukon Film Society to produce the film festival, Industry Conference and were estimated by applying multipliers for the information and cultural industries.

Available Light Film Festival Economic Profile

The results of the multiplier analysis are presented in the table on the following page. The economic impact of the Available Light Film Festival on the Yukon economy were estimated at direct, indirect and induced levels for four economic variables: gross domestic product (GDP), full-time equivalent employment, labour income and taxes (on both products and production).

Direct effects are changes experienced by “front-end” businesses that receive spending from visitors to the Yukon.

Indirect effects arise from the associated changes in activity experienced by businesses that supply goods and services to the “front-end” businesses.

Induced effects measure the changes in the production of goods and services in response to consumer expenditures induced by the spending of wages generated by the direct and indirect production of goods and services.

As illustrated in the table below, direct impacts on Yukon GDP associated with ALFF 2016 expenditures were \$141,400. With indirect and induced impacts added in, the total impact on Yukon GDP was \$210,800.

Available Light Film Festival 2016 - Multiplier Effects in Yukon

	Direct	Indirect and Induced	Total (Direct, Indirect and Induced)
Gross Domestic Product (\$000's)	141.4	69.4	210.8
Employment (Full-time Equivalent)	1.6	0.6	2.2
Labour Income (\$000's)	94.4	31.2	125.6
Taxes (\$000's)	5.7	3.6	9.3

In terms of the level of full-time equivalent (FTE) employment associated with GDP associated with ALFF 2016 expenditures total direct employment was estimated to be 1.6 FTEs. An additional 0.6 of an FTE of indirect and induced employment were also generated.

Direct labour income associated with the 1.6 FTEs of direct employment was estimated to be \$94,400. Total labour income associated with the 2.2 FTE's of direct, indirect and induced employment was \$125,600.

Direct tax revenues for all levels of government (from both products and production) associated with ALFF 2016 expenditures were estimated to be \$9,300.

In addition to the effects on GDP, employment, labour income and taxes, several secondary benefits of hosting the festival were identified, including:

- viewer access to Canadian feature films that would not otherwise be screened in Whitehorse;
- inspiration for Yukon filmmakers to tell Yukon stories on film;
- increased film industry interest in telling northern stories; and
- enhanced cultural richness of Whitehorse, which in turn helps make Whitehorse (and the Yukon) a more desirable place to live.

What would make it easier for you to attend the Available Light Film Festival the next time around?

Promotion

- "Detailed schedule in a super easy to read format."
- "Better promo. Didn't know about it. Interaction would be great."
- "Having a less abstract sense of what a film festival is."
- "Better social media coverage."

Childcare

- "Child care, or child friendly films."
- "Childcare and early screening."
- "Good for families."

Timing

- "Films outside of a typical 12 hour 8:00am to 8:00pm shift."
- "Not being so busy at work. More flexible film schedule."
- "More movies in the evenings, multiple show times for films."
- "I just need more time."

Conclusion

The package of Available Light events presented by the Yukon Film Society in February 2016 – film festival, talent lab and industry conference – created a rich opportunity for Yukon film viewers and film makers to come together to enjoy all that film has to offer.

A total of 2,350 unique individuals were estimated to have attended the 2016 film festival. Most film viewers (82%) were from Whitehorse; 18% of attendees traveled to Whitehorse for the event. Two thirds (66%) of film viewers were forty years or older. Only 2% of ALFF attendees reported being younger than 19 years of age.

Exogenous expenditures made by 2016 ALFF attendees and by the Yukon Film Society to produce the film festival, industry conference and talent lab were estimated to total \$259,822. On the basis of the estimated exogenous expenditures, total (direct, indirect and induced) impacts on Yukon GDP were calculated to be \$210,700. Total employment impacts were estimated at 2.2 full time equivalent jobs, with associated labour income of \$125,700. Tax revenues (from both products and production) were estimated at \$9,300.

In terms of future ALFF growth, with a paid capacity at the Yukon Arts Centre Theatre of 34% in 2016, there remains significant scope to increase film festival attendance and revenues, especially during week days. Intercept survey responses on the question of "what would make it easier to attend ALFF", clustered around the themes of promotion, childcare and timing.

