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# Cinegi Arts&Film Action Research Report

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 the audience agency

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## **Cinegi**

Cinegi Arts&Film was an action research project supported by Arts Council England in partnership with the BFI and delivered by Cinegi as a public benefit version of its digital filmed media distribution service.

Cinegi is a fully digital download solution for public screenings of film and filmed performance, enabling venues of all kinds, from high street pop-up to festival, from community hall to pub, from arts centre to library, in cities, towns and villages to become a 'cinema'. It provides an easy to use solution for extending the secure exhibition of content in high quality HD, opening up new opportunities for audiences and rights-holders.

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Through our collaborative data sharing programmes and our bespoke consultancy offer, we help cultural organisations and policy makers to plan and deliver audience and engagement strategy, with a particular emphasis on data-driven decision-making.

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# Cinegi Arts&Film Action Research Report

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## Executive summary

Cinegi Arts&Film was an action research project, delivered by Cinegi, that ran from January 2017 to May 2018 to test how a digital distribution service could bring filmed arts and cultural content to audiences in venues beyond mainstream cinemas. These venues could include community centres, village halls, arts and cultural organisations and any other non-cinemas interested in showcasing arts content to the public. The project was supported through a grant from Arts Council England, and a partnership with the BFI. The research component was contracted to The Audience Agency and Nesta.

The project enabled promoters and venues throughout England to purchase, download and then screen a variety of content (including filmed theatre, opera, ballet and archive film material) under license in non-cinema venues. It therefore attempted to unlock the potential of both relatively untapped venues (such as arts centres, libraries, museums and community centres) and the UK's networks of amateur and independent film clubs.

The Cinegi Arts&Film team undertook several different activities as part of the project to allow promoters to stage screenings:

- Redeveloping the Cinegi player and platform from its original beta stage, working with its external technology partners.
- Working with arts and cultural organisations to source and license content for the platform, resulting in around 220 titles being available during the project.
- Launching the platform publicly and undertaking marketing and outreach activities to promote take-up of the service.
- Attempting to increase the uptake in two areas of particular 'high intervention' – Cornwall and the South West and East Durham and Sunderland in the North East.

## Research focus

The action research primarily focused on the audiences for arts and cultural content – looking at whether the project reached audiences who would not otherwise engage with the arts or specialised film, expanded their interest in unfamiliar content and developed them into regular attenders. The research also considered what drove the engagement from audiences – was it the content itself, locally sensitive programming and curation, venue experience, location, price or ease of access?

The study also broadened out to consider the supply chain in more detail. Feedback and data was gathered on both promoters that booked screenings and those that did not. Additional research focused on the supply/licensing of content to the Cinegi Arts&Film project - this forms a separate report published alongside this study.

## Research findings

### Audiences for Cinegi Arts&Film content

The Cinegi Arts&Film project reached audiences across the whole of England, along with several screenings in Wales and Scotland. In total, 3,984 people attended a screening, across 117 different events. This was significantly lower than the initial set of projections from Cinegi Arts&Film, which forecast 31,150 attendees over 1,650 screenings (the reasons for this are discussed in the main report).

Audiences at the screenings were generally older than average for arts and cultural events. The audiences were also more female than male and predominantly white. Most of the audiences were retired and the levels of income reported were consistent with that of retired households in the UK.

Generally, audiences were very positive about the experience they had at the event they attended. Seventy-eight per cent rated the content that they saw as 'very good', while 68 per cent rated the overall event as 'very good'. Eighty-three per cent stated that they would be very interested in attending future events, and the remaining 17 per cent would be quite interested. Therefore, when audiences were exposed to the content, they responded very favourably towards it.

One of the main drivers of the Cinegi programme was the idea that screening arts and cultural content in areas with low levels of formal arts and cultural venue provision might help to attract new or less engaged audiences. However, cultural attendance among audiences to the programme was already fairly high. Most respondents had been to an art gallery (70 per cent) or a play (61 per cent) in the last 12 months. Furthermore, over half of the audience (55 per cent) had visited a community cinema screening within the last year, albeit it is likely they would not have viewed arts and cultural content specifically.

In terms of broadening audience horizons for cultural content, the catalogue of titles had around 220 pieces to choose from. Despite this, a small number of films accounted for a high proportion of screenings. The five most frequently screened films accounted for 61 per cent of screenings, with the play *The Audience* on its own taking a 31 per cent share of screenings. While audiences reported high levels of satisfaction and a very high 'Net Promoter Score' (based on whether they would recommend the content to others), the promoters and venues that showcased the footage were relatively conservative in their choices, most often selecting a small range of more high-profile titles. This was reflected in their programming approach and some of their comments in the qualitative research as to what they felt the audience might enjoy.

A significant factor in the project was the requirement from the rights-holders and producers that audiences should pay for tickets, rather than screenings being offered for free. The minimum prices allowed for tickets were £4 and £2 for concessions. Promoters charged more for their tickets than the Cinegi Arts&Film minimum, with an average of £6.31 per ticket.

Research investigated the geographic spread of the events, particularly in terms of whether the project was reaching its target areas in the North East and South West, along with whether it was reaching areas with lower-than-average cultural provision. It was found that audiences were primarily local to the screenings they attended, with 79 per cent located within ten miles of the screening they went to.

A high proportion of screenings (71 per cent) were held in areas that had lower than average access to performing arts venues, indicating that Cinegi Arts&Film delivered access opportunities to areas currently underserved with cultural provision. This demonstrates that the project was successful in broadening access to this type of content.

When analysing secondary data, the populations of the catchments where screenings took place were as likely to engage in live opera and plays as the national average. There was some regional variation though, in the South West events were more likely to happen in areas of low engagement than the national average. Furthermore, all of the North East screenings were in areas with low levels of engagement.

## **Distribution - engaging venues and promoters**

In total, 69 promoters booked at least one Cinegi Arts&Film screening, resulting in 117 screenings over the course of the project. The target number of screenings at the outset of the project had been 1,650 – so the number of screenings fell significantly below the initial projections.

The majority of promoters heard about the service through word of mouth, or specific networks such as Cinema For All, suggesting that direct connections with either networks of venues or individual venues were more effective than social or indirect channels. Engaging networks did bring an upturn in bookings, but this was towards the end of the project timeline.

Encouragingly, a quarter of promoters/venues (24 per cent) that used the platform had never put on a screening before - suggesting that Cinegi was inspiring some new groups to promote this activity. For promoters that used the service, feedback was highly positive, with a focus on audience response to the content and the high quality of the recording and sound.

There were factors that significantly reduced take up from promoters. Some of these were the result of how promoters and venues schedule content, while others related directly to the platform's technology requirements. Promoters reported that the two major barriers to using the service were the long lead-in times for booking films and content generally. Fifty-nine per cent of promoters who had not booked on the platform reported that they tended to book content over two months in advance of screenings, and almost half (48 per cent) reported that the requirement to have Microsoft Windows 10 to use the platform was a barrier to booking. It is of note that promoters did not feel the type of content available was a barrier or impediment for booking, which has positive implications for the future distribution of arts content.

A number of assumptions made at the start of the project also led to screening numbers being lower than anticipated. Notably, Cinegi Arts&Film thought that there would be more engagement through networks related to both the BFI and Arts Council England and that this would result in greater numbers of bookings. The high number of referrals from Film Hubs and Cinema For All members show that the targeting of networks was a reasonable thing to do, but traction with these networks was only achieved at the end of the project which significantly held back sign-up volumes. Finally, there were technology issues with the player related to an update to Windows 10 issued by Microsoft. This had implications on who was able to screen content, and appeared to impact upon screening numbers.

## **Conclusions**

In relation to the objective of engaging new audiences with arts and cultural content, the Cinegi Arts&Film platform had some qualified successes, although the scale of the project in terms of screenings (and therefore audience numbers) was much lower than anticipated. The main cause of this arose in the middle of the supply chain – the promoters and venues that needed to take the risk in terms of screening their first content from Cinegi Arts&Film. While both the content providers (arts and cultural organisations) and the audiences were highly positive about the project, the lack of traction with promoters was the primary issue affecting the project and its ability to bring new arts and cultural content to audiences at scale.

The high intervention areas of the South West and the North East show starkly why this was the case. In the South West, where there are some strong networks of local/rural film clubs and arts networks, there was appetite from promoters to showcase this new material. In the North East, despite high levels of engagement with the Creative People and Places projects, bookings were minimal. In this area there was little experience of putting on film clubs or even having the necessary equipment to do so. A multiplicity of barriers thus made take-up extremely difficult.

Cinegi Arts&Film, therefore, was more successful when bringing new content to areas where there was already some cohesion around rural or local engagement of film or art in other ways, adding to that provision rather than creating an entirely new market. Nevertheless, the number of new promoters that tried Cinegi, and their positive responses to the platform, suggests that growth in screening numbers could also come from beyond the pre-existing networks, in the long-term.

## Areas of future focus

### **Can arts and cultural venues support more screenings of filmed content?**

Arts and cultural organisations often have the capacity and, in many instances, the potential audience to present filmed arts and cultural content. There could be scope for the arts and cultural sector to screen the work of other institutions, developing audiences in this manner. It may be that Arts Council England can look to its sector support organisations (such as The Space and Museums' Development Sector Support Organisations) to stimulate this activity further.

### **Taking lessons from rural touring to inform screenings in non-traditional venues**

What was apparent through the project was that alongside providing content and a reliable technological service, a range of other support was often needed - from help with setting up screenings to curation and marketing. There are parallels here to touring companies, who sell-in their shows to local promoters, ensuring they reach large enough audiences to generate a financial return. Digital distributors should look at rural touring networks for structures and lessons on how to tailor their services in future.

### **A platform for smaller National Portfolio Organisations and other grant-funded cultural producers**

Many smaller producing cultural organisations are developing digital strategies in which the production of captured content is a prominent feature. Few, however, have a viable route to audiences that meet their anticipated objectives of access, profile or income. The potential value of a Cinegi-type platform to close the gap between aspiration and capacity should be explored.

### **Creative People and Places projects need to ensure they can harness digital opportunities in the long-term**

Much of the work of the CPPs has focused on highly localised, participatory arts practise. As the CPPs develop their offer over time, more focus should be placed on how technology can intersect with the participatory work they undertake.

### **Developing promoter knowledge around available filmed content**

It is likely that the amount of captured arts and cultural content - particularly filmed opera, theatre and dance - will increase in the next few years. This means that it may become more important to actively engage with the different communities of promoters and curators who are in a position to showcase this type of content.

### **Ensuring an equivalent level of insight into audiences for digital touring**

The Cinegi Arts&Film research measures the impact and ROI of digital products produced by arts and cultural organisations. Measuring this, relative to other cultural activity is increasingly relevant as organisations are incentivised to deliver on their digital plans. The project has developed an approach for comparative measurement of quantitative and qualitative impact. The potential wider applicability of this approach should be explored.

### **Can filmed arts and cultural content be brought closer to film networks?**

The research showed that networks were often one of the best drivers of promoter interest in the Cinegi Arts&Film project. In future it may be worth considering whether publicly-funded film networks in this space should be incentivised to promote and showcase arts and cultural content.

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## Introduction

Arts organisations have increasingly been working on the digital capture and distribution of their live performances over the past decade. From early innovations such as NT Live, the National Theatre's live-to-digital filmed performances, there has been a growth in organisations seeking to find new audiences and create new markets through filmed content. However, outside of the cinema distribution deals made by a minority of large organisations, there are limited distribution channels for organisations to reach audiences with their captured work.

Cinegi Arts&Film was a project to test how a digital distribution service could bring filmed arts and cultural content to audiences beyond mainstream cinemas, into non-traditional venues that could be used for screening films. The project aimed to give promoters of events at those venues – from community centres and village halls on the one hand to theatres, arts centres, libraries and other cultural venues on the other – access to licensed content that they could then screen publicly to audiences. The objective was to tap into often under-exploited venues, some of which might already run film screenings or cultural events, to screen arts content and so expose audiences to a wider range of cultural output.

This report is the culmination of the Cinegi Arts&Film action research project, delivered by Cinegi. The project incorporated several component parts, including the development of the Cinegi platform and player, the acquisition of content, outreach and marketing to venues and promoters and a research component, which was commissioned from Nesta and The Audience Agency (TAA).

Action research is a reflective process led by researchers working in collaboration with a project. It involves researchers participating in the project while simultaneously conducting research. It aims to improve strategies, practices and knowledge from inside the project. It balances problem-solving activities implemented in a collaborative context with data-driven analysis or research to enable better informed future actions.

The report summarises the action research undertaken to inform the project as it developed over the course of 2017-2018. It also aims to provide insight to the arts and cultural sector on the operational detail of the Cinegi Arts&Film project and to present key findings in relation to the promotion, uptake and audience experience of arts and cultural content.

The Cinegi Arts&Film project sought to establish the platform, license artistic content from UK organisations and market the opportunity to promoters and venues around England, and in some instances the wider UK. It also had a focus on two geographic areas where take-up, or availability, of cultural activity was understood to be low for a variety of reasons. The project also aimed to improve understanding of the market for filmed content by arts and cultural organisations, both in terms of the supply chain and demand for content.

The report aims to give a detailed overview of the project with a particular focus on whether the model was able to bring cultural experiences to new and hard-to-reach audiences. It situates the Cinegi Arts&Film project within the supply chain of captured and filmed artistic and cultural content - from the creation of works and their distribution through to the final audience experience. Due to the project's focus on non-standard venues the report also provides insights into the supply-side of cultural provision outside of traditional institutions.

**The report is structured in the following manner:**

- **Chapter 3** sets out the context for the project, exploring the shifts in the digital landscape that led Arts Council England and the British Film Institute (BFI) to work in partnership to support Cinegi Arts&Film.
- **Chapter 4** reports on the methodology that the research partners used to conduct the research.
- **Chapter 5** reports on audience numbers, demographics, experience and geography of screenings.
- **Chapter 6** reports on the type and experience of the promoters who accessed the project's content and distributed it.
- **Chapter 7** summarises research into the supply of content.
- **Chapter 8** gives concluding points on the research.

### **Definitions used throughout the report**

Within the report we variously refer to 'Cinegi' and 'Cinegi Arts&Film' The difference is defined below:

- **Cinegi** refers to a secure, digital distribution service for the public exhibition of filmed media. The service is made of up a digital platform; marketing and communications; and outreach, guidance and support.
- **Cinegi Arts&Film** refers to the action research project supported by Arts Council England in partnership with the BFI. The Cinegi Arts&Film service is the service that was offered to venues and promoters and is the subject of this report.

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# About the Cinegi Arts&Film project

## 3.1 The wider landscape

The Cinegi Arts&Film project, a digitally-enabled service for showing cultural content, can be seen within the context of a wider shift towards arts and cultural organisations engaging in the filmed capture and distribution of their work. This shift comes almost a decade after the pioneering launch of NT Live in 2009<sup>1</sup>. Many arts and cultural organisations now regularly capture their work digitally - and a number of large-scale arts organisations have distribution deals with cinema networks, while other organisations distribute their work via free platforms such as YouTube and Facebook Live. The extent of digital capture and distribution does vary by organisational size, but, increasingly, smaller organisations are also exploring and experimenting with this kind of work.

The emergence of filmed theatre, opera and other artistic outputs has been quantified through various studies. Nesta and Arts Council England's 2017 Digital Culture study found that 20 per cent of arts and cultural organisations engaged in simulcasting or livestreaming their work<sup>2</sup>. Research by AEA Consulting reinforces this finding on the supply of content, highlighting that 33 per cent of theatre organisations (including theatre and combined arts) are now producing live-to-digital material.<sup>3</sup>

Despite this though, there are barriers to both producing and distributing content for arts organisations, which means that the market remains fragile. Firstly, few organisations have dedicated budgets to allocate towards digital recording and distribution, or the skills within their organisation to undertake the work. For smaller organisations, this means relying on commissions or one-off projects rather than having dedicated programmes. Secondly, the business models for distribution of this form of content are not yet certain, meaning that revenue generation is still difficult for most organisations working in this space.<sup>4</sup>

The distribution within cinemas of arts and cultural or alternative content, characterised as 'Event Cinema'<sup>5</sup>, has been a rapidly growing marketplace, with revenues in the UK and Ireland of £35 million in 2016 and 49 per cent annual growth

in the number of UK screenings between 2015 and 2016<sup>6</sup>. However, there are some indications that the cinema market for such content is reaching saturation point, with growth reducing slightly in 2017 and fewer blockbuster titles generating large-scale returns<sup>7</sup>. It is thought that this relates to the limited number of programming slots that cinemas provide, relative to the growth in event cinema content from both film and arts organisations.

This growth in event cinema and the wider live-to-digital landscape has happened in parallel with a series of policy decisions to promote digital capture and distribution. In particular, Arts Council England now requires National Portfolio Organisations receiving more than £250,000 funding per annum to have both a digital policy and a detailed plan, which might include reference to how they plan to both capture and disseminate their content.<sup>8</sup>

Arts Council England has also funded two organisations specifically operating in this area. One of these is The Space, which is an organisation set up and jointly funded by the Arts Council and the BBC as a specialist digital commissioning, distribution and development agency for the cultural sector that provides funding, commissioning support, training and online resources to arts organisations looking to make content available across the digital space. This includes both conventional broadcasting of arts content, but also more experimental approaches to digital distribution.<sup>9</sup> The other project, Canvas, a Multi-Channel Network (MCN), primarily on YouTube, was created to distribute and support the development of filmed arts and cultural content aimed particularly at audiences aged 18-35. Operated by Brave Bison, the Canvas channel remains live on YouTube but it ceased to operate as a MCN in March 2018.<sup>10</sup>

While live-to-digital has been growing in prominence in the arts over the last decade, the concept of non-commercial cinema distribution networks for showcasing film goes back much further. There is a strong tradition across the UK of community cinema - screenings in venues that are not traditional cinemas, particularly in rural areas. Cinema for All, the development body for community led cinema such as film clubs, societies and community cinemas was founded in 1946. It receives funding from the BFI and membership sales. In total, the network holds over 1,000 active members that regularly screen in non-cinema venues.<sup>11</sup> While these organisations and groups screened over 675 different film titles in 2016–2017, these were predominantly not made up of live captured arts content or other material developed by the arts sector.

These community cinema organisations are supported by a range of grassroots networks and bodies, such as C-Fylm, Cornwall's film club network, which supports 33 film clubs to put on screenings throughout rural Cornwall.<sup>12</sup> These networks are developed in many areas across the UK and form concentrations of expertise and interest in non-traditional screening in a variety of venues. While there is a strong tradition of community cinema though, these organisations and networks are often voluntary, or receive, relative to other aspects of the film and media sector, minimal amounts of funding.

The BFI reasserted its commitment to engaging audiences (and particularly younger audiences) in its current strategy document, *Supporting Film 2022*. This commitment incorporates providing £15 million in funding to the Film Audience Network for the period 2017-2022, allowing the eight film hubs across the UK to 'carry a strategic lead role and have direct responsibility for more of our Lottery funds to support local distribution strategies, festivals, education activity and key programmes.' These hubs are therefore a vital part of the infrastructure to bring film to regional and non-urban locations.<sup>13</sup> There was some disruption to the Film Audience Networks during the duration of the Cinegi Arts&Film project though, as eight lead partner organisations were appointed in January 2018 delaying their engagement with the project<sup>14</sup>, with the previous four-year funding round having ended in March 2017.<sup>15</sup>

The BFI strategy is to 'ensure that everyone, everywhere in the UK will be able to enjoy more of the UK's moving image heritage', including through exploring commercial partnerships and through conversations with rights-holders.<sup>16</sup> This was specifically relevant to Cinegi Arts&Film, which aimed to distribute BFI archival material through the platform.

The operating context for Cinegi Arts&Film, which is outlined in the section below, was therefore broadly positive at the outset of the project. Arts and cultural organisations are increasingly focused on digital and the distribution of their content in new ways, while community cinema and local networks provided a reliable starting point for the project to try and offer a new service, alongside established geographically focused services for providing licensed filmed content to non-cinemas such as Moviola.<sup>17</sup>

## 3.2 The Cinegi Arts&Film project

Cinegi is a venture spun out of the innovation agency Golant Media Ventures (GMV) in 2013. Financing from Ingenious Ventures in 2014 enabled a beta platform service to be created to showcase feature films, documentaries and arts content. This early-stage work served as the proof-of-concept for the Cinegi Arts&Film project which was awarded ACE funding in August 2016 and launched publicly in January 2017, supported by Arts Council England in partnership with the BFI.

The project was set up to test several hypotheses and, through action research, learn if and how change might most effectively be supported in three areas:

- **Arts content** - bringing new content or content only available in specific venues, regions or at certain times to a broader or new audience.
- **Non-cinema venues** - Engaging with the significant number of often under-the-radar venues that might prospectively be interested in screening filmed arts and cultural content.
- **Digital logistics and payout** - the project sought to create a new kind of platform and player for the content, which would suit both end-users and rights-holders and satisfy the data extraction requirements to create research insights.

As part of its development, the project had a scoping study of the market opportunity for a prospective service.<sup>18</sup> This included discussions on both the supply and demand side, with rights-holders and also with some regional networks and organisations working to develop audiences, including Creative People and Places (CPP) projects. Creative People and Places are 21 independent projects around England, funded by Arts Council England, that seek to grow arts and cultural experiences for people in neighbourhoods that have low or medium levels of engagement with the arts.<sup>19</sup>

The purpose of the exercise was to check the viability of the project and, if established, inform the development of a formal proposal. This assessment was focused on the availability of a strong enough body of quality content for the proposed service, and on the routes by which new audiences could be reached.

Through this scoping it was agreed that the project would work with partners to reach audiences and networks. It was envisaged that the primary partners would include the Arts Council England Creative People and Places projects, touring networks, regional networks of arts organisations, libraries/community organisations and the BFI Film Audience Network and Neighbourhood Cinema initiative. In practice, the involvement from each of these partners deviated from the original scoping study, as is discussed later.

## **Technical platform and player build**

Before launching Cinegi Arts&Film, a beta version of the platform existed, however at the outset of the project an overhaul of the platform and player was required. Changes included adding new functionality to allow networks to book on behalf of venues, an online payment mechanism and more complex reporting and data extraction tools. It also included changes specific to the Arts&Film project, such as those around branding, the presentation of the catalogue and explanatory material on the project, and research component specifically.

The rebuild of the player was more fundamental and required a set of functions that are not usually combined. Specifically, the requirements for:

- Full HD ('high definition') quality at least as good as BluRay.
- Copy-protection through encryption.
- The ability to download to a machine rather than stream content.
- Payout while offline (not connected to the Internet).<sup>20</sup>

Further details on the player's resulting technical capabilities are provided in Appendix 9.2. The rebuild of the Player took longer than planned, which meant that the Cinegi service launched in late January 2017 as opposed to late in 2016 as originally anticipated.

## **Content acquisition for the platform**

Alongside the platform redevelopment, the team licensed content from arts and cultural organisations, securing specific titles for promoters to choose from. This content licensing process went on throughout the lifespan of the project, as new titles were brought on after launch. Overall the rightsholder content licensing agreements was efficient. Deals were concluded quickly and with low management effort and cost to both sides. Cinegi Arts&Film operated under the premise that the only cost to the rightsholder should be the cost of doing the deal and the processing cost. This allowed both the initial costs for arts and cultural organisations to remain low, and for the threshold to reaching a modest profit per title to remain in reach, if there was take-up on the platform.

Content owners were universally positive in responding to the request to contribute to the catalogue and the only reasons for not being included were instances where historic rights issues proved too complex to resolve or content was not ready in time. Rights issues became less of a problem as the project progressed and arts organisations increasingly ensured that new content would have the correct rights secured.<sup>21</sup>

## **Marketing to promoters and venues and support**

The Cinegi Arts&Film platform launched in January 2017, allowing anyone who wished to publicly exhibit content to download the material with a one-off license, for a fee, to show it in a non-cinema venue. Specifically, these could include arts venues, village halls, community centres, pubs and other venues. One of the groups most easily able to adapt to the service was the community of amateur film clubs around the UK, many of whom screen independent, mainstream and classic film to primarily rural and older audiences. The project also attracted interest from a wide range of arts organisations seeking an additional distribution outlet for their captured work.

However, perhaps more interestingly, the Cinegi Arts&Film service sought to enable screenings with other kinds of event promoter and programmers in venues that had the potential to attract audiences. Notably, this included arts venues themselves that had the capacity for screenings but rarely put them on, and with specific groups or clusters of venues like libraries and museums. While community cinema presented one target segment to market to through the project, there were others where the proposition of the Cinegi Arts&Film service was felt to be promising and particularly where promoters did not have a set venue, but would be motivated to use a range of different venues for their screenings.

Event cinema has higher than average ticket prices than normal film screenings. This is because it is often expensive to produce and rarely attracts additional funding so the investment needs to be recouped. Larger arts organisations have therefore invested considerably in positioning it as a premium offering. As a result, they are not prepared to license content for free to distributors or to permit free screenings outside specific promotional and educational exceptions. Agreements

with performers, musicians and creatives also preclude this to ensure they are fairly rewarded for their work. Charging for screenings also addresses fears that event cinema undercut live performance events locally. Using public funds to subsidise the provision of screenings at scale beyond a research project could also be subject to challenge under State Aid or other unfair competition regulations from commercial providers of such services for feature films. It was therefore necessary to replicate within the action research the commercial parameters under which such a service would have operate in the medium term.

The cost of downloading the content for one screening was £99 (£75 + £15 vat + £9 delivery fee). This meant that there was an onus on promoters and venues to charge for tickets to their screenings, rather than allowing the screenings to be free for audiences. Although Cinegi Arts&Film did not dictate promoters' exact pricing, they set a minimum ticket price of £4, and a discounted ticket price of £2. Working from the assumption that the average screening would be approximately 30 people, this meant that promoters should, theoretically, at least cover the costs of the content license.

## Content available on the platform

The project launched with a catalogue of titles from The Royal Opera House, NT Live, The Royal Shakespeare Company, Shakespeare's Globe, a few smaller companies and the BFI archive. The final catalogue contained content from large and smaller companies and across the genres of theatre, music, dance, ballet and opera, long form, medium form and short form. It also contained a series of digitised archive films footage from across the country from the BFI.

The final catalogue ranged from major filmed productions of theatre and opera such as *The Audience* with Helen Mirren, *Giselle* and *Hamlet* through to archive footage of Sheffield Theatre, featuring a young Ian McKellen, and *This England - Cornwall: Helston Furry Dance and Villages* which is a short amateur film shot in the 1930s. The booking patterns and sales of different content is explored in more detail in Chapter 5.



## **Levels of intervention for the project and initial targets**

The project involved various levels of intervention from a small project team at Cinegi Arts&Film to encourage promoters and venues to use the service. The three types of 'intervention' are outlined below.

### **1. High level of intervention and support**

Two areas were selected from the scoping exercise which had low levels of cultural infrastructure due to a rural or spread out community (e.g. very few dedicated arts venues, theatres, cinemas and so forth), or else low engagement with the arts and a lack of access to cultural content.

- Cornwall and the South West – a dispersed rural community lacking cultural infrastructure.
- The North East, including a focus around Sunderland (Cultural Spring) and East Durham (East Durham Creates) – low levels of arts engagement and opportunity.

The interventions in these areas involved direct engagement by the Cinegi Arts&Film team with organisations and partners working closely with local communities to ensure a good understanding of audience needs. This included participating in local events and giving 1:1 support to potential venues.

### **2. Medium level of intervention and support**

Areas across England were chosen where the project could connect and work through Creative People and Places projects. Some examples include:

- Suffolk and Norfolk - Suffolk libraries, Creative Arts East
- St Helens, Lancashire - Heart of Glass
- Medway Towns – Ideas Test
- Black Country – Creative Black Country
- Midlands including a focus around Stoke on Trent

There was also a strategy to work through the BFI's Film Audience Network Hubs, such as Broadway in Nottingham and FACT in Liverpool. Within this was also the intention to work with the BFI's partners such as the UK Cinema Association and Cinema For All.

### **3. Low level of intervention and support - UK wide.**

Cinegi Media had an existing database of over 600 venues and networks. These included film clubs and societies, village halls, churches, community centres, arts centres, local and regional theatres and a variety of sports clubs, student unions and local community organisations. These were in rural areas, villages, small towns and the outskirts of larger cities across the UK.

Finally, potential promoters were to be targeted through the BFI's Neighbourhood Cinema network and through ACE networks including libraries and museums, regional networks of arts organisations, libraries, touring networks and community organisations.<sup>22</sup>

#### **Focus on the North East (East Durham and Sunderland) and Cornwall (and the South West)**

The Cinegi Arts&Film project rolled out a digital platform that was accessible to any promoter in the UK. However, the project funder ACE and the BFI were particularly interested to test whether the service could be delivered in locations with low levels of cultural engagement or lacking high quality provision. These are places that face challenges in either the supply of, or the demand for cultural activity - a lack of concert halls, arts venues and spaces for culture, but also a concurrent lack of uptake from audiences for the specific art forms that Arts Council England funds.

To address this objective two distinct geographical locations were chosen for high levels of support as they provided examples of low infrastructure and/or low engagement with the arts. These were Cornwall (and the South West) and the North East, with a particular focus on Sunderland and East Durham. Cornwall, in general terms, has a dispersed, rural, community, and Sunderland and East Durham both have a lack of cultural infrastructure and populations with very low levels of engagement with the arts.

4

## Research questions and approach

The methodology used by Nesta and TAA focused on answering a series of specific research questions outlined at the inception of the Cinegi Arts&Film programme. However, as 'action research' into the overall implementation of the project, the scope expanded beyond these specific questions to incorporate a broader view of both the project and its operational context.

In addition to audience impact, the research also considers the supply of content to the platform and the distribution networks that are available. As action research, the methodology is not an independent evaluation of the programme, but part of the project's attempts to improve understanding from its operation.

The research was guided by a steering group of key members of staff from the Cinegi Arts&Film management team, Arts Council England and British Film Institute. This group met three times during the project to guide and approve the research methodology and to feed back on the interim findings and final report.

## 4.1 Research questions for the study

The specific research questions which this report tackles are:

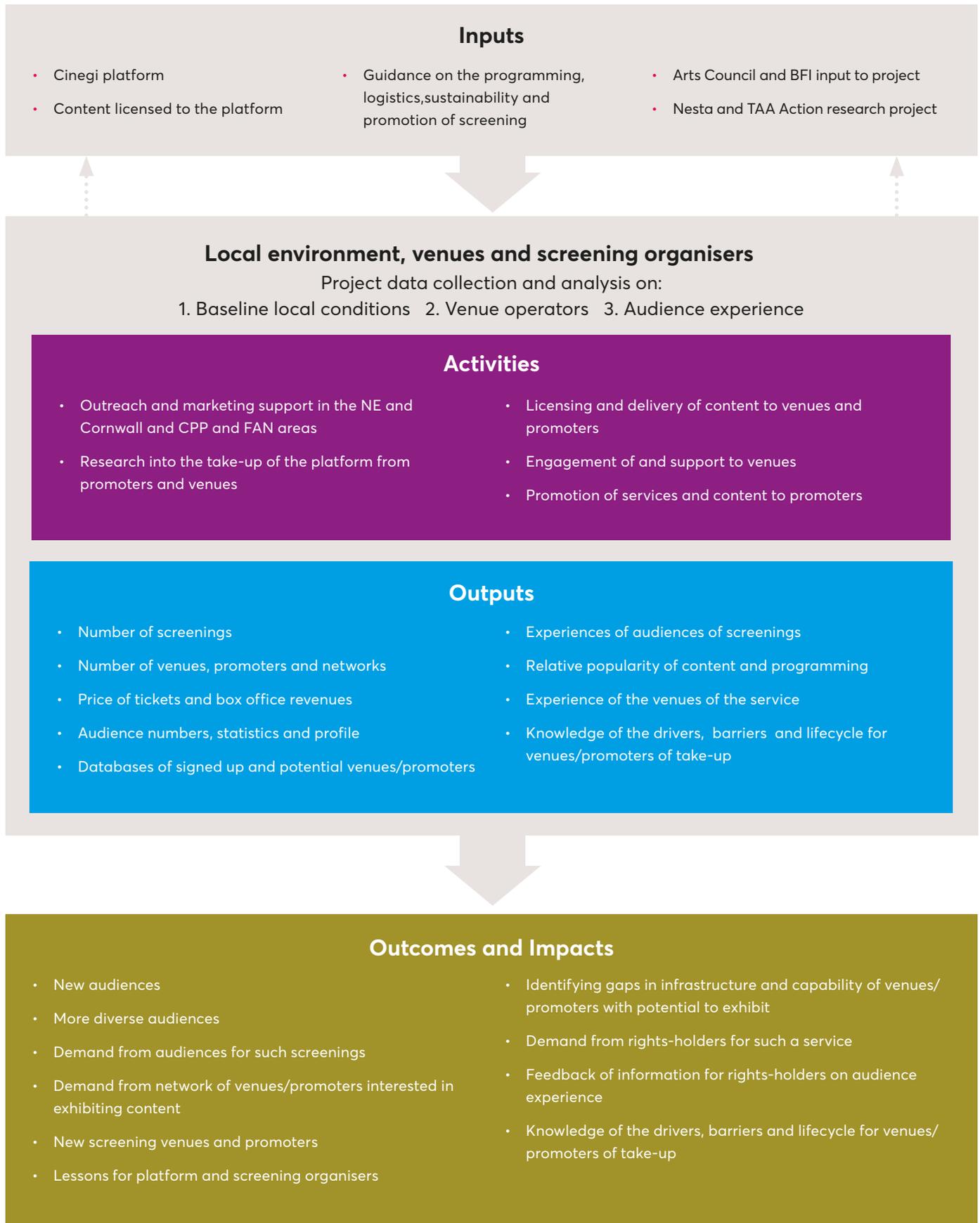
- To what extent do screenings of filmed media in non-cinema venues:
  - » Reach audiences who would not otherwise engage with the arts or specialised film?
  - » Expand audience taste to include content that they would not have seen otherwise?
  - » Develop regular audience engagement with screenings and venues?
- What are the attributes of audience experience that drive engagement for the above (e.g. content type, locally sensitive programming and curation, venue facilities and location, price, ease of access etc.)?
- What are the required capabilities in venues to engage audiences with this type of content – gaps and how these gaps can be filled through guidance and support?<sup>23</sup>

Additional to these core research questions, three other questions were identified during the evolution of the project, as outlined below.

- What are the current trends, issues and projections for filmed content by arts and cultural organisations, what distribution channels do they currently use and what are the opportunities and challenges around developing captured content?
- In the context of slower than predicted uptake of the service, what are the characteristics of prospective Cinegi Arts&Film promoters, and what are the various factors that will drive a promoter to use, or discourage them from using, the service?
- Why was Cinegi Arts&Film unable to encourage more screenings in the North East, one of the original areas of 'high intervention' for the project?

These research questions were situated within a logic model for the whole programme, developed by the researchers in collaboration with the Cinegi Arts&Film team. This is outlined in the following diagram.

Figure 1: Revised logic model for the whole Cinegi Arts&Film project



## 4.2 Action research approach

To answer the research questions, Nesta and TAA gathered a wide range of qualitative and quantitative data. Data was collected on a rolling basis throughout the programme, with a number of discrete pieces of work also conducted at specific points over the 18-month project period. More details are provided in the methodology appendix.

In keeping with the action research approach, feedback was provided by Nesta and TAA throughout the project. This was notable in a number of ways. The interim reporting (see below) gave strong assurances that the Cinegi Arts&Film screenings were happening in catchment areas where provision of arts and culture was below the national average, showing that initially the project was reaching the 'right' areas. During a point at which the conversion of promoters to screenings was proving difficult, Nesta and TAA conducted research into the barriers to using the service. This uncovered a range of issues which fed back into the marketing and communications efforts by the Cinegi Arts&Film team.

Feedback was undertaken through a series of interim reports and areas of specific interest including:

- Weekly audience feedback updates and progress reports (from October 2017).
- Three interim reports (March 2017, August 2017, February 2018).
- Research into promoters who were not engaged with the project (September 2017).
- Research specifically on the North East (June 2018).

The research partners also worked with Cinegi Arts&Film to refine and adapt the approach to data collection as the project progressed. This is considered in more detail in section 6.3.

5

## Audience analysis - attendances, profile, experience, and geographic reach

In this section we provide an analysis of the audience-related aspects of the project. We first consider screening numbers, audience size and the content mix seen by those audiences. We then go on to analyse the audience's demographics and experience of screenings and the extent to which screenings were undertaken in areas with lower access to culture.

### 5.1 Attendances, screening content and ticket yield

#### Summary

From its start in January 2017 the Cinegi Arts&Film project began to build momentum as the project progressed, from an initial slow start in terms of numbers of screenings to a busier programme in the final few months. In total there were 3,984 attendees at 117 screenings. This was lower than the initial set of projections from Cinegi Arts&Film, who forecast 31,150 attendees over 1,650 screenings (see section 6.3 for a discussion of this).

The average audience size per event was 34. This level of attendance was in line with predictions at the outset of the programme. The average price of a ticket was £6.31 across all the events, higher than the minimum price allowed of £4 and £2 (concessions).

Although the catalogue of titles was reasonably extensive from the outset of the project and was consistently added to as the project progressed, a small number of films accounted for a high proportion of screenings. The top five most frequently screened films accounted for 61 per cent of screenings, with the play 'The Audience' accounting for 31 per cent share of screenings. There were lower levels of take up of BFI titles than was expected.

### 5.1.1 Screening numbers and overall attendance figures

In total there were 117 screenings held between late January 2017 and the end of May 2018. The numbers of screenings per month increased as the project progressed, reaching a high of 22 screenings in both April and May 2018. The upward trend in screening numbers can be seen in the two charts below. More than half of the screenings happened in the last four months of the project. Later in the report we have considered the factors that may have encouraged a greater uptake of screenings as the project progressed.

Figure 2: Numbers of screenings per month

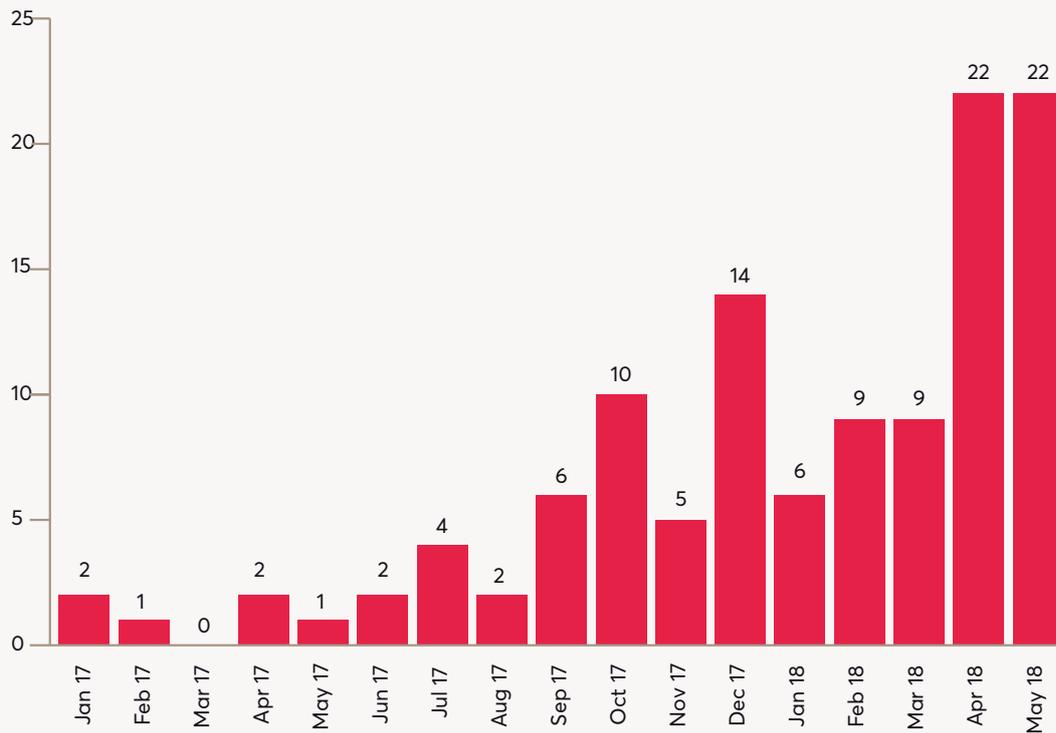
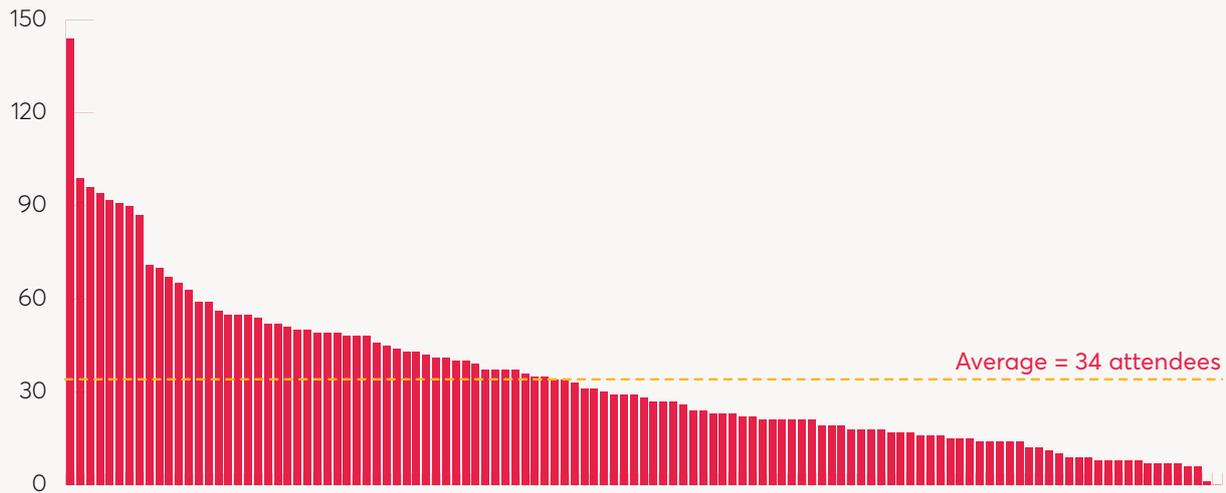


Figure 3 - Cumulative numbers of screenings month on month



In terms of attendance figures, the average number of tickets sold per screening across the project was 34. This average encompassed a broad spread, ranging from a high of 144 to a low of zero (a small-scale screening adversely affected by the weather). This range of event sizes is shown on the following chart, each bar representing a screening, in order from high to low.

Figure 4: Screenings shown in descending order by audience size



Event promoters were asked when booking to predict their screening attendance. The average predicted figure was 48 per screening and although this was higher than the average of 34 achieved, low attendance was not particularly mentioned as an issue by promoters in their feedback comments. Indeed, in some areas venues were aware that there would be a small catchment of potential audience members, and were comfortable to proceed with their bookings on this basis.

### 5.1.2 Content choices and impact on attendances

There was an extensive catalogue of 220 titles available on the platform over the course of the project. While many were available for the full duration, some were added during the project, and some had a limited licence period and were therefore only available for a specific window. Alongside content from major arts brands like the National Theatre and the RSC, titles from some smaller arts organisations became available during the project, for example the Cinegi Arts&Film team worked with The Space to ensure that some of their commissioned work was on the platform.

Table 1: Breakdown of content available on the platform

Content format	Category	Number of titles
<b>Arts long-form titles</b>	Theatre	19
	Opera	4
	Music - classical	4
	Dance	4
	Ballet	2
<b>Arts short-form titles</b>	Theatre and dance	34
<b>BFI Titles</b>	BFI medium and short-form archive	117
	Arts Council film archives	30
	BFI Lotte Reiniger	6

Despite efforts to have a wide variety of different content types in terms of thematic scope, localised archive content and work by smaller arts and cultural organisations, the majority of content shown were the more 'mainstream' or high-profile titles within the catalogue. Five titles ended up being screened at 61 per cent of the events (shown on the chart and table below). The play *The Audience* starring Helen Mirren was particularly popular, chosen by promoters at almost a third of screenings (31 per cent).

Table 2: Numbers of screenings by title, rights-holders in parentheses

Film title	No. of screenings	% of screenings
The Audience (National Theatre)	36	31%
Matthew Bourne's Sleeping Beauty (More2Screen)	14	12%
Giselle (Royal Opera House)	8	7%
The Railway Children (The Railway Children Film Ltd)	7	6%
Follies (National Theatre)	6	5%
Others	46	39%
<b>Total</b>	<b>117</b>	<b>100%</b>

The average audience for these most frequently screened titles is shown below. The two most frequently shown titles (*The Audience* and *Matthew Bourne's Sleeping Beauty*) were attended by larger audiences than average.

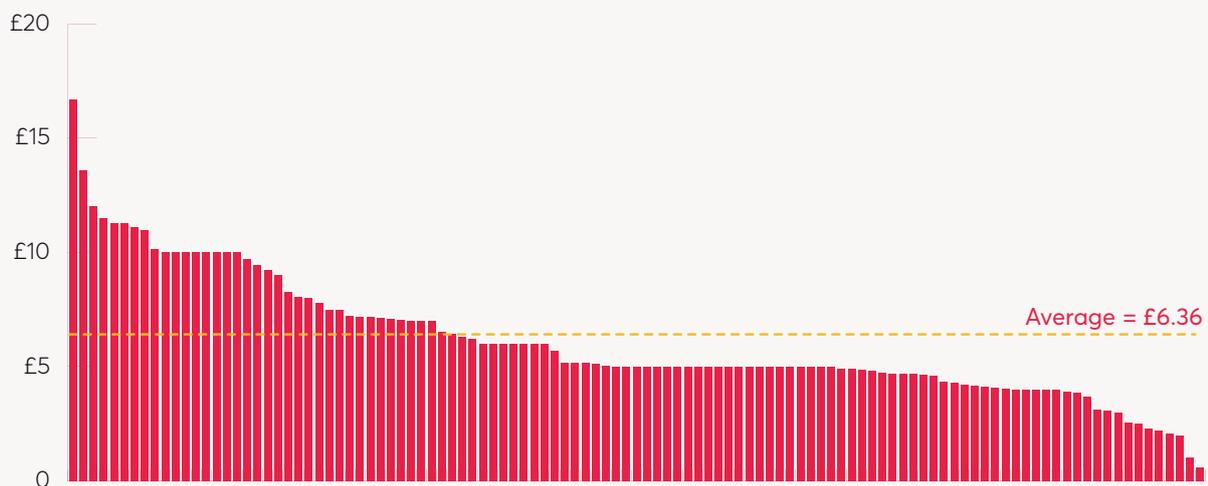
Table 3: Average audience size by title

Film title	Avg. audience
The Audience	42
Matthew Bourne's Sleeping Beauty	41
Giselle	32
The Railway Children	21
Follies	33
Others	28

### 5.1.3 Ticket yield

The minimum price allowed for tickets was £4 and £2 for concessions, but promoters could charge whatever they chose above these prices. Analysis of the promoter returns showed that many promoters charged more for their tickets than the Cinegi Arts&Film minimum, with an average of £6.31 (based on returns where income was higher than 0). This average was slightly higher than the cost of the average cost for a community cinema ticket, which was £5.41 for non-members in 2016.<sup>24</sup> The distribution of average ticket price per event is shown on the chart below, each bar represents a screening, in average ticket yield order from high to low. In the audience survey (examined in more detail in section 5.2.5), we found that only a small proportion (14 per cent) would attend more screenings due to the price of the event, indicating that price was not a particular concern for those that did make it to a screening.

Figure 5: Screenings shown in descending order by average ticket yield



## 5.2 Audience analysis - profile, decision-making and experience

This section details how audiences responded to Cinegi Arts&Film screenings. It is based on the survey feedback from 436 screening attendees across England (around 11 per cent of all screening attendees). We first consider the demographics of attendees across the programme, before looking in more detail at their levels of cultural engagement, their motivations and interest in attending the screening and experience of it, including their response to the Cinegi Arts&Film content.

### Summary

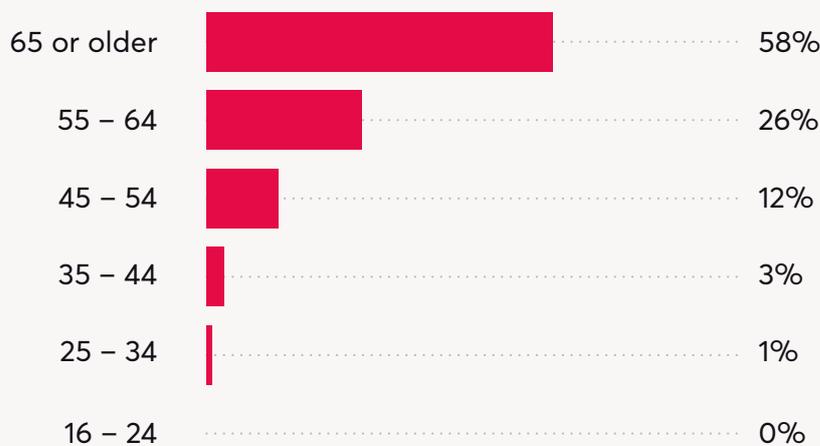
Cinegi Arts&Film audiences were very likely to be older than average arts and cultural audiences. They were mostly female and predominantly white. Most of the audiences were retired and the levels of income reported among the audiences were consistent with that of retired households in the UK. They usually attended screenings with friends or other people, but were seldom to attend with younger members of their family under the age of 16.

Overall, these audiences highly enjoyed the screening they attended and would recommend it to others. They would also have appetite for future events that were in the same geographic region. However, a large cohort of the audience were either already quite regular cultural attenders or relatively regular audiences for other community cinema events. The degree to which the programme captured wholly new audiences to these forms of culture is therefore less than originally hoped for at the start of the project. However, getting access to kinds of content they would not be able to see was a strong motivator among the audience for seeing more screenings. There is therefore evidence that although it is probably difficult to change audience profiles in the short term there is the potential to attract an already engaged community audience with new content and to draw them to high quality content that they might otherwise not have access to.

### 5.2.1 Audience profile

The Cinegi Arts&Film audience survey responses suggest that the programme was reaching older audiences. Eighty-four per cent of respondents were 55 or older and 58 per cent were 65 or older. As might be anticipated, this aligned with the number of retirees, with 58 per cent of the sample describing themselves as retired. A significant minority of the audience surveyed did though undertake some kind of work - 9 per cent were employed full-time, 16 per cent were employed part-time and 12 per cent were self-employed.

Figure 6: Age profile of Cinegi Arts&Film audience



The gender of respondents was heavily weighted towards women. Seventy-six per cent of survey respondents were women and 24 per cent were men. In terms of ethnicity, the audience was predominantly made up of people who self-identified as White British. Only 1 per cent of the audience came from Black, Asian or Minority Ethnic backgrounds - in this instance the 1 per cent identified as 'other'. While this is not a representative audience of the UK population, Cinegi Arts&Film events happened in areas with lower levels of ethnic diversity (in particular, due to large amounts of screenings in the rural South West outside of the region's major urban centres), and so the limited diversity in this regard would be accounted for partially by geography. The research also aimed to understand health issues associated with the audience. Eighty-three per cent of respondents indicated that they were not limited in their day-to-day activities due to a health issue. Thirteen per cent responded that they were limited a little in this regard and 3 per cent reported that they were 'limited a lot'. Children were not directly surveyed, but 16 per cent of audience members had at least one child (aged under 16) in the party.

To understand the economic conditions of the audience for Cinegi Arts&Film screenings the research asked about approximate household income. Fifty-five per cent of respondents reported that they had a household income before tax of under £27,000. While this might indicate that the audiences were made up of those from more deprived categories, the high number of retirees within the sample is likely to have heavily influenced this figure. Indeed, the average household pensioner income in the UK is £29,000 which is broadly consistent with that of the audience.<sup>25</sup>

Figure 7: Audience member household income before tax

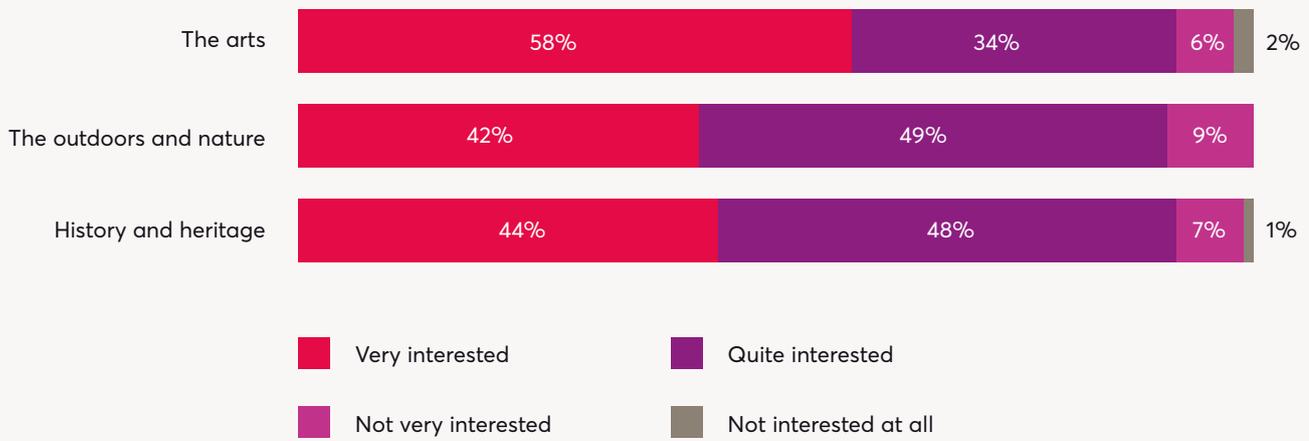


### 5.2.2 Audience engagement with arts and culture

One of the main drivers of the Cinegi programme was the idea that screening arts and cultural content in areas with low provision of formal arts and cultural venue provision might help to attract new or infrequent audiences, or those that did not engage due to reasons like access or transport issues. To look at this in detail, the survey benchmarked cultural attendance and participation among the audiences of the screenings. It also looked at overall interest in various aspects of cultural life.

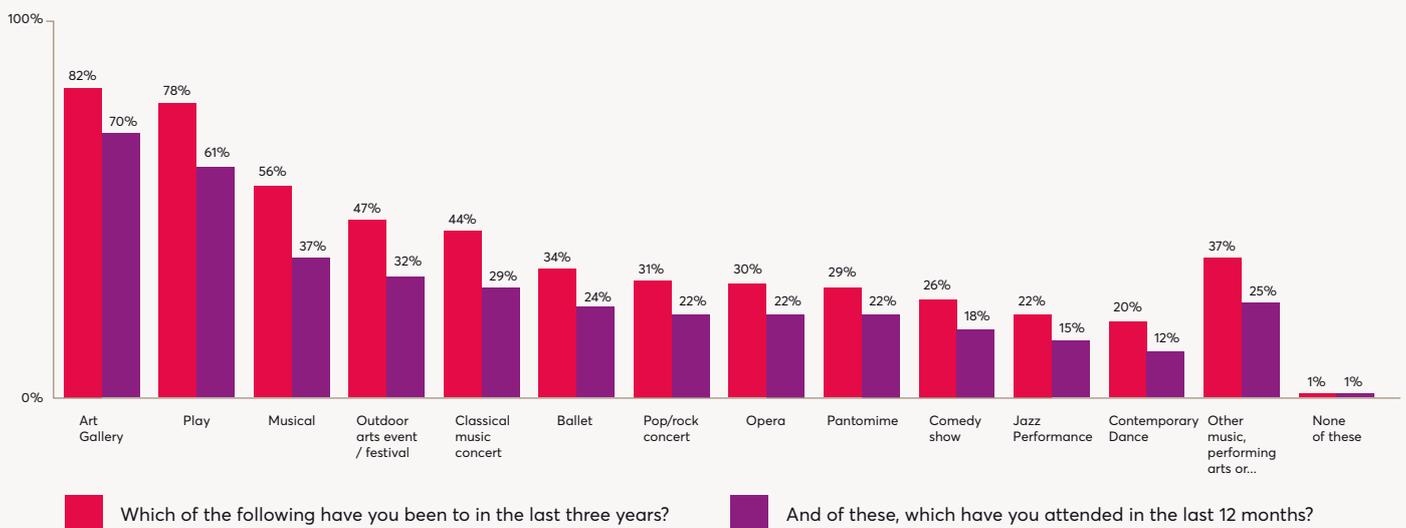
The audience surveyed was highly interested in the arts, and to a lesser extent interested in both the outdoors and nature, and history and heritage. Fifty-eight per cent indicated that they were very interested in the arts generally, while 44 per cent were very interested in history and heritage and 44 per cent in the outdoors and nature. Overall then, attitudes towards culture among Cinegi audiences are very positive.

Figure 8: Audience interest in general areas of the arts, the outdoors and nature, and history and heritage



Following from this, cultural attendance over the last three years was fairly high for respondents. The majority of respondents had been to an art gallery (70 per cent) or a play (61 per cent) in the last 12 months. Meanwhile approximately a third had been to a musical, an outdoor arts event or festival, or a classical music concert respectively over the last year. By comparison in the 2016-2017 national Taking Part survey of participation in England, 38 per cent of those surveyed had attended a play in the past 12 months and 52 per cent had been to a museum or art gallery.<sup>26</sup>

Figure 9: Audience attendance at arts and cultural events over the last three years and last year



### 5.2.3 Audience engagement with community cinema and screenings in non-traditional venues

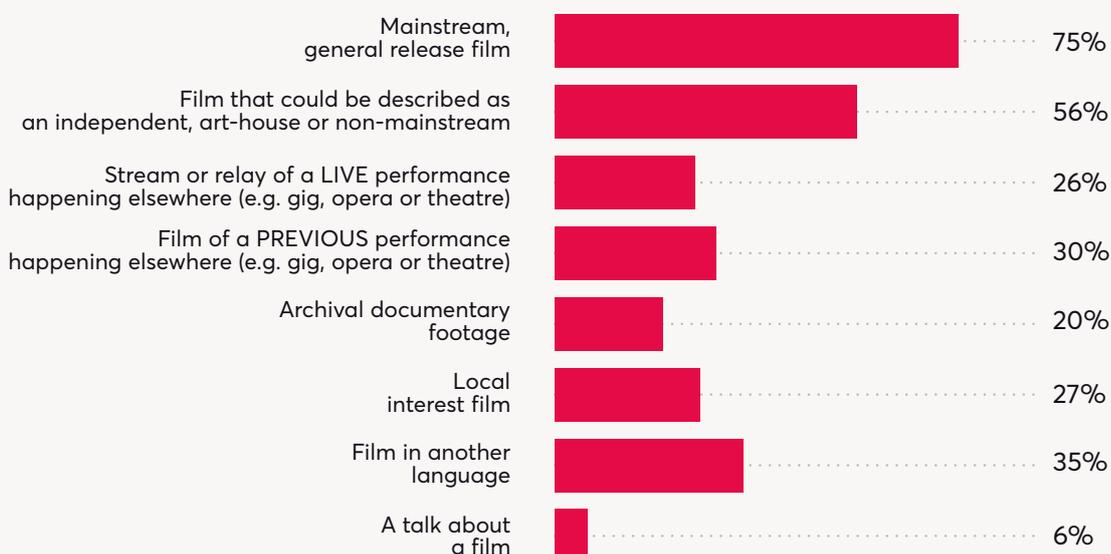
Alongside the audience's engagement with 'traditional' forms of arts and cultural content, the research also sought to understand their interest and engagement with film. In particular, we were interested in whether Cinegi Arts&Film was reaching new film audiences in non-cinema venues, or whether it was exposing existing audiences to new forms of content.

Over half of the audience (55 per cent) had visited a community cinema screening within the last year, a further 13 per cent had been to one in the last two to three years and 10 per cent had been to one over three years ago. Around a quarter of the audience could therefore be considered 'irregular attenders' to community cinema. Finally, 21 per cent had never been to a pop-up film or a film in a non-traditional space before. A significant minority of the audience were therefore exposed to viewing a film in a non-traditional screening venue for the first time.

Among the attendees that had visited in the last 12 months, there was a fairly even split between high-frequency attenders and those that visit less often. Forty-four per cent reported that they went to screenings once every month, a further 35 per cent go every two to three months and 21 per cent go more infrequently over the course of a year.

Those that had previously attended a community cinema event usually watched films and content that was available through Cinegi Arts&Film. Just over a quarter (26 per cent) had previously seen a stream or relay of a live performance happening elsewhere, and 30 per cent had viewed a film of a previous performance that happened elsewhere. Only 20 per cent had viewed archival documentary footage in this type of setting. It seems that the platform did provide a new type of content to audiences, even if they were regular attenders of community cinema.

Figure 10: Types of content that audiences have viewed over the last 12 months in non-traditional screening venues

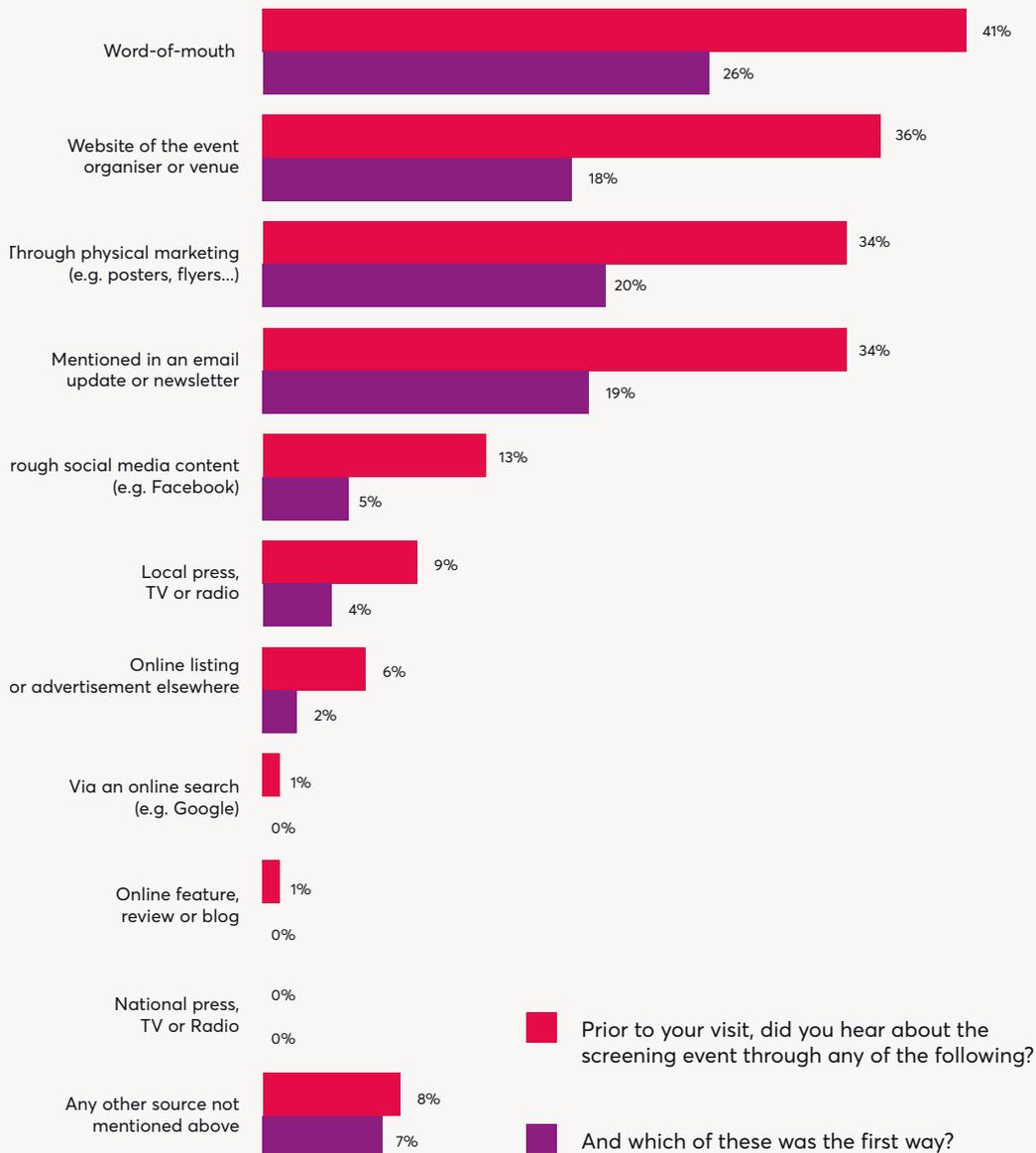


### 5.2.4 Audience awareness of the project and motivations for attending

The Cinegi Arts&Film project provides an innovative digital solution to screening arts and cultural content in places where access may be limited, however there is evidence that effective marketing of the screenings themselves is more traditional. Word-of-mouth was the most common way in which people heard about event they attended, with 41 per cent stating they heard about Cinegi Arts&Film this way and 26 per cent saying it was the way they heard about the event the first time.

As might be anticipated by the age profile of the audience, social media and online search were far less prominent in finding out about the screenings. Only 13 per cent saw any marketing through social media and 1 per cent through proactive online search. However, a few more traditional digital activities were useful to market the opportunities, notably email updates and newsletters, and the promoter/venue website.

Figure 11: Marketing reach of events using Cinegi Arts&Film content



In terms of their motivations for attending the event itself, the convenience of the venue in terms of transport and parking ranked as the most important factor in their decision to attend, with 54 per cent stating that this was very important. In the qualitative responses from audience members it was noted that some types of cultural activity are less accessible in certain parts of the country, particularly outside London.

'It's access to culture that we can't get any other way...We live in a very beautiful part of the world which is lovely but we are very limited. You can't just nip out to see a ballet or an opera or a play whenever you feel like it...This is the way of doing it without having the major upheaval and the travel and everything else that's involved. So good on them is what I say and please can we have more.'

'No, I don't think so because we live outside of London, everything is so hard. I know that sounds really awful but for me, it's sheer, utter convenience that I can walk there [to the screening] and be entertained and they really try hard to make it a really good experience.'

'I like to go to live theatre [several times a year]. The sort of stuff that Cinegi [Arts&Film] was showing, London, The Globe, and stuff. The level of which they perform is seldom in this area or extremely expensive. It's something that I think is a good idea.'

'We didn't really go to the theatre at all. So for me – for us – it's just total and utter convenience. We can both get in the car. We don't go to London to go to the theatre unless it's a special occasion, a really special occasion. I can't remember the last time I went to theatre, it's obviously a long, long time ago. It's because it's so expensive to get to London from here.'

Interestingly, the venue, the setting and the social side of the visit were seen as marginally more important than the chance to experience art and culture in a new setting. It may be that for this group the opportunity afforded by a social scenario is more significant than the content itself in driving attendance.

The price of the screening was important for 50 per cent of respondents and very important for 23 per cent of respondents, and this was borne out in some of the qualitative responses:

'And obviously the cost! You know, it's 40 quid to go to theatre but it's £5 to go here. To me, at this age and stage of my life that's really important.'

'I've not seen *Carmen* and that price, it was an absolute steal. If I'd had to wait for it to come to a theatre and then got tickets it would have been a very expensive outing.'

'I used to live in London so I used to go to the West End. I'd pop over to Southampton to see things now. It's all very expensive now though!'

There were also comments which suggested that the project was improving access for groups for whom mobility was sometimes an issue.

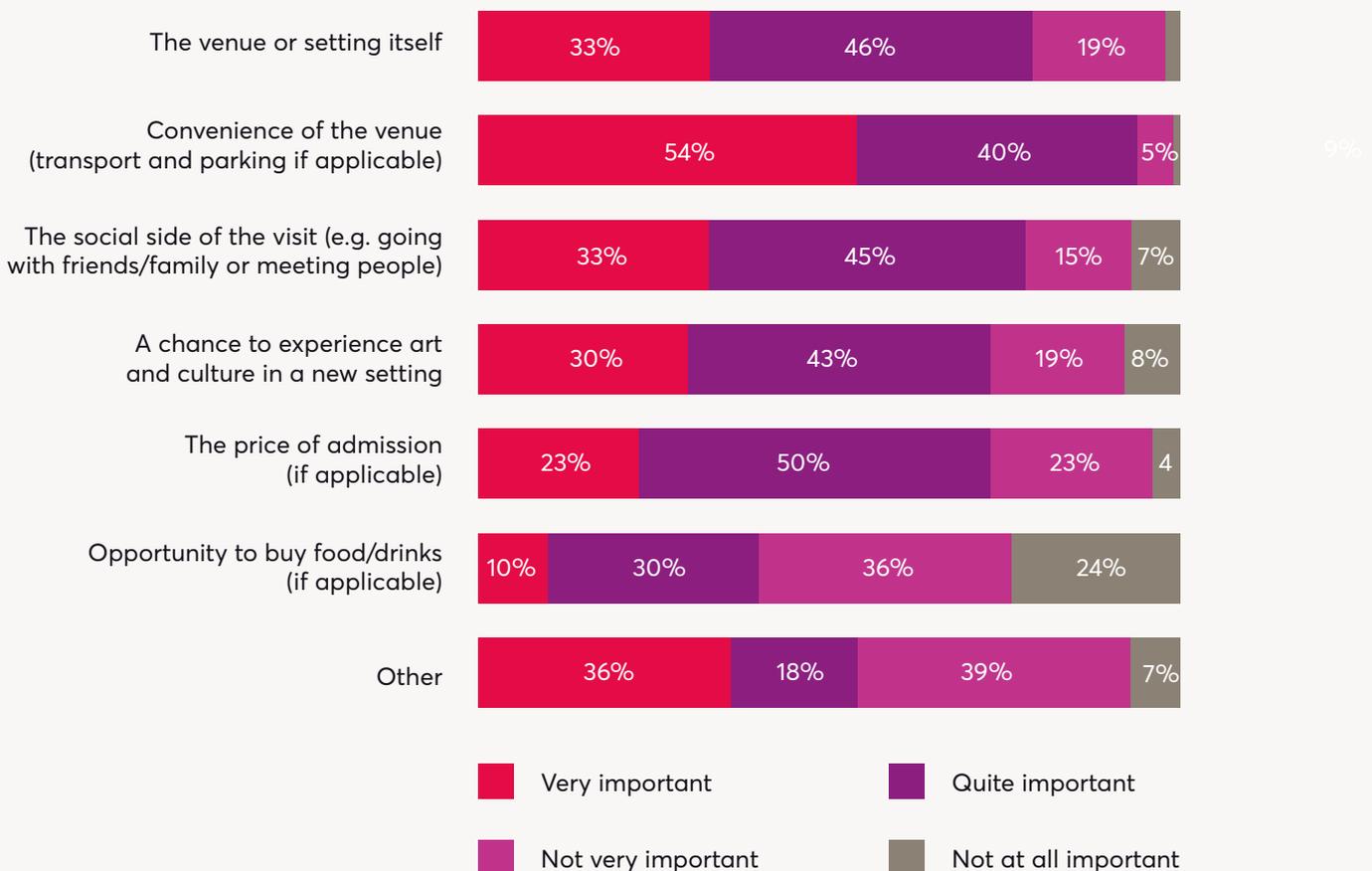
'Asked my mum if she fancied it and she did so we went. That's very local to me. My mum lives around the corner [from the venue], she's getting on a bit now. So to go somewhere local is really handy.'

'It's such a wonderful thing that it's easily accessible locally for those of us that don't find travelling that easy. It was terrific – more please!'

'I've got mobility problems and I can't walk very far so this thing [screening] on the doorstep made it so much more accessible rather than worrying about having to get to a London theatre or whatever...It's about a mile and a half away [from home] and the parking's really convenient so it's virtually effortless.'

The audience themselves predominantly engaged with the events as a social experience. Eighty-two per cent attended the event with other people, however only 14 per cent of that group brought children under 16 years old to the event. Cinegi screenings were not predominantly made up of family audiences therefore. The 18 per cent attending on their own, and the community nature of many screenings, suggests a potential role for the screenings to allow people to interact with their local community.

Figure 12: Importance of factors in decision for audiences to attend the event



The social and community aspect of the screenings was borne out in the qualitative responses:

'It's a sense of occasion and seeing it with other people. It's probably more fun. It's an occasion, it's a social event, it's a community event or a communal experience.'

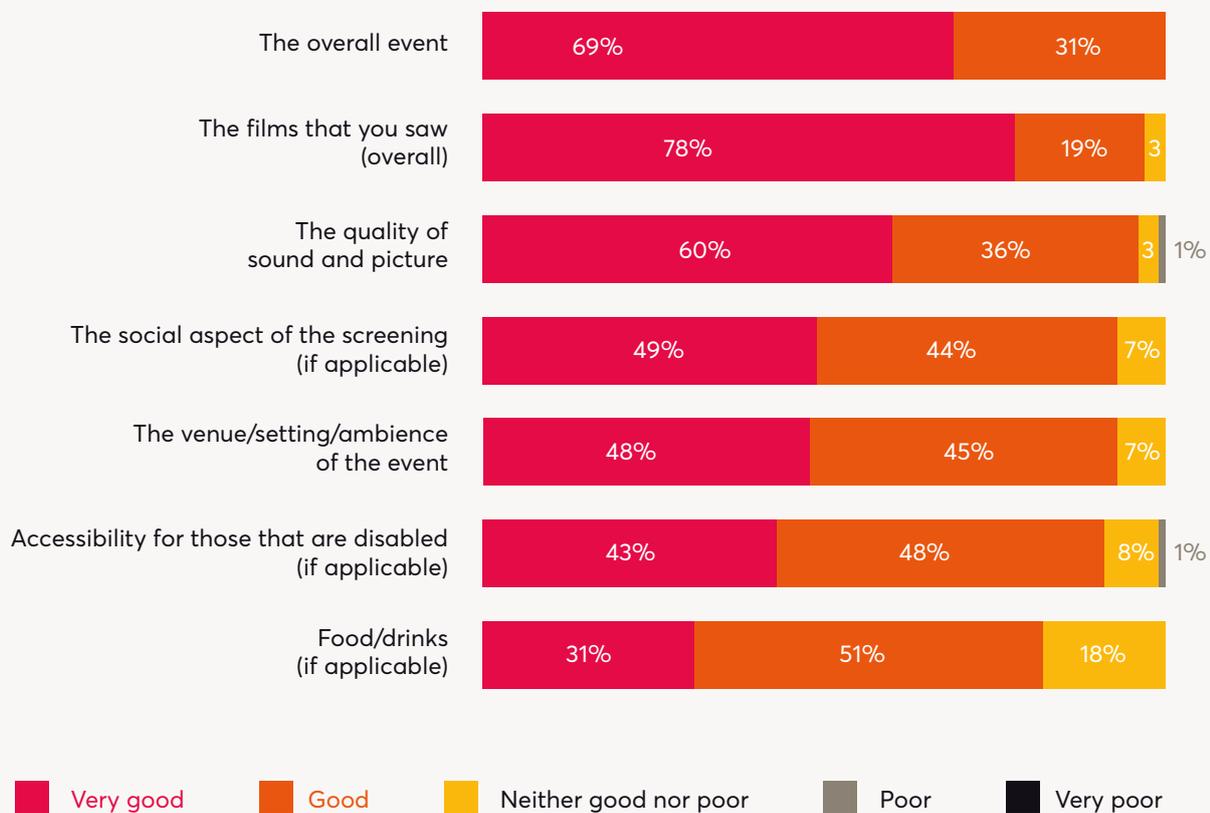
'The thing is, we live in a small village and we know the guy that was sort of launching it initially...It was just like word-of-mouth because we talk to each other and we've got a village shop. People go in the village shop and talk so it's very easy to get information in our village.'

'I took a friend with me – an ex-work colleague and friend. She mentioned some time ago that she'd never been to see a ballet so I thought this might be a good way of introducing her to it, so the two of us went together.'

### 5.2.5 Audience experience of the screening and future plans

The audience experience of Cinegi Arts&Film screenings was strongly positive. When asked to rate the overall event, 68 per cent rated it as very good, and when asked to rate the film(s) or content they viewed audiences were even more positive, with 78 per cent reporting that it was very good. Clearly amongst those that attended the screenings, there was a high degree of satisfaction and enjoyment with the events.

Figure 13: Audience experience of the different aspects of the screening



It was thought that audiences might rate Cinegi screenings negatively compared to the audio and projection quality found in mainstream cinema. This was not supported in the findings, with 60 per cent reporting that they felt the quality of the sound and picture was very good (and a further 36 per cent rating it good), indicating that the objective of the service providing high-definition, high quality content had been achieved.

There was further confirmation of the positive experience of audiences. On a scale of 1-10 in terms of how likely the respondent was to recommend to the content to a friend, family member or colleague 83 per cent rated it as 9-10 and only 2 per cent rated it as six out of ten or lower. This gives an overall Net Promoter Score (NPS) of 81. This NPS score is slightly higher than the 79 observed for all artform rural touring network events (based on Audience Finder 2016-2017 benchmark) and the score of 80 observed for cinema events from Audience Finder (which is a combination of screenings from multi-artform venues, touring, galleries and festivals).

In the qualitative responses there was a recognition that while the experience was not the same as watching a live performance, there were benefits in watching the filmed production.

'As always with this kind of thing, it has its advantages and its disadvantages. The advantage of course is that you've got the close-ups and the camera angles, you know, you're not trying to squint over the head of someone with a pair of opera glasses. But you lose the immediacy and the excitement of the live interaction.'

'It is different, but I have to say, I thought it was filmed really well. It gave you a broad look at the whole stage, because obviously you're slightly limited at what you can look at because whoever is filming it has that bit. Having seen both, I was actually really impressed. It's not like seeing it live and it can't be but I thought it was really good. I felt involved and it kept my attention all the way through.'

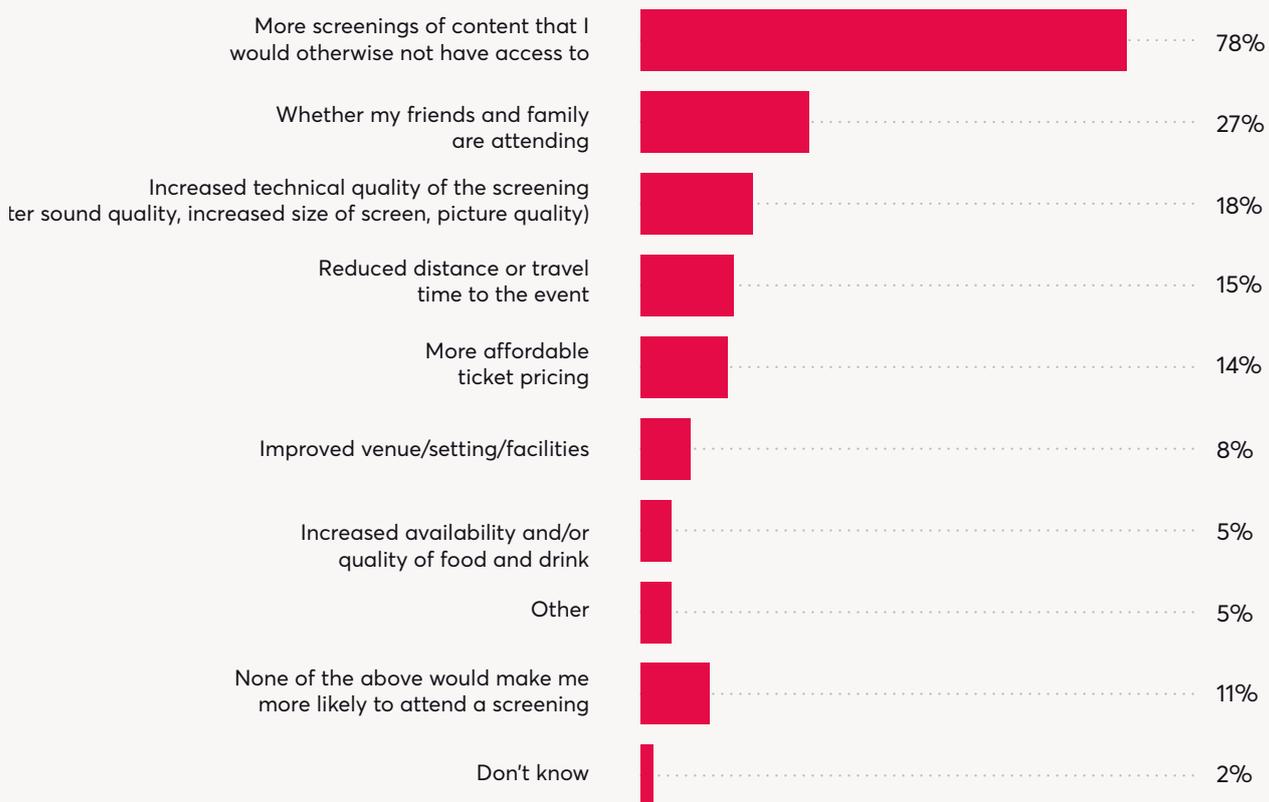
'You could see more [on screen] than you sometimes see if you go to the theatre.'

'You see so much more. You're much closer. You pick up a lot more of the story from facial expressions and things you don't normally see when watching it in a theatre. It is different, it's not the same as being in a theatre and watching a live performance. The atmosphere bits maybe aren't so good [at a screening].'

The positive experience of attendees was also confirmed in their future propensity to attend events. Eighty-three per cent stated that they would be very interested in attending future events, and the remaining 17 per cent would be quite interested. Clearly then, for those that attended a screening the content, setting and execution of the event was found to be an extremely positive experience.

In terms of the motivating factors that would make audiences attend a higher number of future screenings, the most common factor cited was related to the core proposition for Cinegi Arts&Film. Seventy-eight per cent claimed that more screenings of content they would otherwise not have access to would make them more likely to attend in future.<sup>27</sup> By contrast the ticket price, reduced travel time and an improved venue/setting and facilities were not seen as particularly key motivating factors for future attendance.

Figure 14: Motivating factors for audiences in attending a higher frequency of future screenings (limited to a choice of three per respondent)



## 5.3 The geographical reach of the programme

### Summary

Cinegi Arts&Film screenings took place in every English region (and in Wales and Scotland). The South West region held a high proportion of screenings, 40 per cent of the total, followed by the South East with 18 per cent. A high proportion of screenings (71 per cent) were held in areas that had lower than average access to performing arts venues, indicating that Cinegi Arts&Film did take access opportunities to areas currently underserved with provision.

Audiences were local, with 72 per cent living less than a 15 minute drive time from the venues. Looking at the catchments of each of the screenings in more detail, secondary data (TGI) suggested that overall the populations of these catchments were as likely to engage in live opera and plays as the national average. The relatively high proportion of events in the South East contributed to this. In the South West, events were more likely to happen in areas of low engagement than the national average. All of the North East screenings were in areas with low levels of engagement.

Using Audience Spectrum profiling, the audience details collected were profiled to understand more about their characteristics and likely cultural engagement. This showed that Cinegi was successful in attracting higher proportions of what are termed 'mid engaged' segments, in particular the Home and Heritage group that accounted for 22 per cent of attenders compared to a national arts engagement figure of 9 per cent. There was also some success with two lower engaged segments, Up Our Street and Heydays.

In research conducted by the Cinegi Arts&Film team on the creation and distribution of filmed arts and cultural content (see Chapter 7), many arts organisations mentioned the idea of building audiences in new geographical areas as a motivating factor for the digital capture of their performances. Three arts organisations outlined some of the typical motivating factors in this regard:

'We really do want to capture that audience that can't see us in person. That's always been our ambition for any digital approach we take. It's about growing our audience outside of London.'

'Audience Development is top of the list. There's still many places that we can't get to either through outreach with schools or with touring'.

'Projects like Cinegi help us to connect with more rural audiences which is something we've not been particularly strong on and definitely something that is a key area for us to improve on.'<sup>28</sup>

In this section, then, we consider the geographical spread of Cinegi Arts&Film screenings and then look at the catchment areas that the project reached, to uncover whether it was reaching potentially underserved audiences with a cultural offer.

### 5.3.1 Location of screenings

Screenings were held in every English region, with a high proportion in the South West (40 per cent), which was one of the two focus areas. Seventeen per cent of screenings were held in the South East and the rest were spread evenly across the other regions. Nine screenings were held in the North East and six in both Scotland and Wales.

Table 4: Count and percentage of screenings by region

Region	Screenings	%
East	7	6%
East Midlands	2	2%
London	5	4%
North East	9	8%
North West	5	4%
Scotland	6	5%
South East	20	17%
South West	46	39%
Wales	6	5%
West Midlands	7	6%
Yorkshire and the Humber	4	3%
<b>Total</b>	<b>117</b>	<b>100%</b>

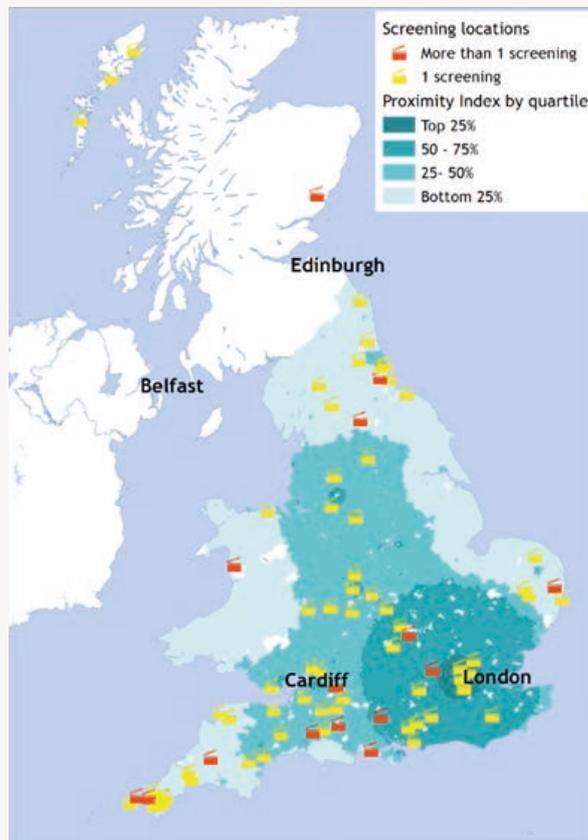
### 5.3.2 Current access to cultural provision in locations where Cinegi content was screened

Using datasets held by The Audience Agency, it is possible to look at the locations of screenings and assess their current access to cultural provision. The analysis was completed using the 'access to performing arts' index which measures levels of arts access and showed whether Cinegi Arts&Film was providing opportunities to access culture in areas that are currently lacking in provision.

The following map shows the locations of screenings overlaid onto a thematic representation of 'access to performing arts'. Locations where more than one screening happened are also shown on the map.

The access to performing arts index is calculated for every Super Output Area (SOA) in England and Wales and then these are grouped in quartiles.<sup>29</sup> The areas with the darkest shading are in the top 25 per cent in terms of access to performing arts venues (this effectively corresponds to London on the map), the slightly lighter shading shows the 25 per cent of SOAs with the next highest level of access and so on. Scotland and a number of much smaller areas do not have shading due to an absence of data.

Figure 15: Map showing location of screenings overlaid onto access to performing arts index



The map shows that the majority of Cinegi Arts&Film screenings happened in areas in the bottom half in terms of access to performing arts venues in England and Wales, that is they occurred outside London and the larger shaded area that surrounds it. To analyse access in more detail the numbers of screenings and locations are shown on the following table.

Table 5: Percentage of venues and screenings by Performing Arts Accessibility Index

Performing Arts Accessibility Index by quartile	% Cinegi venues	% Cinegi screenings
Top 25% SOA's	8%	5%
75 - 50%	21%	23%
25 - 50%	31%	32%
Bottom 25% SOA's	40%	39%

Forty per cent of the screening venues were in the band of SOA's with the least access to provision (the lightest shaded area on the map). A further 31 per cent were in the next band, meaning 71 per cent were in areas with less than the national average access to performing arts venues. The picture is similar when screenings are considered. The Cinegi Arts&Film programme therefore delivered performing arts content to areas that were underserved with opportunities to see live performances.

### 5.3.3 Socio-demographics and cultural engagement of screening catchments

Using secondary data, the population of the places where Cinegi screenings were held was also investigated. This indicates whether the screenings were in areas with low engagement in culture and helps us to understand more about the socio-economic status of the locations.<sup>30</sup>

The table below shows the percentage of screenings whose catchments were lower than the England average for two types of cultural engagement (opera and plays based on TGI data) and Indices of Multiple Deprivation (IMD, based on Census data). The figures for the North East and the South West focus areas have also been included.

**Table 6: Percentage of screenings with catchments below the national average for Opera/Plays attendance and IMD**

Area	Opera	Plays	IMD
England	50%	44%	45%
South West	65%	65%	47%
North East	100%	100%	100%

Half of screenings across England (50 per cent) had catchments that were less engaged than the national average for Opera attendance. This leaves 50 per cent that happened in areas that were more engaged than the national average, a neutral overall result.

The percentage of screening catchments lower than the national average for Plays was only 44 per cent, meaning that more than half (56 per cent) of screenings happened in areas that have higher engagement than the national average. For IMD, 45 per cent of screenings were in areas that were more deprived than the national average, leaving 55 per cent that happened in areas that were less deprived.

Overall these figures show that, based on TGI secondary data and proxy catchments, at an overall national level, Cinegi Arts&Film screenings did have catchments that were lower than the national average for deprivation and levels of theatrical productions (Plays).

When we consider the two regions containing focus areas, the picture is different. Every screening in the North East happened in areas that were lower than the national average on these variables. In the South West, screenings happened in areas that tended to be less engaged in Opera and Plays than the national average (65 per cent of screenings), but in terms of IMD the figures were close to the national average.

Example analysis has been provided for three screenings in the panels below, one each from the South West, North East and South East regions.

The maps show how a proxy catchment was applied to each screening. For the St. Oswald's Church screening in the North East, for example, the catchment area was based on a nine-mile drive distance and is shown in orange.

The figures on the right of the panel then show how the orange catchment area compares to the regional and England average on a number of variables. Figures are expressed as indexes where 100 is average. So, for opera attendance, St. Oswald's Church happened in an area which is slightly more likely than other areas in the North East to be engaged in opera but significantly less likely than the England average.

These examples show how we were able to understand more about the population characteristics of places where Cinegi screenings happened.

### Helston Museum



**Venue location:** North East  
**Genre:** Performing arts

**Catchment area:** 9 miles  
**Covers** 455,493 adults

06 June 2017

St. Oswald's Church

**Plays index**  
Compared to region 108  
Compared to England 80

**Social grade index**  
Compared to region 92  
Compared to England 79

**Opera index**  
Compared to region 106  
Compared to England 62

**Audience Spectrum index**  
Compared to region 80  
Compared to England 59

**Cinema index**  
Compared to region 102  
Compared to England 92

**Deprivation index**  
Compared to region 85  
Compared to England 66

### Helston Museum



**Venue location:** South West  
**Genre:** Documentary

**Catchment area:** 10.5 miles  
**Covers** 94,085 adults

31 August 2017

Helston Museum

**Plays index**  
Compared to region 96  
Compared to England 93

**Social grade index**  
Compared to region 84  
Compared to England 84

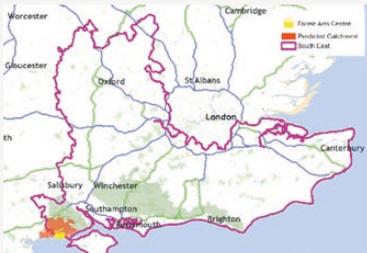
**Opera index**  
Compared to region 99  
Compared to England 89

**Audience Spectrum index**  
Compared to region 81  
Compared to England 97

**Cinema index**  
Compared to region 97  
Compared to England 103

**Deprivation index**  
Compared to region 66  
Compared to England 71

### Matthew Bourne's Sleeping Beauty



**Venue location:** South East  
**Genre:** Streamed performing arts

**Catchment area:** 11.3 miles  
**Covers** 206,757 adults

03 January 2018

Forest Arts Centre

**Plays index**  
Compared to region 96  
Compared to England 113

**Social grade index**  
Compared to region 95  
Compared to England 105

**Opera index**  
Compared to region 96  
Compared to England 123

**Audience Spectrum index**  
Compared to region 111  
Compared to England 136

**Cinema index**  
Compared to region 97  
Compared to England 103

**Deprivation index**  
Compared to region 94  
Compared to England 117

### 5.3.4 Distance travelled by audiences

Using the 806 audience postcodes collected at events the distance that attenders travelled to the events was calculated. Almost two-thirds (64 per cent) lived less than five miles from the screenings, demonstrating the particularly local audience for Cinegi events. Around four out of five attenders (79 per cent) lived less than ten miles from the screening.

Table 7: How far audiences lived from the screening they attended

Distance from screening	Audience %	Cumulative %
0-4 miles	64%	64%
5-9 miles	15%	79%
10-14 miles	6%	84%
15-19 miles	3%	87%
20-29 miles	3%	90%
30-49 miles	1%	91%
50-99 miles	1%	92%
100 miles or more	8%	100%

To further understand audience location, drive times were also calculated. This takes account of the specific road layout around screenings. This showed that a large proportion of audiences were very local to the screenings, 72 per cent were within 15 minutes drive time. Eighty-six per cent were less than 30 minutes drive time.

The distance analysis also confirmed the proxy catchments that were applied to screenings during the project to understand the reach of screenings (used in the analysis in section 5.4.3).

Table 8: Audience drive times from screenings they attended

Drive time from screening	Audience %	Cumulative %
Less than 15 minutes	72%	72%
15-29 minutes	14%	86%
30-44 minutes	4%	90%
45-59 minutes	1%	91%
60-89 minutes	1%	92%
90-119 minutes	1%	92%
2 hours or more	8%	100%

The regionalised spread of screenings and local nature of the audience was one of the driving factors behind the original concept of Cinegi Arts&Film, which was further confirmed by interviews with audience members:

'I haven't been to the theatre for a very long time. Living down here, it's not easy, but I must admit I have never been a great theatre goer.'

'All I can say is, please can we have some more! It's such a wonderful thing that it's easily accessible locally for those of us that don't find travelling that easy.'

'I live in Cornwall and don't get to the theatre or the cinema hardly ever. I can't remember the last time I went. I haven't been to a live performance of anything since I was child. It's just not something that really happens here without a great deal of travelling and logistical... so, the fact that it was something that was filmed live and then shown on a screen just literally two seconds from my house was really convenient and just brings a bit of city culture to a very rural community. So that was why I went, I thought 'oh this will give me a taste of city life.'"

### 5.3.5 Audience Spectrum profiling of audiences

The postcodes collected from audiences were profiled using Audience Spectrum to understand more about their profile and likely cultural engagement patterns. The 806 postcodes collected enabled the overall Cinegi Arts&Film audience to be compared to the national figures for the population and cultural engagement (using Audience Finder benchmark).

Comparisons have been expressed on the tables as indexes. An index lower than 100 indicates that the segment is smaller in the Cinegi profile and an index of more than 100 indicates that it is higher. Significant differences are shown in bold.

**Table 9: Cinegi Arts&Film Audience Spectrum profile compared to English population and overall Audience Finder benchmark (17/18)**

Engagement	Segment	Cinegi	English population		Audience Finder overall benchmark	
		%	%	index	%	index
High	Metroculturals	5%	5%	98	11%	<b>42</b>
	Commuterland Culturebuffs	25%	11%	<b>240</b>	19%	<b>134</b>
	Experience Seekers	2%	8%	<b>22</b>	9%	<b>19</b>
Medium	Dormitory Dependables	21%	14%	<b>144</b>	21%	99
	Trips and Treats	10%	16%	<b>63</b>	15%	<b>67</b>
	Home and Heritage	22%	11%	<b>195</b>	9%	<b>261</b>
Low	Up Our Street	8%	10%	<b>87</b>	6%	<b>151</b>
	Facebook Families	2%	10%	<b>18</b>	5%	<b>40</b>
	Kaleidoscope Creativity	1%	10%	<b>13</b>	5%	<b>28</b>
	Heydays	4%	5%	<b>76</b>	2%	<b>222</b>

Thirty-two per cent of screening attenders were from the 'highly engaged' band of Audience Spectrum segments. This percentage was larger than the figure for the English population (24 per cent) and lower than the Audience Finder arts engagement benchmark (39 per cent), meaning these types were over-represented at Cinegi Arts&Film screenings compared to the population of England, but were found in smaller proportions than you would typically find at ticketed arts events.

Of these highly engaged segments, Commuterland Culturebuffs were overrepresented in the Cinegi Arts&Film audience, and there were fewer Metroculturals and Experience Seekers. Commuterland Culturebuffs, as the name suggests, are much more likely to live outside urban areas, consistent with the location of many of the screenings.

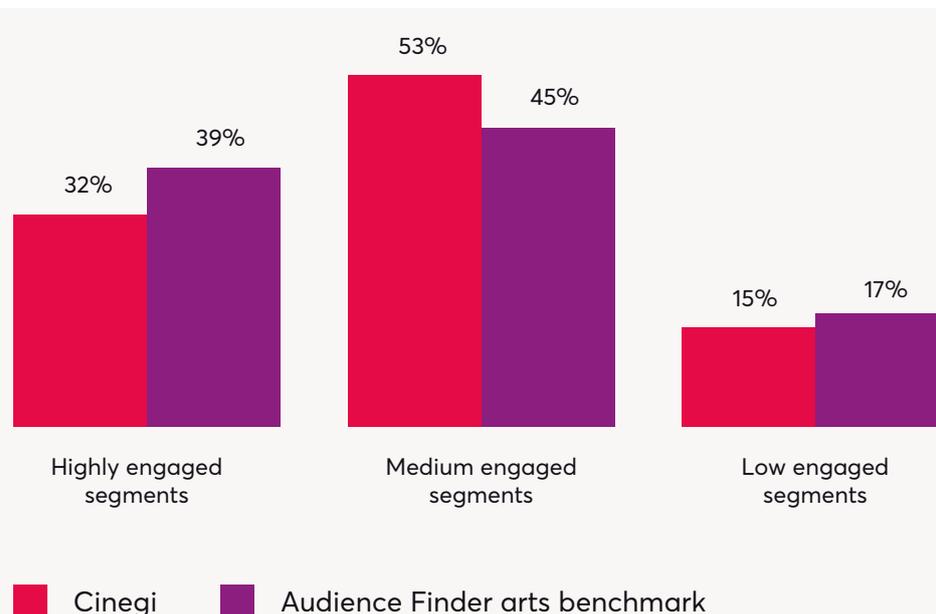
More than half (53 per cent) of the audience were from the medium engaged segments, higher than the 41 per cent population figure and the 45 per cent of the arts engager benchmark, which suggests the screenings were successful at reaching those in these segments. Of the medium engaged segments, Home and Heritage were particularly overrepresented compared to the Audience Finder benchmark (22 per cent of Cinegi Arts&Film but just 9 per cent of Audience Finder). Home and Heritage are a mature group, that have cultural interests but they don't tend to be high engagers due to their less accessible locations. This segment in particular are very consistent with the profile observed in the survey data (section 5.5).

Fifteen per cent of the audience was from low engaged segments, compared with 35 per cent in the population and 18 per cent of the arts engager benchmark. Although this indicates that Cinegi Arts&Film screenings did not particularly appeal to lower engaged audiences compared to national averages, it is interesting to note that the screenings did attract a higher proportion of two particular segments; Up our Street and Heydays. Up Our Street tend to show an interest in popular arts and entertainment and do not have high disposable incomes to attend, hence their low engagement rank. Heydays are older and less engaged than the other segments, in many cases with arts attendance less important than it once was due to health and accessibility issues.

The other two low engaged segments, Facebook Families and Kaleidoscope Creativity are not typically found in great proportions in the catchments where most screenings took place.

Overall, at a national comparison level, the Cinegi Arts&Film screenings were not attended by larger proportions of low engaged audiences than arts attender benchmarks, but some interesting patterns emerged when considering individual segments, particularly Home and Heritage.

Figure 16: Cinegi Arts&Film attender Audience Spectrum profile compared to Audience Finder benchmarks for 'high', 'medium' and 'low' engaged segments



6

## Distributing the content of Cinegi Arts&Film - engaging venues and promoters

Having reviewed the audience numbers, demographics, experience and the geographic reach of screenings, this section analyses how the Cinegi Arts&Film content was distributed to audiences. The audience screenings throughout the project were driven by the demand from promoters - who booked content from the platform and then distributed it.

We consider how promoters were recruited into the programme from marketing and outreach through to sign-ups to the platform and conversion to bookings. We also explore survey findings on the barriers to promoters using the platform for the first time.

### Summary

In total, 69 promoters or venues booked at least one Cinegi Arts&Film screening, resulting in 117 screenings over the course of the project. Research with promoters who knew about Cinegi Arts&Film but had not yet booked indicated that the two main barriers were the long lead times that they work to when planning and booking and also a hesitation around utilising new technology, or adapting to a specific operating system on their computer to run the programme (Microsoft Windows 10).

The majority of promoters heard about the service through word-of-mouth, or specific networks such as Cinema For All, suggesting that direct connections with either networks of venues or individual venues were more effective than social media or other indirect channels. Engaging networks did bring an upturn in bookings, but this was late in the project timeline so had minimal impact on the final screening numbers.

Encouragingly, a significant number (24 per cent) of promoters/venues had never put on a screening before - suggesting that Cinegi was inspiring some new groups to take part in this activity from the promotion side.

While participating promoters were still most commonly community organisations or Film Society (Cinema For All) members, the project engaged a significant proportion (36 per cent) of venues outside of this segment. This points at potential for future growth in the range and type of organisation and individual prepared to put on a screening.

## 6.1 Building the profile of Cinegi Arts&Film with promoters

### 6.1.1 Awareness and engaging with promoters

To build the profile of the Cinegi Arts&Film platform with promoters, the team employed various strategies, both direct to individual organisations as well as relationship building with networks and gatekeepers. Specific support was also provided to the focus areas in the South West and North East (examined in more detail in Section 5.6). Key engagement and support strategies are outlined in appendix 9.3. The goal of the marketing activity was to encourage promoters to sign up to the platform and ultimately book screenings.

When promoters signed up to the platform they were asked how they had heard of Cinegi Arts&Film, enabling insight into the success of the different engagement strategies. Direct contact from Cinegi Arts&Film was the most frequently mentioned category, with 25 per cent finding out in this way. This shows that for the lists that the team held, direct contact was a successful approach. Two networks also featured prominently, Cinema For All (21 per cent) and BFI/Film Audience Network (14 per cent). A further 15 per cent heard by word-of-mouth. Together these four categories accounted for 75 per cent of responses.

The Cinema for All and Film Audience Network (FAN) referrals came late in the project (in 2018), as there had been some prior disruption with the FAN's due to the end of their funding cycle. Earlier engagement from these networks, which were productive at the end of the project, might have boosted sign-ups. Social media only drove 8 per cent of initial knowledge about the service, suggesting that in this field networks, contacts and industry knowledge are the main ways to raise awareness.

**Table 10: How they first heard of Cinegi Arts&Film**

(Note: respondents could only select one option from the list.)

How did you hear about Cinegi Arts&Film?	%
Direct contact by Cinegi	25%
Cinema For All	21%
Word-of-mouth	15%
BFI/Film Audience Network	14%
Social media	8%
Arts Council England	6%
Web search	4%
Hub lead organisation (HLO)	2%
Independent Cinema Office	2%
National media	1%
Creative People and Places project	1%
Local media	0%
Other	1%

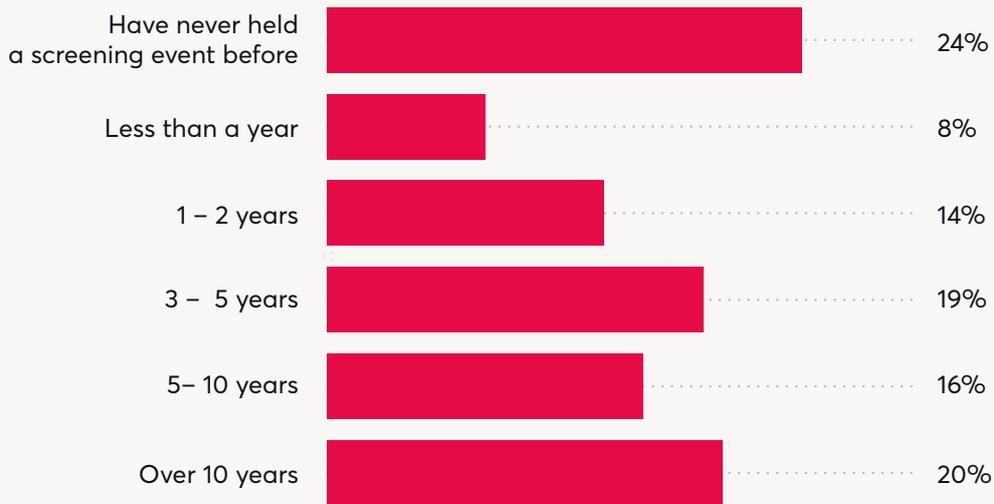
### 6.1.2 The profile of promoters who signed up to the Cinegi Arts&Film platform

The promotion of Cinegi Arts&Film resulted in 254 sign-ups to the platform – against original estimates of 285 promoters involved in the project. Sign-ups were from networks, organisations or individuals interested in finding out more about the platform and the process for booking but not all of them went on to book a screening during the 17 months of the project. These figures showed, however, that Cinegi were successful in recruiting promoters to sign up to the platform.

Of the 254 sign-ups, 37 per cent were in target areas of the North East or South West and 155 (61 per cent) were in the rest of the UK (a further small percentage were from outside the UK).

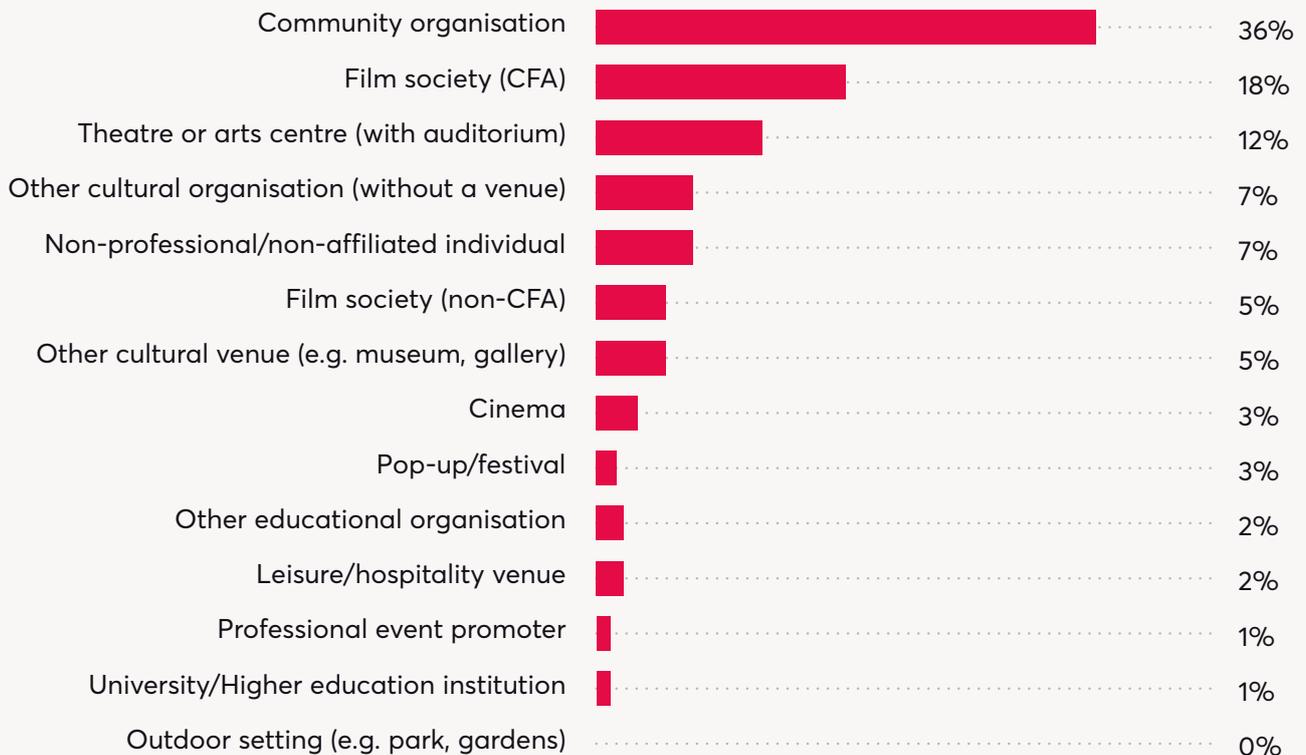
Analysis of the platform data showed that there was a high level of interest in Cinegi Arts&Film from new promoters. Around one in four (24 per cent) had never held a screening event and a further 21 per cent had been screening for two years or less.

Figure 17: How long they had been screening events



Of those that signed up to the platform, more than a third were Community organisations. A further 18 per cent were Cinema For All Film Societies and 12 per cent were Theatres or Arts Centres (with an auditorium). Together these three types of organisation made up almost two-thirds of sign-ups, leaving a third for a wide range of further organisation types (see the following graph).

Figure 18: Organisation type breakdown for sign-ups to the platform



Those who signed up to the platform also included network or umbrella organisations that represented a group of venues. In total, there were 17 of these types of organisations on the final sign-up list. This meant that the potential venue reach of Cinegi Arts&Film through platform sign-ups was actually 1,107 venues, more than four times larger than the 254 'accounts' that were created. This shows the potential that can be unlocked if these types of organisations can be encouraged to endorse and promote the service to their members.

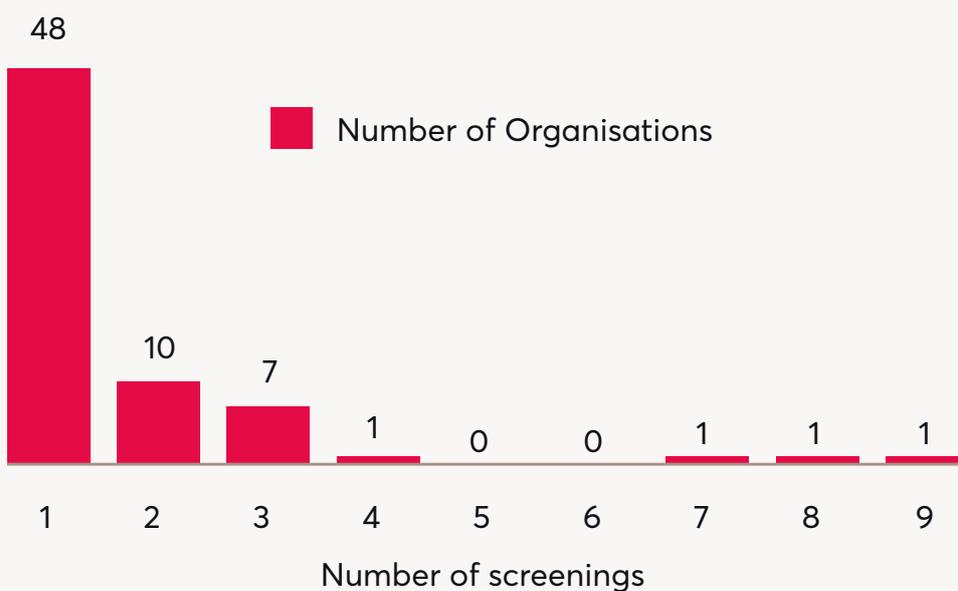
The rate of new sign-ups per month stayed relatively constant through the 17 months project period and did not drop towards the end. This indicates that there was still building interest and potential in the marketplace that Cinegi Arts&Film could have further tapped into.

## 6.2 Profile of promoters who booked screenings

### 6.2.1 Conversion rate and types of organisations

Of the 254 organisations who signed up to the platform, 69 went on to book a screening – a conversion rate of 27 per cent. Of the 69 who booked, 48 screened one Cinegi Arts&Film event and 21 screened more than one event over the project lifetime (shown on the graph below).

Figure 19: Number of orgs by number of Cinegi Arts&Film events they presented



When planning the project, the Cinegi Arts&Film team built projections of conversion rates from sign up to initial screening and then repeat screenings. This was used to set the overall screening targets. Although numbers of sign-ups to the platform were close to projections, the final number of screenings fell short.

One reason for this shortfall was that the projections were based on a 90-day average lead time from sign up to first booking. The screenings data showed that during the programme this interval was much longer, an average of 154 days. With about a third of sign-ups happening in the last six months of the project period, there is likely to be a good proportion who intended to book but could not within their planning cycles.

A further reason for the shortfall was a lower than anticipated rate of repeat bookings by promoters. When planning the project, it was projected that all venues would on average present a screening every two months. Data from the project showed that, in fact, for those that did screen more than once, the average interval was 46 days, or around 1.5 months. However, across the project, only 31 per cent of organisations which engaged in screenings did so more than once within the project period. This was a key reason for the overall shortfall in frequency of screenings when compared to predictions.

The flow from sign-ups to booking to numbers of bookings is shown broken down by organisation type in the following table (Table 11). The subsequent chart (Figure 20) visualises the percentage shares. Community organisations made up a large proportion of the organisations who booked for Cinegi Arts&Film and were also most likely to be converted from initial interest to booking and then to booking multiple times. Cinegi Arts&Film also had some success with Cinema For All Film Societies, these made up 19 per cent of the organisations who booked. Theatres or Arts Centres (with auditorium) and other cultural organisations (without a venue) accounted for a further 17 per cent of organisations. These four organisation types made up 81 per cent of the organisations who booked. There were also screenings in unusual venues, for example in Bodmin and Wenford Railway station.

Figure 20: Share of sign-ups, bookings and screenings by organisation type

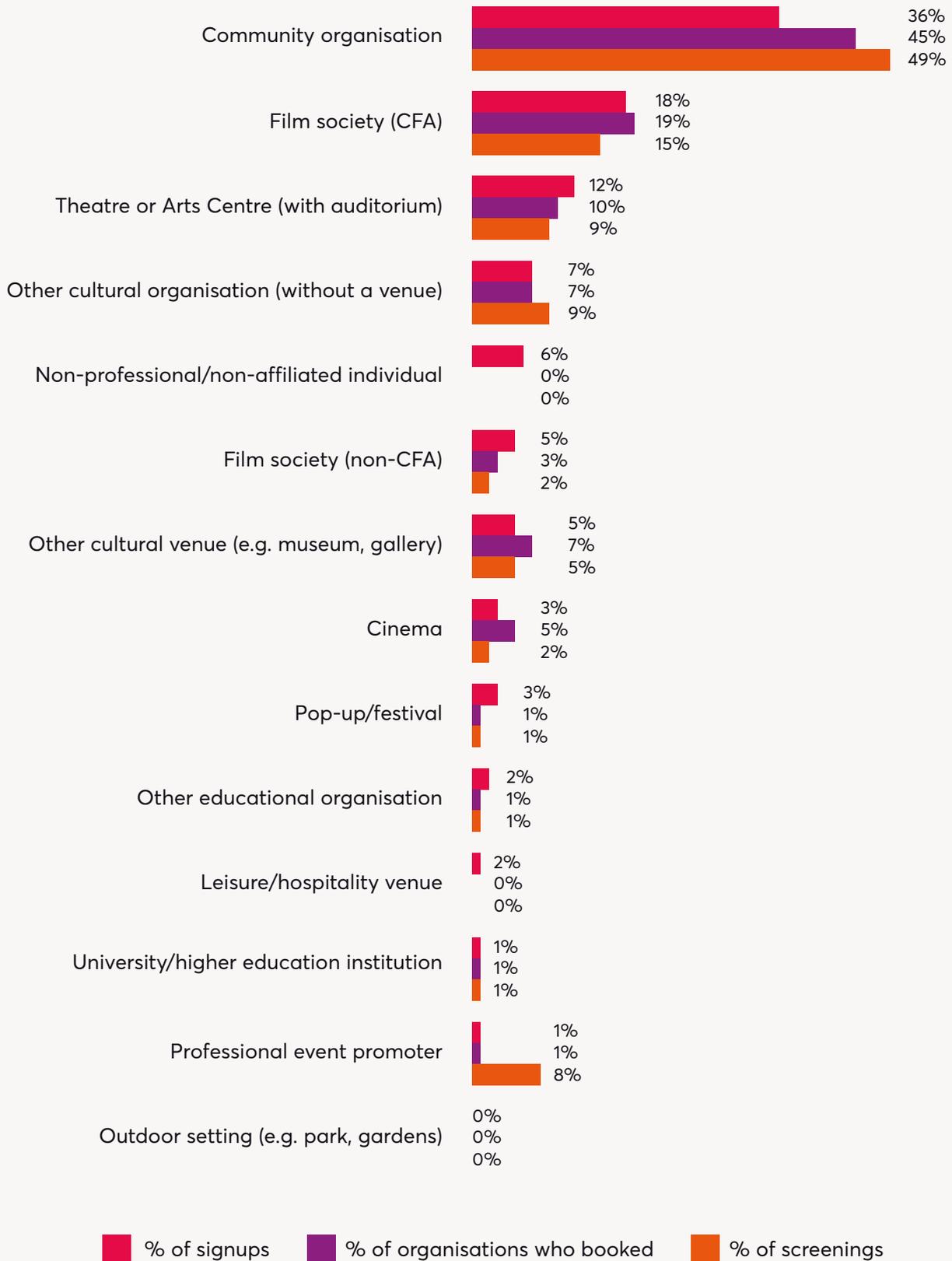


Table 11: Organisation type breakdown by sign-ups, bookers and screenings

Type of organisation	Count of sign-ups	% of sign-ups	Count of orgs who booked	% of orgs who booked	Count of screenings	% of screenings
Community organisation	95	36%	31	45%	57	49%
Film Society (CFA)	47	18%	13	19%	17	15%
Theatre or Arts Centre (with auditorium)	32	12%	7	10%	11	9%
Other cultural organisation (without a venue)	19	7%	5	7%	10	9%
Other cultural venue (e.g. museum, gallery etc.)	12	5%	5	7%	6	5%
Film Society (non-CFA)	13	5%	2	3%	2	2%
Cinema*	8	3%	2	3%	2	2%
Professional event promoter	3	1%	1	1%	9	8%
University/Higher Education Institution	3	1%	1	1%	1	1%
Other educational organisation	6	2%	1	1%	1	1%
Pop-up/festival	7	3%	1	1%	1	1%
Outdoor setting (e.g. park, gardens)	1	0%	0	0%	0	0%
Leisure/hospitality venue	4	2%	0	0%	0	0%
Non-professional/not-affiliated individual	16	6%	0	0%	0	0%
<b>Totals</b>	<b>266</b>	<b>100%</b>	<b>69</b>	<b>100%</b>	<b>117</b>	<b>100%</b>

\* Note that those self-defined as 'cinema' are not 'theatrical cinema venues' whose sole purpose is the commercial exhibition of films. Cinegi Arts&Film did not have a license to grant those cinemas access to the content. Instead these are usually community organisations that have a screening one day per week, or for non-commercial purposes.

## 6.2.2 Attendance by organisation type

The following table shows the percentage breakdown of screenings and average attendance at events for the different types of organisation (note screening numbers are quite low for the categories in the bottom half of the table).

Highest attendances were observed for 'cinemas'\* (see note), although this was only based on a small number of screenings. Film Societies (CFA) were interesting because they had attendances that were much higher than the average of 34 and they made up a significant proportion of screenings. Community organisations accounted for the largest number of screenings and were only slightly higher than average in attendance size.

Table 12: Percentage of screenings and average attendance by organisation type

Type of organisation	% of screenings	Average tickets
Community organisation	49%	35
Film Society (CFA)	15%	51
Theatre or Arts Centre (with auditorium)	9%	33
Other cultural organisation (without a venue)	9%	17
Professional event promoter	8%	21
Other cultural venue (e.g. museum, gallery etc.)	5%	16
Cinema*	2%	80
Film Society (non-CFA)	2%	27
Other educational organisation	1%	52
Pop-up/festival	1%	14
University/Higher Education Institution	1%	24

\* Note that those that self-defined as 'cinema' are not 'theatrical cinema venues' whose sole purpose is the commercial exhibition of films. Cinegi Arts&Film did not have a license to grant those organisations cinemas. Instead these are a mix of community organisations that have a screening one day per week, or for non-commercial purposes.

## 6.3 Performance against projections

To test the impact of Cinegi Arts&Film screenings on audience engagement, it was necessary to gather robust and representative data from the screenings. At the outset of the project, the research methodology was built based on the anticipated scale of programme in terms of screening numbers.

As the project progressed, and in response to the lower than anticipated levels of take up of the service by promoters, it was necessary to look again at the projections, both for screenings and for the resulting research samples. The following table shows the projections for screening numbers and audience survey responses, a key metric in terms of delivering robust action research. As the project progressed, the screening numbers were re-forecast in response to low take-up, and in November 2017 the figure was reduced to 953.

The final figures for the project show that while the screenings fell well below November 2017 projections, the minimum target number of surveys was exceeded, providing a robust base for analysis. This was achieved by adapting the data collection approach and this in turn more than doubled the yield of surveys per screening from the projected 1.5 to 3.7. In total, 11 per cent of the total audience was surveyed across the programme.

### Assumptions for initial screening numbers

A number of assumptions were made at the outset of the project which informed the projections for screening numbers. While these are considered in more detail in the Cinegi Arts&Film project report, several factors led to the final screening numbers falling short of these projections. There were assumptions made about how quickly sign-ups and bookings could be converted into screenings, which would subsequently lead to future bookings. However, as seen elsewhere in the report, there were long lead-in times for screenings. There were also assumptions made about the types of equipment held by, for example, libraries that might be interested in screenings, which proved to be mistaken. These barriers were far greater than anticipated. Finally, projections were made about the support and promotion from networks such as Film Audience Networks and Cinema For All. While there was support from all these sources, it had been anticipated that this might be greater from the outset of the project, leading to more momentum at the start.

Table 13: Screening numbers and survey returns - Projections and final figures

Stage of project	Screening number	Avg survey returns per screening*	Total survey returns
Projection - Project outset	1,650	1.5*	2,475
Projection - Sep 2017	953	1.5*	1,430
Final figures observed - June 2018	117	3.7	436

\* This multiplier is based on baseline calculations made during project planning and takes into account, percentage screenings that collect data, estimated audience size and response rates

## 6.4 Understanding promoter engagement - feedback from those that held a screening

At various points during the programme, feedback was gathered from promoters on their experiences of screening Cinegi Arts&Film titles. A key source of information was the post event platform returns, and comments requests were comprehensively completed by promoters. Feedback has been divided into positive comments and suggested improvements.

### Promoter feedback

Promoter feedback focused on the positive atmosphere and audience experience, the success of the often new content and the overall quality of the event. Promoters felt that the audience responded well to filmed performance and many were looking forward to screening more events and building their audiences. Some promoter comments on audience responses were:

'The audience were keen to see further Cinegi [Arts&Film] productions, especially those performances not easily accessible elsewhere in our rural area.'

"The audience was up for a change and thought it was utterly brilliant. Many members of the audience said afterwards that 'they would have liked to stand up and cheer'."

Meanwhile some promoters made positive comments about the technology, allaying some early reservations that this might prove a difficult part of staging a screening:

'I was extremely relieved that the quality of the recording was excellent and ran very smoothly. Having done our first Cinegi [Arts&Film] screening we may well look at doing a further screening.'

'The evening was wonderful and every one of us enjoyed the event. The quality of the sound and vision in our village hall was excellent. We look forward to more ballet in your catalogue.'

Many of the promoters that staged screenings were looking ahead to what they could do next:

'It was the first year we had shown a non-mainstream film as part of the Wanstead Fringe and gave us an extra dimension to the whole event. Though small in audience numbers it was a very important part of the festival. I would definitely try to do it again in future years.'

'Would hope that Cinegi [Arts&Film] does return as we would like to show more in future.'

'In between our regular programming we would want to do an event with Cinegi [Arts&Film] twice a year.'

There were also suggested improvements, which tended to mention technical glitches, providing more promotion support and giving context/explainer information to help introduce new content to people.

'If we had some more promo content for social media we might be able to talk more about it. As it is, our busy marketing team works with what we have - but having some social media assets (e.g. press release with reviews, clips of show) might help us.'

'Availability of official posters could have helped.'

It should be noted that Cinegi Arts&Film did provide marketing assets and promotional material to help arts organisations and promoters sell their events.

One promoter also mentioned that the length of some performing arts content could be too long for the comfort of a community centre, and suggested more variation.

'We didn't choose some content due to its length being around three hours, too long to be in a cold town hall on not the best chairs. More variation in length of content.'

## 6.5 Understanding promoter engagement - feedback from those that had not held a screening

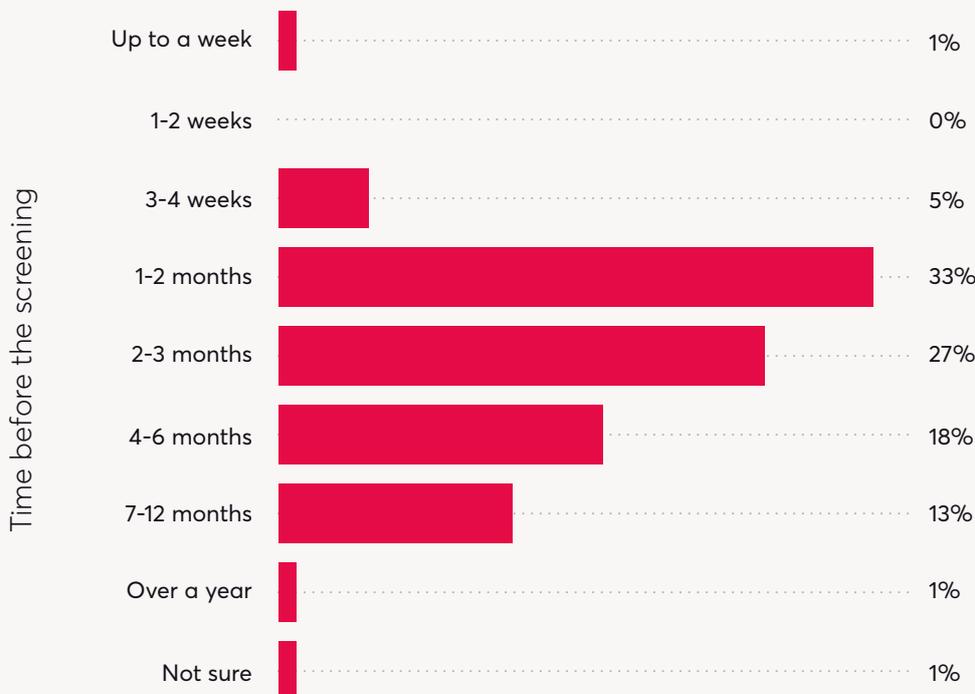
To understand why targets for promoter take-up and screening numbers were not met, research was conducted with promoters who had not yet booked a screening. It explored how community cinema organisations and film clubs usually approach their bookings, and some of the barriers to staging screenings with Cinegi Arts&Film.

The research drew on a short survey of organisations that had not yet staged a screening, along with a series of in-depth interviews with some of the respondents. The specific focus areas in the South West and North East are considered separately.

### Lead-in time for promoters to consider using the platform

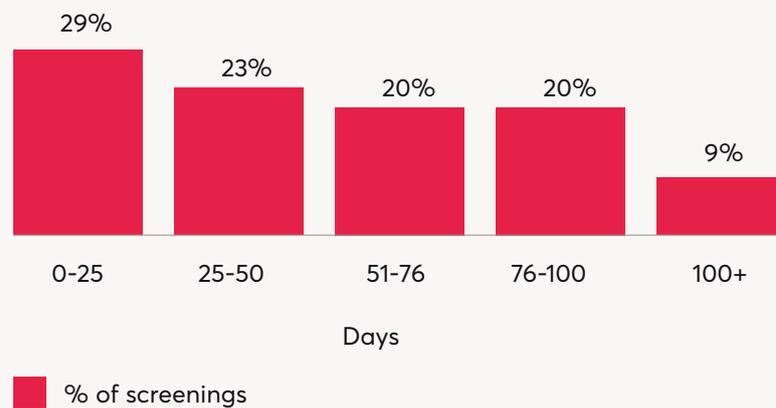
When asked about their conventional lead-in times for booking content, 59 per cent of promoters indicated that they needed at least two months lead-in time before an event. This trend was exacerbated by the fact that many promoters indicated that they booked in seasons or 'blocks' of content. If a window was missed and a season was already booked, some promoters would not be considering what to book next for a lengthy period.

Figure 21: Amount of time in advance promoters typically book screening content



When we examine what happened on the platform we find that there was indeed a lag between bookings on the Cinegi Arts&Film platform and screenings taking place. The average time between booking and screening was 55 days, with almost a third (29 per cent) of purchases taking 76 days or over to go from booking to screening. The distribution is outlined in the chart below.

Figure 22: Days between booking and screening on the Cinegi Arts&Film platform\*



\* Note this is based on returns data on the platform and may contain some re-bookings or outliers where the date is not a true reflection of when an original booking was made, or screening held

## Barriers to using the Cinegi platform

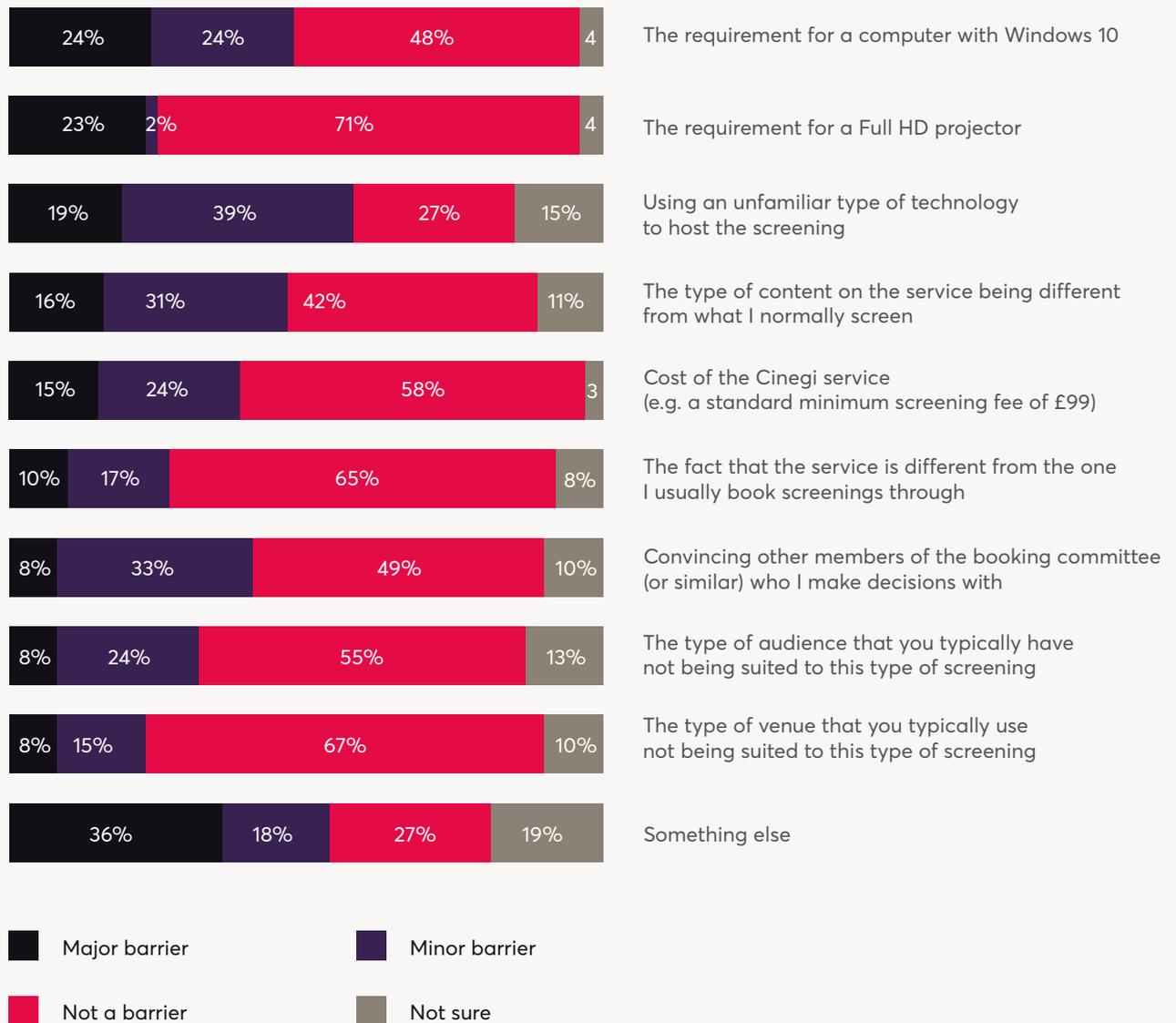
Promoters were asked about a series of possible barriers to take-up and usage of the platform. The most prominent barriers were technological issues, rather than issues around content or perceived audience behaviour.

### Equipment and technology barriers

Within the survey, 'Using an unfamiliar type of technology to host the screening' and 'the requirement for a computer with Windows 10' were both cited as major barriers to take-up. Only around a quarter of respondents said that using an unfamiliar technology was not a barrier. Another technical aspect – 'the requirement for a Full HD projector' – while a less widespread problem, was a major barrier for almost a quarter of respondents.

As an example of these issues the Libraries Unlimited project in Devon wanted to deliver screenings of RSC titles to their network of 50 libraries. However, on surveying their members they found that their entire PC network used Windows 7 and none had an HD projector, delaying their ability to screen programme content.

Figure 23: Perceived barriers to the using the Cinegi Arts&Film service



The qualitative interviews shed more light on the nuance of the situation. A large number of village hall promoters use providers such as Moviola or the Rural Cinema Network (RCN) to provide the equipment, films and often a presenter. This all-in-one package means that actually the equipment concerns were effectively outsourced, but if content was not available through these routes (Moviola, RCN or others) then individual promoters might struggle to take up the content provided by Cinegi Arts&Film.

A number of respondents did not use a service like Moviola, but instead sourced films themselves – these respondents tended to be more tech-savvy and

unconcerned about these barriers (or already had the equipment to deal with them). However, one of these interviewees noted that among the wider community of promoters the general knowledge base was very low around some of the technical elements of the Cinegi service, for example, Windows 10 and other technology requirements.

There was some unease across a range of promoters around using new technology. Several mentioned how they (and other promoters they knew) would be nervous about using the platform without support – even if instructions were very clear. Several seemed unaware of the fact that content could be previewed to ensure content played correctly at the event.

This issue was confirmed by interviews with promoters that had booked screenings. Where there was dissatisfaction with the service, it was most often around technical issues and glitches (such as the player crashing) while attempting to stage the screening.

In addition, issues were caused by Microsoft introducing the 'Fall Creators' update to Windows 10 in October 2017 which prevented machines that had updated to this version playing copy-protected video (affecting Cinegi, Google and many other services). Effectively then, a large segment of Windows 10 users were unable to use the player to screen to their audiences. By the spring of 2018 the Cinegi Arts&Film team reported that this had impacted significantly on bookings - in the period December 2017 to February 2018 there were 56 bookings, while between March 2018 and May 2018 there were 14 bookings, a fall of 42. While it is difficult to project the exact uptake that might have been achieved without this technical problem, it seems clear that this had at least some impact on overall booking rates and subsequent screening numbers.

### **Promoter views of audiences' likely demand for content - possible barriers**

The survey of promoters who had not booked indicated that 'the type of audiences that they typically have are not suited to this kind of content' was not a barrier to take-up of the service. Similarly, the 'type of venue' not being suitable to this type of screening was also not seen as a barrier. However, 'convincing other members of the booking committee' was seen by 41 per cent of respondents as either a major or minor barrier, suggesting a potential blockage at this stage.

The open comment areas in the survey gave some indication of audience experience of filmed arts and cultural content. Fifty per cent of the qualitative responses indicated that their audience had some experience of NT Live, content from the Royal Opera House or other well-known filmed theatre, opera and dance content.

Some mentioned that this type of content is available in mainstream cinemas close by, although it is worth noting that the Cinegi Arts&Film service can extend the window of time in which titles are available beyond often very limited runs in traditional cinemas:

'Events from the ROH and RSC are shown in cinemas seven to ten miles away from our location.'

'(The audience is) aware of similar content at local cinemas (e.g. NT Live).'

In a few of the comments the promoters expressed some hesitation around both the content available and the mechanism of using the Cinegi Arts&Film platform and player to showcase the content:

'We are not convinced that there is any benefit from changing our current method of operation which is popular with our audiences. It is possible that we could use the service on an ad hoc basis if there was a particular item that we wanted to show. We already have links with BFI, and suppliers for NT Live etc., but are mindful that we cannot show many more than one film/event per week.'

'Whenever I look at the website the content seems thin.'

In general, these views made up a very small minority of comments in relation to the content and audiences potential receptiveness to it. The barriers related to technology implementation were consistently more prevalent.

## 6.6 Area focus - the supply chain in Cornwall and the South West and the North East

The Cinegi Arts&Film project had two geographic areas of 'high intervention'. In these areas, high levels of marketing and outreach resources were deployed to drive the number of screenings, with the specific intention of bringing cultural activity to either areas of low engagement or low access to culture (in some instances both).

The experience in each of these areas of high intervention was very different. In the North East, despite concerted efforts to drive uptake there were only nine bookings over the course of the project. In the South West however, engagement was far higher and 40 per cent of the total screenings happened in this area. To understand more about why the project was unable to gain traction in the North East, additional interviews were conducted with stakeholders in the region to share insight on the challenges and opportunities around cultural activity and the Cinegi Arts&Film project specifically.

### 6.6.1 The South West - Cornwall

Cornwall and the South West was chosen at the outset of the project as a geographically dispersed area of largely rural communities limited cultural infrastructure, with no overall connecting infrastructure. Cornwall has a high level of interest in cultural activity, but a lack of access, particularly to work from the larger arts organisations. It also has a large elderly population who don't tend to travel beyond their own town or village. Cinegi Arts&Film planned to work with existing networks, e.g. Carn To Cove (Cornwall's performing arts scheme for rural audiences) and Moviola to encourage venues and promoters to use the platform.

The first Cinegi Arts&film screening occurred in Cornwall, in a small village hall in Gwinear – a venue that went on to screen again. Cinegi Arts&Film held a second launch event at AMATA in Penryn, inviting local promoters and networks to see how the platform worked and introduce them to the available Arts&Film catalogue.

In April and September 2017 Cinegi presented at Carn To Cove hosted 'menu parties' introducing Cinegi Arts&Film directly to promoters in both Carn To Cove's network, C-Film and also in Devon to Villages in Action. In July 2017 Cinegi attended a series of Moviola hosted community cinema networking events in Dorset, Wiltshire, Sussex and Wales, again presenting an overview of the Cinegi Arts&film service, introducing the catalogue and networking with promoters. The result of these events was two-fold. They established a solid connection with these networks, which book and promote multiple venues, significantly extending the potential reach from 'network sign-ups'. Secondly, where promoters were members of respective networks primarily for programming support, but had their own equipment and technical capability to hold screening events, some signed up to Cinegi independently and booked screenings directly.

Additionally, meetings were held with and support offered to Cornwall WI, Libraries Unlimited, Cornwall Museums Partnership. Libraries Unlimited in partnership with the RSC were eager to present RSC content across their whole network of library venues, however, their ability to fulfil this ambition was restricted by technical capabilities. Cinegi suggested and then worked with Libraries Unlimited to audit their AV equipment across their 50 libraries which revealed a significant need to invest in upgrading (not a single HD projector in the network of libraries and the network running on Windows 7 which was not compatible with the platform).

The higher density of take-up from networks and individual venues across Cornwall and the South West compared to the rest of the UK reflects the focus on this area connecting into and working with existing networks, allied to the high level of marketing and support resources deployed.

Cinegi Arts&Film in Cornwall and the South West stimulated new screenings happening for the first time in a range of venues new to public screenings, and also broadened the programming offer of established film clubs. Highlights included the establishment of new film club 'Klub Fyln Zennor' in the far West of Cornwall, 'Bodmin in Motion' a new annual arts festival screening in heritage and community venues around Bodmin, and the RSC's first ever screening in a library at Barnstable Library in Devon.

### **6.6.2 The North East - Sunderland and East Durham**

Sunderland and East Durham was selected as an area of relatively limited cultural infrastructure and low levels of engagement with cultural activities. Cinegi's initial proposal was to work with two Creative People and Places (CPP) projects - East Durham Creates and The Cultural Spring (Sunderland) to attempt to encourage venues and promoters to use the platform.

Cinegi Arts&Film launched the project at an event in Blackhall in East Durham, followed by a workshop with local promoters in the area to promote the opportunity. Subsequent to this, screening equipment was brokered by the Cinegi Arts&Film team and sourced through Cinema For All and placed within East Durham Trust (one of the consortia members of East Durham Creates), allowing local promoters to loan the equipment to stage screenings. Despite this positive development, interviews with Cinegi Arts&Film team members suggests momentum was lost in terms of sign-ups through the early lack of screening equipment.

In May 2017, a series of workshops began at Sunderland Friends Meeting House, New Life Christian Church in Morpeth, Seaham Town Hall with The Cultural Spring and the Community House in Peterlee with East Durham Creates in September 2017 to encourage promoters in that area to take up the service. Although there was interest from the venues and promoters at the session, no bookings were made from the workshop. The Cinegi Arts&Film team continued to engage with the two CPPs until September 2017, at which point they diverted resources into areas where there was more traction for the project, to drive up the number of screenings.

To address concerns that affordability might be a barrier in the North East, a few free screenings were permitted and the minimum ticket price was waived for other screenings. This did not lead to further bookings or ticket sales. There is therefore limited evidence that price was a barrier to audience attendance in this instance.

## **Barriers to take-up in the North East**

Interviews were conducted with a range of stakeholders, including staff from the CPP projects, venues and the Cinegi Arts&Film team - along with stakeholders at Arts Council England and East Durham Trust. These interviews touched on barriers to take-up in the local area. Overall, there was no one single blockage stopping promoters from using the service more widely, but rather the cumulative effect of multiple barriers.

## **Lack of alignment with CPP workstreams**

A range of stakeholders agreed that the CPPs' missions and delivery plans dovetailed effectively with Cinegi Arts&Film's purpose to open up access to new venues with arts content that audiences had not yet seen. This alignment was felt by all parties at both strategic (e.g. Arts Council England) and operational levels. However, the practical barrier was that the CPPs were already delivering on an engagement plan with their own targets related to funding during this period.<sup>31</sup> While the Cinegi Arts&Film project felt aligned, and a good opportunity to embed and expand a film strand to their work, the capacity to assign specific resource to this activity was not available.

Allied to this point, CPP staff had less experience of community cinema and screenings than with participatory arts activity. While in the South West of England there was a foundation of people with skills, networks and expertise in screening

events, the North East - and particularly the target areas - did not have this foundation. Finally, the work of the CPPs is based around involving the community in the decision-making and creation of culture. While there are ways in which Cinegi Arts&Film could have been used to engage the community from the outset (for example, co-curation of events and involving communities in staging the events themselves) these were not presented at the outset, with the link to participatory arts and cultural work not strongly promoted at the start of the project.

## **Content available on the platform**

Some non-users of the Cinegi Arts&Film who were interviewed felt that the content being promoted on the platform was at times difficult to offer to audiences. Multiple interviewees felt that if the content available had been more mainstream, more relevant to local audiences or more family-friendly then promoters and venues would have been more minded to book screenings.

One interviewee cited the fact that they had convened two other screenings (outside the project) with more family-focused content over the summer holidays for children. They indicated that they had linked this to a summer barbeque, making the film a part of an overall event. This type of event could be seen as a catalyst or starting point to getting audiences warmed up to the idea of film clubs and screenings of arts and cultural content.

## **Equipment**

The technical equipment was not seen as a barrier to undertaking screenings for the majority of the project's duration, as this had been resolved in terms of equipment loans through the CPPs. Indeed, East Durham Creates attempted to incentivise promoters by offering to subsidise the hire of the projection and audio equipment, with no success. While not an ongoing barrier though, the lack of infrastructure available at the start of 2017 was an issue in the early stage of the project.

## **Communication with venues and promoters**

The issue of introducing a completely new service into an area in which there was already difficulty in engaging audiences was a barrier to promoters picking up on the opportunity. One interviewee cited the fact that if they could have been the central point of contact, as a trusted party, for the screenings there might have been more community outreach.

Allied to this, there was little expertise within the venues themselves, which were often multi-functional spaces offering a range of other services. Whereas in the South West there were people with a background and knowledge of putting on screenings within the venues themselves, this did not exist in these parts of the North East.

## **Possible actions for future uptake in these areas**

Both the Cinegi Arts&Film team and wider stakeholders put forward a number of ideas in the interviews at the end of the project to increase the uptake of both Cinegi Arts&Film as a service, but also the wider activity of screening films and other content in non-traditional venues. These were not implemented throughout the project, but could be used in future work. Suggestions included:

- Expanding the content of the platform to include more mainstream and family-friendly content. This would then act as a 'gateway' into some of the more difficult or involved content. It would also mitigate the risk for promoters of putting on something initially unknown.
- Create a film strand of the Creative People and Places projects. This would then bring dedicated community cinema expertise into those projects, helping to drive outreach in those areas. This expertise could be combined with the community involvement that lies at the heart of the CPP projects. Stakeholders involved with East Durham Creates felt strongly that while there had not been a high number of screenings, the learning from the project would be taken forward to stage more diverse screenings in future in the area.
- Create a single point of contact in each area to coordinate all aspects of the film screenings, including the technology, equipment and other aspects such as marketing support. In areas that have low levels of take-up, providing a trusted local intermediary could encourage promoters and venues to ultimately stage more screenings and take more risks in terms of content.
- Linked to this, establishing Cinegi Arts&Film as a community-based project, with a longer time frame to support community engagement, audience awareness and appetite for the programme was seen to be a suitable approach to facilitate this model of cultural provision.

There was a general sense that the Cinegi Arts&Film concept could lead to screenings in future in the area, but that there would have to be more support and more relevant content to make this a reality. As identified in the geographic analysis, the North East is an area with both low levels of cultural infrastructure and cultural participation making it a particularly challenging area to reach new audiences. Given the additional challenges inherent with launching any new technology an implication for future work may be that in such circumstances the focus, initially, should be on deploying and scaling the technology in environments where appropriate infrastructure already exists and it is easier to attract a ready audience.

7

# The supply of content to Cinegi Arts&Film

## Summary

Arts and cultural organisations are increasingly focusing on the digital capture and distribution of their content. This was a vital component of the Cinegi Arts&Film project, as it relied on a variety of rights-holders being able to release content to the platform. Organisations get involved with capture and distribution for a range of reasons, primarily around audience engagement, education, promotional activity, artistic innovation and, in certain instances, driving commercial revenue.

Despite optimism from organisations about digitising their performances, there remain a number of barriers to adoption. Most significantly, funding is still difficult to source - in particular for smaller organisations who are still reliant on one-off project funding. Distribution models are also a major barrier. Apart from larger organisations distributing through cinemas there is currently a fragmented and uncertain market for reaching audiences - particularly around commercial models. Despite this though, arts and cultural organisations are generally positive about the future potential of digital capture and screening.

The Cinegi Arts&Film project required the availability of a supply of high quality content to the platform that would prove exciting for promoters to showcase. However, despite the proven success of productions by national brands such as NT Live, the Royal Opera House and the RSC for screenings in cinemas, the majority of captured arts and cultural content by smaller companies has yet to attract a significant audience. Despite this, it seems likely that the amount of filmed content available from arts and cultural organisations will increase in future. Less certain though, are the distribution pathways that will be available for this content and the likely revenue streams from it.

The Cinegi Arts&Film team conducted research into the supply-side provision of content that could be showcased through Cinegi, but equally through other digital distribution routes. It drew on a mix of desk-based research and 11 semi-structured interviews with arts and cultural organisations of all sizes that have previously captured and distributed filmed content.

The findings show that the larger organisations currently working in this space now have long-term plans for broadcasting their works, usually involving cinema networks to reach bigger audiences. However, the long-term plans for smaller organisations are much less certain, and the trajectory is not definitively moving towards more digital content. As one smaller organisation pointed out, 'until we can see how it can be monetised, it's hard to prioritise digital work.' In this sense it is very likely that small- or medium-sized organisations will seek opportunities as and when they emerge, rather than holding longer-term plans for capture and distribution.

Despite this, there was general positivity expressed through the interviews about the future of digital content in this space, with a number of organisations emphasising that they did have specific plans for their content pipeline. Along with this, a number were also looking to innovate with their marketing, communications and outreach for the captured content.

Despite this positivity, the biggest issue affecting particularly smaller organisations is the lack of a distribution channel that provides any certainty around achieving audiences at scale. Allied to this, smaller organisations continue to struggle to find a business model that would allow them to sustainably capture and distribute content. As the market matures this may be resolved through new or existing platforms, distribution networks and other means. However, currently finding the link between the product and the audience remains difficult.



## Conclusion

The Cinegi Arts&Film project attempted to bring filmed arts and cultural content to non-traditional venues outside of conventional cinemas. The service aimed to harness the increased supply of quality filmed performance from arts organisations (particularly theatre, ballet and opera) alongside archive footage to provide high quality artistic experiences to those with often limited access and opportunities for engagement. It sought to capitalise on the strong community cinema and film club networks around England, while also reaching out into areas that were underserved by any form of mainstream arts and cultural provision.

In relation to the objective of engaging new audiences with arts and cultural content, the Cinegi Arts&Film platform had some qualified successes, although the scale of the project in terms of screenings (and therefore audience numbers) was much lower than anticipated. There is evidence from the research that the screenings were in areas with lower access to cultural activities. Furthermore, a number of audience members emphasised that they would have been unable to see the content through any other route, suggesting that the platform was leading to additional cultural participation and was bringing culture to areas with less physical cultural infrastructure. However, across the whole programme of screenings, these were not in areas where there were particularly low levels of engagement or high levels of deprivation (although there was some success in certain locations).

Cinegi Arts&Film was most successful in attracting bookings from promoters (and subsequently reaching their audiences) in community cinema organisations. These promoters and venues already had established audiences, and there is evidence that the screenings expanded the repertoire of what was ordinarily shown to them.

Overall, the audiences were not necessarily new to these artform offerings, but many (particularly those who gave qualitative feedback) are attending less now due to factors like lifestage and location. Cinegi Arts&Film has therefore been an attractive proposition for these audiences, with positive feedback on both the content and execution of the screenings. The audience size figures per screening were strong overall and only marginally lower than pre-project forecasts. The Cinegi Arts&Film service therefore appears to have created a new way for these audiences to engage in artforms via filmed performance and alternative content. It also re-engaged irregular attenders to arts and cultural activities and provided additional opportunities for people that do engage in live performance.

The feedback from audiences was extremely positive. Viewing performances in this way provided a rich and engaging experience and many commented on the overall atmosphere of the events. Audiences also indicated high levels of satisfaction with the picture and sound quality of screenings. A particularly positive finding for the project was the interest in attending a future event and to recommend the experience to others.

In terms of the films that promoters chose to present, most of the screenings were made up of the most 'mainstream' content on the platform (typically performances by large arts organisations or theatres) and anecdotal evidence from the promoters indicated that audiences may already be quite familiar with NT Live showcases or similar content.

There were big differences in the number of promoters engaging with the project in the two focus areas where a high level of support and encouragement was given. In the South West take up was greater than in other regions but in the North East the service failed to gain traction. Take-up appeared to rely heavily on established networks and contacts. In the South West, where there is a tradition and infrastructure of community cinema, the appetite for the project was higher. In the North East, a combination of barriers - from practical considerations such the availability of projection equipment, to issues around the content available - meant that bookings proved very hard to obtain.

A lesson for future projects of this type may be that, given the associated challenges of launching any new technology, the initial objective should be on scaling the activity in areas where it is likely to be easier to stimulate take-up. After this, a strategy to reach less engaged audiences may be easier to develop. The research also suggests the need for a sustained strategy to build awareness of the service and confidence in its use among venues and promoters. This is particularly important at the beginning of roll-out when awareness is lower.

The Cinegi Arts&Film project was more successful in reaching and engaging new or irregular audiences by 'plugging in' to the existing infrastructure that exists around community cinema and its supporting networks than it was in attempting to build new audiences from a base of limited current engagement. The challenge, then, remains how to go beyond offering more content to an existing group of engaged audiences. There is some evidence that the project achieved this in certain instances, but overall there is little evidence that it has drawn wholly new people into experiencing arts and cultural output.

One implication is the importance of the Creative People and Places model. A growing body of evidence suggests that the sustained success of the CPP approach in reaching non-engaged communities has been due to a heavy investment in mediation and participatory work. The findings from Cinegi Arts&Film show that even with a high level of support, driving engagement with prospective promoters in areas of low engagement was very difficult, even with specialist audience development initiatives already in place in the form of the CPP projects.

Feedback from promoters showed that around one in four (24 per cent) had never held a screening event and a further 21 per cent of promoters had been screening for two years or less. Understanding the needs of these new promoters who, almost by definition, will be trying to reach new audiences may provide one way to unlock cultural content for a wider range of people. Overall, there was momentum building in sign-ups, bookings and ultimately screenings of Cinegi Arts&Film content, however this did not grow as fast or as high as the projections at the outset of the project.

## 8.1 Areas of future focus

### **Can arts and cultural venues support more screenings of filmed content?**

Arts and cultural organisations often have the capacity and, in many instances, the potential audience to successfully present captured arts and cultural content. However, through the Cinegi Arts&Film project, the number of these organisations actually using the service was relatively low, compared to the uptake from community arts organisations, for example. There may therefore be additional scope for the arts and cultural sector to screen the work of other institutions, developing audiences in this manner. It may be that Arts Council England can look to its sector support organisations (such as The Space and Museums' Development Sector Support Organisations) to stimulate this activity further.

### **Taking lessons from rural touring to inform screenings in non-traditional venues**

It was apparent through the project that alongside providing high-quality content and a reliable technological service, it was often necessary to provide a range of additional 'support' to promoters - from help with setting up screenings to curation and marketing. There are parallels here to touring companies, who have to sell-in their shows to local promoters, ensuring they reach large enough audiences to generate a financial return. Digital distributors should look at rural touring networks for structures and lessons on how to tailor their services in future.

### **A platform for smaller NPOs and other grant-funded cultural producers**

In our experience, many smaller producing cultural organisations are developing digital strategies in which the production of captured content features large. This is particularly true for NPOs (e.g. touring companies) who have recently created digital strategies as a condition of Arts Council England funding. Few, however, have a viable and tested route to audience that has real potential to meet their planned outcomes, be they of access and reach, profile development, or straight income-generation. The potential value of a Cinegi-type platform to close the gap between aspiration and capacity - in knowledge and skills, visibility and impact, and available resources - could be explored.

## **Creative People and Places projects need to ensure they can harness digital opportunities in the long term**

Much of the work of the CPPs focuses on highly-localised, participatory arts practice - involving communities in helping to choose, shape and involve themselves in the projects that take place within areas of low participation in culture. However, this project has shown that there has been a limited ability to harness a digital service - even with additional support from the core Cinegi Arts&Film team. As the CPPs develop their offer over time, more focus should be placed on how technology can intersect with the participatory work they undertake. This would benefit from working with CPPs more closely when they are planning activity, as this is where the real opportunity lies to embed Cinegi Arts&Film into practice.

## **Developing promoter knowledge around available filmed content**

It is likely that the amount of captured arts and cultural content - particularly filmed opera, theatre and dance - will increase in the next few years. However, this study shows that there was a preference from promoters for content where there was a strong brand, recognisable lead 'star' or actor, institution behind the production or a mixture of all three. This means that it may become more important to actively engage with the different communities of promoters and curators who are in a position to put on this type of content, in order to help them develop the confidence to screen both 'mainstream' arts and cultural content and more niche offerings. The risk remains that for most screened content there is simply not a large enough community of promoters available willing to take the risk to offer this to audiences.

## **Can filmed arts and cultural content be brought closer to film networks?**

The research showed that networks were often one of the best drivers of promoter interest in the Cinegi Arts&Film project. However, many film networks see filmed performance content as outside of their remit - particularly those with a direct focus on film. Despite this, the audience survey returns showed a real appetite for this type of content where it was shown. In future it may be worth considering whether publicly-funded film networks in this space should actively promote and showcase arts and cultural content.

## **Ensuring an equivalent level of insight into audiences for digital touring**

With the rapid uplift in the quantity of captured content on tour and the level of resources being invested in it, being able to measure impact and ROI - and in a way relative to other cultural activity - is going to be increasingly relevant, both for individual producers and for Arts Council England as a major investor in National Portfolio Organisations' digital policies and plans. The project has developed a method for recording the reactions of audiences of public screenings of captured arts and cultural content and has provided a framework to enable measurement of quantitative and qualitative impact and which enables comparison with the impact of other arts organisations. The value of this approach and its potential roll-out should be explored.

# Appendices

## 9.1 Methodology appendix

The methodology appendix details the data collected throughout the action research project. The table describes the different types of data, how it was gathered through the project and the sample size of each data source.

Table 14: Research data gathered through the Cinegi Arts&Film project

Type of data	Description	How was this gathered?	Quantity of response	Date of data gathering
Stakeholder interviews and scoping	A series of scoping interviews with key stakeholders.	In-depth interviews conducted by Nesta.	8 interviews	October-November 2016.
Cinegi Arts&Film Platform Data	This included user accounts that were created on the platform (called 'sign-ups' in the report, details of bookings made and the resulting returns post screening.	Access to the platform for Nesta and TAA.	266 Cinegi Arts&Film accounts created  117 separate screenings	Throughout the programme
Audience postcode data	This data was gathered to inform questions about whether the programme was reaching its intended targets geographically.	Gathered by promoters on behalf of the programme.	806 valid audience postcodes gathered	Throughout the programme
Audience online survey	This was an online survey of audiences that attended Cinegi Arts&Film screenings.	TAA online survey instrument.	436 survey responses gathered	Throughout the programme
Audience qualitative interviews	A series of in-depth interviews with Cinegi audiences to look more closely at the findings of the online survey.	TAA interview team.	10 interviews carried out	This was conducted in May-June 2018
Non-engaged Promoter online Survey	An online survey of promoters that had either signed up to the platform but not yet used Cinegi Arts&Film or who had not yet signed up to the platform.	TAA online survey distributed through Cinegi Media's list of ~800 promoters and venues.	81 survey responses	One-off survey conducted in August 2017

Type of data	Description	How was this gathered?	Quantity of response	Date of data gathering
Non-engaged Promoter interviews	A series of interviews to look in more depth at the issues identified in the non-engaged promoter online survey.	—	10 interviews	Conducted in August 2017
Supply-side research into content generation from arts and cultural organisations	A series of depth interviews with arts and cultural organisations along with background research into the current landscape of capturing and distributing opera, theatre and ballet.	Conducted in-house by the Cinegi team. This research is set to be published separately, although some material is used within this report.	11 interviews	Interviews completed February 2018
Specific North-East research and in-depth interviews.	A series of interviews with stakeholders in the North East to examine how they were able to interact with the Cinegi Arts&Film project and to look at the barriers they faced to implement the project and encourage take-up in venues and with promoters.	Conducted by Nesta and TAA.	Approximately 8 interviews	May-June 2018.
Follow-up interviews with promoters.	A series of short feedback calls conducted by the Cinegi Arts&Film team with both promoters that booked a screening and those who had not.	Conducted in-house by the Cinegi Arts&Film team.	27 promoters that had staged screenings  19 promoters who had not staged screenings	June 2018

## Baseline and secondary data

In order to examine the research questions around audience engagement and whether the Cinegi Arts&Film project captures and retains new audiences, we established a baseline model of cultural engagement using a variety of secondary data sources, in particular those developed previously by The Audience Agency.

This model enabled us to set national baselines and also focus on particular areas of interest where screenings were projected to take place (for example in the North East and South West). These baselines give an indication of the levels of current cultural engagement and the current availability of equivalent content, nationally and in specific areas where screenings were held. This analysis allowed us to understand the pre-existing supply and demand for the kind of content that Cinegi Arts&Film offered around the country.

Table 15

### Secondary data used to inform the baseline model and analysis

Engagement indicators - The Taking Part and TGI population surveys were used to set baselines in specific geographical areas and also for comparisons for audience survey responses.

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Audience Spectrum geo-demographic profiling tool - Audience Spectrum segments the population into ten segments depending on their engagement with culture. It allows us to compare the profile of attenders to Cinegi Arts&Film events with population baselines.

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Access to cultural provision - The Audience Agency has mapped cultural provision across England and built 'access indexes' for different artforms. These show how well any particular area is served with opportunities to attend. These were used in this project to understand whether Cinegi Arts&Film provided opportunities for people to engage in areas that are currently under served.

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Audience Finder attender data - This was used to provide baselines for audience profiles/catchments and as well as quality of experience (using Net Promoter Score ratings).

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Census data - This was used to understand baselines for demographic and socio-economic status.

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## Changes in research approach

In response to lower screening numbers than were originally projected throughout the project it was necessary to adapt the research approach to ensure minimum targets were achieved for the audience survey.

Guidance documentation for promoters was updated and the importance of research was further emphasized across the platform and in communications. The need to collect data was reinforced at each stage of the booking and screening administration process, and crucially, further resources were provided for specific contact, encouragement and hand holding (for example, sending personalised emails at key points and calling promoters in advance of the screenings).

While most of the above can be scaled up to larger volumes of screenings, the personal approach of calling and encouraging does require additional time resources to complete effectively. However, the building of effective relationships direct with promoters, or via champions in umbrella or network organisations did pay dividends for the data collection.

## 9.2 Cinegi player technical appendix

This appendix gives additional information on the technical components of the Cinegi player. The format of the platform was significantly different to consumer Video on Demand (VoD) services. The four additional (and important) functional elements as the platform allowed promoters to:

- Secure a licence for public exhibition in non-cinema venues. Public screenings cannot use consumer licences. And non-cinema venues require a different licence to cinemas, which is available from few suppliers generally and which is not commonly available for arts content.
- Report and pay in line with what rights-holders require for public exhibition (audience numbers, box office revenues and fees proportionate to these).
- Download the purchased content for offline playout, so that their screening would not require an Internet connection within the venues.
- Put together a 'programme' of different content. Therefore, the promoter could, for example, show a short archive film from the BFI before a filmed theatre production, or put together a series of short films in any order they wished with a straightforward single license and download for the 'programme' of content from different rights-holders. We discuss the content more fully later on.

## 9.3 Marketing and outreach appendix

This table provides a summary of the significant marketing and outreach activities undertaken by the Cinegi Arts&Film team. It is not a comprehensive list of every piece of activity carried out, but lists the most notable activities over the course of the project.

Table 16: Details of Cinegi Arts&Film marketing and communications activity

Type of activity	Description of activity	Area in which activity was targeted	Timeframe of the intervention
<b>Events*</b>			
<b>Blackhall Community Centre Launch</b>	The official launch event of Cinegi Arts&Film was held at a screening in Blackhall Community Centre.	North East England - area of high intervention	February 2017
<b>Cornwall Launch Event</b>	Held at AMATA	Cornwall - area of high intervention	January 2017
<b>Moviola promoter events</b>	Moviola is a large rural film scheme with 60 of its own screens operating every month, and more than 150 Associates. These events plugged Cinegi Arts&Film content into their catalogue, highlighting the opportunities to promoters directly.	England	12/07/17 - Bourton Dorset/Wiltshire 15/07/17 - Llanfair Kilgeddin 22/07/17 - Bunwell, Norfolk 23/07/17 -Poringland, near Norwich 29/07/17 - Milland, West Sussex 30/07/17 - BEAMINSTER, Dorset
<b>Promoter events with Carn to Cove members</b>	These two events presented the Cinegi Arts&Film platform to 51 promoters in the Carn to Cove network	South West	Praa Sands Event - 26/04/2017 Launceston Event - 27/04/2017
<b>Cinema for All Annual Conference</b>	Cinegi Arts&Film partly sponsored the annual conference and attended, engaging directly with members of the community cinema network	Sheffield (UK wide representation of organisations and groups)	November 2017

\*This presents a list of the most significant promotional events, rather than a comprehensive list of all events throughout the project

Type of activity	Description of activity	Area in which activity was targeted	Timeframe of the intervention
<b>Platform promotions</b>			
<b>Introductory discount offer on the Cinegi Platform</b>	A discretionary discount was offered to incentivise people to book screenings on the platform. In total, twenty discount codes were used.	England	Bookings made before February 2017.
<b>New Years' Offers</b>	A discount was offered at the start of 2018 to encourage further bookings on the platform. Sixteen discount codes were used.		Bookings made before the end of February 2018
<b>Marketing to networks</b>			
<b>Engagement with local cinema networks (e.g. Carn to Cove, Flicks in the Sticks)</b>	Outreach work was conducted with a range of community cinema networks to encourage local promotion of the project and group bookings.	England-wide. There was a particular emphasis on supporting networks in Cornwall and the South West.	Throughout the course of the project.
<b>BFI Film Audience Networks</b>	<p>The BFI Film Audience Networks promoted the Cinegi Arts&amp;Film project through newsletters - although this was limited in 2017 by the restructuring process taking place within FANs.</p> <p>One exception is Film Hub North, which invited the Cinegi Arts&amp;Film team to present to a training event for community cinemas.</p> <p>In 2018 there was more proactive promotion to members of the networks - particularly from Film Hub Wales.</p>	England	<p>2017 - some newsletter promotion</p> <p>2018 - More targeted outreach, including Film Hub Wales proactively finding out about interest from members.</p>

Type of activity	Description of activity	Area in which activity was targeted	Timeframe of the intervention
<b>Marcomms activity</b>			
<b>B2B marketing to direct mailing list contacts</b>	<p>Cinegi Arts&amp;Film promoted the platform via targeted newsletters, email marketing to ~2,726 organisations.</p> <p>Calls were also made to a number of contacts from the lists.</p>	England	Throughout the course of the project.
<b>Social Media communications</b>	Promotion of Cinegi Arts&Film through various social media platforms, specifically including Facebook and Twitter.	England	Throughout the course of the project.

# Endnotes

1. Nesta (2011), NT Live: Digital Broadcast of theatre - Learning from the Pilot Season; and AEA Consulting (2016), From Live-To-Digital: Understanding the Impact of Digital Developments in Theatre on Audiences, Production and Distribution.
2. Arts Council England and Nesta (2017), Digital Culture 2017.
3. AEA Consulting (2016), From Live-To-Digital: Understanding the Impact of Digital Developments in Theatre on Audiences, Production and Distribution.
4. *Ibid.*
5. Defined by the BFI as alternative content or non-feature film programming, which includes theatre, opera and ballet/dance
6. BFI (2018), Statistical Yearbook 2017.
7. Screen Daily (2018), 'Event cinema close to saturation in the UK, but international opportunity remains, say ECA' panel. See, <https://www.screendaily.com/news/event-cinema-close-to-saturation-in-the-uk-but-international-opportunity-remains-say-eca-panel/5126353>. article
8. MTM and the Space (2016), Digital Policy and Plan Guidelines.
9. See, <https://www.thespace.org/who-we-are>
10. See, <https://bravebison.io/projects/canvas/>
11. Cinema for All (2017), Community Exhibitor Survey 2016/2017.
12. See, <https://www.carntocove.co.uk/cfylm/>
13. BFI (2017), BFI2022: Supporting UK Film, BFI Plan 2017-2022
14. See, <http://www.bfi.org.uk/sites/bfi.org.uk/files/downloads/bfi-press-release-uk-wise-collaboration-increases-opportunities-film-audiences-filmmakers-2018-01-25.pdf>
15. See, <http://www.bfi.org.uk/news-opinion/news-bfi/announcements/bfi-film-audience-network-lead-partners-announced>
16. *Ibid.*
17. For example Moviola offers venues such as town and village halls, theatres and schools the opportunity to screen a range of films. In Moviola's base areas of Dorset, Hampshire, Wiltshire and Somerset, they offer a complete cinema service, with venues being provided with projection equipment, the screen, the film, tickets, publicity materials and a presenter. Venues outside these location (or within the area which have their own equipment) are provided with support under an associate scheme.
18. Cinegi Arts&Film (2016), Scoping Study (Unpublished project documentation).
19. For more information see, <http://www.creativepeopleplaces.org/>
20. Cinegi Arts&Film (2018), Final Project Report to Arts Council England (Internal project documentation).
21. Cinegi (2017), Interim Report to Arts Council England (Internal report).
22. These levels of intervention and target screening and audience numbers are an edited version of the document: Cinegi (2016), Action Research Project: Audience development through screenings of arts, culture and film in community venues of all kinds - Proposal. (Unpublished 2016).

23. Cinegi Arts&Film (2016), Action Research Project: Audience Development through Screenings of Arts, Culture and Film in Community Venues of All Kinds: Research Partner Brief (Internal Project Documentation).
24. BFI (2017), Statistical Yearbook 2017.
25. ONS (2017), 'What has happened to the income of retired households in the UK over the past 40 years?'
26. DCMS (2017), 'Taking Part Survey: England Adult Report, 2016/17'. Arts Council (2015), 'Taking Part 2014/15: THEATRE'.
27. This question did not explicitly state that the content would be arts and cultural, but that may have been the implicit meaning taken by respondents given the context of the question.
28. Cinegi Arts&Film (2018), Supply Side Research (Internal project documentation).
29. SOAs are a sub-regional geography used by the Office for National Statistics. They typically have a small spatial scale i.e. there will be many SOAs in a single local authority.
30. This analysis was conducted by taking an area around each screening, known as its proxy catchment, and then looking at this area's population characteristics. Proxy catchments were applied to every screening based on an understanding of catchment areas of similar events, based on Audience Finder data. The catchments describe the area where 75 per cent of the audience are likely to live.
31. See, <https://www.artscouncil.org.uk/funding/creative-people-and-places-fund>



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