



THE RESURGENCE OF FILM FESTIVALS

DRIVERS OF SUSTAINABILITY AND GROWTH

What the latest audience data reveals about festival success trends

2026 White Paper by Iddo Patt, Co-Founder and CEO

eventive

FESTIVALS ARE BACK AND HERE TO GROW

Five years out from the worst of the pandemic chaos, we're finally seeing the festival ecosystem settle into new, stable patterns. For film festivals, filmmakers and independent cinema exhibitors, a persistent question remains: does the most important art form of the 20th century still have something to say to mass audiences today, and is anyone listening?

The answer is a resounding yes.

Following up on our 2024 White Paper, What's Next for Film Festivals, we have observed that the positive audience trends we first identified back then have not only continued but have solidified into a new, durable reality. With Eventive now having issued more than 15 million tickets since 2020, the data confirms that the explosive "post-COVID bounce" has settled into a higher baseline for the entire sector.

This growth is defined by deeper engagement. Average revenue per ticket has climbed to its highest level yet – exceeding \$13 in 2025 – while capacity utilization now consistently surpasses pre-pandemic benchmarks, averaging in the mid-50% range. This gradual rise in average attendance and sales signals that audiences are not merely returning; they are placing a higher value on the shared cinematic experience than ever before.

As we move forward, we also find ourselves in a new era of AI-driven marketing and audience development tools. Far from depersonalizing the industry, these technologies hold ever more promise for connecting humans with meaningful, human-created experiences. By leveraging these tools, organizers can cut through the noise to locate and engage the specific audiences predisposed to get the most out of their programming, while finding new ways to develop connection with the broader community.

Crucially, success belongs especially to those festivals and organizations that have cultivated clearly defined communities with a sense of mission and identity – supported by strong membership programs and a commitment to meeting audiences where they are.

Whether it's at the movie theater and in-person events, virtual screenings, or the intelligent application of new technology, our common goal remains the same: bringing people together around the power of film.



Iddo Patt
CEO and Co-Founder
Eventive

ABOUT THE DATA SOURCES

For this paper, we focused on data from 1900 organizations issuing 15 million tickets for 6000 festival editions between 2018 and 2025.



Festivals examined include festivals from 50 countries (including U.S. events in all 50 states), 14 of *Moviemaker Magazine's* Coolest 25 Film Fests, 30 of *Moviemaker Magazine's* 50 Worth the Entry, 7 of *USA Today's* 10 Best, and 112 out of 180 listed members of the Film Festival Alliance

BASIC NAVIGATION FOR INTERPRETING STATISTICS

For the charts and data points presented here, we have endeavored to distill the state of the entire industry into simple numbers, in order to represent a “typical” organization. However, one thing we’ve learned in working with film festivals is that none is quite “typical.” So it’s important to use your judgment as you compare your own stats to the data here.

KEY FINDINGS

1. Film festivals have maintained their audience, stabilizing at a higher baseline of revenue and attendance compared with pre-pandemic levels.
2. Average revenue per ticket issued and capacity utilization (percentage of seats filled) are higher than ever.
3. Prime-time evening showtimes remain the core of in-person and virtual attendance, while virtual adds a distinct late-night boost.
4. Most ticket revenue still arrives either well before the festival or at the last minute, affirming a “bookend” strategy for sales and marketing.
5. Virtual audiences represent a durable share of overall attendance, stabilizing at roughly a quarter of total viewers.

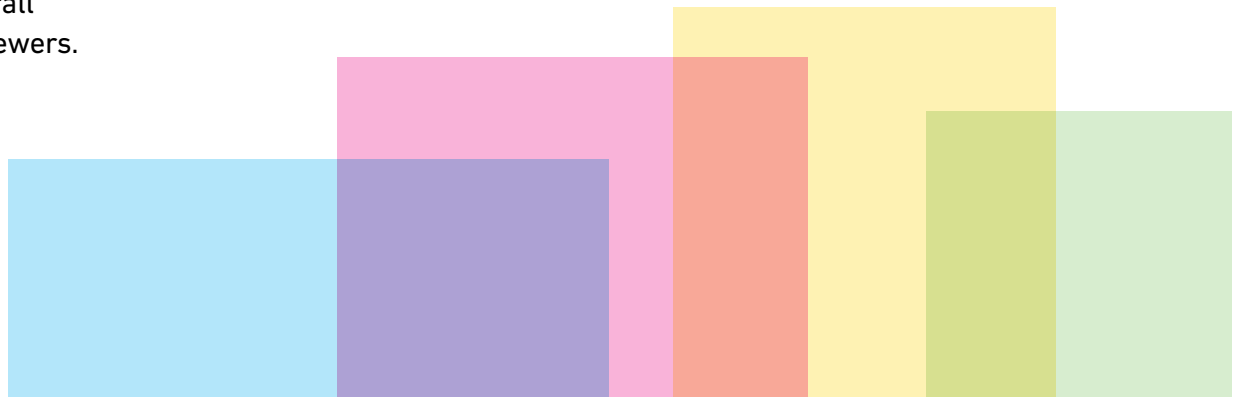
GLOSSARY

Average: The average (or mean) is the result of dividing the sum of the values in a set by the number of those values. It is primarily dependent on the values of the data points themselves. Because of that, you can look at it as guidance for the general value of all the festival organizers together, including the outliers.

Gross: The raw total. Gross sales for organizers are total sales including taxes and fees.

Median: The median is the midpoint of a data set once it is sorted in order. It isn’t affected so much by the values themselves, as by the number of values. Since the median is the middle value of a set, you can look at it for guidance on where most of the individual festival organizers are on the spectrum, without being affected by outliers.

Net: The adjusted total. For our purposes, net sales for organizers are calculated as total sales after fees and taxes are deducted.



KEY FINDINGS

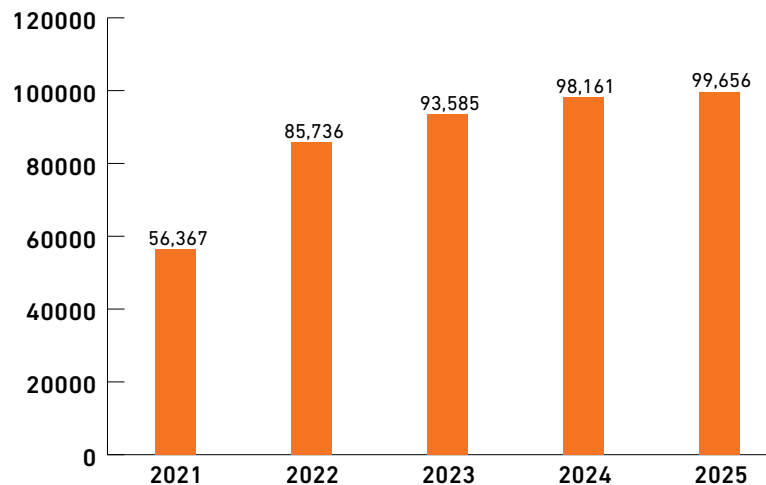
1. AVERAGE ATTENDANCE AND SALES ARE UP

To understand how robust the post-pandemic recovery really is, we studied the average net sales for festivals on the Eventive platform and found that the average organization increased its net sales by 74% between 2021 and 2024, bringing average revenue close to double its 2021 level. Immediately after the recovery, every year seemed like a roller coaster. Now the ride is leveling out – but at a much higher altitude. The data shows that the explosive post-COVID bounce has settled into a reliably higher baseline for both revenue and attendance.

Average attendance for festivals rose steadily from about 5,600 tickets issued per organization in 2021 to more than 7,500 in 2025 – an increase of roughly one third (34%).

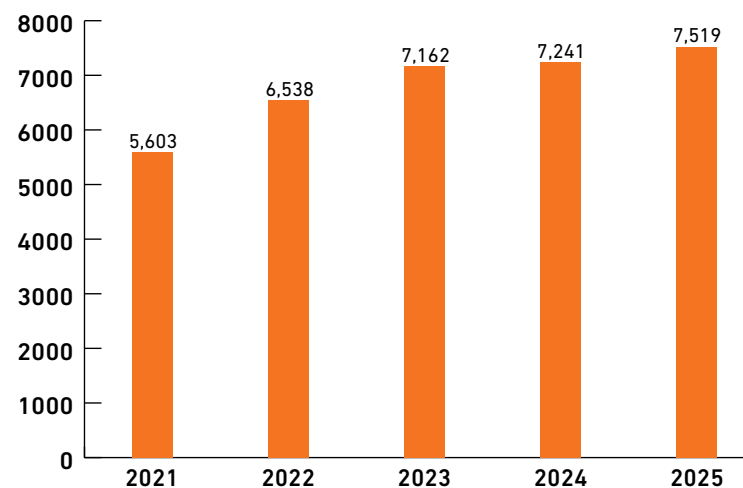


Average Net Sales (USD)



Note: Net sales here are calculated by subtracting costs related to ticketing (like credit card processing and taxes) from gross sales. These figures do not take into account other expenses such as staffing, marketing, film rental or venue costs

Average Tickets Issued



Note: These tables show the aggregate results for festivals in the U.S. using the Eventive ticketing platform.

Insights from the data:

1. **Growth is broad-based, not just driven by a few large festivals.** Even after removing the biggest outliers, average net sales climbed sharply from 2021 to 2025.
2. **Attendance continues to rise alongside revenue.** The steady climb in average tickets issued suggests that festivals are not merely charging more – they are also reaching more people.
3. **A new stabilization is evident in 2025.**

Working theory on how to best leverage this trend:

Plan for steady (not explosive) growth

The big jumps from 2021 to 2023 were largely a rebound from pandemic disruption. Going forward, it's important to maintain core audiences and deliver experiences that consistently draw them out to theaters.

Invest in audience development – even in steady years

When organic rebound growth stops, the real work begins. Now is the time to invest in marketing to push to a new peak. A year when revenue holds steady, but attendance grows, is an opportunity: more people are engaging, and you have room to refine pricing, membership offerings and pass structures.

BOTTOM LINE:
THE GROWTH STORY
CONTINUES, BUT IS
SHIFTING FROM A
DRAMATIC REBOUND
TO MORE SUSTAINABLE,
STEADY EXPANSION.

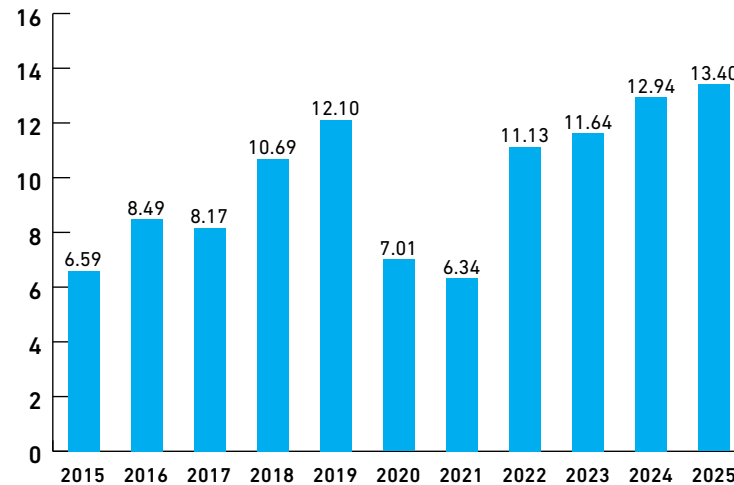
Eventive’s prior white paper, *What’s Next for Film Festivals: Patterns of Recovery and Growth*, highlighted Average Revenue per Ticket Issued (ARPT) as a bellwether metric that captures ticket sales, pass sales and ancillary income (such as concessions, merch and donations) at the unit level.

After dropping to around \$7.01 in 2020 and \$6.34 in 2021, ARPT rebounded to \$11.13 in 2022 and \$11.64 in 2023. By 2024, ARPT reached approximately \$12.94, and 2025 data shows it climbing above \$13 – the highest level we’ve ever recorded.

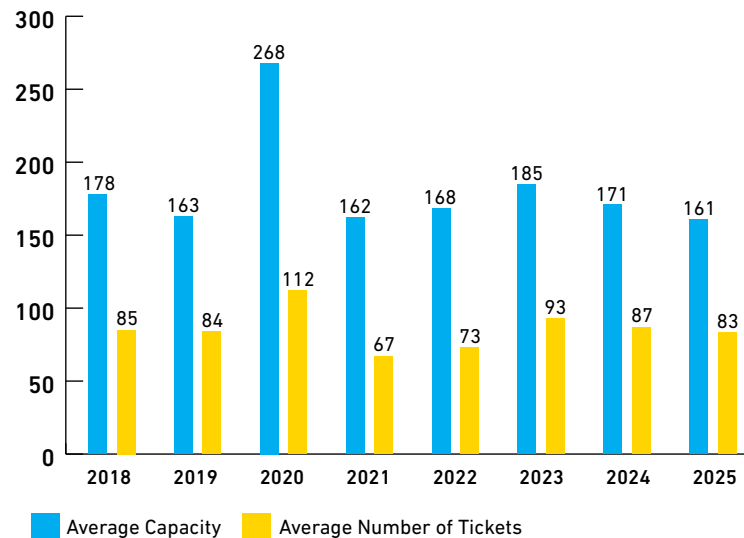
Considering ARPT alongside Capacity Utilization (percentage of seats filled), we observe that these trends suggest festivals are doing two important things at once: generating more revenue per attendee, while also filling a healthy share of available seats. In other words, the unit economics are improving as we keep up with inflation in prices – while festivals also become increasingly effective at packaging, cross-promotion and capturing additional value per ticket issued.

Festivals are earning more per ticket issued while sustaining strong venue fill.

Average Revenue Per Ticket
(2015 – 2025)



Average Capacity and Number of Tickets

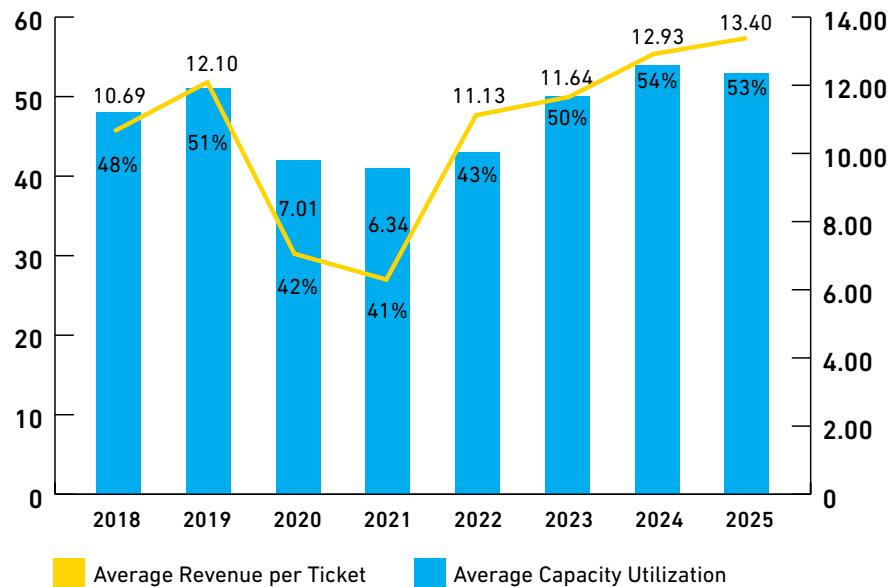


Note: Data from ticket product sales, exclusive of membership fee income, for festivals based in the U.S.

Insights from the data:

- 1. Revenue per attendee is at an all-time high.** ARPT now exceeds its 2019 peak, indicating that the combination of ticket pricing, passes, memberships and on-site sales is more productive than ever.
- 2. Seat-filling has surpassed pre-pandemic benchmarks.** Capacity utilization (percentage of seats filled) has moved from 48–51% in 2018 and 2019 to the low to mid 50% range in 2024 to 2025, suggesting a notable recovery of pre-pandemic demand.
- 3. Revenue and utilization now rise together.** We saw that dips in ARPT coincided with drops in utilization during heavy virtual years. The recent pattern now shows both metrics climbing in tandem, reinforcing ARPT as a key festival health indicator.

Average Revenue per Ticket and Capacity Utilization



Note the correlation as we overlay Average Revenue per Ticket with Capacity Utilization.

Working theory on how to best leverage this trend:

Treat ARPT as a benchmark metric


Track ARPT alongside capacity utilization for each festival edition and for key segments (e.g., members vs. non-members, passholders vs. single-ticket buyers). When both metrics rise together, your overall strategy is working.

Experiment at the premium end first

Before raising base prices across the board, there is potential to introduce higher-priced VIP passes, premium experiences or higher ticket tiers.

Use utilization data to refine scheduling and venue sizing

Consistently undersold or oversold events are signals to reconsider time slots, ticket caps and venue assignments, to optimize both revenue and audience experience.



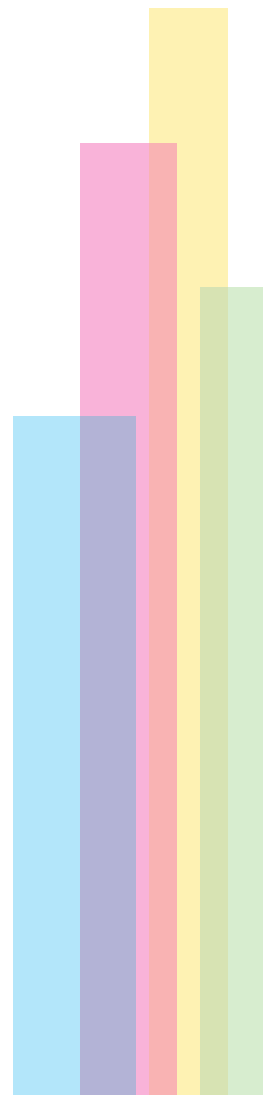
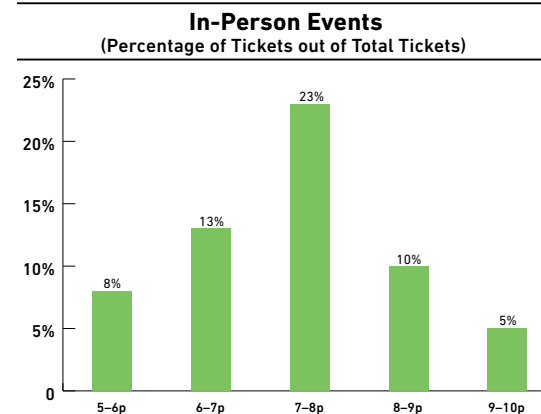
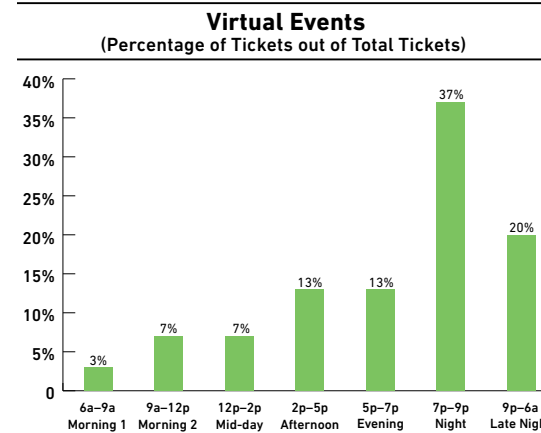
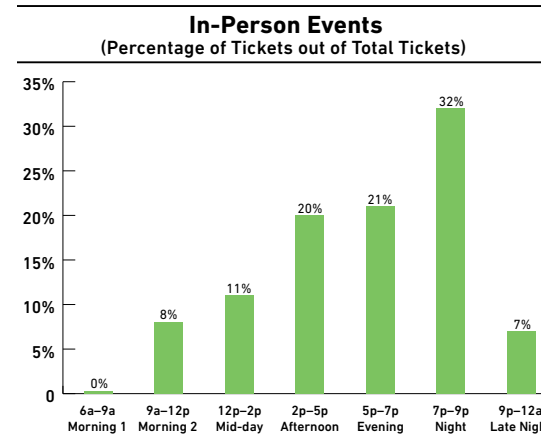
BOTTOM LINE: FESTIVALS ARE NOW EARNING MORE PER SEAT *AND* FILLING MORE SEATS – A POWERFUL INDICATION THAT AUDIENCES SEE LASTING VALUE IN THE FESTIVAL EXPERIENCE.

To better understand when audiences prefer to attend screenings, we analyzed ticket distribution by time of day for both in-person and virtual screenings.

For in-person events, late afternoon and evening time slots clearly dominate. Afternoon shows (2–5 pm) capture about 20% of all tickets sold, while early evening screenings (5–7 pm) add another 21%. And prime nighttime (7–9 pm) is the single largest block at 32%. Mid-day slots (12–2 pm) represent roughly 11%, and while morning screenings are rare, 9 am–12 pm accounts for about 8%. Attendance at 6–9 am is negligible and late night shows (9 pm–12 am) account for only around 7%.

We all know the 7 pm screening is king, and the data backs that up. But when the theater lights go up, the virtual audience is just getting started. While in-person attendance drops sharply after 9 pm, virtual screenings enjoy a second wind, capturing a significant late-night crowd that’s not likely to show up to a brick-and-mortar venue. Early and prime evening virtual slots, 5–7 pm and 7–9 pm, together account for about 50% of viewing (13% and 37% respectively). Afternoons (2–5 pm) contribute another 13%. On top of that, virtual adds a significant extended late-night segment, as roughly 20% of virtual tickets are redeemed between 9 pm and 6 am.

Further, a closer look at the in-person evening window shows that prime time isn’t spread evenly across the night. The single strongest hour is 7–8 pm, accounting for 23% of all in-person tickets. Attendance ramps up from 5–6 pm (8%) to 6–7 pm (13%), then begins to fall after 8 pm (8–9 pm: 10%; 9–10 pm: 5%), reinforcing that the 7 pm start is the anchor slot for broad-audience programming.



Insights from the data:

1. **Virtual significantly extends the day.** Late-night virtual viewing (around 20%) suggests a sizable audience for on-demand-style access that would be problematic to serve in-person.
2. **Evenings remain prime time across the board.** Whether virtual or in-person, the 7–9 pm and 5–7 pm windows are the clear attendance peak.
3. **Afternoons are the strongest secondary time slot.** Afternoon screenings (2–5 pm) account for roughly one-fifth of in-person attendance and more than one-tenth of virtual attendance – a solid option for families, retirees or flexible workers.

Working theory on how to best leverage this trend:

Lean in to late-night virtual bonus viewing

Consider special late-night virtual programming – like genre, special interest or boundary-pushing titles that play especially well after dark, with minimal additional operational cost.

Protect and optimize evening slots

Reserve 5–9 pm (especially 7–9 pm) for your highest-profile titles, galas and events that benefit from maximum buzz and attendance.

Program afternoon blocks for specific audiences

Use 2–5 pm for events, like school partnerships, senior matinees or affinity-group spotlights, that may not need prime-time placement but still warrant strong support.

BOTTOM LINE: PRIME TIME EVENINGS STILL RULE, BUT VIRTUAL LETS YOU EXTEND YOUR FESTIVAL DAY INTO LATE-NIGHT HOURS WITHOUT ADDING VENUES OR STAFF.

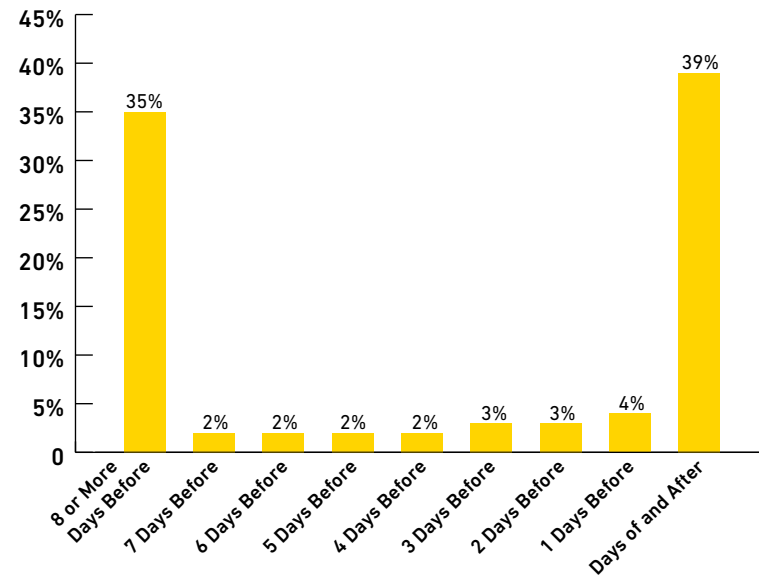
To gain strategic insight into the film festival sales pipeline, we examined the times when audiences purchase tickets relative to the start date of a festival. The main chart shows the share of net sales segmented by the number of days before the festival start date.

The trend is clear: one-third of revenue arrives more than a week before a given event, and nearly 40% hits on the first day of the festival or later. The remaining sales are spread thinly across the intervening days.

Insights from the data:

1. **Sales are bookended.** The majority of revenue clusters around two periods: early (at or beyond 8 days out) and very late (on or after the event start). The middle week is surprisingly quiet.
2. **Last-minute behavior is persistent.** Even with more digital tools and advance marketing, a large share of attendees consistently buy tickets at the last minute – especially once festival buzz kicks in.

Net Sales in Days Leading Up to Festival Start



Across all film festivals considered in our analysis, this chart displays the percentage of net sales on average attributable to different points of time in their overall journey.

Working theory on how to best leverage this trend:

Plan major marketing pushes around purchase behavior.

Announce your festival early and start selling early bird passes to engage your biggest fans. Create a sense of urgency about the festival in ensuing months by incrementally increasing the pass value. Then promote your program launch and ticket sale dates. Finally, add a focused effort on the days right before and during your festival.

Use dynamic messaging.

Not panicked discounting. Because last-minute buying is normal, not a sign of failure. Resist the urge to slash prices too early. Instead, highlight urgency, limited capacity and don't-miss-out messaging as events approach.

Align staffing and support with real demand.

Box office and customer support volume will spike around your on-sale date and again on event days – schedule staff accordingly rather than spreading them evenly across the entire sales window.

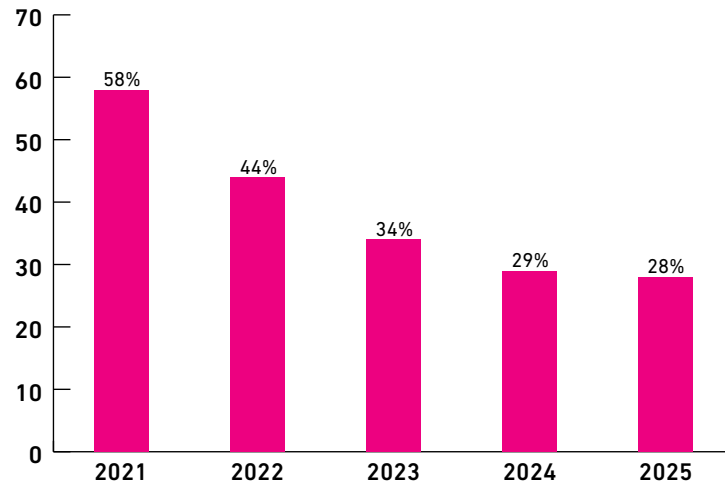
BOTTOM LINE: TICKET SALES FOLLOW A TWO-WAVE PATTERN – EARLY PLANNERS AND LAST-MINUTE DECIDERS. YOUR MARKETING AND STAFFING STRATEGIES SHOULD BE DESIGNED AROUND THOSE WAVES

The debate is over: virtual is not just a pandemic stopgap. While virtual no longer dominates, it has successfully stabilized, consistently contributing more than one quarter of total festival attendance to hybrid festivals.

When we examined how much attendance comes from virtual screenings in festivals that offer both in-person and online film screenings, we found that the share of virtual attendance (out of total attendance) has stabilized between 29% in 2024 and 28% in 2025.

Choosing to cut virtual programming is effectively choosing to turn away one quarter of your potential audience.

Percentage of Virtual Versus Total Attendance



Insights from the data:

1. **Virtual complements, rather than replaces, physical attendance.** The simultaneous growth in net sales, ARPT, and capacity utilization implies that in-person demand is healthy even as virtual audiences remain substantial.
2. **Virtual is not going away.** The steep drop from 2021 to 2023 reflects the return of in-person events, but the curve flattens in 2024 and 2025, suggesting a new equilibrium rather than a continued slide to zero.
3. **Hybrid remains a strategic asset.** Adding or maintaining a quarter of total attendance is a compelling motivation to leverage virtual to expand reach, accessibility and revenue without eclipsing in-person experiences.

Working theory on how to best leverage this trend:

Treat virtual as a permanent pillar of your festival

Plan a consistent hybrid model instead of treating virtual as a last-minute add-on – especially if your goal is to enhance accessibility, geographic reach and year-round programming. Further, take full advantage of hybrid's potential as an audience acquisition tool. This year's virtual attendees can be next year's in-person attendees.

Design online programs for online audiences

Prioritize accessible titles, captioning, audio descriptions, and time-flexible viewing windows to serve differently-abled audiences, rural communities and those who can't travel.

Use virtual to deepen engagement with core supporters

Members and passholders benefit from bonus virtual access before or after the festival, extending the life of your program and nurturing loyalty.

BOTTOM LINE: VIRTUAL ATTENDANCE HAS SETTLED INTO A STABLE, MEANINGFUL SLICE OF FILM FESTIVAL AUDIENCES. A HYBRID STRATEGY IS A LONG-TERM COMPETITIVE ADVANTAGE.

Build for sustainable expansion, not short-term spikes. The post-pandemic rebound is over. Focus on steady audience development through consistent marketing investment, even in years when revenue plateaus. When attendance grows but revenue holds, you have room to optimize pricing and packaging – this is progress, not stagnation.

Master your metrics and experiment strategically. Track ARPT (Average Revenue Per Ticket) and capacity utilization as your north star indicators. When both rise together, your strategy is working. Before raising base prices, test premium offerings – VIP passes, exclusive experiences, higher-tier tickets – to find your ceiling. Use utilization data to refine scheduling, venue sizing and time slot assignments.

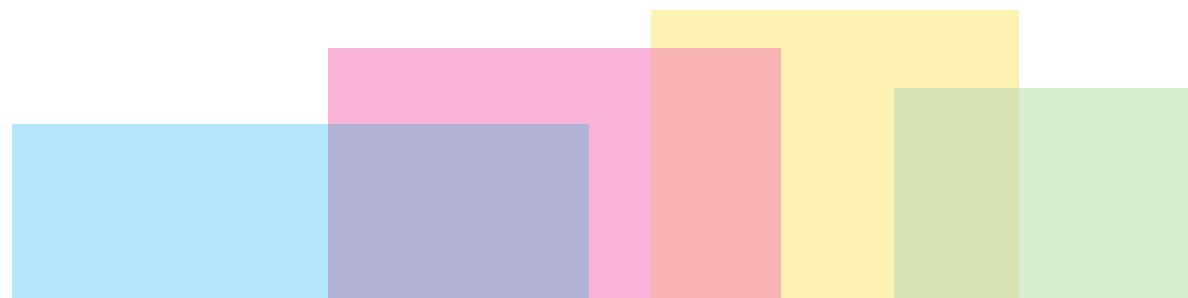
Program intentionally across all time segments – in-person and virtual. Protect 5–9 pm (especially 7–9 pm) for marquee titles and high-buzz events. Use afternoon slots (2–5 pm) for targeted programming like school partnerships and affinity groups. Extend your festival day into late-night hours with virtual programming – genre, special interest films and boundary-pushing content that thrives after dark with minimal operational cost.

Market in waves based on sales timeline trends. Coordinate major pushes at different periods when your festival tends to sell the most tickets: for example at program launch/on-sale to capture early planners, or in the final days leading into the festival for last-minute deciders. Lean on urgency-driven messaging. Align box office and support staffing with these demand spikes.

Commit to hybrid as a permanent strategy. Virtual is no longer experimental – it's a stable, meaningful audience segment and a competitive advantage. Design online programs intentionally for accessibility (captioning, audio description, flexible viewing), geographic reach and year-round engagement. Leverage virtual access to attract new audiences and to deepen loyalty with current members and passholders with bonus content before and after your festival.

**IN SUMMARY: LET YOUR
AUDIENCE DATA GUIDE
YOUR GROWTH**

A growth mindset remains essential, but the path forward requires more nuance. Festivals that will thrive are those that integrate data-driven pricing, audience-specific programming, hybrid infrastructure, and wave-based marketing into a cohesive year-round strategy – one that actively supports membership growth and keeps core audiences engaged beyond festival dates.



ABOUT THE AUTHOR AND CONTRIBUTORS

Iddo Patt, CEO and Co-Founder of Eventive, drew upon a long career in film and commercial production to create the leading platform for audience management and virtual cinema screenings for film festivals, filmmakers, distributors and cinemas all over the world. His intimate knowledge of filmmaking and festival organizing, passion for a sustainable independent film ecosystem, and access to audience data from 15 million tickets issued all give him a unique and widely regarded voice in the industry.

Tejaswi Bhavaraju is the Data Scientist at Eventive, where he organizes and analyzes massive amounts of data collected over the years. Tejaswi studied statistics at the Wharton School of Business and cinema at the School of Arts, University of Pennsylvania. His professional passions come together elegantly at Eventive, where he works on research projects like this one, develops data-driven enhancements to products and services, and studies the potential use cases of AI in independent film that can be secure and sustainable. His latest project, which we are very excited to present, is the automated Film Festival Marketing Assistant – designed to help festivals grow audiences and optimize strategies for operations, marketing and audience experience.

Todd Looby is the Director of Revenue Operations at Eventive. His diverse experience includes business management, project management and a long stint as an independent filmmaker. He also served as executive director of Bend Film, where he became an early adopter of Eventive back in 2016. As Bend incorporated Tin Pan Theater and then virtual programming in 2020, he continued to leverage the Eventive platform to tie it all together. At Eventive, Todd continues his personal mission to grow indie film audiences and help make festivals and theaters more successful.

ABOUT EVENTIVE:

Founded in 2015, Eventive is the ticketing and streaming platform with a mission to make film festivals and independent film accessible to more and more people. What began as a smarter ticketing system emerged as the leading platform for audience management and virtual cinema screenings for film festivals, filmmakers, distributors, and cinemas all over the world. Eventive has now issued more than 15 million tickets and provides ticketing and/or streaming for Sundance, CPH:DOX, Fantastic Fest, AARP Movies for Grownups, and 1500 other organizations.


COMING ATTRACTIONS

Stand by for much more. Leveraging a data set that now encompasses more than 15 million tickets sold, topics for our next white paper or upcoming newsletters may include:

- How pricing and membership programs for arthouse cinemas have evolved since the pandemic.
- How Eventive for Filmmakers is empowering filmmakers with direct to audience distribution.
- Emerging programming and operations trends.
- How festivals are moving toward more efficient programming.
- What genres attract the most interest across all festivals.
- The benefits and drawbacks of broad programming, compared to targeting niche audiences.
- The bottom line impact of engaging audiences via balloting and other interactive tools.

To ask us questions, recommend topics for research, or to just be on the list for future white papers, please contact us via insights@eventive.org.





MORE POWER TO INDEPENDENT FILM

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Consult with us about how you can leverage these insights for your festival.

Order a copy of the companion white paper, *What's Next for Film Festivals: Patterns of Recovery and Growth*.

Explore AI-assisted practical insights with the Eventive Festival Marketing Assistant.

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