

DO MUSEUMS HAVE 'BRAND IDENTITIES' THAT ARE RECOGNISED BY
VISITORS?

Dr Niall Caldwell
Senior Lecturer, Marketing
Department of Business and Service Sector Management
London Metropolitan University
277-281 Holloway Road
London N7 8HN

email: n.caldwell@londonmet.ac.uk

Ph: 44 -(0)1223-462353

DO MUSEUMS HAVE 'BRAND IDENTITIES' THAT ARE RECOGNISED BY VISITORS?

Abstract

Museums and galleries want to be thought of as brands, but are they succeeding with visitors in distinguishing between themselves as effectively as other types of brands? This paper reports the results of an innovative study that uses the consumer trade-off model, Conjoint Analysis, applied for the first time to museum visitors at the Tate Modern Gallery, London. The purpose of the paper is to identify and measure the 'key decision criteria' for museum visitors. If museums have successfully developed 'brand identities' this research will show whether visitors are motivated by considerations of branding in their choice of museum destinations in London. Hence the research goal was to look at how visitors prioritise the factors that are important to them in determining their choice of museum to visit. In the first stage of the research the factors (or principle components) were identified, and in the second stage those components were measured against each other to determine a rank order of importance. The results have implications for museum marketing strategies that aim at building museum brands.

Key words: Museums and Galleries, Brands, Associations, Conjoint Analysis, Tate Modern Gallery, London

DO MUSEUMS HAVE 'BRAND IDENTITIES' THAT ARE RECOGNISED BY VISITORS?

INTRODUCTION

Cultural institutions, such as museums and galleries, are regarded as being in competition with other visitor/tourist destinations both at the national level (Arts Council 2001) and at the international level (Plaza 2000). Museums and galleries are under pressure to perform as businesses (McLean 1997, Kotler 1998). Re:source, the Council for Museums, Libraries and Archives, in a report which sets out the future for England's museums, states that "museums act as catalysts for urban regeneration."(2001:8) Cultural institutions are increasingly expected to manage their resources and assets in a manner that provides 'value-for-money' to stakeholders. Museums are under continuous pressure to produce higher visitor numbers (either to their real locations or to their virtual websites, or by other means of counting which may include number of visitors to an exhibition with a loan object from the museum) to justify public or corporate investment. Even when part of the not-for-profit sector, museums are forced to generate revenues in a number of entrepreneurial ways, for example, by hiring out galleries for personal and corporate events, and by selling 'branded' merchandise. Within this context, understanding the reasons why visitors choose to go to a particular museum destination, or its website, or to purchase its branded goods, is crucial. The brand identity, brand strength, and brand associations of cultural institutions are relatively new concerns for marketers. The cultural industries have only recently adopted a marketing orientation (that is, putting the customer/visitor at the centre of the activities of the institution) and they are now eager to find out which marketing strategies will be appropriate to their brands.

BRANDING THE CULTURAL INDUSTRIES

In the service industries customer satisfaction has been a significant area of marketing research. The service industries have examined the frameworks of service expectation among customers (and staff) and have studied the perceptions of service delivery from the perspective of those customers. The results of this sort of research have benefited countless companies by enabling them to understand which aspects of their service matter most to customers, and by highlighting the gaps between customer expectations and delivery of service. Museums and galleries (henceforth, museums) have conducted extensive research regarding their 'products,' their visitors, and their other stakeholders. Examining the expectations of visitors concerning their museum visit provides the means of understanding what motivates visitors to choose between museums when they embark on a cultural day out.

Brand associations are part of brand building (Aaker 1996). Associations can be highly individual, as the results of this study will show but they also congregate around a few dominant or central images of the brand. These are refined by experience with the brand and its competitors or substitutes, and act as conceptual guides in situations of choice and uncertainty. The purpose of brand building is to try to make those choices follow certain paths; the purpose is to create customer loyalty. This study of visitors' concepts of museums and the factors that influence their choice of museum demonstrate that in the case of museums much of a brand's identity is determined by the nature of the collection; location and architecture also play a role. The concepts of intellectual excitement and personal enrichment that are characteristic of the museum experience are hard to communicate, but adequate understanding of the 'product offering' is needed from the perspective of visitors in

order to see how whether these intellectual and affective concepts can play a role in museum marketing.

The marketing departments of large museums such as the British Museum (six million visitors annually) and the Tate (four million) are inclined, in their marketing communications, to present their institutions as if they were well-established brands. The British Museum has (since 2000) added the advertising strap line “illuminating world cultures”. And the Tate has become an umbrella brand with branches throughout the United Kingdom. However, the question remains: do museums have brand images that are recognised by visitors? Our sources of information on museums are numerous and sometimes contradictory. The purpose of this study is not to trace the origins of visitors’ knowledge of museums, but rather to examine the end result, in terms of the image or identity which visitors hold regarding a museum. Given the wide array of choices available to the museum visitor in London, what makes someone choose one destination rather than another? What are the brand associations of museums? Have these brand associations developed in a similar way to other product/service associations?

A TWO-STAGE METHOD.

The data for this study was collected in two stages. In the first stage the Repertory Grid method was used to elicit visitors’ constructs concerning museums. A total of 139 Repertory Grid questionnaires were completed by visitors to eleven London museums and galleries. The repertory grid is based on George Kelly’s personal construct theory in which individuals are assumed to develop over time a set of personalized constructs or “dimensions” with which they view the world.(Kelly 1955; 1966) From a marketing point of view, these

constructs are typically product attributes. (For a detailed account of how the repertory grid method was implemented see Caldwell and Coshall 2002.)

The results from the repertory grid survey provide the starting point for the second stage of this study. The museum visitors' frequently used constructs are summarized in Table 1.

[Insert Table1 here]

These constructs are those used by visitors to describe how they discriminate between the museum 'products' that are on offer. The most commonly named factors denote the basic conceptual categories that govern the way people evaluate a museum visit decision. These factors are listed according to the frequency with which they occurred among all the factors identified. Table 1 shows only the top twenty factors and these relate to all of the museums in the original list of eleven. The second stage of the research was to apply the findings regarding museums in general to a particular museum, Tate Modern. First the factor scores for the most significant factors are analysed. Then, using the most significant factors, a Conjoint Analysis study was conducted with a new sample of visitors to measure the utility that visitors have for each of the named factors. For a list of the most commonly extracted factors (and their levels) see Table 2.

[Insert Table 2 here.]

For the second stage of the research these factors were used as the product attributes for a Conjoint Analysis. This method is used here for the first time in the museum context. Conjoint Analysis (sometimes called Trade-Off Analysis) is a marketing technique for

measuring and understanding the ‘trade-offs’ that consumers make when comparing products or brands. Every product is made up of a collection of features or attributes some of which are hard to measure on their own but, when taken together, Conjoint Analysis gives a way of assigning values to each attribute. For an example of a typical list of product features that might be analysed using the conjoint method see Table 3.

[Insert Table 3 here.]

Conjoint methods were developed in response to the view that the ranking of importance of product features is better performed if the product features are considered simultaneously; individual features considered separately could lead to incorrect conclusions about what matters most to consumers (and visitors).

The literature on Conjoint Analysis is large. Dahan and Hauser (2002: 196) were able to identify 150 articles published in top marketing journals in the last twenty years. The reason for such levels of interest has come from the applicability of conjoint methods to analysing all kinds of product development tasks. The ability to analyse multiple combinations of potential product attributes has been enormously beneficial to product development teams relating to consumer goods and services. For the service industries to know both the criteria that customers use to evaluate a product or service and the relative importance of each of these criteria gives a valuable picture of the customer perspective (Ostrom 1995, Tucci 1997). Visitor analysis in museums is stuck at the first stage: although museum marketers have correctly identified many of the most important criteria governing visitors preferences they do not have a sense of which of these criteria matter most to visitors. The original contribution made by the research presented here is to use the conjoint technique to

investigate visitors' preferences for museums and galleries in comparison with one another.

So, the Repertory Grid Analysis provides the input for the Conjoint Analysis. The five factors measured in the conjoint trade-off were: functional form, previous experience, suitability for children, admission charges, exhibits. The fact that these attributes were drawn from visitor's own constructs (as opposed to being created by the marketing staff of the museums) overcomes one of the drawbacks of conjoint research, namely, that bias comes from the inappropriate use of constructs which do not matter to visitors. This explains the importance of using the Repertory Grid method in the first stage of this research: since museum visitors have supplied the factors that are to be measured then the problem of bias has been overcome.

The Conjoint Analysis study was conducted at Tate Modern three months *after* the very successful opening. The study was conducted with 499 visitors in December 2000. They were asked to do a trade-off comparison of five factors: functional form, previous experience, suitability for children, admission charges, and exhibits, to determine whether each one of these components was actually relevant to their museum visit.

RESULTS

Repertory Grid Analysis generated a set of institutional attributes or *factors* that visitors commonly use to differentiate between competing museums and art galleries. Factors are the general attribute categories of a product or service. The factors and their associated levels that acted as input to the Conjoint Analysis part of this study are presented in Table 2. The full-concept method of Conjoint Analysis was applied by presenting each respondent

with a set of cards on which all the factors of Table 2 were represented with a different combination of factor levels on each card. This subset is called an *orthogonal array* and is created so that each level of one factor occurs with each level of another with equal or at least proportional frequencies. In the present study sixteen cards constituted the orthogonal array. Prior to conducting the conjoint analysis survey, this array was generated by the Orthoplan procedure available in the SPSS computer package. Survey respondents were then asked to score each of the sixteen cards from 1 “very low preference” to 10 “very high preference”.

A team of interviewers conducted 559 interviews with tourists to the Tate Modern gallery. Selection of survey respondents before they entered the Tate was based on convenience, rather than on any probability sampling method. The orthogonal array was presented to respondents for scoring. Information was collected concerning the gender, age (five groups from 18-30 years up to 61 years and above) and nationality (three groups - British, other European and elsewhere in the world) of the tourists visiting the Tate and who responded to this survey.

[Insert Table 4 here]

The results show a hierarchy of key decision criteria that appear to be in force when visitors decide on going to a museum. Table 4 shows the results for the sample as a whole. The functional form of the place visited plays a determining role. That is, visitors have uppermost in their minds the differences between the types of institutions they are visiting (these are essentially the differences between modern art galleries, museums, and galleries which display historical exhibits).

What this means is that while it is clear that the fundamental association with the core product --exhibition of art/paintings--has been imprinted on the visitor's awareness, it is not immediately clear what value visitors have for this product.

There is a consistent suggestion that these components represent the Tate being construed according to its functional form. In other words, the strongest brand association for the Tate has to do with its functional characteristics - a modern art gallery. The brand extension that the Tate is undertaking in London (namely, Tate London = Tate Modern + Tate Britain) has therefore a very delicate task. If the Tate wishes its brand to be identified as 'modern art gallery', they are doing a very fine job. (With such a strong functional brand association, the Tate is unlikely to attract visitors who are not interested in modern art.) Furthermore, if they wish to communicate other messages, such as 'good day out', 'exciting', or 'educational', there is more work to be done.

CONCLUSIONS AND IMPLICATIONS OF THIS STUDY FOR BRANDING CULTURAL INSTITUTIONS

This study of visitors' concepts of museums and the factors which influence their choice of museum to visit demonstrate that in the case of museums much of a brand's identity is determined by the nature of the collection and other proprietary brand assets such as location or architecture. Brand associations are part of brand building. Associations can be highly individual but they also congregate around a few dominant or central images of the brand. However, branding ought to work beyond the parameters of these fixed assets. For a cultural

institution to call itself a brand it must succeed in arousing in the visitor feelings of loyalty built on strong (product) associations. Museums have had limited success in this regard. The results of this research suggest that not even the Tate has managed to build a brand association that rises above a functional description of its core business –modern art museum. Table 5 shows the range of factor scores for the Tate that were generated from the Repertory Grid Analysis.

[Insert Table 5 here]

Although the consistent positive associations correctly identify the Tate doing its job, ‘exhibiting modern art/paintings in a gallery context (as opposed to a museum).’ The neutral scores for the affective dimensions of brand building ‘enjoyable and interesting’ indicate that for the Tate as a brand, visitors do not associate these terms with the Tate in a strong positive way. The negative scores for the components ‘educational’ and ‘a place to take school children’ mean that the Tate has work to do to make this segment feel more at home in their environment.

Let’s return to the question posed by the title of this paper: Do museums have ‘brand identities’ that are recognised by visitors? While the results show that visitors have a wide range of associations with museums, the most frequent associations are with the most purely functional aspects. The results of this study confirm the general conclusion reached above that ‘functional form’ and ‘exhibits’ are the most important categories for all groups of visitors. Hence there is no evidence of the affective dimensions of brands as influencers (‘excitement,’ ‘fun,’ ‘enjoyable experience’). This shows that museums have yet to develop the more affective types of brand associations that are characteristic of the well developed

product and service brands.

It appears that important museum brands are largely ignorant of the attitudes, impressions, dispositions, or mental constructs that are associated with and attached to their brands. Even though the corporate communications strategists within the large museums think of their product in terms of brands, brand extensions and rebranding, there is little evidence when interviewing visitors that they identify the distinctive features of a museum 'brand.' The situation of non-visitors is even more perplexing. If museums wish to profit from branding, they must have greater awareness and sensitivity to the non-functional aspects of their brand. Non-visitors who are not enticed by functional claims may well be motivated by the excitement of a controversial or thought-provoking exhibit. The task of museum marketing then has to be to establish and differentiate their brands on the basis of affective and emotional attachments such as those that have come to dominate products and services.

Table 1 The Principle Components found using Repertory Grid Analysis

| Component | Frequency of occurrence (n=139) | % of respondents (n=139) | % of total components (n=583) |
|------------------------------------|------------------------------------|-----------------------------|----------------------------------|
| 1 Exhibits paintings | 61 | 43.9 | 10.5 |
| 2 To do with history | 44 | 31.7 | 7.5 |
| 3 Interesting | 28 | 20.1 | 4.8 |
| 4 (Art) gallery | 24 | 17.3 | 4.1 |
| 5 Museums | 22 | 15.8 | 3.8 |
| 6 Known to me | 20 | 14.4 | 3.4 |
| 7 Educational | 17 | 12.2 | 2.9 |
| 8 Enjoyable | 16 | 11.5 | 2.7 |
| 9 Modern art | 16 | 11.5 | 2.7 |
| 10 Place to take (school) children | 13 | 9.4 | 2.2 |
| 11 Old exhibits | 12 | 8.6 | 2.1 |
| 12 To do with science/engineering | 12 | 8.6 | 2.1 |
| 13 Diverse/lots of variety | 11 | 7.9 | 1.9 |
| 14 Have visited | 10 | 7.2 | 1.7 |
| 15 Exhibits art and is interesting | 9 | 6.5 | 1.5 |
| 16 Tourist attraction | 9 | 6.5 | 1.5 |
| 17 Art museums | 8 | 5.8 | 1.4 |
| 18 Convenient | 8 | 5.8 | 1.4 |
| 19 Popular | 8 | 5.8 | 1.4 |
| 20 Good reputation | 7 | 5.0 | 1.3 |

Table 2 The most commonly extracted factors from RGA

| Factor name | Levels |
|---------------------------------|---|
| 1. Functional form | 1 Gallery showing modern art |
| | 2 Gallery showing all types of art |
| | 3 An art gallery and museum |
| 2 Previous experience | 1 A place that I have visited before |
| | 2 A place that I have not visited before |
| 3 Children | 1 A place suitable for children |
| | 2 A place unsuitable for children |
| 4 Admission charges | 1 A place that charges admission |
| | 2 A place that does not charge admission |
| 5 Pertaining to exhibits | 1 Interesting |
| | 2 Educational |
| | 3 Diverse exhibits |

Table 3 Conjoint attributes with their levels

| | |
|------------|----------------------------------|
| Brand | Buzz GO EasyJet Ryanair |
| Price/Fare | £29 £35 £50 £59 |
| Departure | Morning Afternoon Evening |
| Plane type | Boeing 737 Airbus 320 |

Table 4 Average importance scores for the entire sample

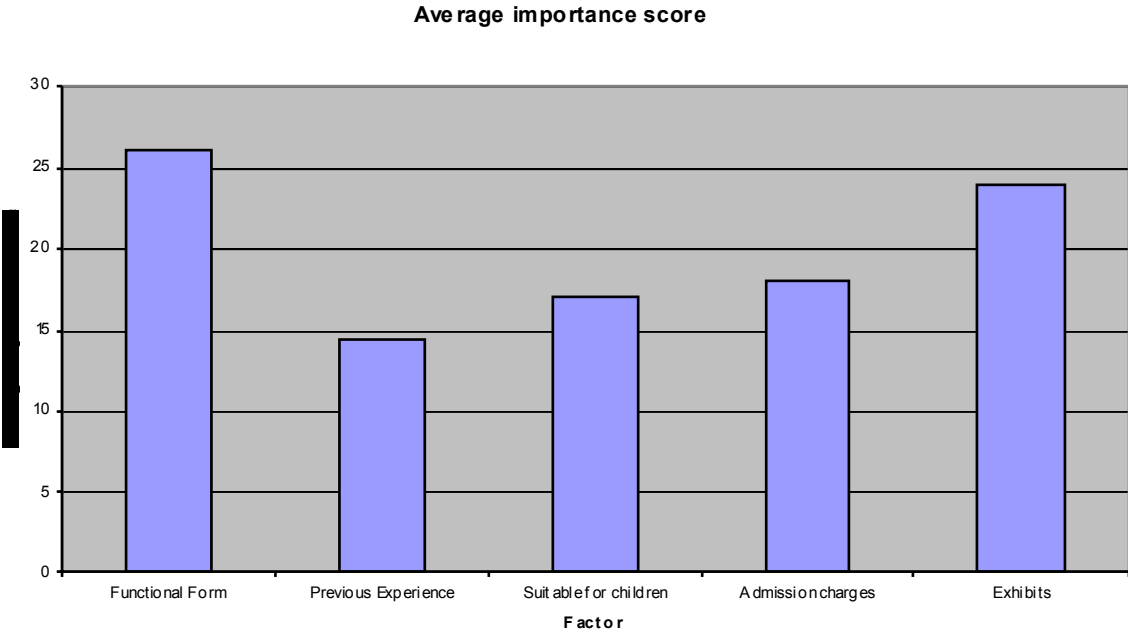


Table 5. Principle component scores for the Tate

| Positive | Neutral | Negative |
|-----------------------------|--------------------------|---------------------------------------|
| 'Exhibits art/paintings' C1 | 'Enjoyable' C8 | 'Educational' C8 |
| '(Art) gallery' C4 | 'Interesting' C3 | 'Old exhibits' C11 |
| 'Modern Art' C 9 | 'Tourist Attraction' C16 | 'Place to take school children C10 |

REFERENCES

- Aaker DA. Managing Brand Equity. New York: The Free Press, 1991.
- Aaker DA. Building Strong Brands. New York: The Free Press, 1996.
- Arts Council of England (2000), "Public Attitudes to the Arts."
- (2001), "Arts in England, attendance, participation and attitudes." Research Report 22, July.
- Barich, Howard and Philip Kotler (1991), "A Framework for Marketing Image Management," Sloan Management Review, 32 (Winter), 94-104
- Bhattacharya, C. B., Hayagreeva Rao and Mary Ann Glynn (1995), "Understanding the Bond of Identification: An Investigation of Its Correlates Among Art Museum Members," Journal of Marketing, 59 (October), 46-57.
- Brown, Tom J. and Peter Dacin (1997), "The Company and the Product: Corporate Associations and Consumer Product Responses," Journal of Marketing, 61 (January), 68-84.
- Caldwell, Niall G. (1997), "Marketing the Guggenheim," Museums Journal, 97, 10, 32-3.
- (2000) "The Emergence of Museum Brands," International Journal of Arts Management 2, 3, 28-34
- Caldwell, N and J. Coshall (2002) "Measuring brand associations for museums and galleries using repertory grid analysis," Management Decision, 40, 4, 383-392

Coshall, John T. (1991), "An Appropriate Method for Eliciting Construct Subsystems from Repertory Grids," *The Psychologist*, 8, 4, 354-357

Dahan, Ely and John R. Hauser (2002) Product Development –Managing a Dispersed Process," in Barton A. Weitz and Robin Wensley *Handbook of Marketing*, Sage Publications, London

Dellaert, B, A Borgers, H Timmermans (1996) "Conjoint choice models of joint participation and activity choice," *International Journal of Research in Marketing*, 13, 251-264

Goulding, C (2000) "The Museum Environment and the Visitor Experience," *European Journal of Marketing*, Vol. 33 No.9/10, pp.859-873

Honikman, Basil (1976), "Personal Construct Theory and Environmental Meaning: Applications to Urban Design," in *Environmental Knowing: Theories, Research and Methods*, G.T. Moore and R.G. Golledge eds. Strousburg: Dowden, Hutchinson and Ross.

Keller, Kevin Lane (1993), "Conceptualizing, Measuring and Managing Customer-Based Brand Equity," *Journal of Marketing*, 57 (January), 1-22.

---- (1998a), *Strategic Brand Management*. Upper Saddle River, NJ: Prentice Hall

----, Susan E. Heckler and Michael J. Houston (1998b), "The Effects of Brand Name

Suggestiveness on Advertising Recall,” *Journal of Marketing*, 62 (January), 48-57.

Kelly, George A. (1955), *The Psychology of Personal Constructs*. New York: Norton.

---- (1966), “A Brief Introduction to Personal Construct Theory,” in *Perspectives in Personal Construct Theory*, Douglas Bannister, ed. London: Academic Press.

Kotler, P and A. Andreasen (1996) *Strategic Marketing for Non-Profit Organisations*, 5th ed, Prentice Hall

Kotler, Neil and Philip Kotler (1998), *Museum Strategy and Marketing*. San Francisco: Jossey-Bass.

Manly, Bryan F.J. (1986), *Multivariate Statistical Methods: a Primer*. London: Chapman and Hall.

McLean, Fiona (1997), *Marketing the Museum*. London: Routledge.

MORI (2001), “Visitors to Museums & Galleries in the UK,” *Re:source: The Council for Museums, Archives and Libraries*, February.

Myers-Levy, Joan (1989), “The Influence of a Brand Name’s Association Set Size and Word Frequency on Brand Memory,” *Journal of Consumer Research*, 14 (September), 197-207

Plaza, Beatriz (2001), "Evaluating The Influence of a Large Cultural Artifact in the Attraction of Tourism, The Guggenheim Museum Bilbao Case," *Urban Affairs Review*, Volume 36, No. 2, pp.264-274

Re:source, the Council for Museums Archives and Libraries (2001) *Renaissance in the Regions: a new vision for England's museums.*