Digital Business Models for Performing Arts

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Abstract: This paper investigates the obstacles hindering — and the best practices enabling — the adoption of digital business models by UK performing arts organisations. Evidence is provided through a qualitative case study approach, originating from eighteen semi-structured interviews with digital experts from the UK arts and cultural sector. Findings from the interview data suggest that the main barriers preventing the adoption of digital business models include an apprehensive sentiment towards digital technologies among the senior personnel of performing arts organisations, siloed digital thinking on both organisational and sector levels and the lack of monetisation techniques for digital cultural content. Best practice is proposed to tackle these obstacles, such as the introduction of small-scale R&D funding, the recruitment of experts from other industries and the identification and replication of existing digital business models implemented by performing arts organisations. The paper concludes on the impact of the coronavirus pandemic as an accelerator of digital transformation in performing arts and a contributor to the transformation of arts producers into necessity entrepreneurs. The analysis of the digital experts' diverse empirical accounts can contribute to digital entrepreneurship theory as well as produce guidelines for industry professionals and recommendations for policymakers on how to best support the UK arts sector in digital business model innovation beyond the Covid-19 crisis.

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Introduction

Until recently, the digital replication of a live performance was considered somewhat unattractive, technologically challenging and lacking the essence of a live event. Consequently, most performing arts organisations showed little interest in the digital capture of performance, and were slow to explore the opportunities of digital entrepreneurship. However, the recent rapid changes forced on the arts and cultural sector by the Covid-19 outbreak, such as the closure of cultural venues and strict regulations on social distancing, present a considerable challenge for the industry at large. The current crisis also acts as a driver of digital transformation, accelerating organisational decision-making and encouraging experimentation with novel and innovative business models. Since the introduction of video streaming by Netflix in 2007, audiences' habits of cultural consumption have been revolutionised, and the rise of various video streaming platforms has increased the competition over audiences' time and attention (Lotz, 2017). While the global dominance of streaming and social media platforms has created a plethora of opportunities for digital entrepreneurship, arts organisations often lack resources and expertise to adopt digital business models and engage in business model innovation.

While some scholars (e.g. Zagalo and Branco, 2015) have praised digital platforms for their emancipatory and creative features that allow users to better express, collaborate and participate on a global scale, recent times have seen an amplification of critical voices, particularly in academia, over data privacy, political manipulation and insufficient content moderation (Tufekci, 2017; Gillespie, 2018; Morozov, 2018). Digital platforms form ecosystems that Van Dijck and colleagues (2018) refer to as platform societies, where platforms act increasingly as gatekeepers to social and financial interaction. Even though arts organisations now have access to larger, international audiences on digital platforms, revenue streams are often meagre and far from lucrative. Meanwhile, policymakers across Europe are urging arts producers to engage in innovative business planning and explore alternative income generation methods to traditional public funding (ACE, 2015; TEH, 2015). Artists and arts organisations have been persuaded by their funders to become more entrepreneurial in transforming audiences into customers. Nevertheless, in the platform economy, arts organisations struggle to embrace digital entrepreneurship, to focus on their audiences' needs and establish sustainable revenue streams that justify the resources spent in producing their digital content.

This paper proposes an investigation into the obstacles preventing performing arts companies from adopting digital business models, while highlighting the factors and best practises for performing arts organisations to fully embrace this transition. Our goal is to provide high quality evidence originating from eighteen semi-structured interviews with digital experts from the UK arts and cultural sector. By documenting and analysing these empirical experiences, our investigation can contribute to creative industries entrepreneurship theory, as well as produce guidelines for best practice and recommendations for policymakers and industry professionals on how to best support the UK performing arts sector through these extraordinary times.

Research context

In the UK, performing arts are classified as part of the creative industries. The origin of the terms cultural industries and creative industries have been comprehensively traced (e.g. Cunningham, 2002; Hesmondhalgh, 2007; Hesmondhalgh and Pratt, 2008; Towse, 2014). Nevertheless, to fully comprehend how cultural entrepreneurship (CE) - or arts entrepreneurship (AE) as it is sometimes referred to - occurs in the UK, it is appropriate to begin with a brief historical overview on the origins of the creative industries, and the factors influencing the evolution of the concept.

The terms of culture and industry have been in dichotomy since Adorno and Horkheimer (1944) introduced the pejorative definition of commercial, "mass produced" media in contrast to unique, superior-quality high art. While their intention was to underline the dangers of the commodification of arts, this seemingly paradoxical coupling of the terms "culture" and "industry", marked the introduction of the concept, which today is known as the cultural and creative industries, and commonly utilised by researchers and international organisations.

Hesmondhalgh and Pratt (2008) observe that the interplay between cultural industries and cultural policymaking became more prominent in countries such as the UK, France and Australia in the 1980s. The growing interest in the cultural industries in the Western world was a result of workers' increased leisure time, technological development and the rise of consumerism, among other factors. In cultural policymaking, certain publicly funded forms of elitist high culture were thought to need protecting from the cultural industries, which presented the commercial and self-sufficient, reverse side of culture. However, the term cultural industries proved problematic for several reasons. Among other things, it was ambiguous and only referred to a small minority of sectors producing cultural goods, such as performing arts, film, visual arts and the heritage sector. Therefore, another term was needed to encompass the increasing significance of the creative sector's impact on the economy as a generator of economic value and source of employment.

In 1998, the newly founded Department of Culture, Media and Sport (DCMS) coined the term creative industries, which:

> "*… have their origin in individual creativity, skill and talent and … have a potential for wealth creation through the generation of intellectual property*" (DCSM, 1998)

These industries included advertising, antiques, architecture, crafts, design, fashion, film, leisure software, music, performing arts, publishing, software, TV, and radio. In the more recent times, the UK government has systematically highlighted the creative industries for their ability to create jobs and generate value for the economy. According to the DCMS (2020), in 2018, the creative industries contributed £111.7BN to the UK economy, an increase of 43.2% since 2010. Cultural policy scholars (e.g. Garnham, 2005; Towse and Handke, 2013; Schlesinger, 2017) argue, however, that linking traditionally publicly-funded arts with other high-economic-value sectors such as film and television or information technology, is hardly a politically neutral decision.

Business models and digital business models

The term business model was adopted by information technology scholars to refer to computer/systems modelling in the 1970s (Wirtz, 2011), but it took another twenty years for business and management scholars to discover it. In the 1990s, however, 'business model' became a buzzword of managerial discourse, as it was mainly utilised in the context of the fast-growing electronic commerce and particularly the dot com bubble (Timmers, 1998; Amit and Zott, 2001). Nielsen and Lund (2018) observe that during that period the term became strongly linked to online businesses, and the rise of - what was then called - the New Economy, and what was later to be referred to as the Digital Economy.

It has been suggested that it was the emergence of the Internet that transformed the concept of economy by accelerating the transition of the so-called Old Economy companies into the online environment (Kotha, 1998), as well as seeing the establishment of numerous ambitious technology companies. Although many of the technology start-up ventures failed after the burst of the dot com bubble, the concept of business model remained, and terms such as business model innovation and business model management were introduced in academic discourse. Many (e.g. Timmers, 1998; Afuah and Tucci, 2001; Amit and Zott, 2010) seem to agree on the key role of the Internet as a trigger of business model innovation. Langley and Leyshon (2017) also introduce the concept of platform capitalism, emphasising the key role platforms in digital economic circulation.

The business model construct has been researched from various theoretical perspectives, such as information technology (e.g. Timmers, 1998; Amit and Zott, 2001), organisational theory (e.g. Linder and Cantrell, 2000) and strategic management theory (e.g. Hamel, 2000; Chesbrough and Rosenbloom, 2002). Despite the increased interest in the concept, scholars remain divided over the conceptualisation, components and the purpose of the business model construct. Zott *et al*., (2011) conducted a systematic review on 133 academic journal articles published in 1975-2009, and concluded that the business model literature had mostly developed in silos. The three main streams of research were: 1) online business and the use of information technology in firms, 2) strategic aspects, e.g. value creation and competitive advantage and 3) innovation and technology management. Many have attempted to define what a business model actually is. It has been, for example, described as "*an architecture*" (Timmers, 1998, p.2), "*a system*" (Amit and Zott, 2001, p.511), *"a heuristic logic"* (Chesbrough and Rosenbloom, 2002, p. 529), "*a story*" (Magretta, 2002, p.4) or "*a reflection*" (Casadesus-Masanell and Ricart, 2010). Others have focused on investigating the purpose of the concept, and agreement have been reached among some scholars on the following: a business model is an independent unit of analysis, and a holistic overview on how a firm or an organisation creates and captures different types of value within their network of partners and other stakeholders (Afuah and Tucci, 2001; Osterwalder *et al*, 2005; Osterwalder and Pigneur, 2010; Zott *et al*., 2011).

Since the turn of the millennium, much of the business model research has focused on business model management (BMM) and business model innovation (BMI). Several definitions for the notions have been proposed. Wirtz (2011, p.72) defines BMM as "*an instrument for the control of a company and comprises all target-oriented activities within the scope of design, implementation, modification and adaptation as well as the control of a business model in order to realize the overriding goal of generating and securing competitive advantage.*" His perception articulates the essence of BMM, which centres on value creation and value capture on organisational level. BMI, on the other hand, is more focused on reformulating the value proposition and re-structuring the entire firm (Casadesus-Masanell and Zhu, 2013).

For the last two decades, and perhaps due to the universal decline in public funding for the arts, there has been increasing interest among arts professionals and arts funders to contextualise the business model construct and business model innovation methods in the arts and cultural sector (ACE, 2013; TEH - Trans Europe Halles, 2015). For instance, many sector support and intermediary organisations (e.g. International Network for Contemporary Performing Arts (IETM), Arts Council England (ACE) and Culture Hive) have proposed their versions of Osterwalder and Pigneur's (2010) Business Model Canvas, which they have customised to meet the needs of cultural organisations[1]. As stressed by Schiuma and Lerro (2017), however, the particular characteristics of the arts and cultural sector can make the transfer and adaptation of these commercially-focused frameworks challenging and unsuccessful.

To date, limited scholarly attention has been paid to the exploration of how arts and cultural sector business models differ from those of the business sector, or how arts and cultural organisations can develop their business models in order to adapt them in relation to the digital economy. As an apt starting point, however, the European Union-funded Creative Lenses project (Rex *et al*., 2019) investigated business models in arts

[1] E.g. https://www.culturehive.co.uk/resources/business-model-canvas/

and cultural industries, and highlighted the following key differences between arts and cultural sector business models and those utilised by commercial enterprises:

- Arts and cultural organisations rarely have the freedom to choose what business model they implement, but this is rather determined by the economic, political, social and cultural contexts of the organisation.
- There are different types of value created through an arts organisation's business model, such as artistic, social, cultural and economic.
- Arts organisations often implement more than one business model. Indeed, they can utilise several – sometimes conflicting – business models simultaneously.

Since 2013, ACE and NESTA have been conducting the longitudinal Digital Culture survey, and in 2019 data was collected from 1,182 arts and cultural organisations on their use of digital technologies. The results revealed that previously, in 2013-2014, there had been notable growth in the number of organisations considering digital technologies important or essential for their business models. However, between 2015-2019 this upward trend had lost momentum, and in 2019 only 49% of the participating organisations still agreed with the statement (ACE & NESTA, 2019). The survey also highlighted that while digital technologies are commonly harnessed for marketing purposes in arts organisations, only 7% of the arts organisations were able to generate revenue from their digital content located on third-party platforms. These findings indicate that while digital transformation has reached the marketing departments of the arts and cultural organisations, in terms of business model development the sector still relies upon the traditional product-based model, where most income is generated through the ticket sales of live performances.

Business and management scholars (e.g. Afuah and Tucci, 2001; Amit and Zott, 2001; Massa and Tucci, 2013) argue that digitalisation has enabled the introduction of novel and innovative business models and value creation techniques. However, others (e.g.Taplin, 2017) have highlighted how digital technologies can be disruptive for the arts, as the emergence of novel formats, for example, in the music industry has undermined traditional business models and left many artists wondering how to survive in the digital world. Bakhshi & Thorsby (2010, p.7) observe that sometimes digital technologies can be seen as "dumbing down" the arts and increasing competition over the time and attention of cultural consumers. Also, levels of digital maturity can differ greatly among arts and cultural organisations. Whereas some of the "born-digital" organisations base their business models on experimenting with novel digital technologies in their artistic practice, many do not have the resources or capabilities to implement anything other than the traditional product-based business models, centred on the revenue generation from live performance ticket sales (Searle, 2017). This argument is supported by Li (2020), whose study of 80 creative industries organisations found that digital transformation was a driver of business model development and offered the organisations a wider choice of potential models, though with the caveat that not many of these models were truly novel. Consequently, Li (2020) explored how digital transformation changes business models in the creative industries, and concluded that digital technologies can accelerate the development of business models in three key ways: by automating, expanding and transforming (AET).

The extant literature on how arts organisations can engage in creating more sustainable business models for the digital economy tends to focus on the importance of business model development and innovation. Scholars (Muñoz-Seca and Riverola, 2009; Muñoz-Seca and Riverola, 2010; Schiuma and Lerro, 2017) have highlighted that it is essential for the arts and cultural sector to broaden their existing business models and adopt new ones, as innovative business models can make arts and cultural organisations more sustainable and impactful. Many researchers (e.g. Hume *et al.*, 2006; Muñoz-Seca and Riverola, 2009; TEH - Trans Europe Halles, 2015) have argued, however, that despite the policy-imposed need for innovative business models and strategic planning in the arts and cultural sector, often the approaches and tools used by the arts and cultural organisations, and the design, implementation and development of new business models are incoherent and unsuccessful.

Entrepreneurship in the arts

The value created by arts and cultural organisations differs from the value created by commercial enterprises and traditional entrepreneurs. Whereas the classic Schumpeterian entrepreneur is an active agent of innovation and change, creating "gales of creative destruction" through the introduction of radically innovative services and products to cease opportunities and drive economic reward, the cultural entrepreneur has very different motivations (Schumpeter, 1942; Acs *et al.*, 2009). Fairlie and Fossen (2018) introduce the conceptual distinction between "necessity" and "opportunity" entrepreneurship that is typically applied to the developing economy context, but seems particularly relevant to the arts and cultural sector during the current Covid-19 crisis. Drawing on this dichotomy, it can be argued that the restrictions brought upon the sector by the pandemic has transformed many arts producers into necessity entrepreneurs. This also echoes Rex's and colleagues (2019) findings that arts organisations' business models are often dictated by the social, political or financial conditions of their operating environment.

Caves (2000) outlines several proprieties distinguishing creative industries' entrepreneurship from 'traditional' economy-driven entrepreneurship. Perhaps most seminal of them is "art for art's sake", insinuating that in artistic practice, the pursuit of financial gains is inferior to purely artistic ambitions. Eikhof and Haunschild (2007), drawing on Bourdieu's (e.g. 1990) work on social practice, reveal the tensions between "artist's logic" and "economic logic" in artistic production, and draw attention to the precarious position of artists, who are obliged to regularly combine the sometimes-opposing logics in their *métier*. Chang and Wyszomirski (2015), based on their review of journal articles on AE between 2003-2013, consider AE primarily as a management process composed of different skillsets with a primary goal of sustaining an organisation and creating both social and cultural value.

To summarise, CE and AE as concepts can appear ambiguous, and they have been studied from many different theoretical perspectives, including - but not limited to - sociology, strategic management theory and organisational theory. The historical debate on the incompatibility of arts and business has influenced our understanding of CE and AE and this dichotomy is still present today. However, as Chang and Wyszomirski (2015) posit, through the symbiotic combination of arts and entrepreneurship logics, cultural professionals can achieve financial sustainability and autonomy, while being able to fulfil their artistic goals and create different types of value for society.

Digital platforms and the platform society

Digital entrepreneurship theory has commonly emphasised the manifold entrepreneurial opportunities offered by the adoption of novel digital technologies in terms of accessibility, low barriers of entry and cost efficiency (Castells, 2010; Mole and Mole, 2010; Zagalo and Branco, 2015). Many (Belleflamme *et al*., 2012; Mollick, 2014; Nambisan, 2017) have also explored how the newly formed digital infrastructures such as, for example, crowdfunding platforms and social networking sites have enabled diverse communities to be formed and act as foundations of entrepreneurial activities. Other scholars (e.g. Tufekci, 2017; Gillespie, 2018; Morozov, 2018) have expressed concerns over the monopoly of the dominant digital platforms in terms of data privacy, lack of content moderation and black-box algorithms. In the context of the arts and cultural sector, this is particularly relevant, as for arts funders equal access to publicly-funded arts remains one of the key priorities (ACE, 2020).

Most digital cultural content tends to be located on major digital platforms, such as YouTube, Facebook, Instagram, Twitter, Vimeo and more recently Twitch. The academic literature on the topic is diverse, but digital platforms are generally considered as more than mere software-based media. Andersson Schwartz (2017) describes digital platforms as governing systems, arenas for social action and mediators of economic interaction. Van Dijck *et al.* (2018) define the concept of a platform society as an ecosystem of digital platforms that penetrate every level of society, and shape heavily our social life. Nieborg & Poell (2018) posit that "platformization" has transformed the political economy of the cultural industries as the digital platforms have penetrated the production, distribution and circulation of cultural content. This, they stress, has led to a phenomenon of platform "contingency", where cultural producers have become dependent on the powerful digital platforms. Platforms have also disrupted traditional business models by making audiences media producers, or "prosumers", who are increasingly involved in immaterial labour while interacting with the cultural content distributed on the platforms (Toffler, 1981; Ritzer and Jurgenson, 2010; Andersson Schwarz, 2017).

Another issue that occurs particularly in the performing arts sector, is the lack of viable digital products. This might stem from the real/virtual dualism that was originally discussed by scholars such as Benjamin (1935), who described how a piece of art loses its aura and unique existence when reproduced mechanically. While the music industry has actively reformatted content according to technological developments (Leyshon, 2014), the performing arts have been slow to explore the opportunities offered by the digital economy, putting them in a precarious position when faced with the unprecedented challenges, such as those brought on by the Covid-19 pandemic.

The interdisciplinary theoretical framework detailed above supports the formulation of the following research questions:

RQ1: What are the best practises for enabling the adoption of digital business models for performing arts organisations in the UK?

RQ2: What are the obstacles preventing or hindering the adoption of digital business models?

Methodology

The nature of the research questions firmly steered us towards a qualitative case study approach. Case study as a research strategy can be utilised when exploring "*a phenomenon in its real-life context*" and particularly when the boundaries of the said phenomenon are not yet clearly defined (Yin, 2016, p. 98). Conversations can offer robust and plentiful data about individuals' personal and social lives, experiences and personal reflections, and therefore semi-structured interviews were chosen as the research method (Brinkmann, 2015). The data used to identify the obstacles preventing - and best practices for enabling - the adoption of digital business models in performing arts, was collected from eighteen semi-structured interviews with fifteen digital experts, conducted via online video calls. Either Skype, Zoom or Microsoft Teams was used as the video call platform. Fourteen interviews took place between October 2019 - February 2020, and four interviews were conducted in September 2020. Three of the participants were interviewed twice, as the rapidly evolving situation with the Covid-19 pandemic shaped their opinions during the data collection period.

The interviewees occupied senior positions as specialists and executives in the UK arts and cultural sector, and all had over ten years of industry experience. Expert interviews - a common research method used across the social sciences - are considered to provide richer and more in-depth data in the exploratory phase of a research project than, for example, participant observations or surveys (Bogner *et al.*, 2009).

Table 1 provides details on the professional specialities of the research participants and outlines the numbers of interviews and their durations.

Number	***Specialisation***	***Organisation type***	***Interviews***	***Duration***
1	Digital distribution	Sector support organisation	1	47min
2	Digital audiences	Sector support organisation	1	46min
3	Digital content production	Sector support organisation	1	40min
4	Digital policymaking	Sector support organisation	1	50min
5	Digital policymaking	Sector support organisation	1	60min
6	Digital policymaking	Sector support organisation	1	37min
7	Digital policymaking	Sector support organisation	2	60min and 37min
8	Digital-related research	Sector support organisation	1	66min
9	Digital content production	Large arts organisation	1	25min
10	Digital broadcast	Platform	1	36min
11	Digital distribution	Independent consultant	1	40min
12	Digital audiences	Large arts organisation	2	42min and 23min
13	Digital business development	Medium-sized arts organisation	1	48min
14	Digital broadcast	Independent entrepreneur	1	37min
15	Digital research	Independent consultant	2	77min and 58min
			18	**829min**

Table 1. List of participants

Semi-structured interviews and data analysis

The selection of interviewees was influenced by the consideration that industry experts are in a better position to offer a more comprehensive overview on the adoption of digital business models in performing arts, than, for instance, individual artists or art producers. Hence, purposive sampling was used to “handpick” and shortlist potential research participants (Denscombe, 2010). The main criterion was that the expert was established in the sector, and the use, management and development of processes involving digital technologies was a key part of their work. Furthermore, it was ensured that the experts came from a variety of backgrounds and were specialised in different aspects of digital cultural production. Some of the interviewees were recruited through personal or academic contacts and snowballing technique, but because high-positioned industry experts can be extremely difficult to reach and persuade to participate in a research project, the principal investigator’s industry contacts played a central gatekeeping role in introducing the researcher to the shortlisted candidates. To conduct ethical research, all participants and their employers were guaranteed full anonymity throughout the research project.

During the interviews, the participants were, for example, asked questions about the UK arts and cultural sector regarding digital transformation, digital entrepreneurial initiatives introduced by different arts organisations, methods of digital content production and monetisation of digital content. The participants were encouraged to share their empirical experiences as digital experts working with manifold and diverse performing arts organisations. Due to the semi-structured nature of the interviews, spontaneous questions emerged naturally, the participants could freely elaborate on topics they found relevant. Each interview was audio recorded and transcribed verbatim by the researchers. The transcribed interviews were then coded using the NVivo qualitative data analysis software (*NVivo*, 2020). Some a priori codes stemmed from the literature review and provided an initial framework for the coding process. However, many codes emerged from the data corpus. Codes were then organised in themes and prepared for thematic analysis, which was conducted following the method detailed in Braun and Clarke (2006).

Findings and discussion

Thematic analysis of the interview data revealed recurrent themes relevant to the research questions. The themes were grouped into three categories for discussion: 1) Sentiment towards digital, 2) Digital organisation, and 3) Monetisation. Below, the findings from each category are presented and discussed in relation to the research questions.

Sentiment towards digital

Since one of our research aims was to look into the obstacles hindering performing arts organisations from adopting digital business models, a prominent theme that emerged from the interview data was an apprehensive sentiment among performing arts companies towards digital technologies. Expert 12 considered that this antipathy might be a key factor in postponing digital transformation in the sector:

"*I think that generally arts organisations, cultural institutions are probably behind the curve in terms of digital transformation, they have long-established ways of working, long-established arts forms to manage, and they have managed them in a certain way for decades*"

Expert 11 concurred and highlighted the live/digital dichotomy (Benjamin, 1969) that appeared pronounced among the organisations she had worked with:

"[Arts organisations] have struggled, because... I think, because there has been a perception that [digital] is not for them"

However, many of experts stated that there is great disparity within the performing arts sector. While some of the sector leaders are well-equipped and keen to transfer their operations in the digital environment, echoing what has already been established by many (e.g. Hume *et al.*, 2006; Muñoz-Seca and Riverola, 2010; TEH - Trans Europe Halles, 2015) small and medium-sized organisations do not necessarily have the resources or skills needed to embark on the transition process. It was also argued that the UK arts and cultural sector is digitally advanced in a global scale, despite not possibly being as digitally mature as some other sectors of the UK economy.

Expert 4 provided some evidence that the negative sentiment among performing arts organisations towards digital technologies and digital business model innovation has been amplified by performing arts audiences' lack of appetite for digital content:

"I don't get a sense that there's a great appetite for people to be consuming performing arts content online, whether it's live, or recorded as live, or specially recorded… there doesn't seem to be a great appetite for it."

This was without a doubt the case prior to the pandemic, but following the global lockdown and closure of cultural venues brought on by the Covid-19 outbreak, some experts did observe a notable change in performing arts organisations' willingness to engage with digital technologies as the organisations were seeking novel ways to distribute and monetise their content. Expert 1 stated:

"The coronavirus pandemic has had an unprecedented effect on the number of organisations factoring digital capture and distribution into their short and long term planning. This has resulted in a huge increase in the number of performances being published online."

This clearly demonstrates how the Covid-19 pandemic is creating substantial market imperfection in the UK performing arts sector, where out of necessity (Fairlie and Fossen, 2018), performing arts organisations are forced to explore novel entrepreneurial opportunities and make rapid choices relating to the use of digital technologies. The expert interviews also unveiled the long-standing attitudes that root from historical debates around the compatibility of arts and business and the live /digital juxtaposition (Adorno and Horkheimer, 1944; Benjamin, 1969; Caves, 2000). Arts entrepreneurship is based on ensuring the autonomy and sustainability of an arts organisation while granting them the freedom to fulfil their artistic ambitions and create value for the society (Chang and Wyszomirski, 2015). Therefore, we posit, based on the interview data, that there are signs of the current crisis acting as a catalyst of change in attitudes towards digital technologies in performing arts for both the art producers and their audiences accessing the digital content.

Digital organisation

The experts identified various obstacles hindering the adoption of digital business models relating to the level of digital maturity in performing arts organisations. Echoing the Digital Culture 2019 study (ACE & NESTA, 2019), instead of the use of digital technologies being embedded in the organisation's strategy on every level and department, the production of digital content was often considered to be solely the marketing department's responsibility, and therefore did not, for example, have a designated budget. Expert 2 observed that this was a common scenario in many performing arts organisations:

"While there are fantastic creative and digital collaborations, I still see an awful lot of digital work that is taken on by the marketing team, and it's done as a bolt on, and it's done in parallel with the main performance … and I think unfortunately, if you then have a marketing team who are having to not only create digital work, but then ultimately market it as well… it might be a struggle for them."

Expert 6 described this organisational phenomenon as "siloed thinking" and argued that it was, in fact, a sector-wide issue:

"I think siloed thinking is a problem for the arts sector. And, I think with digital content, you know, it's like the marketing department is creating their content, the education department is creating their content, the performance department is creating their content… that is… not necessarily the best way of doing it."

These findings support the assumption that the arts sector has been slow and ill-prepared in their attempts to engage in digital business model innovation, and amplify the arguments already prominent in extant literature that call for active engagement in BMI (Muñoz-Seca and Riverola, 2009; Muñoz-Seca and Riverola, 2010; Schiuma and Lerro, 2017).

Expert 5 among others found that a change of attitude was necessary for embedding the use of digital technologies on every level and process of the organisation:

"…I still think we're not quite there. So, digital is held as a separate shiny thing that only certain people know about. And, we really need to be in a position where digital is business as usual. It's part of everyone's role. It's not just siloed somewhere in an organisation."

ACE's Digital Culture Network[2] was brought up by several experts as an example of best practice to encourage the adoption of digital business models by performing arts organisations. It was considered that the digital experts coming from different sectors with specialist skills were in a good position to assist performing arts organisations in their digital transformation process.

Another obstacle preventing the adoption of digital business models was the observation that whereas digital audiences tend to be younger and digitally native, senior executives in performing arts organisations often possess only very basic digital skills, and therefore do not fully understand the limitations or potential of digital technologies. Expert 6 had strong views on the leadership's lack of digital skills:

"*I think there's a naivety about digital distribution and its ability to reach audiences in the arts sector… partly because the leadership doesn't really understand technology and how things work."*

Expert 5 agreed and pointed out that this was an issue rooting from long-standing hierarchical structures within the sector**:** *"… the leadership is generally a lot older, and not digitally native."*

Many solutions were proposed to tackle this generational barrier. The ones that emerged most commonly were: formal and informal digital capacity building particularly aimed at senior staff members, the investment in and retention of existing digital experts in arts organisations and the recruitment of experts from other industries. These findings support Searle's (2017) argument that, perhaps due to this lack of digital expertise, many arts organisations still rely on the traditional product-based business model, where income is mainly generated from live performance ticket sales. The lack of resources, skills and capabilities identified by the experts, particularly in SME arts organisations, has hindered the comprehensive embedding of digital technologies in business strategy and business models.

The interview data also revealed several barriers to the adoption of digital business models by performing arts organisations, which rooted from the innate disparity within the arts and cultural sector. A number of experts considered that the unequal distribution of R&D funding was a major obstacle. Expert 8 found that this was due to lack of structure within the sector:

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[2] https://www.artscouncil.org.uk/developing-digital-culture/digital-culture-network

"I think… it's a highly unstructured sector. There are areas which are quite well structured within it … if you receive consistent public funding through the Arts Council … that does give your organisation some continuity and some confidence that you're going to be around for a bit longer."

Expert 3 elaborated on the topic observing that sector leaders and some larger and more digitally mature organisations were highly successful, but it was the smaller organisations that tended to struggle as their resources were scarcer:

"The biggest and medium-sized organisations are doing digital incredibly well, and the smaller ones have seen that success, they want to emulate that, the problem there is that gap between the resources and abilities that they have"

Many of the experts posited that as a solution, small-scale research and development grants were urgently needed for performing arts organisations to conduct experiments with new digital technologies from which best practice could be shared. Expert 14 stated:

"I think there needs to be proper funding for a range of innovative projects, projects which look into innovative rights models, innovative creative strategies, innovative distribution opportunities. Because it is only by actually trying out real projects that we'll be able to judge their creative success and their viability."

Expert 8 argued that while there was some R&D funding available, it was not enough for the whole sector to engage in experimental projects that could reformulate value propositions and act as a driver of BMI (Casadesus-Masanell and Zhu, 2013):

"I have been making the case for quite a long time now… that there should be more R&D spending in the arts. And [some organisations] have done a really good job of making that case to the government, which is why funding has become available… but it is on a macro level, it isn't at the level of what this R&D should actually look like, and how it would actually need to be structured."

The majority of the experts recognised that arts organisations were keen to find new ways of collaborating with large digital platforms, however the initiatives to open a dialogue with platform representatives were often fruitless, as platforms seemed to prioritise more lucrative, commercial partnerships. Therefore, sector-support organisations and public bodies were considered to hold a key role in establishing these connections. Expert 3 reflected upon the best practices to enable this communication:

"I don't think Big Tech companies have got the resources to speak to arts organisations, I think it takes … a case study or an intermediary organisation to facilitate that conversation … and feed it back to the sector, let them know that these opportunities are available out there."

The findings relating to digital platforms were somewhat surprising in that only a few experts pointed out how some performing arts organisations, particularly during the current pandemic, were actively trying to end the "platform contingency" by introducing their own platforms and selling their performances directly to broadcasters (Nieborg & Poell, 2018). However, many organisations remained happy "prosumers" of the platform society, despite the fact that economic value created from their initiatives was only acquired by the dominant digital platforms (Ritzer and Jurgenson, 2010; Andersson Schwarz, 2017).

Monetisation

Regarding the monetisation of digital performing arts content, many of the experts recognised that while posting content on social media can be beneficial for marketing and branding purposes, it merely serves to automate marketing processes in an existing business model (Li, 2020), but rarely transforms business models, or creates new revenue streams to sustain an arts organisation. Therefore, the experts recognised the pressing need for new digital value propositions and monetisation strategies to maintain sustainability and compensate for declining public funding. They identified a plethora of such approaches and strategies, some of which were already generating — or had the potential to generate —income for performing arts organisations. This provides evidence of the UK performing arts organisations actively engaging in BMI, and seeking ways to expand and/or transform their existing business models (Li, 2020), and as the pandemic lingers on, this transformation continues to gain momentum.

Indeed, some of the experts argued that the Covid-19 pandemic had accelerated the transformation of the monetisation landscape in the arts and cultural sector, stressing that during the first lockdown arts organisations were rushing to distribute their content online for free to engage with their audiences and to fulfil their public service remit. However, as the pandemic proved longer than first anticipated, Expert 1 pointed out that arts organisations were forced to change their strategy:

"Initially, the vast majority of …content was free to access, published on YouTube and embedded onto the arts organisation's website. More recently, there has been demand from the sector for charging for this content, resulting in a lot of research into subscription, PPV and pay-walled content."

However, despite the manifold entrepreneurial initiatives recently introduced by performing organisations, the more recent interview data also revealed fears over the great financial uncertainty that was shadowing the arts industry, brought on by the Covid-19 crisis.

Conclusions and limitations

In this article, we have investigated the obstacles hindering — and the best practices enabling — the adoption of digital business models by performing arts organisations in the UK. The analysis of the data collected revealed three recurrent themes: sentiment towards digital, digital organisation and monetisation. Under the first theme, the main obstacle highlighted was performing arts organisations' apprehensive attitude towards digital technologies and audiences' lack of interest in digitally captured performance. The former perhaps stems from tightly ingrained operational traditions and the hierarchical structure of the arts and cultural sector, while the latter might just reflect the slow pace of digital transformation in the sector, which has not enabled the emergence of more innovative and attractive digital products. While the experts were not able to provide much advice on how to change the attitudes towards digital prior to the coronavirus outbreak, the interview data provided some evidence that the financial pressure brought on by the global pandemic on the arts and cultural sector, has already initiated a swift in the traditional attitudes towards digital technologies.

The analysis of the second theme, digital organisation, unveiled several barriers to the adoption of digital business models by performing arts organisations, such as the lack of digital skills among senior executives and unequally distributed R&D funding. Furthermore, the interview data supported previous research findings (e.g. ACE & NESTA, 2019) in highlighting that the adoption of digital technologies has happened in silos, both on organisational and sector levels. Best practice was proposed to tackle these issues, such as the nurturing of existing digital experts within the sector and the recruitment of professionals from other sectors and industries. Most importantly, however, many of the experts stressed that for performing arts organisations to truly engage in digital BMI, small-scale research grants were urgently needed, in order to determine the viability and sustainability of their digital ventures.

Finally, relating to the theme of monetisation, the experts recognised that sharing content online for free can be beneficial, but observed that the era of freely-accessible digital cultural content might have ended with the first wave of the Covid-19 pandemic, as this approach cannot sustain an arts organisation. To share best practice, the experts identified a host of existing revenue streams and value propositions that had been expanded or transformed by digital technologies (Li, 2020) and were actively implemented by performing arts organisations.

Based on these findings, we want to conclude with the observation that the UK performing arts sector seems to, at last, undergoing a full digital transformation, heavily accelerated by the global pandemic. Arts organisations are now forced to make rapid decisions on their digital strategies, decisions which they have perhaps been dismissing for decades as irrelevant. We argue that arts producers have become necessity entrepreneurs (Fairlie and Fossen, 2018), implying that their entrepreneurial initiatives, driven by the current crisis, require them to abandon the traditional, sceptical attitudes towards digital technologies, combine artist's and economic logics (Eikhof and Haunschild, 2007) and fully embrace the needs of their digital audiences. As one of the experts stated: "Digital needs to be business as usual", otherwise arts organisations will only stand a slim chance of survival. In these challenging times, digital capacity building, recruitment from other industries and collaboration with other sectors as well as with digital platforms is key when exploring the opportunities of digital entrepreneurship.

Our investigation also confirms the previous findings by Rex and colleagues (Rex *et al.*, 2019) that arts organisations rarely choose their business models, but they are rather determined by the economic, cultural, political or social conditions of the organisations' operating environment. Furthermore, the variety of emerging digital business models identified by the experts supports the argument that arts organisations often implement multiple business models in parallel.

The expert interview data provided evidence of many organisations already engaging actively in BMI and experimenting with novel digital business models. Although in the scope of this research project it is too early to draw conclusions on the impact of the Covid-19 pandemic, despite ACE and DCMS's best efforts to provide life support for the struggling sector, many of the interviewees saw the future of arts looking financially precarious. Organisations that were already digitally mature were doing the best under current circumstances, and there has been an emergence of hybrid performances and new ways of re-creating the live experience in the digital environment. However, organisations with large venues to maintain tend to struggle, as they cannot be sustained solely with public subsidy and the revenue from their digital initiatives.

As all qualitative research, also this study has some inevitable limitations that need to be taken into consideration. It is appropriate to point out that the findings and conclusions are not generalisable to all performing arts organisations in the UK, due to the small number of the interviewees and also the subjective, interpretivist nature of the research. Nevertheless, this rich qualitative study provides some unique insight into performing arts organisations' digital business models, as well as an interesting starting point for arts producers to reflect on their choice of business models, and can perhaps offer guidance in the BMI process. However, more research is needed, especially of that of quantitative nature, in order to make the conclusions on the sector at large and make systematic comparisons between performing arts organisations. Therefore, we look forward to reaching conclusions about *"Covid-19: Impacts on the cultural industries and the implications for research"* project by University of Leeds that explores the longitudinal impact of Covid-19 on the cultural industries.

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