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STRONGER ARTS AND CULTURAL ORGANISATIONS FOR A GREATER SOCIAL IMPACT

RISKY EXPERIMENTS, MIXED RETURNS: RECENT RESEARCH ON BUSINESS MODEL INNOVATION IN UK PERFORMING ARTS ORGANISATIONS

Report written by
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Risky Experiments, Mixed Returns: Recent Research on Business Model
Innovation in UK Performing Arts Organisations
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Creative Lenses is a four-year project, running from 2015 to 2019, that seeks to make arts and cultural
organisations more resilient and sustainable by improving their business models and developing their
long-term strategic and innovation capacities

To find out more about Creative Lenses and its publications, **visit www.creativelenses.eu**



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CONTENTS

5	EXECUTIVE SUMMARY
6	INTRODUCTION
7	SUMMARY
9	THEMES EMERGING
15	METHODOLOGY
16	SNAPSHOT OF KEY RESOURCES
32	REFERENCES
36	ABOUT THE AUTHORS

EXECUTIVE SUMMARY

This report summarises recent research on business model innovation in UK performing arts organisations and venues, much of which is based on practical experimentation and surveys published in the ‘grey’ (that is, non-academic) literature¹. Its purpose is to inform discussions within the Creative Lenses project about the future sustainability of arts and cultural organisations in Europe by sharing insights from the extensive experimentation to date in the UK.

Arts organisations are adjusting to changes in the public funding landscape and exploring different ways to sustain activities and relationships with audiences while remaining true to their values and purposes. Traditional business models are being challenged and new ways of defining and capturing value are emerging. In this transition, the cultural sector has centered its attention on developing new sources of revenue. Organisations are pursuing greater income diversification and cost reduction through a combination of traditional revenue sources, such as fundraising or audience expansion, and innovative practices based on collaboration, new commissioning models or the development of new products and services. Technology is a cross-cutting resource enabling new approaches in all domains. However, the sector is still testing the potential of digital tools and use of digital data.

More experimentation and more investment is needed to identify and spread effective strategies and to develop capabilities to implement them. Public subsidy remains a valued resource enabling experimentation. The wide variety of capital resources, capacities and drivers shaping the futures of arts and cultural organisations means that multiple business models are emerging. The report summarises and synthesizes 23 key publications published in the UK, covering a range of topics and providing practical examples for readers to explore in more depth.

¹ By ‘grey literature’ we mean reports, blogs, working papers or project outputs which might use research methodologies based on academic ways of working and might involve academics, but which are published outside of academic channels such as peer-reviewed journals or conference proceedings.

INTRODUCTION

This publication is produced within the context of Creative Lenses, a four-year collaboration project involving 13 partners in nine countries supported by the European Commission’s Creative Europe programme. It aims to study and develop capacities in business model innovation to improve the sustainability of organisations in the arts and cultural sectors.

The report brings together and summarises recent research findings published in the UK relating to the topic of innovative business models in arts organisations, in particular performing arts organisations and venues. Recognising the diversity of much of the UK’s arts infrastructure, this report captures some of the main insights from a range of research reports in the ‘grey’ (that is, non-academic) literature. The purpose of doing this is two-fold. First this report aims to make this research more accessible to arts practitioners and cultural producers

and managers in Europe for them to access and follow up. Second it aims to support the goals of the Creative Lenses project, by analyzing publications reviewing recent practice that complement other research drawing on academic literatures.

The report first offers a summary of insights from the reports, and then a discussion of the main themes emerging in this research. It then provides snapshots of 23 key research reports, with links to enable readers to access them directly.

SUMMARY

1. New business models are **increasingly being discussed**. However, performing arts organisations show a diverse range of capacities and resources shaping their motivations and abilities to develop new business models. Tools such as the business model canvas² provide an initial point of departure for many when developing strategies for a performing arts organization, but there are other ways that they are developing new thinking and new practices.

2. The challenging economic environment and in particular the reduction in public subsidy has forced arts organisations to seek **alternative sources of finance**. This does not necessarily imply a radical reformulation of business models. What seems to be happening is a deepening of traditional business practices, in combination with the testing of new approaches and ways of working:

a. Traditional approaches: Increasing efforts are dedicated to **fundraising**, leading to growing competition for funds. The performing arts sector might benefit from tailored or collaborative fundraising models. **Expanding audiences** also features prominently as an option to increase revenues. Although the potential is high, more experimentation and investment is needed to identify and explore viable segments and products.

b. New approaches: **Collaboration, partnerships and co-production** are seen as way forward for smaller organisations and not-for-profits. Evidence suggests that cost and risk sharing have a positive impact on arts organisations. Increasing cooperation with public institutions with wider social objectives has extended the activity for the cultural sector beyond its traditional domain. Additionally, the **increasing commercialisation of new products and services** complementing core activities can be observed across the sector.

3. Digital tools and the use of digital data are increasingly being embraced by arts organisations, although different segments of the performing arts sector show **contrasting capacities to use them and varying levels of adoption**. For example, digital broadcasting has been celebrated as a way to develop and expand new audiences. However, pilot programmes have not led to greater engagement with new or different audiences. Nevertheless, loyal audiences see digital screening as value for money for those living outside urban areas. The effectiveness of digital fundraising tends to be below expectations. As a result, further research and experimentation is needed in order to refine strategies.

² <https://canvanizer.com/new/business-model-canvas>

THEMES EMERGING IN THE GREY LITERATURE

Theme 1: The changing ecosystem of the performing arts sector

The arts and cultural sector is highly diverse but despite differences across art forms and types of organisation, there is wide agreement about the fact that decreasing public funding at national, regional and local levels is forcing organisations to rethink their models and practices (Arts Quarter, 2014; Harvey, 2016).

The sector has shown remarkable resilience and looks to the future with moderate optimism (Arts Quarter, 2016). Industry players affirm that further cuts would put in danger a successful, yet precarious, ecosystem (Neelands and Easton, 2015). Public subsidies are perceived as an engine of change through targeted programmes funding the adoption of novel technologies or new ways of working. In addition, public support is seen as enabling arts organisations and others to do cultural R&D (Annabel Jackson Associates, 2015; Neelands and Easton, 2015). In this respect, Hetherington (2015) shows how small amounts of public funding play a critical role in absorbing risk and allowing higher frequency and scale of productions in the mixed economy of the theatre sector.

Theme 2: Adjusting to the new funding landscape through innovation and new ways of working

Diminishing funding might appear as the main concern of performing arts organisations, but income generation is only one of the constitutive parts of a business model (Yershon et al, 2015). The heterogeneity of the performing arts sector leads to different strategies when adjusting to the current changing landscape. The main factors determining the capacity to respond are location (rural or urban), size, venue ownership, the sub-sector in which an organisation operates and its resource base (mixed-economy or more reliant on public support) (Arts Quarter, 2014; Arts Quarter, 2016).

Bakhshi and Throsby (2010) identified four dimensions of innovation; audience reach, art form development, value creation, and business models. Across all four domains technology is presented as a crosscutting element enabling change, for example in overcoming the physical constraints of venue-based organisations. According to the 2014 Digital Culture survey conducted by the Digital R&D Fund for the Arts, the degree of technological uptake between

performing groups and performing arts venues differs substantially (MTM, 2014a; MTM, 2014b), highlighting the wide differences in capacity and drivers shaping change within the cultural sector. Venues have long adopted digital tools for marketing purposes, selling tickets and data analysis supporting commercialisation.

The fastest growing area of digital adoption is interactive education, while less emphasis is placed on developing digital infrastructure to support the creation and distribution of work. In contrast, performing groups use technology for communication, preservation and archival purposes. However, crowdfunding, online donations and commercialising products online are the areas where higher investments are being made. This reflects an ongoing trend pursuing diversification in revenues, one that is expected to continue in the years to come (Arts Quarter, 2016). Borrowing from developments in entrepreneurship, conceptual toolkits have emerged to aid the cultural sector in tackling business model change. For example, Aldridge (2016) presents the business model canvas approach. She sketches four possible kinds of business model for arts organisations; the monetisation of assets model; the freemium model, where organisations charge for premium services; the switching costs model, focused on capturing and retaining audiences; and the leveraging skill-sets model, where internal talent is transformed in a revenue generating resource. The different revenue streams that arts organisations are trying to develop can be grouped in four domains: fundraising,

audience expansion, collaboration, and commercialisation of new and existing assets. Insights from research in each of these areas is detailed below.

Theme 3:
Fundraising becoming more competitive and more skilled

A survey by Arts Quarter (2014, 2016) shows that the cultural sector increasingly sees fundraising as a key source of revenue. Yet, the performing arts sector perceives fundraising as a challenge given the small scale of its organisations, their experimental high-risk practices and the lower fundraising base that the sector starts from. The lack of a fixed audience and sufficient resources to devote to fundraising adds to the challenge. In order to overcome these obstacles the development of tailored or collaborative fundraising models is suggested as a possible solution (Arts Quarter, 2014). Additionally, the increasingly competitive context in the field will inevitably generate winners and losers (Arts Quarter, 2014). For this reason, Wright (2016) emphasises the need to have a strategic approach to fundraising. She warns against the current orientation of targetting charitable trusts (Arts Quarter, 2016), while the strongest growth comes from individual giving. A survey by Blackbaud (2014) reveals the increasing role of technology in the not-for-profit sector when developing new fundraising campaigns. Social networking, special events and email are the main channels used to connect with individual donors. However, researchers are still trying to assess which strategies work, as the effectiveness of campaigns tends to be

below expectations. Despite the challenges, not-for-profits recognise that digital tools and applications are under-utilised and almost half of the respondents plan to invest to increase success ratios in the year to come.

Case study:
Birmingham Hippodrome and the Catalyst fund

The Birmingham Hippodrome aimed at widening its pool of lower level donors. To achieve this goal the team developed a holistic fundraising strategy which included a new communications strategy, the integration of communications and technological resources, the deepening of partnerships across departments and the promotion of training at all levels of the organisation. A grant of £240,000 supported the programme during three years, allowing the organisation to grow donations in the target segment from £13,000 to £60,000. (Source: BOP Consulting, 2015)

Theme 4:
Expanding audiences v. engaging audiences in new ways

The changing relations between performing arts organisations and their audiences are complex. A trade-off emerges between expanding audience reach and the production of new work, which tends to have lower attendance levels (Bakhshi and Throsby, 2010). The evaluation the Digital Fund for the Arts, for example, showed that technology and public investment have

allowed the development of new means to connect with audiences, leading to deeper relationships that remained consistent with an organisation’s mission and values. Therefore, the fund has contributed to the amplification of current practices rather than to their transformation (Fleming, 2016). In addition, the fund, along with recent research, has provided evidence to start to understand the potential of one of the major trends in this area, that of digital screening (Arts Professional, 2015; Fleming, 2016; Mellor, 2012; Wise, 2014; Yershon et al, 2015). Digital broadcasting and live screening of performances offer the possibility of overcoming the physical boundaries of arts venues. Wise (2014) notes how live broadcasting of opera in cinemas didn’t have the expected impact in terms of audience development. However, digital screening is seen as value for money for audiences living outside urban capitals. Audiences feel that digital screening can represent a new artistic form, as cinematic techniques offer a different experience to live performances. The economic sustainability of digital broadcasting is yet to be demonstrated. Although the overall prospects are positive (Yershon et al., 2015), the economic potential differs across audience segments and type of performance (Mellor, 2012).

Theme 5:
New services and increasing commercialisation

Case study:
Miracle Theatre’s Digital R&D project ‘Live & Digital’

The Miracle Theatre, a small-scale theatre-maker in a rural location, wanted to test the viability of screening theatre as a means to expand audiences. Audiences’ reactions to live streaming confirmed that live performances are their preferred option.

However, the pilot project proved the viability of live screening as advantages were found in terms of cost savings and convenience when audiences did not have a wide range of arts experiences available in their current location. Although all the shows broadcast were free, this case study produced a business model template for small organisations aiming at developing digital theatre. (Source: Scott et al., 2015).

Arts organisations are increasingly commercialising their offers. A key variable when developing new services or products is whether an organisation has a venue or not (Bolton et al, 2010; Fleming, 2016). Ticket sales, fees for courses, commercial hires, the development of new facilities or building a property portfolio are the main activities from which income is thought to increase in the next years (Arts Quarter, 2016; Bolton et al, 2010; Fleming, 2016). Devlin and Dix (2015) have proposed the introduction of a revolving investment fund, open to for-profit and not-for-profits with a commercial orientation to bridge the gap between public funding and market investment.

Intellectual property (IP) emerges from the literature reviewed as a resource that arts organisations often overlook (Bakhshi and Throsby, 2010; Bolton, 2010; Fleming,

2016). Those intangible assets that seem to be generating new revenue streams are often linked to intellectual and relational capital, the goodwill of supporters and volunteers, brand value and reputation (Bolton et al, 2010). The IP of cultural assets remains underexploited (Fleming, 2016; Hetherington, 2005; Yershon et al, 2015). Fleming (2016) suggests that this is due to a lack of IP literacy and readiness to commercialise by arts organisations.

Case study:
The Yard Theatre

In a global city like London, property prices are a significant barrier for performing arts organisations when thinking about developing their own spaces. The Yard Theatre started as a pop-up space for young directors to show new work in East London. It evolved into a permanent space through smart collaborations and community cooperation. The space was developed in a dormant warehouse in Hackney Wick in two weeks with a budget of just £11,000 and using materials salvaged from the nearby Olympic site. The space is split between a theatre and a bar, also functioning as a club. In addition to winning multiple awards for space innovation and supporting emerging artists, an additional achievement of The Yard has been that of attracting a growing younger audience. Additionally, The Yard has set up outreach programmes allowing it to establish links within the local community, one of the most disadvantaged in London. In accordance with its community ethos, ticket prices are maintained at an affordable

level and artists participate in a profit-share scheme. (Source: Turner, 2012).

Theme 6:
Increased collaboration

Enhancing cooperation, within and outside of the arts sector, appears to be a recurrent strategy enabling cost and financial risk reduction (Alan Arts Quarter, 2016; Devlin and Dix, 2015; Hetherington, 2005). Collaborations are often invoked as a way forward for those operating in less commercial arenas or at a regional and local level (Harvey, 2016). Public programmes, such as the Dance Touring Partnership or the Strategic Touring Partnership, have supported the creation of new partnerships, which in turn, have facilitated coordination and cost sharing between producers and promoters (Escott, 2010; Annabel Jackson Associates, 2015). Often these programmes have not generated a substantial increase in audiences but have contributed to broadening the spectrum towards those less engaged with the arts (Cowley, 2015). Yet, collaboration also requires going through a learning process and does not always lead to a reduction in costs or increased artistic risk taking (Annabel Jackson Associates, 2015; Hetherington, 2005).

Increasing cooperation is pursued with public institutions that have wider economic and social objectives. This has led to a trend in commissioning services related to social outcomes beyond the cultural field

(Slay and Ellis-Petersen, 2016). However, for this domain to develop, more evidence regarding the impact of the arts is needed (New Economic Foundation, 2005; Slay and Ellis-Petersen, 2016). Additionally, new institutional models, new public partnerships, and potential new income streams derived from increasing fiscal autonomy at a regional and local level are starting to emerge (Arts Quarter, 2016; Harvey, 2016).

Case study:
Kent County Council and Cultural Commissioning Programme

Artistic engagement has the potential to improve outcomes of public services, such as education or health services. Kent County Council has piloted a cultural commissioning programme showing how active intervention and explicit reference to the role of culture improves the possibilities of arts organisations being considered as a viable partner in the provision of public services. To aid in developing these collaborations, Kent County Council, the Royal Opera House Bridge and Artswork have produced an Arts and Cultural Commissioning Toolkit. Most of the programmes are still ongoing and concrete results in terms of outcomes are not yet available. (Source: (Slay and Ellis-Petersen, 2015)

ARTISTIC ENGAGEMENT HAS THE POTENTIAL TO IMPROVE OUTCOMES OF PUBLIC SERVICES, SUCH AS EDUCATION OR HEALTH SERVICES.

KENT COUNTY COUNCIL HAS PILOTED A CULTURAL COMMISSIONING PROGRAMME SHOWING HOW ACTIVE INTERVENTION AND EXPLICIT REFERENCE TO THE ROLE OF CULTURE IMPROVES THE POSSIBILITIES OF ARTS ORGANISATIONS BEING CONSIDERED AS A VIABLE PARTNER IN THE PROVISION OF PUBLIC SERVICES

METHODOLOGY

To conduct this desk research the authors first set the following research questions in order to delimit the scope of analysis:

- How are UK organisations operating mixed arts venues and in the performing arts developing new business models without compromising their artistic integrity, mission and values?
- What are the examples of business model innovation in organisations operating mixed arts venues and in the performing arts?
- What are the conditions that drive or enable business model innovation in UK arts organisations?

Since we wanted to find the relevant grey literature it was appropriate to use Google, although we recognized that our findings would be influenced by previous search histories. We also reviewed the public outputs of several UK organisations active in supporting, funding and developing the arts and cultural sectors relating to the topics of business models, innovation, technology, audience development, marketing and strategy. From this desk research we created a long list of 33 items to consider for inclusion. We compared this emerging

list to other materials being reviewed by researchers within the Creative Lenses project. We then asked a small number of colleagues active in the UK arts and cultural sectors to give suggestions for reports and studies that discussed business model innovation, which resulted in many overlaps. The authors then reviewed the long list and selected 23 items to summarise for this report. The criteria for this selection was that the reports (a) had to discuss business model innovation, innovation, strategy or a closely related topic including new digital approaches to business models in the arts; (b) focus on the performing arts sector or venues for performing or mixed arts somewhere in the UK; and (c) be based on or informed by a survey, desk research, interviews or action research project or other kind of evidence. The selected reports were analysed with a focus on identifying recurring themes, convergence of research outcomes as well as discrepancies between results. The thematic analysis was written by the first author and then revised in discussion with the second author. The research was conducted in the first half of 2016.

SNAPSHOTS OF KEY RESOURCES

This section summarises 23 reports relating to business model innovation in UK performing arts organisations and venues.

Report title	Strategic touring programme: Final evaluation report
Year	2015
Author(s)	Annabel Jackson Associates Ltd. Bath
Institution	Arts Council England
Type	Evaluation
Topics	Touring, marketing, partnerships
Available from	http://www.artscouncil.org.uk/sites/default/files/download-file/ ST_Evaluation_Report_final_small.pdf
Accessed on	06 May 2016

This evaluation assesses the results of Arts Council England’s (ACE) Strategic Touring Programme launched in 2011. The programme had as a strategic objective the development of new touring approaches and reaching areas and people with low engagement with the arts. Although overall assistance was slightly below the target, the programme has shown high additionality. It also strengthened new ways of working; two thirds of partnerships undertook joint marketing between producer and promoter and coordination between promoters and companies improved as a result of the programme. This set the basis for an extension of the touring infrastructure, leading to spin-off projects and the creation of resources and tools. New models were tested such as a new consortium of venues with the expectation to increase buying power and obtain better prices. However, the expected cost reduction was not realised due to diverging requirements and difficulties in allocating the valuable weekend slots. Importantly, ACE’s funding helped to leverage external finance and expand the appetite for touring among participants.

Report title	Ideas to spark your future business model
Year	2016
Author(s)	Julie Aldridge
Institution	Arts Marketing Association, Arts Council England and the Audience Agency
Type	Guide
Topics	Business models innovation
Available from	http://culturehive.co.uk/resources/your-future-business-model
Accessed on	07 May 2016

This guide presents the well-established Business Model Canvas approach as a flexible tool for developing, reimagining or analysing the business models of arts organisations. The author sketches the main existing model in the arts and provides guidance to help in the diversification of income streams as well as in business model innovation. Four models are proposed as a possible way forward for arts and cultural organisations; the freemium model; the monetisation of assets; the switching costs model, focused on capturing and retaining audiences, and the leveraging skill-sets model, where organisations make the most of internal talent.

Report title	Pulse report: Screenings: Who benefits?
Year	2015
Author(s)	Arts Professional
Type	Survey
Topics	Digital screening, new technologies
Available from	http://www.artspprofessional.co.uk/pulse
Accessed on	12 May 2016

This survey explores the effect of digital screenings in the overall arts ecology, audience responses and the attitudes of the sector towards this growing distribution channel. It provides important data for organisations exploring the viability of digital screenings. Pricing preferences show that digital screenings are not equivalent to live experiences, as the majority of respondents are not willing to pay the same price as a live show. However, digital screening is seen as a value for money for those living outside urban capitals. In terms of audience engagement, there is no major difference between live screenings and recorded shows. Those employed in the creative sector do not present a strong opinion regarding the

impact of screenings in their organisation, although there is a favourable consensus regarding its potential for income generation. For a minority of respondents big productions of established organisations have pushed smaller independents to the margins due to the clash of programming and the limited resources devoted to non- London organisations leading to an unfair competition.

Report title **Private sector revenue generation in the contemporary performance sector**
Year **2014**
Author(s) **Arts Quarter**
Type **Survey**
Topics **Business models, fundraising, performing arts, revenue diversification**
Available from **<http://culturehive.co.uk/wp-content/uploads/2016/02/CPC-Sector-Findings-Summary.pdf>**
Accessed on 05 May 2016

This report summarises the main findings of a survey aimed at capturing the current and future changes in the business models of the contemporary performance community in the UK and overseas. There is a wide agreement (89 per cent) in incorporating fundraising as a necessary tool to diversify revenue streams and replace diminishing public support. However, the responses show that the sector is highly diverse and the speed of change in accommodating new business models is dependent on size, location, the level of public support, as well as if the organisation is venue-based. Respondents perceive that attracting external funding is harder for the performing arts sector than for other cultural sectors, given their experimental, high-risk practices and the small scale of their organisations, often without the fixed audience or resources to devote to fundraising. As a result, tailored fundraising models may be needed and collaborative fundraising is suggested as a possible solution. The results show that the performing arts sector starts from a lower fundraising base when compared with the wider arts' community. Additionally, the size of the funding community interested in contemporary performance might not have the capacity to absorb the increase in requests for help, inevitably generating winners and losers. Crowd-funding as a source of revenues is perceived with interest by organisations but mixed opinions were voiced regarding its potential. Lastly, developing commercial models is shown as a goal of three quarters of interviewees, mainly through extension of their commissioning models, commercialisation of intellectual property, development of a training offer and through the delivery of services to businesses.

Report title **Revenue generation in the Arts: 2015-16**
Year **2016**
Author(s) **Arts Quarter**
Type **Survey**
Topics **Trends, revenue diversification, fundraising, new strategies, sectoral capacities, regional and local level**
Available from **<https://app.box.com/s/6cbmysdvzguecbpso3x9hy8w7epm7j22>**
Accessed on 06 May 2016

This survey identifies how arts organisations have adapted to the current funding landscape and looks at future avenues for revenue generation. A diversification of revenue streams appears to be taking place, a trend that is expected to continue. The sector is cautiously optimistic regarding fundraising. More than half of the respondents are deepening fundraising efforts or developing new activity. Moderate growth in fundraising revenues is anticipated in some areas, mainly grant-making trusts, high net worth individuals and the business community. Yet, the strongest increase in growth comes from individual giving. Importantly, half of the respondents feel they need to bring their fundraising case up to date. The main barriers for success are capacity restrictions in small organisations and increasing competition, while the market for potential support does not show an expansion. Similar results emerge from those organisations facing cuts by regional and local authorities. At a local level, organisations are engaging in advocacy within their regions to increase support from other sources, exploring new commissioning models, creating shared marketing opportunities (e.g. local tourism budgets) and promoting the exploitation of empty spaces owned by local authorities. Respondents report an increase in partnerships, within and outside the arts sector, which are identified as an imperative for achieving future sustainability. Almost all respondents believe that earned revenues will increase in the next financial year. The main sources are ticket sales, an increase in profit from activity, course fees, learning programme fees, commercial hires, and joint ventures or co-productions. Lastly, in the next three years organisations aim at developing new facilities and programmes, partnerships and new relationships with audiences and innovations in distribution.

Report title **Capital matters: How to build financial resilience in the UK's arts and cultural sector**
Year **2010**
Author(s) **Margaret Bolton, Claire Cooper, Claire Antrobus, Joe Ludlow and Holly Tebbutt**

Institution **Calouste Gulbenkian Foundation**
Type **Report**
Topics **Skills, revenue diversification, intangible assets, new technologies**
Available from **<https://static.a-n.co.uk/wp-content/uploads/2017/08/Capital-Matters-How-to-build-financial-resilience-in-the-UK's-arts-and-cultural-sector.pdf>**
Accessed on 06 May 2016

The report explores new avenues for business models in the not-for-profit sector and focuses on medium-sized organisations in the arts and cultural sector in England and Scotland. The authors state that cultural organisations must shift from a mindset of deficit management to one of asset management based on investment and surplus generation. The report identifies a lack of strategic financial planning skills and data as the main reasons why cultural organisations lack the capital that could enable them to absorb shocks. The authors point to intangible assets as a possible source of financial resilience if correctly identified and exploited. Possible assets are intellectual capital and relational capital, goodwill of supporters and volunteers, brand value and reputation. Case studies suggest that organisations have started to commercialise internal knowledge through training courses and consultancy services supported by their reputation and brand. Yet, the report acknowledges that consultancy services only manage to break even and that the most common and profitable assets tend to be of a tangible nature, mainly buildings. For this reason, organisations are considering building a property portfolio or expand services like catering or events. On average building-based organisations across art forms have higher earned income ratios than organisations that are not venue-based. Lastly, technology is identified as a tool supporting change in business models. It is mainly used to understand audience satisfaction and behaviour, innovate in products and programmes, and develop audience participation.

Report title **Culture of innovation: An economic analysis of innovation in arts and cultural organisations**
Year **2010**
Author(s) **Hasan Bakhshi and David Throsby**
Institution **Nesta**
Type **Report**
Topics **Innovation, new technologies, audience reach**

Available from **<http://www.nesta.org.uk/publications/culture-innovation>**
Accessed on 07 May 2016

This report attempts clarify the concept of innovation in the arts and cultural sector. The authors identify four dimensions of innovation; audience reach, art form development, value creation, and business models. Technological change is presented as a crosscutting element enabling to overcome physical constraints and promoting innovation along the areas identified. Digital technologies are expected to allow for a greater exploitation of cultural assets leading to value creation. The report grounds its findings in the collaboration with two large-scale institutions, the National Theatre (NT) and the Tate. The size of these organisations is noted as one of the factors allowing them to innovate by spreading the risk of failure across different projects. Econometric analysis of audience demand and new survey data is used to explore the potential for expanding capacity and audience reach. Importantly, the analysis points to the trade-off between audience reach and production of new work, which tend to be less popular in terms of attendance. Lastly, the authors recognise the limits of economic valuations to capture the value of cultural experiences.

Report title **State of the not-for-profit industry survey summary report**
Year **2014**
Author(s) **Blackbaud, Inc.**
Type **Survey**
Topics **Digital fundraising**
Available from **https://www.blackbaud.co.uk/files/bbe/SONI/SONI_UKReport2014.pdf?mkt_tok=3RkMMJWWfF9wsRomrfCcl63Em2iQPJWpsrB0B%2FDC18kX3RUmJL2Zfkz6htBZF5s8TM3DUVdDXr1Z6kEJSbE%3D**

Accessed on 06 May 2016

This survey investigates online giving, peer-to-peer fundraising, social media and gift aid in the not-for-profit sector in the UK and Ireland. On average, 15 per cent of individual donations are received through online giving and more than half of respondents have experienced an increase of individual giving through this channel during the last year. Social networking, special events and email are the main marketing channels used to connect with individual donors. The use of social media has increased during the last 12 months with 96 per cent of organisations using social networks to form links with their communities. However, not-for-profits note that

effectiveness of campaigns tend to be below expectations and almost half of respondents plan to invest to increase success ratios in the year to come. Mobile technology is mainly limited to SMS while apps and other platforms are under-utilised. In contrast, fundraising events such as challenges are frequent methods to broaden peer-to-peer fundraising. Uptake of digital tools varies with size. Only 63 per cent of small not-for-profits (less than £250,000 in annual in-come) accept online donations. Lastly, the report notes that experts are still trying to determine which tools and strategies are most effective to raise funds online.

Report title **Dance touring partnership: Strategic touring fund 2013-15 box office data analysis**
Year **2015**
Author(s) **Daniel Cowley**
Institution **The Audience Agency**
Type **Evaluation**
Topics **Cooperation, strategic partnerships, marketing, audience development**
Available from **<http://culturehive.co.uk/resources/dance-touring-partnership-box-officeanalysis-2013-2015>**
Accessed on 06 May 2016

The Dance Touring Partnership is a network of theatres pooling resources to support the touring of dance projects and the development of new audiences. The report analyses the results of the bookers of four Dance Touring Partnership tours under Arts Council England’s Strategic Touring Fund. Based on box office records, it concludes that young people attendance increased in 3 per cent, first-time attenders rose by 6 per cent and a 3 per cent increase was experienced among those with low engagement with the arts. Ticket sales were slightly below target.

Report title **Theatre touring in the 21st Century: An exploration of new financial models**
Year **2015**
Author(s) **Graham Devlin and Alan Dix**
Institution **Arts Council England and Theatre Development Trust**
Type **Report**
Topics **Collaboration, touring models**
Available from **<https://theatreni.org/assets/uploads/UK-Theatre-Touring-Theatre-Exploration-of-New-Financial-Models.pdf>**
Accessed on 07 May 2016

The report reviews the changing conditions of the touring environment and its current challenges. It details existing support mechanisms and social investment options in the UK and briefly summarises international models. The role of collaborations and co-productions is highlighted as a crucial enabler of tours. The authors list the advantages and disadvantages of the dominant models financing tours. Public funding is adequate to support small scale touring in areas with lower cultural engagement. However, companies presenting traditional or commercial work that doesn’t necessarily engage with audience development are not covered by public funds. Finance from trusts and foundations is patchy and infrequent. Additionally, positive social impacts tend to be expected; hence it’s not a viable option for commercial productions. Indirect support mechanisms, such as the Theatre Tax Relief, are seen as having a favorable impact in terms of cost reduction. In contrast, when tax relief is linked to social outcomes, as in the case of Social Investment Tax Relief, the authors argue that not many theatre companies qualify. Debt finance facilitated through programmes such as the Arts Impact Fund require minimal risk and remain untested for touring. Crowd-sourcing is only applicable to small productions and offers high uncertainty in terms of raising the finance required. Considering the above, the authors recommend the introduction of a revolving investment fund, operated by a third party, open to for-profit and not-for-profits with a commercial orientation.

Report title **How dance companies and venues can develop effective relationships**
Year **2010**
Author(s) **Rachel Escott**
Institution **The Audience Agency**
Type **Guide**
Topics **Collaboration, marketing, audience expansion**
Available from **<http://culturehive.co.uk/resources/how-dance-companies-venues-candevelop-effective-relationships>**
Accessed on 06 May 2016

This guide outlines ways in which dance companies can increase tour bookings, build deeper relationships with venues, enhance marketing efficiency and increase engagement with audiences. Recommendations include sharing communications and marketing efforts based on local audience information as well as co-developing a communication strategy with venues. Partnerships with other companies, venues in a city or region and local dance development agencies are proposed as a way to facilitate audience expansion.

Report title **Funding arts and culture in a time of austerity**
Year 2016
Author(s) **Adrian Harvey**
Institution **New Local Government Network and Arts Council England**
Type **Report**
Topics **Regional and local level, collaboration, new commissioning models, new institutional models, revenue diversification, public investment**
Available from <http://www.artscouncil.org.uk/publication/funding-arts-and-culture-timeausterity>
Accessed on 04 May 2016

The report quantifies the decrease in spending by local authorities in the cultural sector since the 2008 financial crash and outlines possible strategies to absorb future cuts. It is estimated that in the next five years funding for non-statutory duties will largely disappear. Consequently, the report attempts to find new models and sources of revenue to facilitate the future survival of mid-sized art and culture organisations. The author suggests that collaborations with institutions concerned with wider economic and social objectives can open new investment lines at a bigger scale. The report identifies new institutional models (eg Dorset County Council), new partnerships and collaborations (eg Birmingham’s Culture Central), and potential new income streams brought by the increased fiscal autonomy that the devolution agenda will enable (eg Liverpool City Council).

Report title **The interdependence of public and private finance in British theatre**
Year 2005
Author(s) **Stephen Hetherington**
Institution **Arts Council England**
Type **Report**
Topics **Mixed economies, interdependence, collaboration, risk**
Available from <http://www.artscouncil.org.uk/publication/interdependence-public-andprivate-finance-british-theatre>
Accessed on 05 May 2016

This report analyses the financial interdependence between public and private funds in the operation of the British theatre sector. The sector is shown as a complex ecosystem where its smallest components are

essential to its functioning. It quantifies the public contribution to the theatre sector finance as 14 per cent, highlighting the mixed economy nature of the sector. However, this small amount plays a critical role in absorbing risk and allowing higher frequency and scale of productions. Among others, collaboration and co-production models are analysed as a mechanism for financial risk reduction and profit maximisation. Yet, under certain partnerships such as consortiums, artistic risk taking seems to diminish due to the need to satisfy the interests of all members. Independently of the sources of finance, the report concludes that the motivation behind theatre productions is always to present high quality work.

Report title **Digital culture 2014: How arts and cultural organisations in England use technology. Performing groups. Fact sheet**
Year 2014
Author(s) **MTM**
Institution **Nesta, Arts and Humanities Research Council & Arts Council England**
Type **Survey**
Topics **Digital technologies, performing groups, revenue diversification**
Available from <http://artsdigitalrnd.org.uk/wp-content/uploads/2014/12/Digital-Culture-2014-Fact-sheet-Performing-Groups.pdf>
Accessed on 09 May 2016

This fact sheet summarises the main results of the 2014 Digital Cultures survey looking at the use of technology by performing arts groups. This includes dance companies, theatre organisations, orchestras and other groups producing and touring work. In general, performing arts organisations appears to be less impacted by the digital turn than other cultural sectors and also tend to show a lower engagement with technology than the overall sector. The main purposes of digital technologies are marketing and communications, preserving and archiving their work. Additionally, around half of the participants report that digital tools are important to create and distribute work, slightly below the average of the cultural sector. However, crowdfunding, accepting online donations and selling products, all related to revenue generation, are the digital activities with higher growth within performing groups.

Report title **Digital culture 2014: How arts and cultural organisations England use technology. Performing arts venues. Fact sheet.**

Year **2014**

Author(s) **MTM**

Institution **Nesta, Arts and Humanities Research Council & Arts Council England**

Type **Survey**

Topics **Digital technologies, performing groups, revenue diversification**

Available from **<http://artsdigitalrnd.org.uk/wp-content/uploads/2014/12/Digital-Culture-2014-Fact-sheet-Performing-Arts-Venues-.pdf>**

Accessed on 09 May 2016

This fact sheet takes a closer look to performing arts venues within the 2014 Digital Culture survey. Respondents tend to be large organisations ranging from theatres to concert halls. The use of digital tools for marketing and selling tickets is common, as well as data analysis derived from commercialisation. Accordingly, technology is perceived as increasingly important for their business model, well above the average of the sector. The fastest growing area of digital adoption is interactive education while venues tend to place less emphasis in incorporating technology to the creation and distribution of their work.

Report title **Live streaming productions for independent producers and small-scale venues**

Year **2012**

Author(s) **Chris Mellor**

Type **Report**

Topics **Live streaming, audience expansion, new business models**

Available from **<http://culturehive.co.uk/resources/live-streaming-productions-forindependent-producers-and-small-scale-venues>**

Accessed on 07 May 2016

This report evaluates the Camden Theatres model of paid live streaming tested by Camden Fringe in 2010 and 2011. It describes the key issues to consider for independent producers and venues when approaching live streaming. The author reviews existing tools available to facilitate this task and emphasises collaboration as a crucial component to successfully

attract digital audiences. A description of the types of audiences and their willingness-to-pay provides insights on the potential of digital theatre live streaming across different products. A useful quantification of costs and estimates of the demand to breakeven is also provided. The author provides a wide range of insights regarding teams, skills, social media strategies, digital audiences, and contracts among other issues that will facilitate the reflection of those considering digital live streaming.

Report title **How public investment in arts contributes to growth in the creative industries**

Year **2015**

Author(s) **Jonothan Neelands and Eliza Easton**

Institution **Creative Industries Federation, Warwick Business School and Arts Council England**

Type **Report**

Topics **Mixed economy, research and development, risk, public investment**

Available from **<http://www.artscouncil.org.uk/publication/how-public-investment-artscontributes- growth-creative-industries>**

Accessed on 05 May 2016

This report gathers the voices of business leaders and entrepreneurs in the creative economy who emphasise the crucial role of public funding to support training, R&D and the generation of creative ideas. These are seen by the creative community as key elements for growth in the cultural and creative sector. The author describes the mixed economy of the British creative industries and highlights their resilience when adjusting to diminishing public funds. However, it is noted that there are limits to this capacity of adjustment without fundamentally altering the cultural and creative ecosystem. In terms of creative and cultural policy, the authors welcome the expansion of tax incentives but state that vital components of the creative sector will suffer without public investment. In particular, subsidies are seen as key to maintain infrastructure, mitigate risks, as well as in promoting cultural and creative education and community outreach which provide the base for the creatives and audiences of tomorrow.

Report title **Capturing the audience experience:
A handbook for the theatre**
Year 2005
Author(s) New Economics Foundation
Institution Independent Theatre Council, Society of London Theatre,
Theatrical Management Association
Type Guide
Topics Well-being, indicators, new methodologies
Available from [https://itc-arts-s3.studiocoucou.com/uploads/helpsheet_](https://itc-arts-s3.studiocoucou.com/uploads/helpsheet_attachment/file/23/Theatre_handbook.pdf)
[attachment/file/23/Theatre_handbook.pdf](https://itc-arts-s3.studiocoucou.com/uploads/helpsheet_attachment/file/23/Theatre_handbook.pdf)
Accessed on 07 May 2016

This toolkit presents a framework to measure the impact of theatre on people’s well-being. The toolkit is based on the assumption that theatre can enhance meaning, promote entertainment and build shared experiences conducive to deep societal impacts. It proposes practical and tested tools to measure such impacts based on an Audience Experience Framework along with sample surveys templates. The main domains of audience experiences captured by the tools proposed are engagement and concentration, learning and challenge, shared experience and atmosphere, personal resonance and emotional connection and energy and tension.

Report title **The art of commissioning: How commissioners can
release the potential of the arts and cultural sector**
Year 2016
Author(s) Julia Slay and Madeline Ellis-Petersen
Institution New Economics Foundation
Type Report
Topics New commissioning models, social impact
Available from [https://neweconomics.org/2016/05/the-art-of-](https://neweconomics.org/2016/05/the-art-of-commissioning)
[commissioning](https://neweconomics.org/2016/05/the-art-of-commissioning)
Accessed on 04 May 2016

This report aims to help commissioners of public services to improve outcomes by including arts and cultural programmes in social areas beyond the traditional cultural sector. The report is part of Cultural Commissioning Programme, a three-year initiative inspired by a model of service delivery emphasising prevention as a core rationale. Within this framework, the strength of arts and cultural organisations is seen in their

embeddedness within communities, both in terms of place and networks. Therefore, they appear more open and inclusive than traditional providers, limiting the stigmatisation associated with the use of some public services. The report shares learning from two pilot programmes led by Kent County Council and the NHS Gloucestershire Clinical Commissioning Group. It identifies the main barriers that commissioners and arts and cultural organisations face and proposes practical recommendations on how to overcome them. The report summarises case studies where arts and culture organisations provide a wider conception of public value in contrast with a possible future of public provision reduced to acute services, often linked to poor outcomes and high costs.

Report title **English Touring Opera. Opera in Cinemas**
Year 2014
Author(s) Karen Wise
Institution Creativeworks London
Type Survey
Topics Digital screening, audience development,
audience expansion
Available from [http://www.creativeworkslondon.org.uk/wp-content/](http://www.creativeworkslondon.org.uk/wp-content/uploads/2014/05/ETO-Working-paper-May-2014.pdf)
[uploads/2014/05/ETO-Working-paper-May-2014.pdf](http://www.creativeworkslondon.org.uk/wp-content/uploads/2014/05/ETO-Working-paper-May-2014.pdf)
Accessed on 12 May 2016

This report analyses the results of a survey on cinema opera audiences. It shows that audiences for cinema opera are mainly made up of the traditional groups of opera attendees, without a significant impact on building new audiences. This is especially the case for younger audiences, as less than 10 per cent of attendees were under 50 years old. Equally, those attending did not show a greater predisposition to attend a live performance after experiencing opera in movie theatres. The main reasons for choosing to attend a screened performance were cost, accessibility, and comfort. Respondents felt that opera screenings can be considered a different art form and provides different experiences to a live performance facilitated for example, by close-ups and other cinematic techniques.

Report title **The current picture for arts fundraising**
Year **2016**
Author(s) **Michelle Wright**
Institution **Arts Fundraising & Philanthropy**
Type **Magazine Article**
Topics **Fundraising, competitive strategy**
Available from **<http://artsfundraising.org.uk/now-new-next/>**
Accessed on 06 May 2016

The author offers an overview of the current state of fundraising in the UK, where only 1 per cent of donations in 2014 were devoted to the arts. According to the Arts Council England (ACE) 2014/15 data and Department of Culture Media and Sport Charitable Giving Indicators 2014/15 private funding is heavily unbalanced in favour of London, ACE’s National Portfolio Organisations and large organisations. As the fundraising market becomes more competitive, organisations outside London with limited internal resources to devote to fundraising will find increasing challenges to attract private sector funds. Individual giving is still the strongest source of contributed income but arts organisations are focusing on trusts as a main area for development. The author claims this area will become increasingly competitive and calls for a more informed and strategic fundraising approach.

Report title **Making digital work: Business models. Sharing the learning from the Digital R&D Fund for the Arts**
Year **2015**
Author(s) **Nicole Yershon, Rohan Gunatillake, Suzy Glass, Gaynor Aaltonen, Chris Unitt and Iain Aitch**
Institution **Nesta, Arts and Humanities Research Council & Arts Council England**
Type **Report**
Topics **Innovation, digital business models, new digital technologies**
Available from **http://artsdigitalrnd.org.uk/wp-content/uploads/2015/06/DigitalRDFundGuide_Business.pdf**
Accessed on 09 May 2016

This collection of articles discusses key topics relating to the development of digital business models in the arts. Gunatillake clarifies the concept of business model innovation while noting that income generation is only

one of its constitutive parts. Glass reflects on the case of The Firestation Centre, where its management has taken an organisational approach open to risk and business model innovation. This has allowed them to undertake initiatives from testing a dynamic pricing model in ticket sales to imagine how a venuebased model can expand beyond its physical boundaries. Aitch’s article summarises key learnings emerging from the digital distribution of the Miracle Theatre’s shows, set in a rural location. Digital distribution allowed the theatre to quickly expand their audience, while maintaining a communal experience by streaming its shows in spaces such as pubs or cinemas. The competitive dynamic of a market in formation, that of digital distribution, is explored by Unitt in his article. The author urges cultural organisations to reflect on their strategy in this area before new entrants gain a dominant position and a critical knowledge on digital audiences.

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Report title: **Catalyst evaluation year two**
Year: 2015
Author(s): BOP Consulting
Institution: Arts Council England
Type: Evaluation
Topics: Fundraising
Available from: http://www.artscouncil.org.uk/sites/default/files/download-file/Catalyst_report_year_2.pdf
Accessed on 09 May 2016.

Report title: **A home for new work: The Yard Theatre**
Year: 2012
Author(s): Turner, Laura
Type: Magazine article
Topics: New business models, collaboration
Available from: <https://www.ayoungertheatre.com/a-home-for-new-work-the-yard-theatre-hackney-wick-london/>
Accessed on 08 May 2016.

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