

mtm

# Arts Council England: Canvas programme evaluation

May 2018

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# 1 Executive summary

## 1.1 Background to Canvas and this evaluation

In 2014, Arts Council England (ACE) awarded a grant of £1.8m to Brave Bison to develop and deliver an online showcase destination for arts video content. Their response was to create Canvas, a multi-channel network (MCN) for the arts. It had three overarching aims:

1. To make arts video content more discoverable and engaging to audiences
2. To increase the number and range of people engaging with the arts, both online and offline, and the depth of this engagement
3. To develop the skills and digital capacity of the arts sector and increase the volume and quality of creative media.

This report assesses the degree to which Canvas had met its objectives at project end and highlights key learnings to inform future arts sector programmes.

## 1.2 Headline findings – how well did Canvas deliver against its objectives?

We set out the five main objectives below – each of which relates to the aims listed above - and summarise of our key findings.

### **Was Canvas successful in building a network of arts organisations committed to publishing video online?**

Canvas launched in September 2015 as a MCN for the arts in England. The idea was that Canvas would sign up members to create a network of arts organisations that it could help to produce and more effectively distribute high quality video content. In return, those organisations would allow Canvas to share and promote their content across the Canvas channel. This objective would help to address all three core aims and would leave the arts and cultural sector better equipped to benefit from the opportunities presented by online video.

Canvas achieved 60 members by the end of year 1, of whom 40 were National Portfolio Organisations<sup>1</sup> (NPOs), against a three-year target of 150 NPOs. Securing NPO sign-ups proved harder than was anticipated.

It became evident as the project evolved that Canvas network members derived most benefit from the training and support they received. However, Brave Bison found it was not possible to provide in-depth support to a large number of organisations of differing scales and types whose relationship to digital varied widely, while meeting the project's other obligations.

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<sup>1</sup> National Portfolio Organisations receive regular funding from ACE – currently for a period of four years (2018-22). For the funding period 2015-2018, there were 663 organisations in the ACE National Portfolio

Responding to this challenge, Brave Bison refined the network model in January 2017 to offer more intensive skills, channel management support and content collaborations to a smaller number of partners.

At the end of March 2018, Canvas had signed up 24 core members to this revised model (the maximum number to which it could offer intensive support), plus an additional 100 associate members, resulting in a total of 124 member organisations.

Overall, Canvas succeeded in building a sizeable network that comprised a diverse mix of organisations across regions, art forms and sizes. However, for a range of reasons, it found it difficult to achieve the scale of membership initially envisaged. In total, 13% ACE NPOs (85) were core or associate members of Canvas, whereas around 75% of NPOs are estimated to operate YouTube channels.<sup>2</sup>

### **Did Canvas make arts video content more discoverable and engaging to audiences?**

Across all three years of the programme. Canvas:

- Commissioned and produced 275 videos for the Canvas channel, meeting overall its targets for content production
- Developed and operated a YouTube channel that both audiences and sector peers found engaging and on a par with three leading, well developed YouTube channels: Tate, Creators Project, and Barbican
- By year 3, Canvas had implemented a broad marketing strategy that combined different approaches across paid campaigns, editorial placements and PR / seeding, leading to notable coverage in arts publications and online news sites, and a significant increase in YouTube views from external sources.

Overall therefore, the evidence points to Canvas having some beneficial impact on making content discoverable and engaging to audiences

### **Did Canvas increase the number and range of people engaging with the arts online and offline, and the depth of this engagement?**

Canvas set out to create and aggregate videos (and a destination) to reach large and diverse audiences, with a particular focus on 18–35 year olds – and to stimulate interest in online and offline arts. At the end of three years, Canvas had:

- hit its core targets for reach with 3.3M views and 4.7M minutes of watch time (cumulatively)
- hit its core target for engagement with 15.9k subscribers – though this target was reduced significantly as the project evolved<sup>3</sup>

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<sup>2</sup> Brave Bison notes that: 'Very few NPO YouTube channels are regularly updated or managed professionally and even fewer have the scale required to be part of the YouTube Partner Programme. Fewer than 3% of NPO YouTube channels would qualify for this programme and therefore would not be able to monetise their content or join another MCN in the future

<sup>3</sup> The initial subscriber target was 100,000 by March 2018. This was originally calculated to generate revenue sufficient to make the project sustainable after the three years was up and it was not calibrated to be realistically commensurate with other high performing arts channels

- attracted a UK focussed audience, with 39% of all views coming from the UK (exceeding target of 30%), and 60% of views coming from 18–35 year olds (matching the target)

The Canvas network also delivered significant reach and engagement:

- total Canvas network views were 61.5M cumulatively: 2.6M from core network members; 55.7M from associate members; 3.3M from the core Canvas channel
- the Canvas network had 370k subscribers at the end of March 2018: 21.6k from core network members; 332k from associate members; 15.9k from Canvas

However, Canvas failed to deliver meaningful reach or engagement on other platforms, despite publishing 108 videos to Facebook during year 3.

Significantly, in year 3 nearly half of audiences we surveyed (45%) agreed that viewing the Canvas videos on the YouTube channel would make them more likely to attend arts events (compared to 36% in year 2), demonstrating that Canvas – and, by extension, arts video done well – has a real potential to increase engagement with the arts offline.

Overall, the evidence points to Canvas having some beneficial impact on attracting audiences to the arts on YouTube and on encouraging some viewers to consider engaging with the arts offline too.

### **Did Canvas develop the skills and digital capacity of the arts sector and increase the volume and quality of creative media?**

Arts and cultural organisations face significant challenges if they are to take advantage of the opportunities presented by digital video and social platforms. They must learn how to create new types of content, and how to make this content engaging for generations of users who have grown up on YouTube and Facebook and have developed particular behaviours and expectations. Crucially, they must learn how to make this content discoverable through SEO and social media, in order to reach audiences who otherwise will not know it exists.

Reflecting these challenges, developing the skills and digital capacity of the arts sector was one of Canvas's core objectives. We have broken this objective down into two parts:

- Improve the skills and capabilities of arts organisations on social video platforms, and in the volume and quality of creative media produced
- Develop opportunities for longer term, sustainable propositions and new business models.

Our findings with regards to capacity building are mixed:

- In years 1 and 2, the majority of organisations did not report seeing a positive impact from network membership in terms of the quality of online video they produced or the size of their audiences. In year 3, following the transition to increased hands-on support for core members, the picture is slightly improved – at least half of core members reported seeing a positive impact from network membership, but Canvas still only hit some of its targets for impact

- Canvas increased its training output as the programme developed, largely meeting its targets for training output and attendance in year 3, but missing its targets in year 2:
  - In year 1, there were no targets for training events as Brave Bison's development work was focussed on introducing organisations to the Canvas programme to encourage them to join the network.
  - In year 2, Canvas failed to deliver the agreed number of webinars and in-venue training events. By the end of year 2, Canvas training reached 68 organisations (54 NPOs), missing cumulative targets for 100 organisations and 75 NPOs.
  - In year 3, Canvas shifted its training delivery away from large group workshops and towards one-to-one or small group surgeries and bespoke support for core network members. As a result, Canvas increased its training and development output significantly and met most of its targets
- Attendees were generally positive about the training they participated in during all three years, but organisations were less positive about the impact that training would have on their channels, across categories such as audience size and quantity of output. The disparity between the large proportion that found training helpful vs. the proportion that reported positive ongoing impact underscores a major challenge Canvas faced when trying to increase the skills and digital capacity of arts organisations: organisations often lack the time and resources necessary to implement learnings from training
- Most organisations that participated in content collaborations with Canvas were positive about the value that having access to support and resources for production can have, but they also expressed a need for commissioning funds to be able to realise similar projects in the future

Brave Bison was asked by ACE to test whether the service could be sustainable at the end of the grant period by generating income from, for example, advertising and sponsorship. This aim relates to ACE's wider interest in monetising online arts content and in boosting the revenue generating capacity of the sector. Though a small amount of revenue was received from ads, the project failed to generate significant income from any sources over the lifetime of the project, largely due to the traffic volume to the channel not being sufficient.

Over the course of the Canvas programme, the online video landscape changed considerably and many MCNs shifted their business model away from aggregating third party channels to attract ad revenues and towards developing branded content<sup>4</sup>. Canvas was not able to generate sales for arts video content and consequently missed all of its targets with regards to developing sustainable business propositions:

- The network delivered little in the way of advertising revenue – just £12,883 of advertising revenue (£5,978 in year 3; £5,823 in year 2; £1,082 in year 1).
- Brave Bison was also not able to secure any branded content agreements despite its sales efforts, which largely occurred during the final 6 months of year 3, missing its target for £75k in branded content revenue.

Overall, Canvas succeeded in delivering training in video production and distribution to a significant number of arts organisations. However, although the training was generally well received, there is limited evidence that it had longer term positive impact on participating organisations, who often struggled to commit

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<sup>4</sup> Branded content is content that is funded or outright produced by an advertiser.

resources to online video. Canvas tried but failed to demonstrate that arts video can generate significant revenues online.<sup>5</sup>

### **Did Canvas support ACE's Creative Case for Diversity?**

Brave Bison committed to support ACE's Creative Case for Diversity by ensuring "equal access on both the supply and demand side of all the activities carried out as part of Canvas." This support included proactively engaging with and supporting BME-led and disabled-led NPOs; showcasing work by diverse artists and arts companies; and supporting arts organisations with training and advice around equality and accessibility online.

By the end of year 3, Canvas had:

- met most of its core diversity targets in terms of diverse-led organisations participating in the network, showcased in online videos, or reached by training
- demonstrated significant progress in year 3 with regards to diversity as a topic in training and diversity in video collaborations, making up for shortfalls in prior years
- ensured that all core channel videos had manual closed-captioning, which was not always the case in years 1 and 2

However, during all three years, Canvas missed its target for network members agreeing that "working with Canvas has helped you to improve the accessibility of your videos for audiences who might face barriers". Brave Bison notes that: 'While Canvas held multiple webinars on subtitling, these had lower levels of attendance than other sessions, suggesting that individual arts organisations may not themselves be prioritising accessibility.'

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<sup>5</sup> Brave Bison notes that: 'issues around resources, funding and revenue are widespread. Content producers of all sorts are struggling to balance the costs of production and distribution with the revenue generated from digital media platforms.'



### 1.3 Summary of performance indicators

The following tables provide a high-level summary of Canvas's performance over its three years, with further detail in the following sections and Appendix 1.

**Key:** **Green: targets met** // **Yellow: some targets met, some missed** // **Red: most or all targets missed**

#### Core KPIs:<sup>6</sup>

Objective	Category of KPIs	Summary of results	Performance
<b>Aim 1: Make digital arts content more discoverable and engaging to audiences</b>			
Produce or co-produce engaging new content to support these destinations	<b>1.b) Output KPIs: Deploy original content regularly</b>	Cumulative target for number of videos produced met in year 3 but intermediate targets missed in years 1 and 2	
Build up Canvas network / family of channels to make arts content more discoverable	<b>1.e) Outputs</b> (number of network members)	Targets largely met for core members, following a change of strategy in year 2 to focus more intensive support on a smaller number of core members	
<b>Aim 2: Increase the number and range of people engaging with the arts online and offline, and the depth of this engagement</b>			
Core Canvas YouTube channel(s) delivers significant reach and engagement	<b>2.a) Reach</b> core channel(s) views	Target met	
	<b>2.b) Engagement:</b> core channel(s) subscriptions	Target met	
Diversity and accessibility	<b>2.i) Diversity</b>	Target for the core network members met in years 2 and 3. Target for video collaborations met in year 3, but missed in year 2. Associate members target missed in years 2 and 3	
	<b>2.j) Accessibility</b>	Canvas channel met for accessibility in year 3 but did not meet targets in years 1 and 2; network partner impact is insufficient	

<sup>6</sup> Had to be met in order to achieve the objectives in the ACE funding agreement

Objective	Category of KPIs	Summary of results	Performance
<b>Aim 3: Develop the skills and digital capacity of the arts sector and increase the volume and quality of creative media</b>			
Improve the skills and capabilities of arts organisations on social video platforms	<b>3.b) Training reach KPI:</b> # of different arts organisations and NPOs that have participated in Canvas training:	Number of organisations participating in training sessions was met in year 3 but missed in year 2	
	<b>3.d) Outcome KPIs – part 2: Has being part of the Canvas network had a positive impact on your organisation</b>	Canvas network partners reported limited impact from network membership	
Develop opportunities for longer term, sustainable propositions and new business models	<b>3.e) AVOD and sponsorship revenue: Generate revenue from advertising around video content and through brand sponsorship across both official Canvas channels and the broader network:</b> Brand sponsorship revenue	No sponsorship revenue was generated	

**Additional performance indicators**

Objective	Category of KPIs	Summary of results	Performance
<b>Aim 1: Make digital arts content more discoverable and engaging to audiences</b>			
Aggregate, brand and operate new destinations for arts content that are compelling for audiences	<b>1.a) Canvas official YouTube channel(s) a compelling destination</b>	Across all three years, audiences and sector peers alike viewed Canvas channel positively relative to benchmark channels	
Produce or co-produce engaging new content to support these destinations	<b>1.c) Outcome KPIs: Engaging original content</b>	Across all three years, audiences and sector peers alike viewed Canvas original content positively relative to content on benchmark channels	
Online destinations are easy to discover / well marketed	<b>1.d) Marketing and discovery</b>	Marketing and discovery performance was poor during year 1 but greatly improved during years 2 and 3	

Objective	Category of KPIs	Summary of results	Performance
<b>Aim 2: Increase the number and range of people engaging with the arts online and offline, and the depth of this engagement</b>			
Core YouTube channel(s) delivers significant reach and engagement	<b>2.b) Engagement:</b> Watch time	Target met	
	<b>2.c) Advocacy</b> likes and shares	Likes and shares increased over time (positive trend looked for, but no specific target set)	
Canvas network on YouTube delivers significant reach and engagement	<b>2.d) Reach:</b> # of video views for Canvas + network partners	Views increased over time (positive trend looked for, but no specific target set)	
	Uplift in views (to measure impact of Canvas on its members)	Little impact reported by network partners but analysis of data demonstrates a noticeable impact	
	<b>2.e) Engagement:</b> # of subscriptions across network partners (including Canvas)	Views increased over time (positive trend looked for, but no specific target set)	
	Uplift in subscriptions	Little impact reported by network partners but analysis of data demonstrates some impact	
	<b>2.f) Watch time across UK network partners on YouTube</b>	Year 3 data not available due to YouTube MCN rules changing; watch time in year 2 more than double that of year 1 (positive trend looked for, but no specific target set)	
	<b>2.g) Geographic and demographic targets that we will monitor across viewing</b>	Demographic and geographic targets met during all three years	
	<b>2.h) Behavioural impact</b>	Audiences responded positively during all three years, with 36% to 45% confirming Canvas gave them new ideas of arts events to attend	
<b>Aim 3: Develop the skills and digital capacity of the arts sector and increase the volume and quality of creative media</b>			

Objective	Category of KPIs	Summary of results	Performance
Improve the skills and capabilities of arts organisations on social video platforms	<b>3.a) Output KPIs: Delivery of range of high quality education and training events and material</b>	Arts organisations were positive regarding the quality of Brave Bison-led training during all three years. Number and range of training sessions missed targets in year 2 but met targets in year 3	
	<b>3.b) Reach KPI:</b> # of Canvas network member NPOs that have participated in video collaboration with Brave Bison	Targets met for video collaborations and feedback from organisations was very positive in year 3, following mixed feedback in year 2	
	<b>3.c) Outcome KPIs – part 1: positive feedback on training</b>	Across all three years, arts organisations that participated in training were positive overall about training quality, but indicated that, where the resources they are working with is limited, training alone is not enough to increase their capacity	
Develop opportunities for longer term, sustainable propositions and new business models	<b>3.e) AVOD and sponsorship revenue:</b> Advertising revenue	Minimal advertising revenue generated	

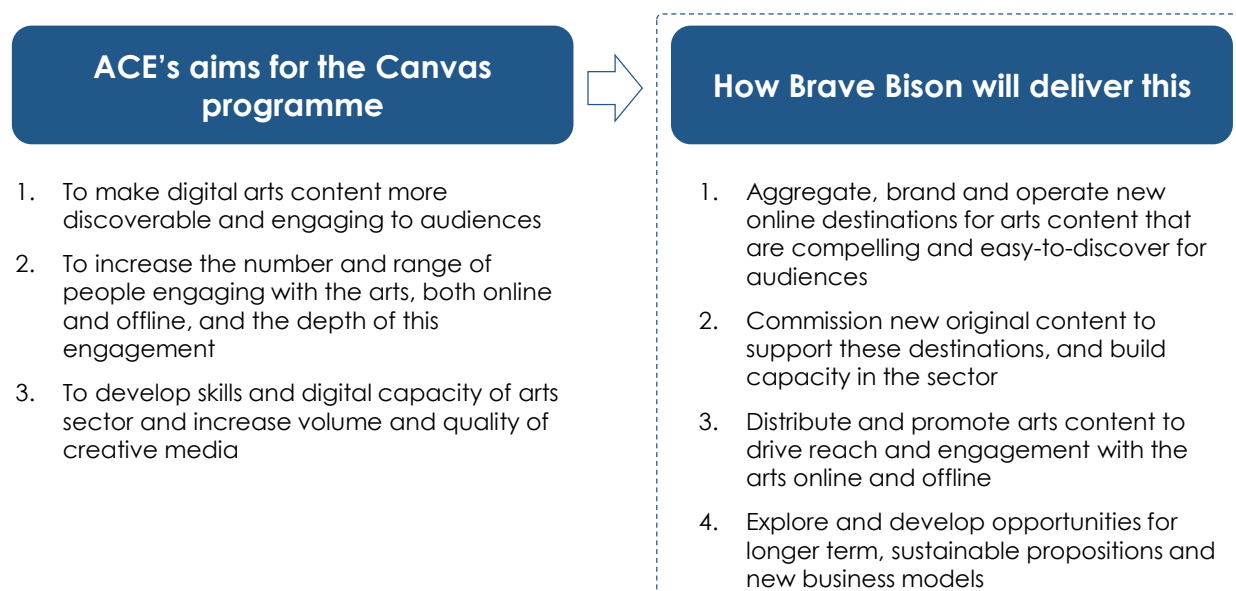
## 2 Introduction

### 2.1 About Canvas

In October 2014, Arts Council England (ACE) awarded a 'strategic funds' grant of £1.8m to Brave Bison (previously known as Rightster) to develop and deliver, over a three and a half year period to March 2018, a project that came to be known as Canvas. The brief for the project was to create an arts-focussed multi-channel network (MCN) that could address a number of inter-related challenges that arts sector video content faces online.

Exhibit 1 sets out what the Canvas project was designed to achieve and what Brave Bison was commissioned to do.

#### Exhibit 1 – ACE's aims for Canvas and key activities undertaken by Brave Bison



In early 2014, when the project was devised by ACE, MCNs were being heralded within the creative and media industries as the future for video distribution and monetisation. The MCN business model was to aggregate online (mainly on YouTube) video channels that shared a common theme, pooling their audiences and managing their channels in exchange for a share of revenue. The MCNs would present themselves to advertisers as a single point of contact able to sell ads that would reach an audience interested in a particular type of content.

Canvas was to be a showcase destination for English arts video content online, targeting a large 'Millennials' audience (then aged 18–35) who are known to be heavy consumers of online video. It was intended to be 'the home for the arts' on YouTube, but would also publish to other platforms where video content is popular, such as Facebook.

Some of the challenges that Canvas would address were that:

- the majority of arts video content is hard to discover amongst the high volume of other content online – the audiences that would be interested in it don't know it is there

- there is a limited volume of high quality arts video content online – partly for capacity and funding reasons, but also because the currently low audience numbers remove the incentive to create
- the arts sector is not very effective at attracting the online Millennials audience that will be important to its future.

Outcomes envisaged by the Arts Council included:

- New original video content would be produced and commissioned
- Existing arts video content would be cross-promoted and its reach amplified through the multi-channel network effect
- Brave Bison would develop the skills and capacity of arts organisations to create and promote new original video content
- Income would be generated, for the MCN and its member organisations, through ads and through sponsorship

## 2.2 About this report

This report has two purposes:

1. To assess how the Canvas project performed against the original aims and the agreed targets
2. To capture and present learnings from the project to inform future comparable activities

The report presents the data and information collected up to the end of the project (31 March 2018). Though the [Canvas channel](#) remains live on YouTube, the Canvas multi-channel network was disbanded when the grant came to an end.

Our research approach and the evaluation framework are explained in detail in Appendix 2.

### 3 Did Canvas build a network of arts organisations committed to publishing video online?

#### The initial focus of Canvas was to build a large network of organisations

Canvas was launched during 2015 as a MCN for the arts. The model was to sign up members to create a network of organisations that would be supported to produce and promote high quality arts video content. In return, those organisations would allow Canvas to share their content across the Canvas channel.

The network model worked as follows:

- Network members would allow Canvas to manage their channels and aggregate audiences across channels in the hope that this might help some to monetise their content
- Canvas network members would receive training and support, benefit from sharing their content on the Canvas channel, and potentially also have opportunities for content commissioning (though this was not guaranteed as part of the network offer).

Canvas attracted 60 members by the end of year 1, of whom 40 were National Portfolio Organisations<sup>7</sup> (NPOs), against a three-year target of 150. Although on course to meet the overall target, it signed up few NPOs than expected and securing sign-ups proved harder in year 1 than was anticipated.

In some cases, larger organisations with more sophisticated video offer chose not to join because they felt they already had sufficient skills and expertise:

- *"The main reason [we did not join Canvas] is we were doing most of it already. We were trying to understand what it was they brought [to a relationship] that we weren't able to do [on our own]"*

On the other hand, smaller organisations with few staff and thinly spread resources were struggling to maintain a meaningful channel. These organisations either chose not to join or in a few cases later terminated their relationship with Canvas because they lacked the resources to create a sufficient volume of content or to maintain a channel:

- *"With reduced capacity we didn't know if we'd have the man-hours to have something else to maintain."*

A number of organisations also expressed concern around Canvas's contractual requirements to monetise content and about their own contractual relationships with artists or performers:

- *"The fundamental reason why we haven't been able to move forward with Canvas is that we couldn't hand over our YouTube account...because we have only been granted the right to use much of the content on it by the artists, and then only for promotional purposes."*

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<sup>7</sup> National Portfolio Organisations receive regular funding from ACE – currently for a period of three years. For the funding period 2015-2018, there are 663 organisations in the ACE National Portfolio

## The network model was revised in January 2017

The year 1 evaluation showed that Canvas members gained the most benefit from network membership through the training and support they received. However, Brave Bison struggled to provide in-depth support at scale to a large number of organisations that differed widely in scale and type and had varying ideas and ambitions in relation to online video.

As a result of these challenges, Brave Bison refined the network model in January 2017 to enable them to offer intensive skills development, channel management support and content collaborations to a smaller number of partners. The new network model consisted of two tiers of partners: *core members* and *associate members*:

- **Core members:** from the first quarter of 2017, 24 full network members received hands on support and management of YouTube channels and a collaboration resulting in two new pieces of video content to be showcased on the Canvas channel
- **Associate members:** received access to Brave Bison training sessions and an online collaborative workspace offering downloadable resources, a shared editorial calendar, and a messaging space.

This rationale for this refined model was that Canvas could have a bigger impact by focusing more on a smaller number of core members. These were selected on the basis that they were diverse, represented a good regional spread, were well-aligned with the editorial vision of the core Canvas channel and were also at the right stage of development to benefit from more intensive support. Associate members were still able to benefit from training opportunities and resources as well as from having their channels linked to a bigger arts network on YouTube. Programme targets were revised, with the agreement of ACE, to better reflect the increased focus on support and training.

By the end of March 2018, Canvas had 24 core members (the optimum number that could benefit from this revised model), plus an additional 100 associate members, making a total of 124 member organisations. The membership had the following profile.

- 21 of the core members were Arts Council NPOs
- 100 organisations were associate members, including 64 NPOs
- In total, 85 NPOs (13% of the NPO cohort) were core members or associate members. Given that around three quarters of NPOs are estimated to have YouTube channels<sup>8</sup> it demonstrates the challenge of getting arts organisations to join Canvas
- 36 non-NPO channels joined as associates, many via a relationship with an MCN in the USA. Significant non-NPOs in the network included the Science Museum and, in the US, the Alvin Ailey American Dance Theatre
- The core members were relatively well-distributed geographically, with at least 3 from each ACE region<sup>9</sup> However, 10 organisations were based in London, exceeding the target limit of 8 set by ACE. This reflected the fact that Brave Bison experienced difficulty in identifying organisations who met the editorial criteria, had a demonstrable commitment to online video, included at least 3 organisations who were diverse-led, and were responsive when approached

<sup>8</sup> Digital Culture Report (2017), MTM – 77% of NPO respondents to the survey operated YouTube channels

<sup>9</sup> Midlands, London, North, South East and South West



- 11 of the top 20 NPOs<sup>10</sup> were Canvas members (2 core; 9 associate). This suggests Brave Bison had success at engaging some larger arts organisations with developed online presences, but that it was challenging to get other major institutions to engage if they did not perceive any benefits to be gained from Canvas.

Canvas core members represented a wide variety of art forms, including dance, music, theatre, visual arts, and combined arts such as circus and opera. These organisations tended to have smaller, under-developed YouTube channels – only three of the core members had over 1,000 subscribers - but were considered ripe to develop to the next level.

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<sup>10</sup> By YouTube subscriber count, see Appendix 3

## **4 Did Canvas make arts video content more discoverable and engaging to audiences?**

### **4.1 Summary of findings**

Our findings are mostly positive regarding the operation of online destinations and the content within them, across all three years of the programme. Canvas:

- Commissioned and produced 275 videos for use in the channel, meeting its overall KPIs for content production
- Developed and operated a YouTube channel that audiences and sector peers alike found engaging and on a par with three leading, well developed YouTube channels: Tate, Creators Project, and Barbican – with similar ratings in all 3 years.

Findings regarding the discoverability and marketing of the YouTube channel were also positive in years 2 and 3, and much-improved over year 1:

- Brave Bison created (and began delivering to) a Canvas marketing strategy during year 2 that included plans for paid promotion of videos as well as display advertising and paid placements on arts-related publishers
- By year 3, Canvas implemented a broad marketing strategy that combined different approaches across paid campaigns, editorial placements and PR / seeding, leading to notable coverage in arts publications and online news sites, and a significant increase in YouTube views from external sources.

## 4.2 Did Canvas aggregate, brand and operate new destinations for arts content that are compelling for audiences?

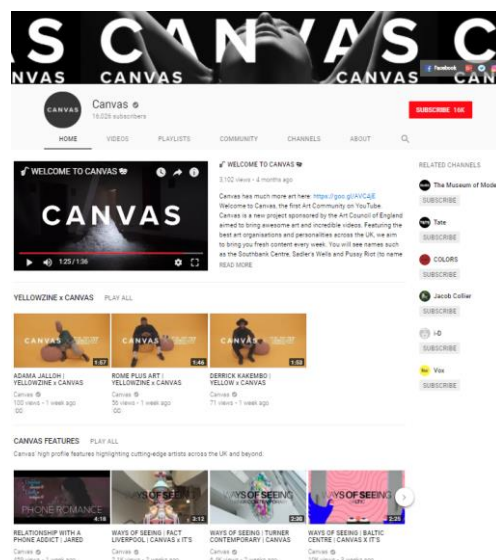
### The Canvas YouTube channel

In September<sup>11</sup> 2015, Brave Bison launched Canvas as a new branded channel on YouTube.

The Canvas channel was presented as the new home for English arts video online.

Over the subsequent two and a half years, Canvas grew and evolved considerably, including changes to the creative vision and content strategy. In January 2017, Brave Bison shifted Canvas's original creative vision, "Where Art Meets Awesome", to "Art Meets Life". *The reason for the shift was to create content around accessible 'urban' art and creativity that it was felt would have a stronger appeal to its target audience of Millennials.*

By the end of March 2018 Canvas had evolved into a mature YouTube channel that hosted 247 original video commissions<sup>12</sup> plus a rotation of third-party content featured in regularly updated playlists based around different art forms, as well as playlists highlighting events and specific themes.



### Audiences responded positively to the channel overall

When asked about the Canvas channel as a whole, the audiences we surveyed<sup>13</sup> were very positive during all three years of the project, across a range of factors (Exhibit 2):

- In year 3, around two thirds of audiences found the channel to be interesting (62%) and of high quality (69%), and around half found the channel to be relevant (53%) and to contain topics of interest (49%). Exhibit 2 shows that these results were consistent across all three years, indicating that Brave Bison created and maintained a channel that a significant proportion of the target audience found to be interesting, relevant and of high quality throughout the life of the programme
- Relative to year 2, significantly more audiences in year 3 said they would share videos (35% in year 3; 29% in year 2) or subscribe to the channel (33% in year 3; 25% in year 2), suggesting that Brave Bison's

<sup>11</sup> The channel went live during July 2015 for beta testing, but was officially launched by the Minister for Culture, Ed Vaizey, at the Arts Council's No Boundaries conference on 30<sup>th</sup> September 2015

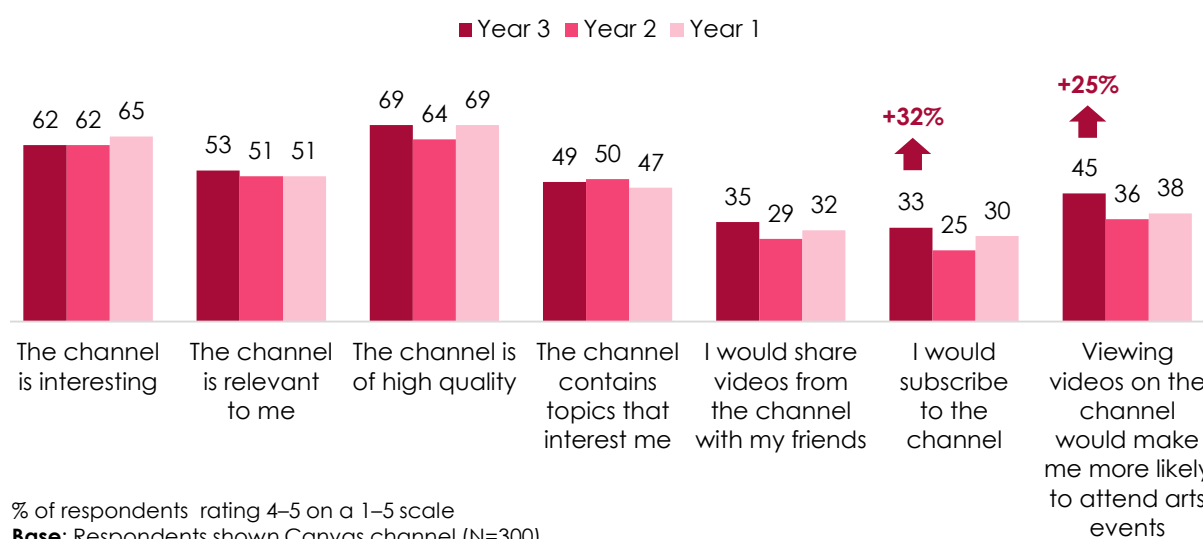
<sup>12</sup> 275 videos were produced but only 247 remained on the channel at the end of March 2018; reasons for removing videos varied but the main one was to remove older videos that no longer met the tone and subject matter of the channel, in order to maintain editorial consistency

<sup>13</sup> Nationally-representative sample of 600 respondents in England, except with a heavier weighting towards Canvas's 18–35 target audience plus a smaller 36+ comparison group (70% 18–35, 30% 36+). Results have been weighted to a representative online sample in the UK. We used a series of screening questions to test audiences' interest in and engagement with the arts, both online and in person, only allowing those indicating a minimal level of arts interest to complete the survey

revised creative vision resonated positively with its target audience. These should be viewed as significant achievements given how selective users tend to be about what content to add to their content feeds and social profiles

- Significantly, nearly half of audiences (45%) agreed that viewing the channel would make them more likely to attend arts events (36% in year 2), demonstrating that Canvas – and, by extension, arts video done well – has a real potential to increase engagement with the arts offline.

#### Exhibit 2 – Audience views on Canvas channel (3-year comparisons)<sup>14</sup>



This overall positive response was reflected in a number of comments from survey respondents:

- "It's completely different from anything else I've seen on YouTube – in a really good way. Looks really high quality and a lot more interesting than the stuff I already watch. I did Drama/Theatre Arts at Uni and have lost touch with it a little bit – this is a really easy way for me to reconnect"
- "I liked the layout very much and the ease of finding what I would like to watch. The channel itself was quite eye-catching"
- "I think it's a great idea to have one active art community on YouTube that shares and experiments with different art forms and different topics. Very impressed."

#### Audiences were positive about the original content

Canvas commissioned or produced 275 YouTube videos over three years: 112 in year 3, 107 in year 2; 56 in year 1. These fall into two types, based on their production style:

- 260 'hub' videos – in-house productions created using Brave Bison's own production resources, including producers, camera operators and editors – such as: "[David Shrigley: Look At This... Skip? | Canvas Presents](#)", "[Nubya Garcia | Steve Reid Innovation Award | PRS Foundation X Canvas](#)" and "[Is Mental Health, The Elephant In The Room? | Lanre Malaolu](#)"

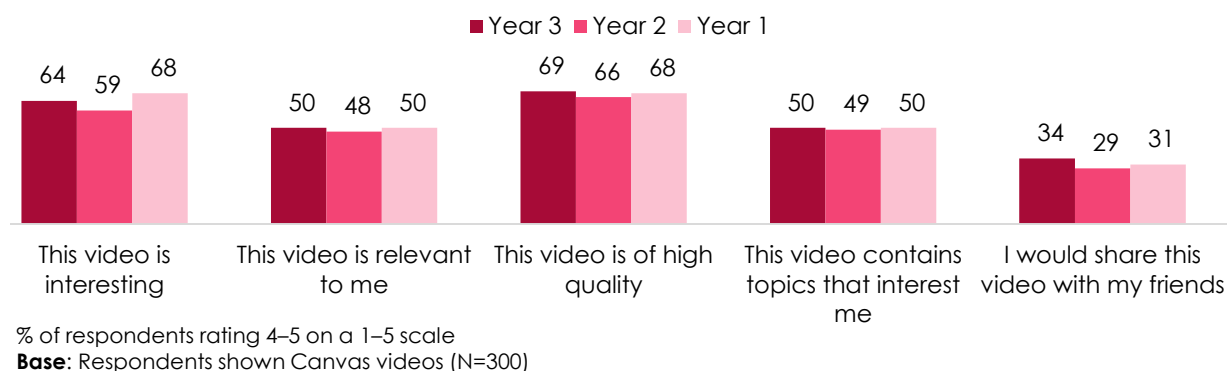
<sup>14</sup> Arrows indicate significant differences between year 3 and year 2 survey results, to a 90% confidence level

- 15 'hero' videos – external commissions made by third-party production companies with a larger budget of £10,000 per video, such as: "[Oxford Student Learns She Has Dyslexia, Dyspraxia & ADHD](#)", "[Choke: When Jealousy Kills | Frantic Assembly](#)" and "[Where Ideas Go To Die](#)".

To evaluate Canvas content, we asked audiences to view one original Canvas video (out of a choice of three) – responses were generally positive and consistent across all three years of the project (Exhibit 3):

- Around two thirds found the videos to be interesting and of high quality
- Around half felt the videos were relevant and contained topics of interest
- As with the response to the overall channel, (Exhibit 2) around a third said they would share the video they watched
- Audiences who viewed the more costly 'hero' videos tended to rate them equivalently to those who viewed the in-house 'hub' productions.

**Exhibit 3 – Audience views on Canvas original video commissions (3-year comparisons)**

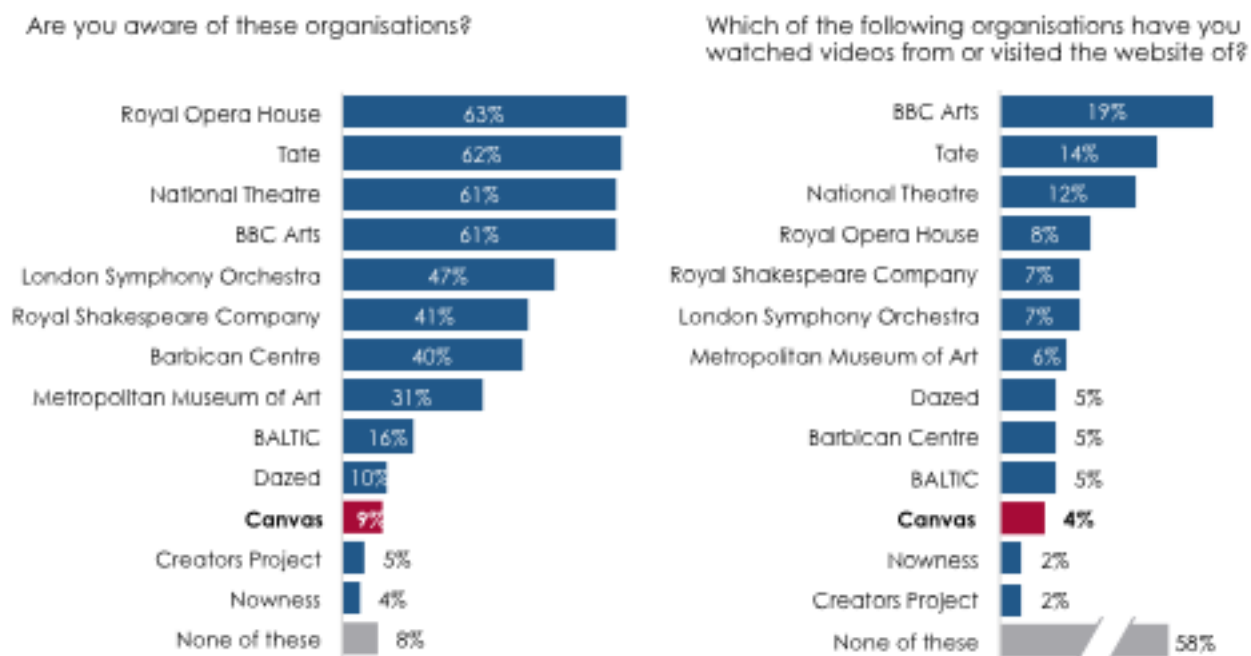


## Canvas performed well against benchmark channels

We compared awareness and usage of the Canvas channel at the end of year 3 to a range of benchmark organisations and results were broadly positive (Exhibit 4):

- Around two thirds of audiences were aware of the major multi-platform organisations and brands, such as BBC Arts and Tate, as well as major arts organisations such as National Theatre and Royal Opera House
- Awareness of Canvas was significantly lower, at 9%, but this result remains on a par with online only company Dazed and higher than online only brands Creators Project and Nowness
- Usage of Canvas was much lower (4%) than that of BBC Arts (19%) and Tate (14%), but this is again at similar levels to usage of longer-standing online only sites and a major UK brand (Barbican Centre).
- Importantly, the other channels were run by major arts brands, whereas Canvas had to develop a new brand from scratch – and without an equivalent live offer that would help it to develop its profile.

#### Exhibit 4 – Audience awareness of arts organisations and viewership of YouTube channels



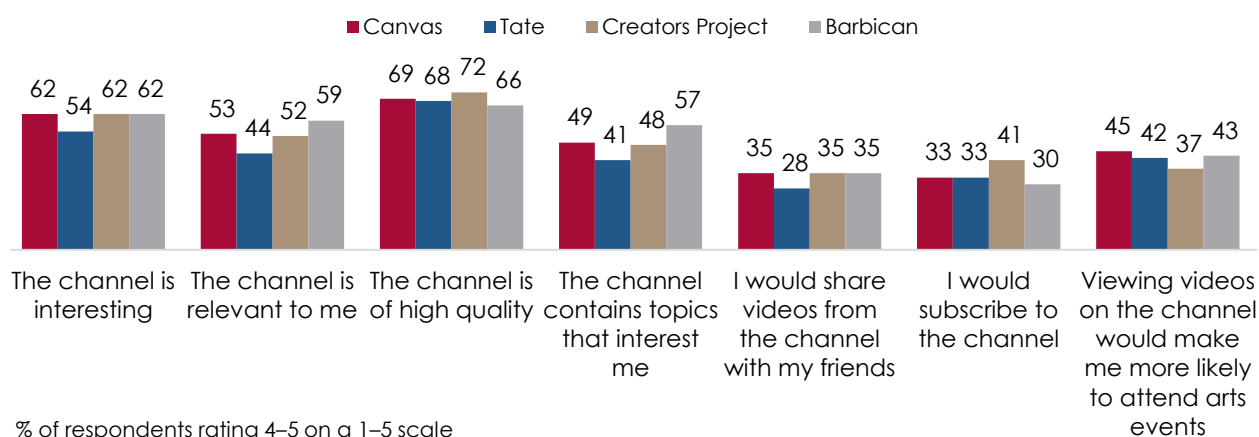
**Base:** Audience survey respondents (N=600)

We then asked audiences to view either the Canvas channel or one of three top-end benchmark arts channels:

- **Tate:** The YouTube channel for a leading British visual arts organisation with four major museums and a large collection of British art. YouTube videos mostly feature visual art and artists involved with museum exhibitions
  - 114k subscribers and 15.9M cumulative views
- **Creators Project:** A YouTube channel founded by the world renowned VICE and Intel, designed to showcase artists across multiple disciplines who use technology to drive creative expression. Creators Project regularly commissions short videos about art installations as well as commissioning its own short films
  - 808k subscribers and 266M cumulative views
- **Barbican:** The YouTube channel for a London-based arts organisation and venue with an international programme primarily focussed on theatre, dance, music, visual arts and film. YouTube videos usually promote or cover current and upcoming performances at the Barbican venue and often feature performing artists
  - 8.7k subscribers and 5.8M cumulative views.

Across a number of key questions the Canvas videos performed on a par with the benchmark channels across all three years of the programme.

### Exhibit 5 – Year 3 audience views on Canvas channel vs. benchmarks<sup>15</sup>

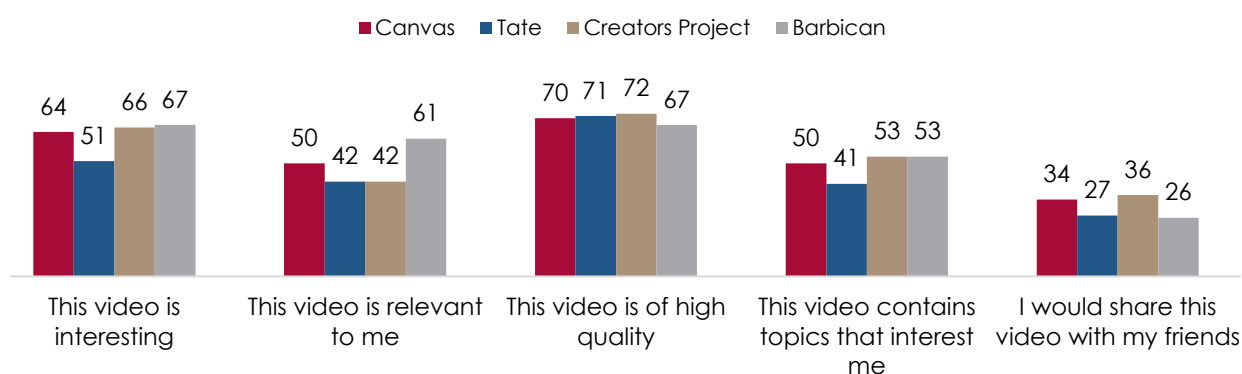


**Base:** Respondents shown Canvas channel (N=300), respondents shown Tate channel (N=100), respondents shown Creators Project channel (N=100), respondents shown Barbican channel (N=100)

In year 3:

- Audiences found Canvas videos to be significantly more interesting than the Tate's videos, and equivalent to the other two benchmark channel videos
- Canvas videos were found to be significantly less relevant than Barbican videos, but more similar to Creators and more relevant than Tate's
- Canvas videos were found to be as high in quality as those of the benchmarks
- On average, audiences were about as willing to share the Canvas videos as the benchmark videos.

### Exhibit 6 – Year 3 audience views on Canvas original videos vs. benchmark videos



**Base:** Respondents shown Canvas video (N=300), respondents shown Tate video (N=100), respondents shown Creators Project video (N=100), respondents shown Barbican video (N=100)

Given the relative newness of the Canvas channel and its assumed lower budget for content production, relative to benchmarks, these results should be viewed as a positive achievement, suggesting that Brave Bison maintained a well-organised, well-presented destination that audiences found compelling.

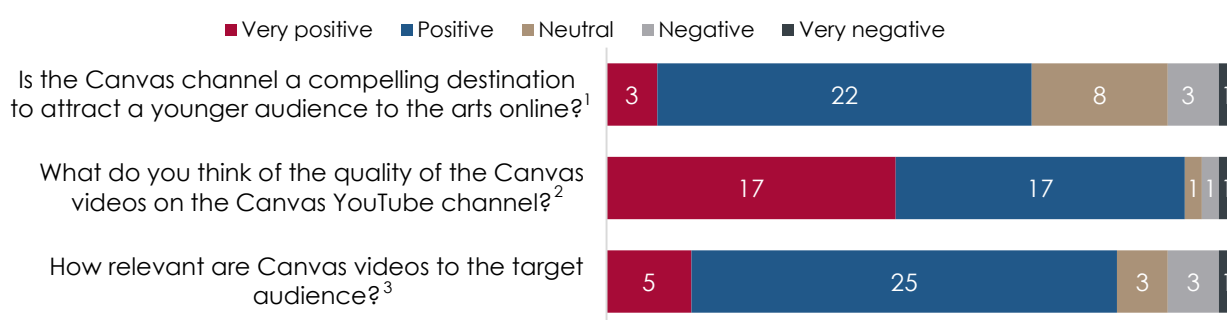
<sup>15</sup> Differences between channels are not significant and are within the margin of error, to a 90% confidence level

## Canvas network members viewed the Canvas channel and videos largely positively

When surveyed at the end of year 3, Canvas network members tended to be positive about the Canvas channel:

- Around two thirds (25 of 37) of respondents judged Canvas a compelling destination to attract a younger audience to the arts online – a significant improvement over the year 2 result (12 of 29)
- A vast majority of respondents (34 of 37) felt the Canvas videos were high quality, and 30 of 37 felt the videos were relevant to the target audience, suggesting that the arts sector thinks Canvas did a good job with its video production (similar to year 1 and 2 results)

### Exhibit 7 – Partner views on Canvas channel



# of respondents

<sup>1</sup> Very compelling / Compelling / Neither compelling nor not compelling / Not compelling / Not at all compelling

<sup>2</sup> Very high quality / High quality / Neither high nor low quality / Low quality / Very low quality

<sup>3</sup> Very relevant / Quite relevant / Neither relevant nor irrelevant / Quite irrelevant / Not at all relevant

**Base:** Partner survey respondents (N=37)

In addition to the survey, we asked arts organisations about the Canvas channel in our depth interviews<sup>16</sup>. About half of the member organisations were positive about the channel and its content:

- “*[The channel is] very lushly done and cinematic [...] It looks great; everything they teach people, they do. It's clear, very interesting, and beautifully made*”
- “*It was quite striking, it was different, it was engaging*”
- “*When we were developing our YouTube channel, we used them as best practice – how it's put together playlists – we based ours heavily on that*”
- “*I think it's well produced and interesting and seems very relevant*”
- “*Branding is now very strong, videos are great and cool and have strong thumbnails that make you want to watch.*”

However, about a quarter of organisations were less positive about the channel and its impact, in part due to the breadth of content featured:

- “*I guess I'm slightly underwhelmed [by the channel]. I'm not quite sure it delivers or gives the impact [it could], for the range of artists and the work that's actually on there*”

<sup>16</sup> We did not send the survey to organisations that we interviewed



- *"In the end I think [the channel] was possibly trying to be too many things to too many different people. Without some clear editorial voice for something like that, it doesn't actually end up being anything to anybody."*

Brave Bison as well as some collaborating organisations<sup>17</sup> observed that working with partner organisations to produce content posed challenges:

- *"It's hard to maintain a consistent editorial line when working across lots of different organisations. [...] It's the challenge of stating an [editorial] position and sticking with it. Quite often creative output is driven by a desire to make something interesting, but someone who comes along and is going to direct a film wants to make their film, not your film. These are collaborative creative productions but they have to create strategic objectives and it's hard to balance [objectives against editorial]"* – Brave Bison
- *"[Canvas has] the classic problem that they are beholden to their partners for what they get, especially short films that are really promos – which aren't that interesting. [...] Canvas need to really think about, and help their partners think about, what is interesting for YouTube."* – Collaborator

### Canvas had largely met its production targets by the end of year 3

Canvas missed its production targets in years 1 and 2, but had met its overall production target by the end of year 3. In year 3, Canvas created two in-house videos per week for YouTube and for Facebook (two each), from a single production shoot:

- Year 1 (September to March only):
  - YouTube: 56 'hub' in-house productions, meeting targets for 10 videos per month from January 2016, but missing production targets prior to this
  - No Facebook videos created (or required) in Year 1
- Year 2:
  - YouTube: 107 'hub' in-house productions, just missing the target of 114<sup>18</sup>; no 'hero' external commissions, missing target for 3 (shortfall made up in year 3)
- Year 3:
  - YouTube: 97 'hub' in-house productions, exceeding the target of 96; 15 'hero' external commissions, meeting the target of 15 and making up for a year 2 shortfall
  - Facebook: 108 videos, exceeding the target of 96.

### Canvas improved its marketing throughout its three years

Our findings regarding the discoverability and marketing of the Canvas channel were mixed across the three years of the programme. In year 1, we found no evidence of a social media and marketing plan for the channel and limited evidence of paid promotion.

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<sup>17</sup> Large organisations whom Brave Bison viewed as key collaborators or potential collaborators; see Appendix 2 for details

<sup>18</sup> Year 2 production target was for 10 videos per month from April 2016 to December 2016, revised down to 8 videos per month in January 2017

In year 2, marketing efforts were much-improved over year 1:

- Brave Bison created (and began delivering to) a Canvas marketing strategy that included plans for paid promotion of videos as well as display advertising and a few paid placements on arts-related publishers (e.g. FAD; Dozen; It's Nice That)
- For much of year 2, Canvas utilised paid promotion in the form of 'TrueView' ads<sup>19</sup>, which delivered an average of 3,850 views per ad, at an average cost of £60 per video (£0.015 per view)
- However, aside from paid promotion, most marketing activity from this new strategy document did not take place until year 3, owing to 'hero' videos not launching until year 3

In year 3, Canvas implemented a broad marketing strategy that combined different approaches across paid campaigns, editorial placements and PR / seeding, as well as publication of a printed magazine:

- **Paid campaigns:**
  - Canvas continued to promote content published on YouTube, with a default TrueView spend of £75 on in-house productions and between £100 and £500 on commissions
  - The default spend on promoting Facebook videos was £25, although this decreased as it became clear it was having little impact on likes and follows. Efforts were then moved to campaigns across Brave Bison's network of Facebook pages in Q4 2017, which Brave Bison reported generated a significant (but volatile) uplift in subscribers
- **Editorial placements:**
  - a second strand involved editorial placements with publishers. A £10k Canvas campaign was run on The Guardian, generating 10,000 impressions and 2.5K views in Q4 2017. However, there was little evidence on the YouTube channel of any significant impact on subscriber numbers, although it may have helped raise awareness of Canvas as a brand.
  - other deals were made with arts publications Huck and It's Nice That, both as part of three-episode commissions totalling £30k. Brave Bison estimated about £10k of each of these deals went towards marketing and distribution, including placements and promotion by these publications
  - Huck delivered reach of 38k users on Facebook, 21k on Twitter plus 100k impressions through display ads on their site.
  - It's Nice That generated 13.5k article views, and reach of 326k users across social media, as well as additional promotion of one of the films on Vimeo, generating an additional 58k views.
- **PR / seeding:**
  - Canvas retained the services of an arts PR and marketing consultant who developed an outreach strategy across publisher platforms and social
  - this seeding approach, alongside Canvas's day-to-day social activities, was successful in contributing to 211k external views on the Canvas channel in year 3, compared to 68k in year 2
  - the PR consultant's work also helped in raising Canvas's profile through articles and Canvas videos on the likes of Metro, Standard, the I and other niche publishers.

<sup>19</sup> TrueView ads are paid placements on YouTube, such as within search results or recommended videos; YouTube only charges for ads when a user clicks on an ad to view the video, indicating interest in and engagement with the content

## 5 Did Canvas increase the number and range of people engaging with the arts online and offline, and the depth of this engagement?

### 5.1 Summary of findings

A core objective for the Canvas programme was to create and aggregate videos (and a destination) to reach large and diverse audiences, with a particular focus on 18–35 year olds – and to stimulate interest in online and offline arts. In this respect the picture is mostly positive:

- Canvas hit its core target for reach in all 3 years, achieving a total of 3.3M views and 4.7M minutes of watch time by 31<sup>st</sup> March 2018
- Canvas also hit its core target for engagement with 15.9k subscribers by March 2018 (which would position it 7<sup>th</sup> the list of 'Top 20 NPOs by subscriber count', see Appendix 3) – though this target was reduced significantly as the project evolved (see 5.2)
- Overall, the Canvas channel attracted a UK focussed audience, with 39% of all views coming from the UK (exceeding target of 30%), and 60% of views coming from 18–35 year olds (matching the target)
- The Canvas network (i.e. the views and subscribers achieved by both the core channel and the channels of its member organisations) also delivered significant reach and engagement:
  - total Canvas network views were 61.5M cumulatively: 2.6M from core network members; 55.7M from associate members; 3.3M from Canvas
  - the Canvas network had 370k subscribers at the end of March 2018: 21.6k from core network members; 332k from associate members; 15.9k from Canvas
- Canvas failed to deliver any meaningful reach or engagement on other platforms, despite publishing 108 videos to Facebook during year 3. As Canvas was devised first and foremost as a YouTube MCN, however, it was not tasked to meet specific targets through other platforms

### 5.2 Did the Canvas YouTube channel deliver significant reach and engagement?

#### The Canvas channel met its views and subscribers targets

Canvas achieved 1.9 million views and added 9,691 subscribers in year 3, notable increases over performance in years 1 and 2:

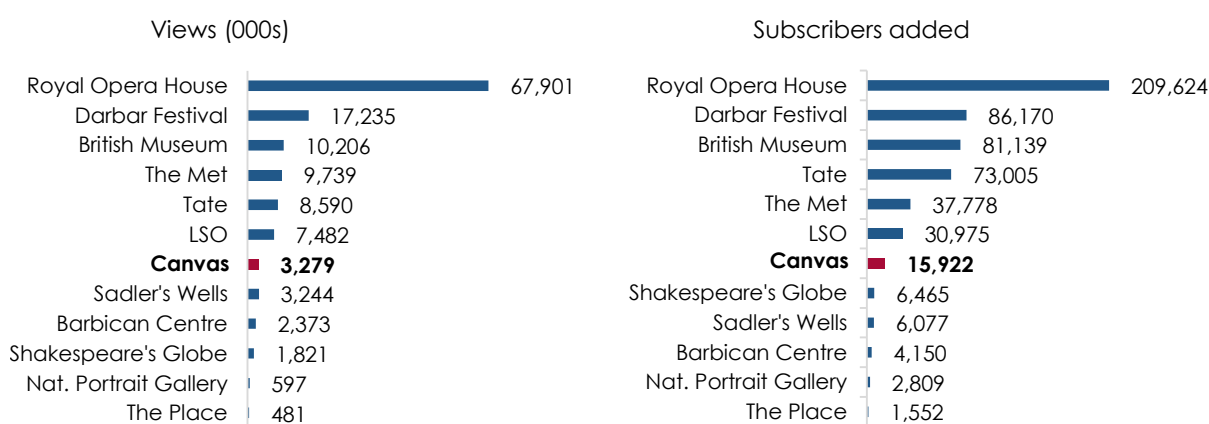
- Year 1: 430k views and 1,616 subscribers added
- Year 2: 920k video views and 4,615 subscribers added.

These result in totals of 3.3 million cumulative views and 15,922 subscribers at the end of year 3, exceeding targets of 2.5 million views and 15,000 subscribers. It should be noted that the original subscriber target for March 2018 was 100,000, the figure estimated by Brave Bison to be the minimum number of subscribers needed for Canvas to have a chance of generating sufficient revenue to make the project sustainable beyond March 2018. The target was lowered to 15,000 during year 2 based on an appraisal by MTM of what was realistically possible, but also sufficiently stretching, in relation to other high performing arts channels on YouTube.

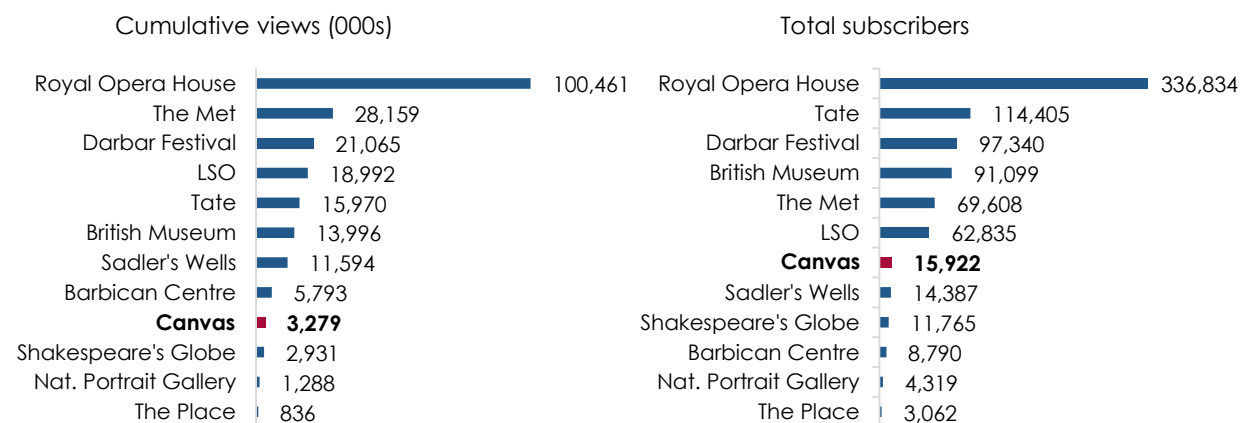
For context, we compared the performance of Canvas during its three years to a basket of other arts and cultural organisations active on YouTube over the same time period, from July 2015 to March 2018.<sup>20</sup>

During year 3, Canvas accrued more views than Sadler's Wells and the Barbican Centre; Canvas also added significantly more subscribers than a number of major arts organisations, including Shakespeare's Globe, Sadler's Wells and the Barbican, bringing its cumulative subscribers above these organisations. Canvas's total views and subscribers are high in comparison with all but a handful of top UK arts channels but remain well short of the highest performing arts organisations' channels internationally, such as the Met (Metropolitan Museum of Art), Tate and Royal Opera House.

#### Exhibit 8 – Video views (000s) and subscriber growth, 1 July 2015 – 31 March 2018



#### Exhibit 9 – Cumulative video views (000s) and total subscribers as of 31 March 2018<sup>21</sup>



#### A small number of stand-out videos contributed significantly to Canvas's view count

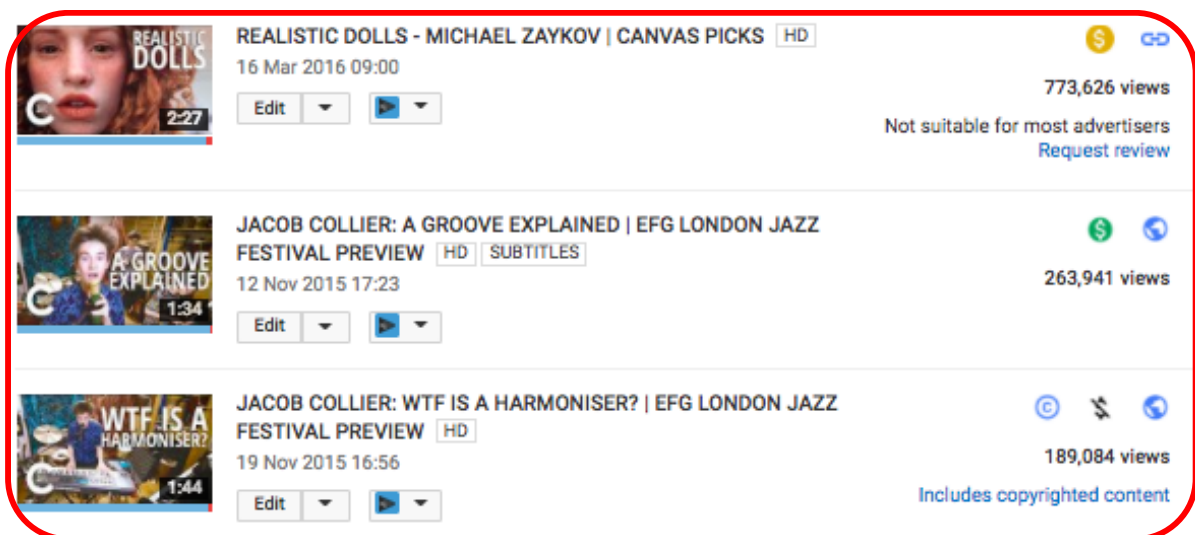
Of the 3.3M video views Canvas received during its three years, 37% of the views – 1.2M – were of just three videos, which were uploaded during year 1. This demonstrates the positive impact that well-performing back catalogue of videos can have on channel performance.

<sup>20</sup> Year 1 did not represent a full year of channel activity (9 months from July 2015 to March 2016)

<sup>21</sup> It should be noted that, typically, the organisations on this list will have operated a YouTube channel for around 10 years up to March 2018, whereas Canvas had only existed for two and a half years

- The top performing video, "Realistic Dolls" received 24% of the channel views (780k). Brave Bison explained that this video's stand-out performance is due to YouTube's algorithm recommending it after a viewer had seen related content. However, Brave Bison also noted that this stand-out performance was unlikely to have had any further effects on viewing of other videos on the channel or growing the subscriber base: *"It doesn't relate to the rest of the things that appear on the channel. You can build subscribers [with a popular video such as Realistic Dolls] but they leave when they learn that the other content on the channel isn't like that"*
- The second and third top performing videos featured a music artist, Jacob Collier. Brave Bison pointed out that the artist has grown in popularity and won two Grammys in February 2017, leading to increased searches – and greater visibility for Canvas's videos showing him performing.

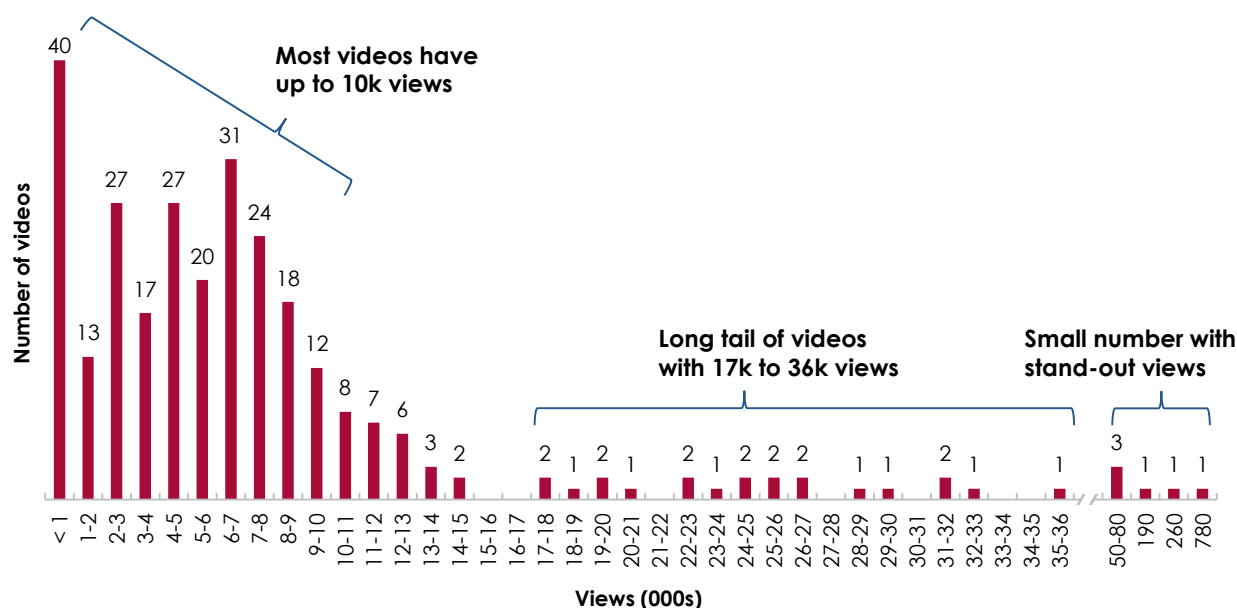
#### Exhibit 10 – Top three videos on Canvas YouTube channel



Video Title	Thumbnail	Duration	Date	Views	Ad Status
REALISTIC DOLLS - MICHAEL ZAYKOV   CANVAS PICKS		2:27	16 Mar 2016 09:00	773,626	Not suitable for most advertisers
JACOB COLLIER: A GROOVE EXPLAINED   EFG LONDON JAZZ FESTIVAL PREVIEW		1:34	12 Nov 2015 17:23	263,941	Not suitable for most advertisers
JACOB COLLIER: WTF IS A HARMONISER?   EFG LONDON JAZZ FESTIVAL PREVIEW		1:44	19 Nov 2015 16:56	189,084	Includes copyrighted content

A vast majority of Canvas videos received under 10k views, contributing to 32% of total views, while a much smaller number of videos, ranging from 17k views up to 780k, contributed to 59% of channel views.

**Exhibit 11 – Histogram of video views on Canvas YouTube channel – the number of videos with views falling into a 1,000-view range**



### Canvas viewer demographics met targets

Canvas met its goal of reaching a young, UK-based audience at the end of year 3, and these results were similar for all three years of the programme:

- 39% of all channel views came from the UK, exceeding the target of 30%
- 60% of all views were from 18–35 year olds, exactly meeting the target

### 5.3 Did the Canvas network on YouTube deliver significant reach and engagement?

At the end of year 3, the Canvas network had the following views and subscribers<sup>22</sup>:

- Total Canvas network views were 61.5M cumulatively: 2.6M from core network members; 55.7M from associate members; 3.3M from Canvas (up from 22.8M views during year 2 and 9.3M during year 1)
- The Canvas network had 370k subscribers at the end of March 2018: 21.6k from core network members; 332k from associate members; 15.9k from Canvas (up from 240k subscribers at the end of year 2 and 139k at the end of year 1).

A majority of these views and subscribers are concentrated amongst a small group of organisations: 66% of network views are from five associate members; 55% of subscribers come from five associate members.

It is also important to note that the 24 core network members were mostly very small – Canvas received twice as many views as the most-viewed core network member (Institute of Contemporary Arts) during year 3, and

<sup>22</sup> Note that we recorded final, cumulative subscriber counts for each channel; views are those accrued by network member channels while they were a member of the Canvas network.

has more subscribers than any of the core network members (only three core network members had more than 1,000 subscribers).

We analysed core network members monthly views and subscribers before and after joining the network, and observed notable uplifts<sup>23</sup>:

- A 270% increase in monthly subscribers added by core members since joining Canvas, compared to average monthly subscribers added prior to joining (exceeding the target for 15% uplift)
- A 142% increase in monthly views accrued since joining Canvas, compared to the average monthly views prior to joining

We cannot decisively conclude that Canvas is responsible for this uplift as there are a number of factors that affect a YouTube channel's growth. That said, there are at least three ways in which being a part of the Canvas network could contribute to the uplift experienced by core network members through following guidance offered in the one-on-support sessions, Health Checks, and the Canvas Playbook:

1. By improving the look and feel of their YouTube channels, including thumbnails and playlist organisation
2. By adding metadata to videos, optimising videos for YouTube's search and algorithmic recommendations
3. By increasing the frequency and volume of their video uploads.

## 5.4 Did Canvas destinations on other platforms deliver significant reach and engagement?

A key feature of the January 2017 production model change was a move to a single shoot per week (versus two per week previously), from which two videos would be created for YouTube. In addition, re-cuts of the material would be made specifically tailored for Facebook. This was partly a response to the fact that during the lifetime of the project Facebook had evolved to rival YouTube as a major destination for video content. As a result, Canvas produced 108 videos for Facebook during year 3<sup>24</sup>. However, despite this level of production, the Canvas Facebook channel did not deliver much in the way of reach or engagement:

- The 108 videos uploaded to Canvas's Facebook channel during year 3 only accounted for 219k views (70k views to 30 seconds<sup>25</sup>)
- The Canvas Facebook page has 70k subscribers, but the viewing figures and page activity suggest these subscribers are not actively engaged and are not contributing to meaningful viewing figures – the last 10 posts to the Canvas page received a total of 27 likes and 1 comment<sup>26</sup>

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<sup>23</sup> Calculated by taking the number of views and subscribers accrued while a member of the Canvas network, divided by the number of months the channel was part of the network; and the number of views and subscribers the channel had when joining the Canvas network, divided by the number of months since the channel launched. Google made a significant change to its MCN policies in January 2018, meaning Brave Bison's tools can no longer access historical data for channels with <1,000 subscribers

<sup>24</sup> Canvas did not produce significant amounts of video for Facebook in year 2 and produced no videos for Facebook in year 1.

<sup>25</sup> Facebook reports views of at least 3 seconds as a 'view', thus to compare YouTube and Facebook performance fairly, we look at views to 30-seconds; YouTube does not measure views exactly to 30 seconds, but this is the closest comparison available.

<sup>26</sup> At 16<sup>th</sup> April 2018

- Furthermore, this subscriber count is unchanged from the end of year 2, when we also observed the page to have 70k subscribers.

These results should be understood in the context that Canvas was designed from the outset to be a YouTube-focussed video channel. Brave Bison noted that driving engagement on other platforms, such as Facebook or Instagram, would require a multimedia approach – images and editorial in addition to video - and the resources for the project were not set up, or sufficient, to deliver extensive multi-platform activity in that way.



## 6 Did Canvas develop the skills and digital capacity of the arts sector and increase the volume and quality of creative media?

### 6.1 Summary of findings

Arts and cultural organisations face significant challenges if they are to take advantage of the opportunities presented by digital video and social platforms. They must learn how to create new types of content, and how to make this content engaging for generations of users who have grown up on YouTube and Facebook and have developed particular behaviours and expectations. Crucially, they must learn how to make this content discoverable through SEO and social media, in order to reach audiences who otherwise will not know it exists.

Reflecting these challenges, developing the skills and digital capacity of the arts sector was one of Canvas's core objectives. We have broken this objective down into two parts:

- Improve the skills and capabilities of arts organisations on social video platforms, and in the volume and quality of creative media produced
- Develop the capacity of arts organisations to generate new revenue streams, thereby supporting the development of longer term sustainable activities.

Our findings with regards to capacity building are mixed:

- In years 1 and 2, the majority of organisations did not report a positive impact from network membership in terms of the quality of online video they produced or the size of their audiences. In year 3, following increased hands-on support for core members, the picture slightly improved – at least half of core members reported seeing a positive impact from network membership, but Canvas still only hit some of its targets for impact
- Canvas increased its training output throughout the three years, largely meeting its targets for training output and attendance in year 3, but missing its targets in year 2:
  - In year 1, there were no targets for number and reach of training events; the bulk of Brave Bison's work was focussed on outreach.
  - In year 2, Canvas failed to deliver the required number of webinars and in-venue training events. In particular, it failed to deliver in-person training in three of the five ACE regions<sup>27</sup>. By the end of year 2, Canvas training reached 68 organisations (54 NPOs), missing cumulative targets for 100 organisations and 75 NPOs.
  - In year 3, Canvas shifted away from large group workshops and towards one-to-one or small group surgeries and support for core network members. As a result, it increased its training and development output significantly compared to years 1 and 2 and met most of its targets
- Attendees were generally positive about the training sessions they participated in during all three years, but organisations were less positive about the actual impact that training attendance would have on their channels, across categories such as audience size and quantity of output./ The disparity between the large proportion that found training helpful vs. the proportion that reported any ongoing impact from

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<sup>27</sup> Midlands, London, North, South East and South West

the training underscores a major challenge Canvas faced when trying to increase the skills and digital capacity of arts organisations: organisations often lack the time and resources necessary to implement learnings from training

- Most organisations that participated in content collaborations were positive about the experience and testified to the value that having access to support and resources for production can have, but they also expressed a need for commissioning funds in order to realise similar types of projects in the future

Canvas missed all of its targets with regards to developing revenue streams:

- The network did not deliver much in the way of advertising revenue – the Canvas network only generated £12,833 of advertising revenue (£5,978 in year 3; £5,823 in year 2; £1,082 in year 1).
- Brave Bison was also not able to secure any branded content agreements, missing its target for £75k in branded content revenue.

## **6.2 Did Canvas improve the skills and capabilities of arts organisations on social video platforms, and increase the volume and quality of creative media?**

Canvas sought to develop skills and capabilities in the sector through four main routes:

- A range of high quality education and training events and materials, designed to cover areas such as video production, marketing and data monitoring and evaluation
- Hands on support and channel management to core members of the network
- Content collaborations – providing organisations with action learning through working with Canvas to produce videos for the Canvas channel
- Network communications and collaboration – connecting network members to each other to improve their abilities to collaborate with each other.

### **Canvas largely met its targets for training delivered and organisations reached during year 3, but struggled to meet its targets in year 1 and 2**

Canvas's training and development output consisted of five main strands of activity:

1. Canvas playbook – a training manual containing guidelines about channel and video optimisation, content management, collaboration and tips to drive views and subscriptions.
2. Channel health checks – reviews of new partners' channels with the aim of identifying quick wins and easy improvements
3. Webinars – exploring a range of topics, such as channel management or video production tips, and sometimes featuring experienced guest presenters from other arts organisations with successful social video channels
4. In-venue group training sessions, bringing a number of organisations together for regional-based training sessions
5. One-to-one surgeries and ad-hoc support.

Throughout the three years of the programme, Canvas successfully delivered the playbook and health checks to all organisations that joined the network.

In year 1, there were no formal targets for number and reach of training events; the bulk of Brave Bison's work was focussed on outreach – introducing organisations to the Canvas programme in order to encourage them to join the network.

In year 2, Canvas failed to deliver the required number of webinars and in-venue training events. In particular, Canvas failed to deliver in-person training in three of the five ACE regions<sup>28</sup>, in turn missing its target the number of organisations reached regionally. By the end of year 2, Canvas training reached 68 organisations (54 NPOs), missing cumulative targets for 100 organisations and 75 NPOs.

In year 3, Canvas shifted its training delivery away from large group workshops and towards one-to-one or small group surgeries and support for core network members. As a result, Canvas increased its training and development output significantly compared to years 1 and 2 and met most of its targets:

- 20 webinars delivered, against a target of 22; however, two additional webinars were cancelled at short notice by guest speakers
- 81 in-venue training sessions held (Midlands: 13; London: 31; North: 10; South East: 13; South West: 14), exceeding the target for 1 in-venue training event in each ACE region per quarter
- Canvas also hit its target for 12 organisations from each region attending training in year 3 (Midlands: 25; London: 23; North: 28; South East: 20; South West: 18)
- Across all 3 years of the programme, webinars and in-venue training events were attended by a total of 204 unique organisations (including 128 NPOs), meeting the target for total organisations (200) but missing the target for NPOs participating in training (150)<sup>29</sup>.

### **Attendees were positive about training, but feedback about actual impact was mixed**

Attendees were generally positive about the training sessions they participated in during year 3, as they were in years 1 and 2.

In year 3, two thirds (22 of 34 respondents) felt the training they received was helpful, narrowly missing the target of 70%. However, when asked about actual impact from training, responses were mixed:

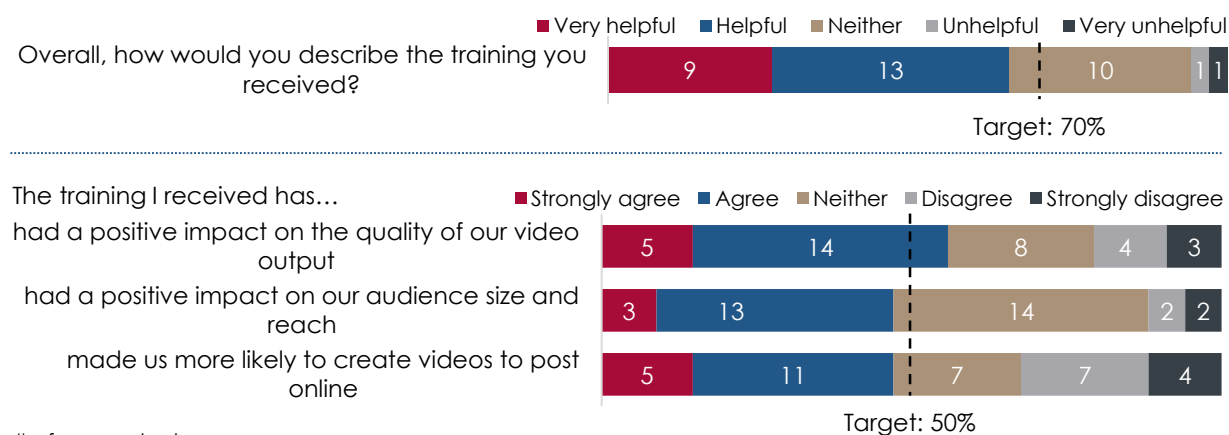
- Just over half (19 of 34) agreed the training had a positive impact on the quality of their video output (target of 50% met)
- However, only 16 of 34 agreed it had a positive impact on their audience size and reach or that it made them more likely to create videos (target of 50% narrowly missed).

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<sup>28</sup> Events not held in North, South East and South West

<sup>29</sup> We have removed duplicates and only counted each organisation once

## Exhibit 12 – Partner survey responses regarding impact from training received



We received mixed feedback about training from the organisations we spoke to in depth interviews<sup>30</sup>. Some found group training sessions and webinars helpful, but many preferred one-on-one support and suggested a mismatch between their needs and training topics:

- "The person in our organisation who looks after all of our social media within the company attended several webinars that were useful"
- "At the start, when it was just going through the basics of the channel, that was really useful – particularly when we were revamping our channel, as we had no experience running a YouTube channel. So I needed that training. [...] When you're really busy you have to be selective about what you take time out of your day to do, and some [training sessions] weren't necessarily relevant to us, though they were interesting. [...] If you're not a marketing specialist then [training sessions] dwindled a little bit in terms of their usefulness"
- "The in-house webinars haven't been of very good quality, I don't know if it's because, over the years, I've done so many webinars that they didn't add anything to what I already knew. When [Canvas] brought external people I got much more out of them – the level of expertise was much greater"
- "Training was very helpful [...] I watched a webinar about end-screens for YouTube and didn't do anything about it for a month or two. By the time I got around to doing it I had forgotten how, so [Brave Bison] was great at just reminding me things by email. It was really useful to go through it on the webinar but also have the one-on-one support that went alongside that"
- "I didn't take an awful lot from [webinars], but it's difficult to do a webinar and talk to the whole audience because people are at different skill levels."

The disparity between the large proportion that found the training helpful vs. the proportion that reported any actual training impact underscores a major challenge Canvas faced when trying to increase the skills and digital capacity of arts organisations: organisations often lack the time and resources necessary to implement learnings from training:

- "It all makes sense, [training impact] is more about having the time on our side"

<sup>30</sup> We did not send the survey to organisations that we interviewed

- *"The problem is time and resources, we don't even have time to change the YouTube appearance. It was great to see what is possible, but we can't realise it in-house. We are as well keen to make different and more interesting videos, however we don't have the resources and time to do it and it's difficult to get new ideas and script ideas signed-off"*
- *"The support and training we have received from Canvas has been extremely useful. Unfortunately as a very small organisation we do not have the time, resources and staff to create as much online video content as we would like or is suggested by Brave Bison."*

### **Health checks and playbooks were viewed very positively**

Upon joining the Canvas network, all partners were given a channel health check and a copy of the Canvas playbook. The health check is a bespoke review of an organisation's channel, with the aim of identifying quick wins and easy improvements that organisations can undertake to start improving their YouTube presence right away. The Canvas Playbook is a training manual containing guidelines about channel and video optimisation, content management, collaboration and tips to drive views and subscriptions.

Throughout the three years of the programme, network members we spoke to found the channel health checks particularly useful:

- *"They provided us with a bullet-point analysis of our whole channel [...] it was maybe 30 to 40 points. [...] Some were good practice in general, but some were more specific to what we were doing. It was great because – especially when you have a small team – it was things you could check off, being able to pick the low hanging fruit"*
- *"It's been really amazing what they've provided us with. From the beginning they gave us this great health check – here's your YouTube channel and here's x/y/z and what you should do"*
- *"We've gone through everything [from the health check] initially, and there's still a few bits we need to do – it was simple wins which was really helpful for us, and it's something we refer back to."*

They also regarded the Canvas Playbook as helpful:

- *"The playbook was a good asset, our channel is looking a lot tidier"*
- *"[The playbook] was very helpful. I'd been on the training day and on the webinars so a lot had already been covered. It was quite handy"*
- *"The thing I've enjoyed and benefitted from most of all are their fast track playbook to get you up to speed with what you should be doing. I found it useful and easy to implement a lot of their suggestions in that document. Just the fact you've got an easy guide makes you just get on with it."*

### **Limited impact was reported from network members in terms of an increase in the volume and quality of creative media produced**

We surveyed and interviewed core network members to establish whether they had seen benefits from being part of the Canvas network. In years 1 and 2, the majority of organisations surveyed did not report seeing a

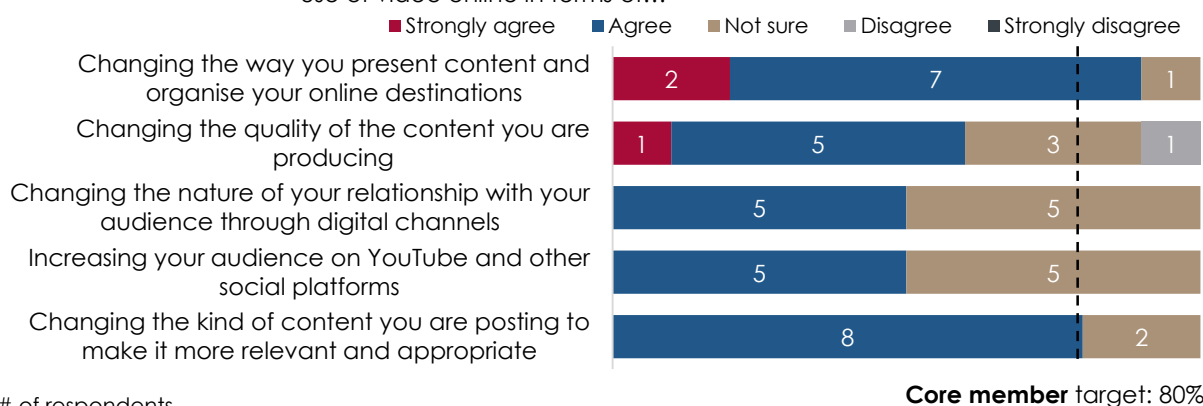
positive impact across a range of areas (see Exhibit 13) from network membership. Canvas consequently missed its impact-related targets.

At the end of year 3, following the transition to increased hands-on support for core members, the picture slightly improved – at least half of core members reported seeing a positive impact from network membership, but Canvas still only hit some of its targets:

- Nearly all (9 of 10) said Canvas had a positive impact on the way they presented and organised their content, exceeding the target of 80%
- 8 of 10 said Canvas had a positive impact in terms of changing the kind of content they posted to make it more relevant and appropriate, meeting the 80% target
- However, only 6 of 10 said network membership had a positive impact on the quality of the content they were producing, and only 5 of 10 said network membership had had a positive impact on their audience size, missing the target
- Only 4 of 10 said that Canvas had a positive impact on the quantity of content they produced<sup>31</sup>
- That said, we note that the non-positive responses regarding impact of network membership were overwhelmingly neutral; only 1 of 100 responses received in total was negative.

#### Exhibit 13 – Core member views regarding impact of network membership

Has being part of the Canvas network had a positive impact on your organisation's use of video online in terms of...



Base: Core member respondents to partner survey (N=10)

When we explored impact of the network through interviews, a few common themes emerged:

- Most organisations reported that engaging with Canvas caused them to think more carefully about their online video activity and priorities:
  - *"It definitely made us rethink the structure and use of our channels and how to expand and grow them. [...] Definitely helped with revamping that and creating new content with that. And definitely helped us generate new ideas for what content we want to post"*
- Core members were overwhelmingly positive about receiving one-to-one support:

<sup>31</sup> There is no target for quantity of content produced thus it is not charted

- *"I think any company [...] would require that [one-on-one] help, because a lot of the time theatre companies are run by practitioners rather than professionals in the marketing industry, so having that advice is always useful"*
- *"I think personally it's that one-on-one aspect that I really like. I hate to say it but sometimes it's good to have someone holding your hands. [...] I would love to sit down in person if possible and take a look at certain technical aspects, for example, and get an answer that reflects a little bit more knowledge"*
- *"It's helpful to know if you create something you can send it to them and ask them how it looks, what we've missed."*
- However, many organisations noted that they lacked the resources to follow through on the useful advice and guidance they received from Canvas:
  - *"In terms of the impact of [our channel] being organised, our subscribers have gone up marginally. There's a slight mismatch between what's required to make a successful channel and the funding we've got. I can't upload videos as often as they suggest. I don't have the resources to exploit the channel"*
  - *"My conclusion would be arts organisations are generally quite small in terms of core team and marketing, so having the capacity to accept Canvas's advice and enact them is also quite difficult. Everything on Canvas's end was good, but it's the challenge that the arts organisations feel of having to do everything they need to do on a day to day basis, as well as taking the advice from Canvas and really actioning it all"*
  - *"We couldn't sustain [weekly updates], couldn't sustain it more content-wise than resource-wise. So we then dropped from a weekly schedule to a monthly schedule. [...] Not surprisingly it reduced the audience a lot on the channel."*

## **Content collaborations were viewed positively – but commissioning funds might serve organisations better**

Another component of the January 2017 network model change was a commitment for Canvas to create two collaborative videos with each of the core network members. In regards to content collaborations, Canvas met all of its targets in years 2 and 3 (there were no targets in year 1):

- 56 organisations in total collaborated with Canvas to create videos over the three years of the programme (39 during year 3, 18 during year 2, 11 during year 1)<sup>32</sup>
- In year 3, 50 of the 97 in-house productions were created in collaboration with core network partners, exceeding the target of 48
- In total, 98 videos were created in collaboration with arts organisations in year 3 (compared to 4 collaborations in year 1 and 12 collaborations in year 2)

<sup>32</sup> We have removed duplicates in the 12 cases where organisations participated in collaborations during multiple years

- In year 3, 14 of 18 organisations surveyed rated their content collaborations as successful or very successful, in terms of the process and the quality of the output<sup>33</sup>

Most organisations that participated in content collaborations were generally positive about the experience and testified to the value that having access to support and resources for production can have:

- *"They interviewed the artist and showed some background – that went really well. 100% positive experience. Process was really great, they were super professional, really open"*
- *"We want to be involved with Canvas as funds are short so we can't always create quality video content. Being able to do [collaborations with Canvas] even once a year would be really helpful"*
- *"Canvas produced two videos that were fantastic and had the highest reach, and our trailer was a huge hit as well – it reminded people of our existence"*
- *"I would highlight the person responsible for the creative output and working with the artists to repurpose their work so that it's suitable for the channel. [...] He better represented the target market and knew exactly what it was he wanted to produce. When we were explaining things to him, we were using a language that was too obscure for him, but he immediately responded in a way that the artists could understand"*
- *"[Videos] are not something we have resources for so having someone like Canvas to work with really helps us."*

However, it is not clear if participating in content collaborations will have much long term impact for the participating organisations – nearly all hoped to create similar types of projects in the future, but expressed a need for commissioning funds in order to realise these.

We spoke in detail to two collaborating organisations, Frantic Assembly and James Cousins Company and present case studies of their video collaborations below:

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<sup>33</sup> We surveyed 10 core network members and 8 associate members that participated in content collaborations; 9 of 10 core network members rated the collaboration as successful in terms of process; 10 of 10 core network members rated it as successful in terms of quality of the content produced



## Content collaboration case study: Frantic Assembly

**The video:** [Choke: When Jealousy Kills | Frantic Assembly](#)

Co-directed by Johnny Kenton and Scott Graham (Artistic Director, Frantic Assembly)

Quotes below are from Kerry Whelan, executive director



**About the organisation:** Frantic Assembly is an internationally renowned theatre company that tours extensively in the UK and internationally, and also operates an extensive learning and training programme

**Objectives of the collaboration:** To create a digital-first piece of performance art:

- "We took something, the movement and the style of it, and transposed it onto the screen. It was created for the screen rather than just the capture of a show"
- "What we wanted to do was create something where the camera became another choreographer or editor, if you like, for the work that was created"

**Outcome:** Two videos created (above film, plus [behind-the-scenes](#)), totaling 7,091 views on the Canvas YouTube channel:

- "We were really pleased with it. It proved that what we were trying to achieve works. [...] [There's a learning curve both for the director of the original movement and for the director of the film [...] given the relatively short space of time over which it was shot, it works and we were very pleased with the style that Johnny brought and what we did together."

**Key challenges:** The editing process was tricky because Frantic was not in the edit room and a re-cut was needed to make the video more appropriate for their audience:

- "The first cut we had just felt too provocative, too sexualized. [...] We have a responsibility: our work is seen by a lot of school children so we have to make sure it's not inappropriate in that way. Those were all taken on board and we were pleased with the final cut, but that's the big thing that you learn along the way, which was part of process"

**Future impact:** Frantic said the experience would encourage them to consider creating more digital projects to amplify their creative ideas that would otherwise only exist on stage:

- "[The experience will help us] provide other potential platforms or versions of work that is created, so that ideas that come up that would have existed in a live stage format could now be considered as well: could this be a film or digital project?"
- "Certainly there's an appetite to look at how projects can be seen across both digital and live platforms."

### Content collaboration case study: James Cousins Company

**The video:** [Varla | Canvas Presents James Cousins Company](#)

Directed by Denna Cartamkhoob and choreographed by James Cousins

Quotes below are from James Cousins, co-founder and artistic director



**About the organisation:** James Cousins Company is a dance company that aims to create high quality, compelling dance productions which inspire and entertain audiences worldwide by transporting them into unique worlds on stage, screen and beyond.

**Objectives of the collaboration:** To create a piece of dance work specifically for film, by repurposing an already-choreographed performance:

- "Dance is quite expensive to create, so we [with Canvas] collectively felt it was better to work with something that was pre-existing so that creative cost [of choreography] was taken out"
- "We took an extract from a piece we made in 2014 and then repackaged it and made it a thing in its own right. It ended up being a film called Varla"

**Outcome:** Two videos created (above film, plus [behind-the-scenes](#)), totaling 4,881 views on the Canvas YouTube channel, as well as coverage from online arts site Nowness:

- "They worked with a production company called Somesuch. [...] Somesuch were fantastic, super professional and efficient, and that was just brilliant"
- "It was picked up by Nowness; it launched on their channel exclusively for the first week and got 39k views in that first week"
- "There was a very positive reaction to it from people I spoke to, that the director spoke to and that the producer spoke to"

#### Key challenges:

- "The difficulty was the music, we had a lot of battles over the music. I guess differences in taste and opinion between myself and the Brave Bison team [...] but we eventually settled on music that was fine"

**Future impact:** James Cousins Company hopes to work with production company Somesuch in the future and intends to apply for funding in order to rework stage shows for film:

- "We'll probably continue working with the same principle of filming something or taking an extract of a stage show and reworking it for film"
- "We've also invested in a Steadicam so that we can create better videos from rehearsals ourselves. This is something that's come out of this process of thinking about video more: how to increase the quality of the behind-the-scenes stuff that we create"
- "It's been such a beneficial project, especially for a company of our size who don't have the resources to create the content for online, which is such a huge platform and has a huge potential audience. To be given the help to think about that is massively beneficial"

### **6.3 Did Brave Bison develop opportunities for new revenue streams, helping to support longer term sustainable activities?**

Brave Bison set out to work towards trying to achieve a sustainable Canvas model by, in the first instance, generating £235k of advertising and sponsorship revenue. However, Canvas failed to meet any of its income targets, demonstrating the difficulty of developing sustainable online video propositions.

Over the course of the Canvas programme, the online video landscape changed considerably and many MCNs shifted their business model away from the aggregation of channels to generate ads revenue and towards branded content – i.e. audio-visual content commissioned by a brand-owner to advertise their product or service through exposure to content that the end reader wants to consume. Due to competitive pressures and decreasing revenue shares for MCNs during the lifetime of the Canvas project, the ad-based model ceased being financially viable for most MCNs. Instead, the business model for MCNs now typically focusses on creating branded content, sold as sponsorship packages. Rather than using their network channel members as independent content creators, they instead leverage those relationships to create opportunities for commissioned branded content.

Following the evaluation of year 1, Brave Bison recognised that the Canvas network would be too small (in terms of views and subscribers) to generate large scale advertising revenue. In total, the Canvas network only generated £12,883 of advertising revenue (£5,978 in year 3; £5,823 in year 2; £1,082 in year 1). Reflecting the wider trend in the MCN market place, Brave Bison's revised proposal for delivering commercial income was to sell branded-content sponsorship packages to brands looking for an association with art and arts organisations. Following assurances that delivery of the rest of the targets for the Canvas programme would not be compromised by the shortfall in ad revenues, ACE agreed that Brave Bison could work to a revised branded content revenue target of £75k.

However, Brave Bison was not able to secure any branded content agreements despite its sales efforts, which largely occurred during year 3. Brave Bison approached 30 brands, across a range of sectors, including alcoholic beverages, automotive, financial services and telecoms, and approached 24 media agencies. 7 brands and 10 agencies responded, but no sales resulted from these discussions and meetings.

Brave Bison reached the conclusion that developing a commercially attractive channel was at odds with its requirement to work with a wide range of arts organisations. Brave Bison also suggested that there was a "mis-fit between the editorial position of a channel that wants to engage younger people with the arts, and the commercial opportunity, where brands would look to engage older arts-engaged audiences."

Brave Bison noted the following feedback from brands and agencies:

- There was a perception that a platform for arts best fits brands in luxury and financial services, but that would be contrary to Canvas's 18-35 target demographic
- The Canvas content was perceived to be too "high-brow" for some brands
- Many brands have strict brand guidelines and would want full control over the production and editorial strategy, thus reducing the freedom of arts organisations for content production.

Brave Bison believe there is some potential for larger arts organisations with significant online scale to fund digital content by offering it as branded content, potentially as an upsell from exhibition sponsorships'.

However, achieving this would likely require bringing in expertise, such as a sponsorship consultant. Brave Bison hired a sponsorship consultant to conduct the above sales activity, but without success. However, it is important to note that Brave Bison delayed activity in this area until the final months of the project, by which point they were unable to guarantee potential sponsors or branded content commissioners that the service would continue beyond March 2018.

## 7 Did the Canvas programme support ACE's Creative Case for Diversity?

Brave Bison committed to support ACE's Creative Case for Diversity by ensuring "equal access on both the supply and demand side of all the activities carried out as part of Canvas." This support included engaging with and supporting BME-led and disabled-led NPOs, showcasing work by diverse artists and arts companies, and supporting arts organisations with training and advice around equality and accessibility online.

With regards to diversity, Canvas's performance was mixed. Canvas did well in terms of the diversity of the work, organisations and artists that it showcased on its channel (and that it worked with to realise collaborations). It struggled more with its targets for membership and underperformed in its role to encourage arts organisations to adopt best practice standards for the accessibility of their videos:

- At the end of years 2 and year 3, 5 of the 20 core members of the Canvas network who were NPOs were BME or disabled-led, exceeding the target of 3 diverse-led organisations (no year 1 target as 'core' members were not part of the year 1 programme)
- At the end of year 3, only 4 of a total of 64 associate member NPOs were BME or disabled-led<sup>34</sup>, missing the target of 15 organisations (2 NPOs in year 2, against a target of 10; no year 1 target as 'associate' members were not part of the year 1 programme)
  - Brave Bison noted that, taking into account that the associate membership included a further 4 diversity-focussed organisations, this meant 12% of the associate members (64 NPOs) were diverse-led or diversity-focussed, compared to 9% of the 2015-18 ACE National Portfolio being diverse-led (59 out of 663)
- In years 1 and 2, Canvas underperformed for diverse-led organisations participating in training (year 1: 4 organisations, against a target of 19; year 2: 2 organisations, no target<sup>35</sup>), but made significant progress in year 3, with 16 diverse-led organisations cumulatively participating in training, against a revised target of 15
- In year 3, Canvas comfortably exceeded its target for diversity in video collaborations, with 65 diverse-led organisations, diversity-focussed organisations, or artists and performers from diverse backgrounds participating in video collaborations (vs. target of 50) – Canvas just missed the target in year 2, with 28 vs. a target of 30
- 2 diverse-led organisations participated in training sessions in year 2, for a total of 6 across the first two years – below pace to meet the March 2018 target of 15 diverse-led organisations.

The primary way that Canvas could support the accessibility of video to audiences is through the use of closed captions on online videos. Though YouTube does have an automatic captioning feature, its accuracy is unreliable so videos must be captioned manually. Throughout its three years, Canvas achieved mixed results with regards to accessibility:

- In years 1 and 2, and despite constant reminders from ACE that best practice close captioning was a basic minimum requirement of the service, we identified numerous Canvas videos that lacked manual

<sup>34</sup> Brave Bison signed up an additional 4 associate members that do not qualify as diverse-led NPOs but that had a diversity focus

<sup>35</sup> During year 2, Brave Bison revised the Canvas training plans as part of the revised network model, thus MTM and ACE agreed to measure training performance at the end of year 2 without any set targets

closed-captioning. We found that all year 3 videos were manually closed-captioned (with the exception of videos containing no spoken words)

- In year 3, 27 out of 38 partner survey respondents (8 of 10 core members) stated that some or most of their content is manually close-captioned by hand, a slight improvement over years 1 and 2 (year 1: 8 of 23; year 2: 11 of 27). The inability of Brave Bison, through its guidance and training, to encourage a more pervasive culture of close captioning amongst its membership suggests that the aim to promote best practice in accessible video content was not well achieved.
- In year 3, 8 of 27 respondents (but 7 out of 10 core members) agreed with the statement “*working with Canvas has helped you to improve the accessibility of your videos for audiences who might face barriers*” – just missing the target for 80% of core members. However, the performance of the core membership shows improvement over prior years when there were no core members receiving hands-on support (year 1: 3 of 23 respondents; year 2: 8 of 27 respondents), suggesting that increased hands-on support had a positive impact on organisations awareness of accessibility needs and how they could be addressed.

## 8 Summary of challenges and key learnings

### 8.1 Arts organisations have a wide range of objectives and a diverse set of needs – but nearly all have limited resources to devote to video

Arts and cultural organisations often lack the resource and capability to produce online video, and tend to require intensive one to one support if they are to move forward their practice in this area. Brave Bison observed that arts organisations have a diverse range of content creation and marketing needs, varying by organisation size, art form, and organisation type:

- *"What a video strategy needs to do is sit within the broader objectives and strategy of an arts organisation, so it supports all those things, rather than being adjunct. [...] Every organisation should have a unique take. That's the broader learning: you can't just drop a model onto arts organisations."* – Canvas programme director

On a related note, Brave Bison also observed that many arts organisations also lacked basic technical know-how – e.g. data analysis, reporting and benchmarking skills:

- *"Data: they don't use it, there's no benchmark for what success might look like and no sense of return on investment."* – Canvas programme director

In our sector interviews, we also observed a wide range of objectives and goals for the use of online videos, including marketing and sales for live arts events, and audience and brand development, as well as distribution of original artistic output.

Brave Bison's experiences and our interviews demonstrated there is no one size fits all solution to support arts organisations to develop their video production and distribution capacity, and arts organisations have a wide range of resource and capability gaps. Key deficit areas include lacks in relation to filming equipment, filming and editing experience, video production and direction (developing ideas for online video), marketing and channel management, and data analytics:

- *"If we wanted to go find a good camera operator that works for the [arts sector] who could you go get? If you wanted a good sound engineer, a light engineer... that whole crew thing was something ACE never thought of."* – Canvas programme member

The one commonality across most small to mid-sized arts organisations is that they lack time and money: they often didn't have the time to engage with Canvas; they lacked the skills and expertise to create or edit video; and quite often didn't have budgets and spare time to devote to producing video or managing a channel. Organisations of this type may have just a single person with responsibility for their video output, who is only devoted to marketing or one or two days a week. Typical responses from arts organisations included:

- *"[Capitalising on digital opportunities] takes a lot of work and time investment, and that's something we've realised working with Canvas. We're just a team of two of us and a couple people part time; we don't have someone specifically working on socials or video content for YouTube"* – Canvas programme member

- *"By far [our biggest challenges] are money, capacity and specialism. No one in our company is a specifically trained videographer, with qualifications or experience in creating and editing video content. Also as a small company, it's about having the capacity and budgets"* – Associate Canvas Member
- *"Canvas are brilliant, we think they're great, but when it comes to the capacity of each arts company, Canvas and video content sometimes get pushed back. We had big ideas about videos we wanted to make, but because of other things coming up, the ideas became scaled back. It had to do with the time and capacity to speak to Canvas and make good on arranging things."* – Canvas programme member

As a result, Canvas struggled during its early days as potential member organisations with highly diverse needs required substantial time investment from the Canvas team to 'on-board' them in to the network and provide support. This proved difficult to manage across scores of organisations. Resources were too thinly spread. This largely explains the challenge Canvas faced in meeting its targets for signing organisations up to the network, and also the limited engagement and impact reported from training sessions (prior to the move to one-on-one sessions).

#### **Key learnings:**

The arts and cultural sector is diverse, often thinly resourced, and has a range of different needs in relation to digital capacity building. To address this it may require a combination of training, one-on-one support, and hardware needs.

In designing future training programmes it is important first to test and assess demand for different types of training across the sector. In-depth, one-on-one support, of the kind Canvas developed, to address this challenge, can be very valuable to organisations, but can be labour intensive to deliver. Brave Bison observed that one-to-one guidance sessions for organisations with minimal spare time or resource could often help them find more cost effective ways of working:

- *"Smaller organizations are so focussed on running the organisation, keeping the core product going, that even when there are simple things to do, they haven't had time to do it. That's why one-to-ones are good, as you can open their minds to simple things that don't cost any money and to partnerships that don't cost any money but that can change things materially."* – Canvas programme director

In addition, there may be more opportunities to pool resources across the sector, e.g. sharing knowledge of production companies or editors known to work well with arts organisations, or sharing or renting camera equipment, as one larger organisation we spoke to already does:

- *"We've purchased our own kit; I'm more than happy to rent it out to other arts organisations at a discounted rate. [...] I just say let me know what your budget is – sometimes it's low and sometimes it's sensible – but whatever it is I accommodate."* – Canvas programme director



## 8.2 Producing high-quality digital arts content can be expensive in terms of expert resource and (to a lesser degree) equipment

A key challenge and lesson emerging from the Canvas programme is that producing compelling digital video content is expensive in terms of expert resource and equipment. Arts organisations are competing within an ecosystem that includes the iPlayer and Netflix at one end and YouTube creators at the other, many of whom have millions of subscribers and have become major cultural figures in their own right. Arts organisations' video content needs to be compelling in terms of look and feel and narrative coherence if it is to command an audience in this highly competitive environment, where the main restrictions on viewing are driven by consumer time. This requires a combination of expert content creation resource and the appropriate hardware and software.

*"Our production values and equipment need to be just as good as the best creators if we are to deliver an audience on YouTube"*

*"It is easy to believe that digital content can be created cheaply ... you can take an iPhone and film and do vlogging in no time at all and if you have the talent you can be one of those young kids that does commentary on football and gets 2M followers...but the reality is that those people are talented exceptions. They are not available to arts organisations."*

Canvas evolved its offer over time to address this challenge, focusing ever-more on providing skills training for staff and volunteers across the sector over and above the supply of equipment. Future programmes should focus on ensuring that the appropriate people expertise is available to organisations across the sector and also on providing training to help organisations develop their own resources: Canvas staff emphasised that there are consistent skills gaps in arts organisations across a wide range of areas, ranging from data management and analytics through to basic production, editing, channel management and multi-channel distribution.

## 8.3 Hero content did not consistently deliver higher viewer numbers than other content

In year 3, Canvas produced 15 'hero' videos, with an external commissioning budget of £10k each, 5x the level of investment of the standard £2k 'hub' videos (the basic costs for Brave Bison staff and equipment). However, these videos did not generate proportionally higher viewing figures.

In general, the major determinants of viewer numbers were more about popularity of subject area (e.g. *Realistic Dolls*) and fit with the YouTube platform (e.g. music), and, crucially, degree to which the content was related to artists or organisations with large subscriber numbers. For example, the second and third-best performing Canvas videos featured Jacob Collier, a Grammy-winning musician.

These findings point the way forward for arts organisations seeking to grow online audiences. Consumers are faced with an ever-wider set of options about what content to engage with, and the deficit is on their attention, not on supply of content, of which there is a surplus. As such, it is critical that the content is relevant and original. In addition, it is critical that the content is marketed and promoted through both artist networks

and paid advertising, so as to surface that content on social networks. Spend on paid ads is relatively low (c. £0.015 per view) but has a strong effect on video view figures and will also feed through in to subscriber numbers.

#### **8.4 The Canvas channel was designed to be a channel for the arts, but an aggregate audience for the arts may not exist**

The Canvas channel covered a wide range of art forms, meaning it was hard to achieve editorial consistency on the channel. This may, in turn, have been a cause of the failure of the channel to meet its subscriber targets.

We asked arts organisations their thoughts on aggregate audiences for the arts online, and views were overwhelmingly negative; many organisations suggested that the arts were niche by definition, and that combining such a wide range of art forms in a single place would never work, no matter how well it was produced and curated. Responses included:

- *"The challenge of putting any arts content out is that by nature you're serving a niche within a niche. To try and make it accessible and entertaining enough for an audience beyond a gallery is really challenging"* – Collaborating organisation
- *"Canvas is a tough sell as it is an arts YouTube channel which includes arts across the board. [...] It is very difficult to believe someone who would be a hard-core opera fan will also be into hip-hop dance. [...] With a channel that does lots of different things, my take is that it is very difficult to grow a good solid audience for a channel like that"* – Collaborating organisation
- *"I don't know whether there is an aggregate audience for all art forms. A dance audience is very specifically a dance audience and aren't necessarily going to cross over. Every theatre will have some cross over but I'm not convinced"* – Canvas Associate Member
- *"I just don't think it's necessary to have an aggregate platform. What it ends up doing is making it appear a bit dull and bland, and the last thing you want is for users to stumble across something bland. The word of mouth and advocacy that comes with somebody's evangelical discovery of a company or a piece of work is what ignites it, and the internet is designed to enable that to spread, There's so much stuff out there that trying to aggregate it becomes problematic."* – Canvas Core Member

#### **Key learnings:**

More focussed online channels appear more likely to have success, such as a dance, theatre, or circus-art channel. In turn, future commissions could have more value for participating organisations by living on their own digital channels, rather than on a central hub channel such as Canvas.

## 8.5 When Canvas was devised, YouTube was the dominant video platform – but in 2018 all the key social media platforms have a distinct video offer

When Canvas was conceived in 2013-14, YouTube was by far the dominant video platform, and the focus of all major MCN activity.

However, over the intervening years, Instagram, Facebook, Twitter, Snapchat and other platforms besides have also become video-friendly platforms. Crucially, each of these platforms provides consumers with a distinct video experience, and requires publishers to tailor video output to each in order to extract maximum value.

Going forwards there are a number of key lessons for organisations across the sector in general and programme designers specifically:

- The video landscape changes quickly – future initiatives need to be agile, with flexible targets and the ability to pivot to different platforms and environments at short notice
- Driving engagement on platforms requires an all-round editorial approach rather than pure-AV output: *"On Facebook you can't just publish videos, you need an all-around editorial approach. [...] If you're going to be effective on other platforms with getting people to watch video, you have to ask yourself what it is you're trying to achieve; if the objective is to engage people with digital content, then video is part of it, not all of it"* – Canvas Team
- Publishing cycles vary by platform: *"[To take advantage of] Facebook, Instagram and Twitter you need to be relevant and appropriate in the kind of content you're serving: maybe one to two videos a day and one to two posts, rather than the YouTube model, which is two to three videos per week. It requires a different production team and a different approach."* – Canvas Team
- Audiences differ significantly by platform, and several non-YouTube platforms provide arts organisations with a significant potential to engage audiences: *"The potential to reach a more arts savvy or arts curious audience is much greater on [non-YouTube platforms]. The potential to engage with those audiences through images, and not just video, is huge on those platforms."* – Canvas programme director

## Appendix 1: Canvas programme year 3 data table

Colour key and definitions:

**Green = core KPI** – must be met in order to meet the conditions of the Arts Council funding agreement

**Blue = level 2 priority KPI**

**Aim 1: Make digital arts content more discoverable and engaging to audiences**

Objective	Key Performance Indicator	Final performance (31st March 2018)	Total year 3 target	Performance against target
Aggregate, brand and operate new destinations for arts content that are compelling for audiences	<b>1.a) Canvas official YouTube channel(s) a compelling destination</b>		Canvas performance benchmarked against three best-in-class arts YouTube channels – Tate, Barbican and Creators Project	Target met: Canvas performed similarly to benchmarks <sup>36</sup>
	<b>Audience view</b> (quant): Measure current and target audience views on relevance, appeal, quality, etc. of overall channel, using rating (% rating 4-5, on a scale of 1-5)			
	% rating quite interesting or very interesting	62%		
	% rating quite relevant or very relevant	53%		
	% agree or strongly agree the channel is high quality	69%		
	% agree or strongly agree the channel is presented and organised well	71%		
	% agree or strongly agree the channel is visually appealing	65%		
	% agree or strongly agree 'I would subscribe to the channel'	33%		
	% agree or strongly agree 'the channel contains topics that interest me'	49%		

<sup>36</sup> No significant differences between Canvas results and benchmark channel results, to a 95% confidence level

Objective	Key Performance Indicator	Final performance (31st March 2018)	Total year 3 target	Performance against target
	<b>Partner view:</b> % of core members and associate members / wider sector who say they believe Canvas is a compelling/very compelling destination to attract a younger audience to the arts online (% rating 4-5 on a scale of 1-5)	68% (25 of 37)	No target	N/A
Produce or co-produce engaging new content to support these destinations	<b>1.b) Output KPIs:</b> Deploy original content regularly:			
	# of 'hero' videos per month	15 hero commissions published in year 3	15 x £10k hero videos (from Jan 2017)	Target met
	# of 'hub' videos per week	<ul style="list-style-type: none"> <li>97 YouTube hub uploads in year 3</li> <li>108 Facebook hub uploads in year 3</li> </ul>	96 YT hub videos 96 FB hub videos (from April 2017)	Target met
	# network partner collaborations	<ul style="list-style-type: none"> <li>50 of 97 hub videos were partner collaborations</li> <li>12 of 15 hero commissions were partner collaborations</li> <li>23 of 24 network partners featured in a collaboration (ICA declined)</li> </ul>	48 of 96 hub videos are collaborations, produced with all 24 core members	Target mostly met
	<b>1.c) Outcome KPIs:</b> Engaging original content:			
	<b>Audience view</b> (quant): Measure current target audience view on relevance, appeal, virality, quality of original content on the channel, using rating (% rating 4-5 on a scale of 1-5)			
	% rating quite interesting or very interesting	64%	Benchmarked as per KPIs section 1.a)	Target met: Canvas performed similarly to benchmarks <sup>37</sup>
	% rating quite relevant or very relevant	50%		
	% agree or strongly agree the video is high quality	70%		

<sup>37</sup> No significant differences between Canvas results and benchmark channel results, to a 95% confidence level

Objective	Key Performance Indicator	Final performance (31st March 2018)	Total year 3 target	Performance against target
	<b>Partner view:</b> % of partners regarding Canvas original commissions as very high quality or high quality (% rating 4-5 on a scale of 1-5)	92% (34 of 37)	No target	N/A
Build up Canvas network / family of channels to make arts content more discoverable	<b>1.e) Outputs:</b>			
	Total number of Canvas network core members	24	24	Target met
	# of NPOs that are Canvas network core members	21	20	Target met
	Geographical distribution of Canvas network core members	London: 10 Midlands: 3 North: 4 South East: 4 South West: 3	4 members from each ACE region Maximum 8 members in London	Target mostly met
	Total # of NPOs that are Canvas network members (core members + associate members)	86 with signed contracts	130	Target missed
	# of non-NPOs that are Canvas network associates	42 with signed contracts	No target	N/A
	# of top 20 NPOs who are partners (core members + associate members) <sup>38</sup>	11 (2 core member, 9 associates)	15	Target missed

<sup>38</sup> Top 20 by subscriber count on YouTube

**Aim 2: Increase the number and range of people engaging with the arts online and offline, and the depth of this engagement**

Objective	Key Performance Indicator	Final performance (31st March 2018)	Total year 3 target	Performance against target
Core YouTube channel(s) delivers significant reach and engagement	<b>2.a) Reach:</b>			
	# of core channel(s) views on YouTube	3,278,657	2,500,000	Target met
	# of core channel views on Facebook <sup>39</sup>	18,623,533 (to 3 seconds) 76,392 (to 30 seconds)	No target	N/A
	<b>2.b) Engagement:</b>			
	# of core channel(s) subscriptions	15,922	15,000	Target met
	Facebook Page likes	69,856	No target	N/A
	<b>Watch time on YouTube (minutes)</b>	4,737,783	3,500,000	Target met
	Watch time on Facebook (minutes)	112,745	No target	N/A
	<b>2.c) Advocacy:</b>			
	Likes on YouTube	23,727	No target	N/A
	Shares on YouTube	9,266	No target	N/A
Canvas network on YouTube delivers significant reach and engagement	<b>2.d) Reach:</b>			
	# of video views for Canvas + all core network members	5,838,758 (Partners: 2,560,101; Canvas: 3,278,657) <sup>40</sup>	No target	N/A
	# of video views for all associate network members	55,705,987	No target	N/A
	Uplift in views (to measure impact of Canvas on its members)	142% increase in monthly views accrued for core members since joining Canvas, over average monthly views prior to joining <sup>41</sup>	No target	N/A

<sup>39</sup> Facebook counts a view as 3 seconds or more – however, BB can use the Facebook Insights tool to capture views that are 30 seconds or more (same as YouTube).

<sup>40</sup> N.B.: only includes organisations with CMS data linked

<sup>41</sup> Calculated by taking the views and subscribers accrued while a member of the Canvas network, divided by the number of months the channel was part of the network, compared to the views and subscribers the channel had when joining the Canvas network, divided by the number of months since the channel launched. Google made a significant change to its MCN policies in January 2018, meaning Brave Bison's tools can no longer access historical data for channels with <1,000 subscribers

Objective	Key Performance Indicator	Final performance (31st March 2018)	Total year 3 target	Performance against target
	<b>2.e) Engagement:</b>			
	# of subscriptions across all core network members (including Canvas)	37,524 (Partners: 21,602; Canvas: 15,922)	No target	N/A
	# of subscriptions for all associate network members	332,107	No target	N/A
	Uplift in subscriptions across all core network members	270% increase in monthly subscribers added by core members since joining Canvas, over average monthly subs added prior to joining <sup>42</sup>	15% uplift in subscriptions growth	
	<b>2.f) Watch time across core network partners on YouTube</b>	Data not available	No target	
	<b>2.g) Geographic and demographic targets that we will monitor across viewing:</b>			
	By demographic profile (% of views 18–35 age group) (core channel)	60%	> 60% of core channel views 18–35 age group	Target met
	% of views within UK (core channel)	39%	> 30% of core channel views within UK	Target met
Users are more likely to attend live art event as a result of using Canvas	By demographic profile (% of views 18–35 age group) (core network)	57%	> 60% of core network views 18–35 age group	Target nearly met
	<b>2.h) Behavioural impact:</b>			
	% of users who say viewing content on Canvas channel makes them more / less likely to attend live arts event	45%	No target	N/A

<sup>42</sup> Calculated by taking the number of views and subscribers accrued while a member of the Canvas network, divided by the number of months the channel was part of the network; and the number of views and subscribers the channel had when joining the Canvas network, divided by the number of months since the channel launched. Google made a significant change to its MCN policies in January 2018, meaning Brave Bison's tools can no longer access historical data for channels with <1,000 subscribers



Objective	Key Performance Indicator	Final performance (31st March 2018)	Total year 3 target	Performance against target
	% of users who say viewing content on Canvas channel gives them ideas for new arts events to attend	42%	No target	N/A
Diversity and accessibility	<b>2.i) Diversity:</b>			
	Number of BME-led and disabled-led NPOs in the Canvas network that are core network members	5 (+ 2 which do not qualify as diverse-led NPOs but are diversity-focussed) <sup>43</sup>	3 diverse-led NPOs are core members	Target met
	Number of BME-led and disabled-led NPOs in the Canvas network that are associate network members (out of 59 total)	4 (+ 4 which do not qualify as diverse-led NPOs but are diversity-focussed) <sup>44</sup>	15 diverse-led NPOs are associate members	Target missed
	# of diverse-led organisations (not necessarily NPOs), diversity-focussed organisations, or artists and performers from diverse backgrounds participating / featuring in video collaborations	65	50 diverse organisations and artists participating/featuring in video collaborations	Target met
	Number of diverse-led arts orgs that have participated in training sessions (NPOs and non-NPOs)	16	15-diverse led organisations participated in training	Target met
	<b>2.j) Accessibility</b>			
	# videos on Canvas channel captioned	All (where necessary)	All Canvas channel videos captioned	Target met
	# of network partners captioning videos	80% (8 of 10) core members, 75% (18 of 24) associate members state their content is closed-captioned by hand. Not possible to evaluate without reviewing all videos from all 24 channels	No target	N/A
	% of partners who agree that 'working with Canvas has helped you to improve the	70% (7 of 10)	80% of core members say	Target missed

<sup>43</sup> Asian Arts Agency, Carousel, Rich Mix, Rifco, Talawa (+ Candoco, Protocol)

<sup>44</sup> Creative Black Country, Darbar, Jazz Re:Freshed, Paraiso (+ Akram Khan, DYSPLA, Elimu Mas, Leicester Jazz House). Many diverse-led NPOs are small orgs which do not produce much if any video (eg B3 Media, Punch Drunk Records, Milap, Phoenix) and whose interest in Canvas Brave Bison reported to be primarily as a source of funding

Objective	Key Performance Indicator	Final performance (31st March 2018)	Total year 3 target	Performance against target
	accessibility of your videos for audiences who might face barriers'		Canvas has helped improve accessibility of videos	
Cost per view / sub	<b>2.k) Cost per view / sub:</b> <sup>45</sup>			
	Cost per YouTube subscription	<b>Cumulative: £46</b> <b>Year 1: £96</b> <b>Year 2: £40</b> <b>Year 3: £46</b>	No target	N/A
	Cost per view	<b>Cumulative: £0.22</b> <b>Year 1: £0.36</b> <b>Year 2: £0.31</b> <b>Year 3: £0.18</b>	No target	N/A

### Aim 3: Develop the skills and digital capacity of the arts sector and increase the volume and quality of creative media

Objective	Key Performance Indicator	Final performance (31st March 2018)	Total year 3 target	Performance against target
Improve the skills and capabilities of arts organisations on social video platforms	<b>3.a) Output KPIs: Delivery of range of high quality education and training events and material e.g.:</b>			
	Canvas playbook	All associates and partners	All core members	Target met
	Health checks	All associates and partners	All core members	Target met
	Webinars (per year)	20 (2 Webinars cancelled by guest speakers: Northern Town and Playbook Media)	22	Target partially met
	Training events held regionally (per year)	Midlands: 13 London: 31 North: 10	1 in-venue training event in each ACE region per quarter	Target met

<sup>45</sup> Calculated by dividing "Production Costs" plus "Marketing Costs" by subscribers added or views accrued during year 2

Objective	Key Performance Indicator	Final performance (31st March 2018)	Total year 3 target	Performance against target
		South East: 13 South West: 14		
	Regional training event attendance	Midlands: 25 London: 23 North: 28 South East: 20 South West: 18	Minimum 4 organisations in each ACE region attending regional training each quarter, and a total minimum of 12 separate organisations per region	
	<b>3.b) Reach KPI: # of different arts organisations and NPOs that have participated in Canvas training:</b>			
	Real-world or online training events	Cumulative: 204 (128 NPOs)	200 different arts orgs have participated in Canvas training, including 150 NPOs	Target partially met
	# of Canvas network member NPOs that have participated in video collaboration with Brave Bison	31 NPOs during Year 3	All 24 core network members should participate in at least one video collaboration during year 3, resulting in 2 YouTube videos and 2 Facebook videos, per member.	Target met
	<b>3.c) Outcome KPIs – part 1: positive feedback on training:</b>			
	% of respondents who say training was helpful/very helpful (4 or 5 out of 5 on scale of 1-5)	65% (22 of 34)	70%	Target missed

Objective	Key Performance Indicator	Final performance (31st March 2018)	Total year 3 target	Performance against target
	% of respondents who agree training has made them more likely to create video to post online	47% (16 of 34)	50%	Target narrowly missed
	% who agree that the training has had a positive impact on the quality of our video output	56% (19 of 34)	50%	Target met
	% of participants who agree the training has had a positive impact on our audience size and reach	47% (16 of 34)	50%	Target narrowly missed
	% of participants more likely to create video output for social video platforms as a result	47% (16 of 34)	50%	Target narrowly missed
	% of participants who say the training will have a positive impact on the quality of their video output	62% (21 of 34)	50%	Target met
	% of participants who say the training will have a positive impact on their audience development	50% (17 of 34)	50%	Target met
	<b>3.d) Outcome KPIs – part 2: Has being part of the Canvas network had a positive impact on your organisation:</b>			
	<b>Core members:</b> Changing the kind of content you are posting to YouTube to make it more relevant and appropriate to the platform (e.g. less marketing focussed)?	80% (8 of 10)	80% of core members say being part of network has had positive/v positive impact in each of these areas (4-5 out of 5).	Target met
	<b>Core members:</b> Improving the quality of content you are producing?	60% (6 of 10)		Target missed
	<b>Core members:</b> Increasing your audience on YouTube and other social platforms?	50% (5 of 10)		Target missed
	<b>Core members:</b> Changing the nature of your relationship with your audience through digital channels?	50% (5 of 10)		Target missed

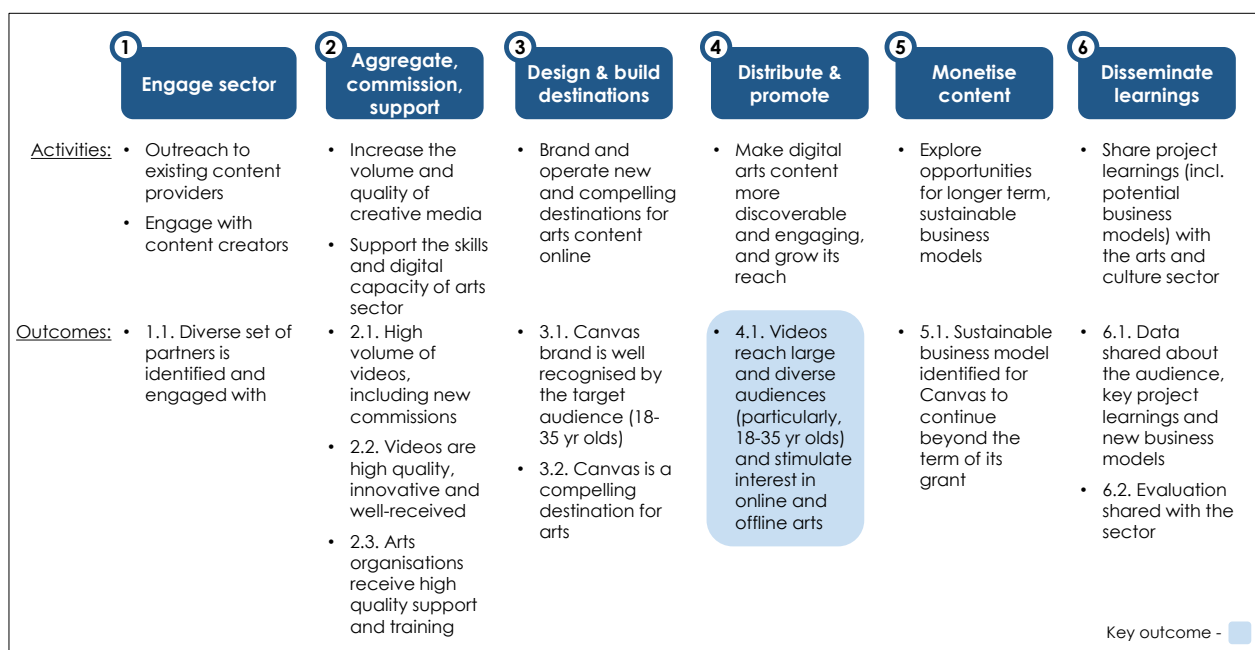
Objective	Key Performance Indicator	Final performance (31st March 2018)	Total year 3 target	Performance against target
	<b>Core members:</b> Changing the way you present content and organise your online destinations?	90% (9 of 10)		Target met
	<b>Associate members:</b> Changing the kind of content you are posting to YouTube to make it more relevant and appropriate to the platform (e.g. less marketing focussed)?	54% (13 of 24)	60% of associate members say being part of network has had positive/v positive impact in each of these areas (4-5 out of 5).	Target missed
	<b>Associate members:</b> Improving the quality of content you are producing?	46% (11 of 24)		Target missed
	<b>Associate members:</b> Increasing your audience on YouTube and other social platforms?	38% (9 of 24)		Target missed
	<b>Associate members:</b> Changing the nature of your relationship with your audience through digital channels?	33% (8 of 24)		Target missed
	<b>Associate members:</b> Changing the way you present content and organise your online destinations?	71% (17 of 24)		Target met
Develop opportunities for longer term, sustainable propositions and new business models	<b>3.e) AVOD and sponsorship revenue:</b> Generate revenue from advertising around video content and through brand sponsorship and integrations across both official Canvas channels and the broader network	£0	£75,000	Target missed
	Total gross revenue generated by the entire Canvas network	£12,883 (year 1: £1,082; year 2: £5,823; year 3: £5,978__)	Extra £600 during year 3	Target missed

## Appendix 2: Our approach

### Logic Model

MTM worked with ACE and Brave Bison in 2016 to design an evaluation framework based on a Logic Model that captures each step of the Canvas journey, from outreach with the sector to engage organisations who might become members of the Canvas family, through the sector support activities that will enable them to produce better content, to the channel design and promotion stage.

**Exhibit 14 – Logic Model Informing Evaluation Framework**



### Evaluation framework and targets

We then used the agreed outcomes from the Logic Model to specify sub-objectives, KPIs and (where relevant) targets for each aspect of the programme to measure success in all key areas. The KPIs and targets are set out in Exhibit 15 below. It is important to note that an original set of agreed KPIs were revised in December 2016 following a mid-point evaluation, leading to a revised plan for delivering the programme.

Note: in this evaluation framework and throughout this document, we have noted different categories of KPIs as follows, in accordance with ACE's guidance:

**Green = core KPI** – must be met in order to meet the conditions of the Arts Council funding agreement

**Blue = high priority KPI**

## Exhibit 15 – KPIs based on evaluation framework

## Aim 1: Make digital arts content more discoverable and engaging to audiences

Objective	Key Performance Indicator	March 2018 target
Aggregate, brand and operate new destinations for arts content that are compelling for audiences	<b>1.a) Canvas official YouTube channel(s) a compelling destination</b>	Canvas performance benchmarked against three best-in-class arts YouTube channels – Tate, Barbican and Creators Project  Aim to be on a par with or ahead of these best-in-class channels by year 3
	<b>Audience view</b> (quant): Measure current and target audience views on relevance, appeal, quality, etc. of overall channel, using rating (% rating 4-5, on a scale of 1-5)	
	% rating quite interesting or very interesting	
	% rating quite relevant or very relevant	
	% agree or strongly agree the channel is high quality	
	% agree or strongly agree the channel is presented and organised well	
	% agree or strongly agree the channel is visually appealing	
	% agree or strongly agree 'I would subscribe to the channel'	
	% agree or strongly agree 'the channel contains topics that interest me'	
	<b>Partner view:</b> % of core members and associate members / wider sector who say they believe Canvas is a compelling/very compelling destination to attract a younger audience to the arts online (% rating 4-5 on a scale of 1-5)	No target

Objective	Key Performance Indicator	March 2018 target
Produce or co-produce engaging new content to support these destinations	<b>1.b) Output KPIs:</b> Deploy original content regularly:	
	# of videos per month	15 x £10k hero videos (from Jan 2017)
	# of videos per week	96 YT hub videos 96 FB hub videos (from April 2017)
	# network partner collaborations each month	48 of 96 hub videos are collaborations, produced with all 24 core members
	<b>1.c) Outcome KPIs:</b> Engaging original content:	
	<b>Audience view</b> (quant): Measure current target audience view on relevance, appeal, virality, quality of original content on the channel, using rating (% rating 4-5 on a scale of 1-5)	Benchmarked as per KPIs section 1.a)
	% rating quite interesting or very interesting	
	% rating quite relevant or very relevant	
	% agree or strongly agree the video is high quality	
	<b>Partner view:</b> % of partners regarding Canvas original commissions as very high quality or high quality (% rating 4-5 on a scale of 1-5)	No target
Build up Canvas network / family of channels to make arts content more discoverable	<b>1.e) Outputs:</b>	
	Total number of Canvas network core members	24
	# of NPOs that are Canvas network core members	20



Objective	Key Performance Indicator	March 2018 target
	Geographical distribution of Canvas network core members	<ul style="list-style-type: none"> <li>- 4 members from each ACE region</li> <li>- Maximum 8 members in London</li> <li>- 20 NPOs are core members</li> </ul>
	Total # of NPOs that are Canvas network members (core members + associate members)	130
	# of non-NPOs that are Canvas network associates	No target
	# of top 20 NPOs who are partners (core members + associate members) <sup>46</sup>	15

<sup>46</sup> Top 20 by subscriber count on YouTube

**Aim 2: Increase the number and range of people engaging with the arts online and offline, and the depth of this engagement**

Objective	Key Performance Indicator	March 2018 target
Core YouTube channel(s) delivers significant reach and engagement	<b>2.a) Reach:</b>	
	# of core channel(s) views	2,500,000
	# of core channel views on Facebook <sup>47</sup>	No target
	<b>2.b) Engagement:</b>	
	# of core channel(s) subscriptions	15,000
	Facebook Page likes	No target
	Watch time (minutes)	3,500,000
	# of comments	No target
	<b>2.c) Advocacy:</b>	
	Likes, shares	No target
Canvas network on YouTube delivers significant reach and engagement	<b>2.d) Reach:</b>	
	# of video views for Canvas + all core network members	No target
	# of video views for all associate network members	
	Uplift in views (to measure impact of Canvas on its members)	No target
	<b>2.e) Engagement:</b>	
	# of subscriptions across all UK network partners (including Canvas)	No target
	# of subscriptions for all associate network members	No target

<sup>47</sup> Facebook counts a view as 3 seconds or more – however, Brave Bison can use the Facebook Insights tool to capture views that are 30 seconds or more (same as YouTube).

Objective	Key Performance Indicator	March 2018 target
	Uplift in subscriptions across UK and non-UK network partners	15% uplift in subscription growth, versus year prior to joining Canvas network, in aggregate, across all core network members
	<b>2.f) Watch time across core network partners on YouTube. Comprises:</b>	
	Official Canvas channel(s)	No target
	Official NPO channels within the network	No target
	<b>2.g) Geographic and demographic targets that we will monitor across viewing:</b> (these apply to both the core channel(s) and the network, on each platform):	
	% core channel views 18–35 age group	>60%
	% of core network views 18–35 age group	>60%
	% core channel views within UK	>30%
Users are more likely to attend live art event as a result of using Canvas	<b>2.h) Behavioural impact:</b>	
	% of users who say viewing content on Canvas channel makes them more / less likely to attend live arts event	No target
	% of users who say viewing content on Canvas channel gives them ideas for new arts events to attend	No target
Diversity and accessibility	<b>2.i) Diversity:</b>	
	Number of BME-led and disabled-led NPOs in the Canvas network that are core network members	3
	Number of BME-led and disabled-led NPOs in the Canvas network that are associate network members	15
	# of diverse-led organisations (not necessarily NPOs), diversity-focussed organisations, or artists and performers from diverse backgrounds participating / featuring in video collaborations	50
	Number of diverse-led arts orgs that have participated in training sessions (NPOs and non-NPOs)	15

Objective	Key Performance Indicator	March 2018 target
	<b>2.j) Accessibility</b>	
	# videos on Canvas channel captioned	All
	# of network partners captioning videos	No target
	% of partners who agree that 'working with Canvas has helped you to improve the accessibility of your videos for audiences who might face barriers'	80%
Cost per view / sub	<b>2.k) Cost per view / sub:</b>	
	Cost per YouTube subscription	No target
	Cost per view	No target

**Aim 3: Develop the skills and digital capacity of the arts sector and increase the volume and quality of creative media**

Objective	Key Performance Indicator	March 2018 target
Improve the skills and capabilities of arts organisations on social video platforms	<b>3.a) Output KPIs: Delivery of range of high quality education and training events and material e.g.:</b>	
	Canvas playbook	All core network members
	Health checks	All core network members
	Webinars (per year)	22
	Training events held regionally (per year)	1 in-venue training event in each ACE region per quarter
	Regional training event attendance	Minimum 4 organisations in each ACE region attending regional training each quarter, and a total minimum of 12 separate organisations per region
	<b>3.b) Reach KPI: # of different arts organisations and NPOs that have participated in Canvas training:</b>	
	Real-world or online training events	200 (150 NPOs)
	Canvas outreach meeting	200 different arts orgs have participated in Canvas training, including 150 NPOs
	# of Canvas network member NPOs that have participated in video collaboration with Brave Bison	All 24 core network members should participate in at least one video collaboration during year 3, resulting in 2 YouTube videos and 2 Facebook videos, per member.
	<b>3.c) Outcome KPIs – part 1: positive feedback on training:</b>	
	% of participants who say training was helpful/very helpful (4 or 5 out of 5 on scale of 1-5)	70%
	% of participants who agree training has delivered actual positive impact (4 or 5 out of 5 on scale of 1-5)	50%
	% of participants more likely to create video output for social video platforms as a result	50%
	% of participants who say the training will have a positive impact on the quality of their video output	50%

Objective	Key Performance Indicator	March 2018 target
	% of participants who say the training will have a positive impact on their audience development	50%
	<b>3.d) Outcome KPIs – part 2: Has being part of the Canvas network had a positive impact on your organisation:</b>	
	<b>Core members:</b> Changing the kind of content you are posting to YouTube to make it more relevant and appropriate to the platform (e.g. less marketing focussed)?	80%
	<b>Core members:</b> Improving the quality of content you are producing?	80%
	<b>Core members:</b> Increasing your audience on YouTube and other social platforms?	80%
	<b>Core members:</b> Changing the nature of your relationship with your audience through digital channels?	80%
	<b>Core members:</b> Changing the way you present content and organise your online destinations?	80%
	<b>Associate members:</b> Changing the kind of content you are posting to YouTube to make it more relevant and appropriate to the platform (e.g. less marketing focussed)?	60%
	<b>Associate members:</b> Improving the quality of content you are producing?	60%
	<b>Associate members:</b> Increasing your audience on YouTube and other social platforms?	60%
	<b>Associate members:</b> Changing the nature of your relationship with your audience through digital channels?	60%
	<b>Associate members:</b> Changing the way you present content and organise your online destinations?	60%

Objective	Key Performance Indicator	March 2018 target
Develop opportunities for longer term, sustainable propositions and new business models	<b>3.e) AVOD and sponsorship revenue:</b> Generate revenue from advertising around video content and through brand sponsorship and integrations across both official Canvas channels and the broader network	£75,000
	Total gross revenue generated by the entire Canvas network	Extra £600 during year 3

## Mixed methods data capture

We evaluated Canvas using a combination of quantitative and qualitative analysis, as set out below.

## Canvas performance data

Data collected by Canvas on reach, engagement and audience profile. Data reported both at the aggregate and channel level to enable programme-level evaluation and channel-level benchmarking.

## Audience survey

We performed an online survey of 'Arts-interested'<sup>48</sup> audiences recruited from an online panel<sup>49</sup> to provide insights into their thoughts about the Canvas channel and videos. Of the sample, half answered questions about the Canvas channel and half answered questions about a benchmark channel. We chose the following benchmarks in order to compare Canvas to a range of different types of arts organisations with strong well-established YouTube presences:

- **Tate:** A British visual arts organisation with four major museums and a large collection of British art. Activities generally involve rotating art exhibitions and YouTube videos mostly feature visual art and artists
- **Creators Project:** An international platform founded by VICE and Intel and designed to showcase artists across multiple disciplines who use technology to drive creative expression. Creators Project regularly commissions short videos about art installations as well as commissioning its own short films
- **Barbican:** Barbican is a London-based arts organisation and venue primarily focussed on theatre, dance and music. YouTube videos usually promote or cover current and upcoming performances at the Barbican venue and often feature performing artists.

We repeated the survey methodology and sample in years 1, 2 and 3.

Note: throughout this document, we have indicated statistical significance for results based upon a 90% confidence interval.

## Partner survey

We sent an online survey to all current network members (core members and associates) to capture their views on the Canvas programme, impact they've seen from network membership and experience with training. In total, 46 organisations filled out the survey in year 3 (12 core members; 27 associates; 7 non-members that attended training).

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<sup>48</sup> 'Arts-interested' – we used a series of screening questions to test audiences' interest in and engagement with the arts, both online and in person, only allowing those indicating a minimal level of arts interest to complete the survey

<sup>49</sup> Nationally-representative sample of 600 respondents in England, except with a heavier weighting towards Canvas's 18–35 target audience plus a smaller 36+ comparison group (70% 18–35, 30% 36+). Results have been weighted to a representative online sample in the UK. Panel was screened to avoid repeat survey respondents from one year to another



## Partner and sector interviews

Over the course of the three years of this evaluation, we conducted depth interviews with 29 arts organisations (8 core members; 13 associate members; 8 non-members), as well as four large organisations whom Brave Bison viewed as key collaborators or potential collaborators, to provide qualitative insights into Canvas's impact and activities (Exhibit 16). Interviews were conducted off the record (Chatham House rules).

### Exhibit 16 – Arts sector interview programme

Organisation	Interviewee(s)	Canvas network membership
Crying Out Loud	Jackie Friend	Core member
FACT	Roger McKinley	Core member
Frantic Assembly	Kerry Whelan	Core member
Gecko	Pippa Fox; Manwah Siu	Core member
ICA	Nick Santos-Pedro	Core member
Ikon Gallery	Samantha Skillings	Core member
James Cousins	James Cousins	Core member
Yorkshire Sculpture Park	Lydia Turnbull	Core member
Barbican	Rachel Williams	Associate member
Contact Theatre	James Ducker	Associate member
Darbar Festival	Sandeep Virdee	Associate member
London Philharmonic Orchestra	Martin Franklin	Associate member
OAE	Zen Grisdale	Associate member
Philharmonia Orchestra	Luke Ritchie	Associate member
Pilot Theatre	Sam Johnson	Associate member
Science Museum	Stuart Reeves	Associate member
Sound & Music	Victoria Johnson	Associate member
Watershed	David Redfern	Associate member
Yorkshire Dance	Antony Dunn	Associate member
Artangel	Nick Chapman	Non-member
B3 Media	Marc Boothe	Non-member
Chichester Festival	Georgina Rae; Lydia Cassidy	Non-member
Glyndebourne	George Bruell	Non-member
HOME (Manchester)	Clare Sydney, Dave Moutrey	Non-member
Royal Opera House	Tony Followell	Non-member
Royal Shakespeare Company	Sarah Ellis	Non-member
Tate	Hilary Knight	Non-member
BBC Arts	Peter Maniura	Collaborator
Little Dot	Catherine Bray	Collaborator
Sky Arts	Phil Edgar-Jones	Collaborator
The Space	Owen Hopkin	Collaborator

## Appendix 3: Top 20 NPOs by subscriber count

This list did not exist previously – we assembled it based on the best available sources of information about NPOs and YouTube subscriber counts. We may have missed one or two – we also came across a few organisations with well-developed YouTube channels that hide their subscriber counts from the public.

#	Organisation	Subscribers on YouTube (31 March 2018)	Canvas membership
1	Royal Opera House	334,624	
2	Darbar Festival	95,741	Associate
3	National Theatre <sup>50</sup>	75,623	
4	Philharmonia Orchestra	57,288	Associate
5	London Symphony Orchestra	47,070	
6	Royal Shakespeare Company	22,698	
7	Sadler's Wells	14,350	Associate
8	Roundhouse	13,905	Associate
9	Southbank Centre	13,058	Associate
10	English National Ballet	11,799	Associate
11	Breakin Convention	11,752	
12	Shakespeare's Globe	11,715	
13	Institute of Contemporary Arts	9,772	Core
14	Barbican Centre	8,745	Core
15	Opera North	8,486	Associate
16	English National Opera	5,725	
17	Akram Khan Company	5,375	Associate
18	Orchestra of the Age of Enlightenment	5,160	Associate
19	DV8 Physical Theatre	5,096	
20	Glyndebourne	5,061	

<sup>50</sup> Includes 'National Theatre Discover' YouTube channel (48k subs) and primary National Theatre channel (27k subs)



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