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Drivers, impediments and manifestations of brand orientation: An international museum study

An international museum study

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Abstract

Purpose – While the body of work exploring brand orientation has grown, there has been a general failure to build on extant research and generate a holistic conceptualization of brand orientation. This paper aims to develop a model of the key drivers, impediments and manifestations of brand orientation in a museum context.

Design/methodology/approach – A collective case study design was used, consisting of key informant interviews using a semi-structured interview protocol and analysis of institutional documents and observational research. Interviews took place with well-known museums across three countries: the UK, the USA and Australia. This paper demonstrates the richness of qualitative case studies as a method of theory building and as a precursor to further empirical research.

Findings – The case study findings reveal both a philosophical and behavioral aspect of brand orientation. Thus, six attributes are presented that include brand orientation as an organizational culture and compass for decision-making and four brand behaviors (distinctiveness, functionality, augmentation and symbolism). The conceptual model also depicts the critical antecedents to brand orientation in a museum context.

Research limitations/implications – This study provides a foundation for future brand research by offering a holistic conceptualization of brand orientation and identifying the primary antecedents in a museum context. Future research may wish to empirically establish a valid and reliable scale of brand orientation and examine its explanatory potential. Future research may also consider other contexts to provide further insight into the drivers and inhibitors of brand orientation.

Practical implications – If organizations seek to establish a strong brand orientation they must devote resources to establishing the brand as a dominant organizational philosophy that guides decision-making. In addition, brand-oriented organizations must establish the brand as a distinctive asset that communicates relevance and accessibility and invest in augmenting initiatives that enable the organization to connect with customers on a personal and emotional level.
**Originality/value** – Using an exploratory method the authors are able to reconcile a number of approaches to brand orientation and provide a conceptualization that incorporates the philosophical and behavioral approaches to business orientations. Museums face substantial resource constraints, competing needs of multiple stakeholders and increasing market turbulence. If museums can achieve such significant organizational change then the sector presents an interesting exemplar for many other non-profit organizations.

**Keyword(s):**

Branding; Museums; Case studies; Brand management.

**Journal:**

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**Introduction**

Museums are an important segment of the non-profit, social, arts and heritage (NSAH) arena. The landscape museums operate within is becoming more competitive and museum directors are striving to achieve their own ambitions and meet the expectations of multiple stakeholders (Goulding, 2000). The need for museums to reconcile an internal curatorial focus with the commercial imperatives of operating in a broad leisure market has been acknowledged for some time (McLean, 1994, 1997; McLean and O'Neill, 2007; Rentschler, 2002). Some refer to this as a debate between a focus on spiritual enrichment/education or fun/entertainment (McLean, 1995a, 1997), while in the broader non-profit literature others refer to the tensions between fulfillment of an institution's mission and marketing's focus on customer satisfaction (Liao et al., 2001). Mottner and Ford (2005) attempt to reconcile the debate by acknowledging that marketing strategy can pursue multiple objectives (i.e. raise funds for non-profits and further the organization's altruistic objectives). The purpose of this paper is not to fuel the museum marketing debate further, but, similar to Mottner and Ford's (2005) view of marketing strategy in a museum context, we seek to advance research by exploring the role brand plays in bridging the curatorial and commercial divide.

Branding is a concept well developed in the general marketing field (Aaker, 1992; Aaker, 1997; Keller, 2000) and a growing body of literature suggests that branding is a meaningful construct for museums (Caldwell and Coshall, 2002; Caldwell, 2000; Scott, 2000). A brand is a name, term, design, symbol, or any other feature that identifies one seller's good or service as distinct from those of other sellers (AMA, 2010). Brand orientation is a fusion of the brand concept with the business orientation literature derived from the resource based view (RBV) of the firm. In this context, the brand is an integrative device that aligns the organization's resources (de Chernatony, 1999; Mosmans and van der Vorst, 1998). There is a growing body of work on the specific brand orientation construct (Bridson and Evans 2004; Ewing and Napoli, 2005; Hankinson, 2001a; Urde, 1994; Wong and Merrilees, 2005), but a definitive conceptualization of brand orientation has yet to find support.

The museum context offers a unique opportunity to conceptualize brand orientation in a manner that applies to a range of organizations. Museums are primarily non-profit, permanent institutions that serve society and its development, are open to the public, which acquire, conserve, research, communicate and exhibit the tangible and intangible heritage of humanity
and its environment for the purposes of education, study and enjoyment (ICOM, 2010). The sector captures a wide spectrum of organizations from the resource-rich to the resource-constrained, niche operators to those offering a broad range of experiences and small entities to large iconic institutions. Museums must address the needs of multiple stakeholders (Goulding, 2000; Mottner and Ford, 2005) with an internal political situation that can be dominated by silos with, often, competing interests. This exploratory study aims to assess the nature, prevalence and manifestations of brand orientation in museums, in addition to exploring the drivers and impediments to brand orientation. Moreover, we seek to develop a model of brand orientation in terms of its dimensions and antecedents. This paper fills a gap in both the museum marketing and broader branding literature. By looking at brand orientation in a museum context, we can apply lessons to other non-profit organizations seeking to become brand-oriented in a climate of significant resource-constraints, competing stakeholder interests and organizational change.

**Brand orientation**

Urde (1994) first referred to brand orientation and later defined it as “an approach in which the processes of the organization revolve around the creation, development and protection of brand identity in an ongoing interaction with target customers with the aim of achieving lasting competitive advantages in the form of brands” (Urde, 1999, p. 117). Urde (1994) conceptualizes brand orientation as a seven-dimension paradigm (target group, corporate identity, corporate name, product, trademark, brand vision and positioning). Based on experiences from companies in France including Nestle, DuPont, Tetra Pak, Volvo and Pharmacia Upjohn Nicorette, Urde (1999) reiterates the value of his 1994 conceptual framework. This conceptualization embraces the behavioral approach to business orientations, which concentrates on the orientation in terms of implemented behaviors and activities.

In contrast, Hankinson (2001b) adopts a more philosophical approach to brand orientation and defines it as “the extent to which organizations regard themselves as brands and an indication of how much (or how little) the organization accepts the theory and practice of branding” (p. 231). Based on a quantitative study of 316 charities, Hankinson (2001a) found that brand orientation comprises a dominant factor of general brand orientation as well as six weaker factors. Hankinson (2001b) proposes that brand orientation encompasses four dimensions including understanding the brand, communicating the brand, using the brand as a strategic resource and managing the brand deliberately and actively. Hankinson (2002) further refines her concept and, using Aizen and Fishbein's model of attitudes, focuses on the extent to which the brand is embedded in the organization's thinking and reflected in organizational values. Hankinson's continuous refinement of brand orientation is commendable. However, it has also contributed to the lack of clarity surrounding the construct.

While Hankinson (2001a, 2002) adopts a philosophical approach to brand as an orientation, Bridson and Evans (2004) are more closely aligned to Urde's (1994) behavioral view. Brand orientation is defined as “the degree to which the organization values brands and its practices are oriented towards building brand capabilities” (Bridson and Evans, 2004, p. 404). In an Australian retailing context, four brand capabilities are identified; namely, distinctive, functional, value-adding and symbolic capabilities. This focus on the extent to which organizations use their brand to perform a range of functions is valuable, but it fails to incorporate the philosophical aspect of brand orientation. Ewing and Napoli (2005) attempt to
reconcile the philosophical and behavioral approaches to brand orientation and define it as “the organizational wide process of generating and sustaining a shared sense of brand meaning that provides superior value to stakeholders and superior performance to the organization” (p. 842). Using Keller's (2000) Brand Report Card as a base, Ewing and Napoli (2005) identify three underlying dimensions of brand orientation (interaction, market sensing and orchestration) in a non-profit context. While the definition encompasses philosophical and behavioral aspects, the measures address brand-oriented behaviors only.

Wong and Merrilees (2005, 2007, 2008) examine brand orientation in a small to medium sized enterprise context. Brand orientation is defined as “a mindset that ensures that the brand will be recognized, featured and favored in the marketing strategy” (Wong and Merrilees, 2008, p. 374). Wong and Merrilees (2007, 2008) operationalize brand orientation as a single construct consisting of five items. These items range from “branding flows through all our marketing activities” to “the brand is an important asset for us”. The approach adopted by Wong and Merrilees (2008) contrasts sharply with that of previous work in that it is a much more marketing function-specific approach. The conceptualizations discussed previously all focus on brand values and practices across the entire organization.

It is evident that researchers have sought to examine how brand-oriented organizations structure themselves (Urde, 1994), how they create, develop and maintain brands (Ewing and Napoli, 2005; Urde, 1994; Wong and Merrilees, 2005, 2007, 2008), their perceptions and evaluations of the importance of brands (Hankinson, 2001a, b, 2002) and the brand capabilities to which they devote resources (Bridson and Evans, 2004). However, the literature has yet to support a single holistic conceptualization of the brand orientation construct. The museum context provides a useful platform in which to address this gap in the literature and identify the manifestations of brand orientation. This leads to:

RQ1. How is brand orientation manifested in a museum context?

Drivers and impediments of brand orientation

What drives an organization to adopt a brand orientation and what inhibits it from doing so has been a topic of discussion for quite some time (Urde, 1994; Wong and Merrilees, 2008). For instance, Urde (1994) identifies three main drivers of brand orientation: decreasing product divergence, increasing media costs, and integration of markets. More recently, Wong and Merrilees (2008) identify a lack of financial resources, time constraints, perceived lack of relevance and a short-term focus on sales activities as brand orientation barriers. Despite the interest in drivers and barriers of brand orientation, little empirical work exists in this area.

Significant changes in the operating environment may have driven the emergence of brand as a business orientation in the museum sector. The sector now faces strong competition from new retail and entertainment venues, destinations and leisure attractions (McLean, 1997). Coupled with this is a sophisticated and demanding audience base (Burton and Scott, 2003) that has greater information access than ever before. With access also befalls marketing clutter and a lack of specificity in audience eyes for what each institution represents. The pressure some museums are under by governments and other stakeholders to reach specific visitor targets magnifies this challenge. Museums are also under increasing pressure to generate their own income and pursue greater self-sufficiency (McLean, 1995a, 1997). Bennett (1994) picks up this theme in his study of those who do not visit South Australian history museums and art galleries. He argues from a mixture of economic and political
grounds that museums are increasingly dependent on the number of visitors they attract, either indirectly (through diverse public use) to ensure continued public funding or directly (through entrance fees). As such, museums are being driven to invest in entrepreneurial approaches to attract and retain funding (Rentschler and Gilmore, 2002). We suggest that such factors may contribute to a cultural shift where the brand may emerge as valuable orientation. Thus, we seek to explore the following research question:

**RQ2.** What drives a museum to adopt a brand orientation?

The longstanding tensions within museums may influence the adoption of a brand orientation. The relationship between the curatorial and commercial imperatives is often referred to as a tension in professional bureaucracies within the institution (Rentschler and Gilmore, 2002). For many museums the focus on scholarly excellence has resulted in a strong curatorial orientation that is inward looking, resistant to change and reticent about marketing (Hancocks, 1988). Museums must operate with a curatorial orientation where the priority is excellence in scholarship through the collection, preservation, research and study of objects (Gilmore and Rentschler, 2002; Kotler and Kotler, 2000). Museums' today must also possess a commercial orientation (Gainer and Padanyi, 2002; Rentschler and Gilmore, 2002). This orientation has much in common with the traditional marketing orientation, but there are some subtle differences. Marketing orientation implies a commitment of resources to customer and competitor research and a focus on sharing customer insights across the organization. Commercial orientation focuses attention on the audience and recognition that the institution competes in a broad leisure and educational sector. In this way, a commercial orientation drives the institution to focus on revenue generation. Thus, marketing and commercial orientations both focus on the customer/audience; however, the resource commitment to research and obligation for the entire institution to adopt an audience focus is not a core aspect of a commercial orientation. For non-marketers, branding is synonymous with marketing (McLean, 1997) and is a commercial priority. There exists a misconception that a “Disneyfied” experience of the museum offer will replace spiritual enrichment objectives. Thus, it is likely that the conflict between the curatorial and commercial priorities of the institution may impede the development of a strong brand orientation.

The persistence of established cultural values in the face of a changing operating environment is consistent with the assertions of Kotter and Heskett (1992). Kotter and Heskett (1992) note that senior management can impede organizational change in two ways: a lack of endorsement from senior management can frustrate the change process; even when the advocate for change is at a senior level, they may fail to convince all of the key stakeholders of the need for change. Museum directors are historically experts in curatorial areas (Rentschler and Gilmore, 2002), however, as managerial demands have risen and the climate has become more competitive, the director's role is more critical than ever before (Gilmore and Rentschler, 2002). The museum context, therefore, provides a useful setting in which to examine the impeding role of leadership and competing orientations in the development of a brand orientation. This leads to:

**RQ3.** What inhibits a museum from adopting a brand orientation?

**Methodology**

As we were interested to know the why and how of brand orientation in the museum context, a collective case study design was adopted (Yin, 1984). The intention is to build a robust...
model that is analytically generalizable to a theoretical proposition (Yin, 1984). The case studies were conducted with 20 well-known US, UK, and Australian museums, see Table I. The criterion for sample selection within each country was to canvas a spectrum of museums in terms of size, scale of operation and type. The study is geographically diverse with similar philanthropic government policies towards the arts evident in Australia and the UK. The US provides a context where museums rely more on private sources of funding. The museums in this study were all open to the public with permanent collections.

In each case the director for marketing or commercial operations was interviewed. This was the most appropriate informed sample able to discuss branding and brand orientation. The semi-structured interviews were typically of 90 minutes duration. The interview protocol included open-ended interview questions structured around subject areas. The first subject area focused on a general discussion of the museum sector and addressed changes in the sector, current challenges and problems, and the attributes needed to compete effectively. The second subject area addressed aspects of the institution: culture, structure, priorities, strengths, weaknesses and unique challenges. The third subject area included questions on the purpose of branding, attitudes towards branding within the institution and the role of branding within the institution. This section also focused on the respondent's personal experiences with branding initiatives within the institution. The fourth subject area asked respondents to describe their brand and what they believed it stood for in the minds of the institution's various stakeholders (i.e. curators, visitor services, donors, trustees and members).

Subsequent interviews of a less formal nature included phone and e-mail correspondence, which were field-noted and coded. These latter interviews were frequently used to clarify particular aspects of the analysis as they arose. While the interviews provided the primary data source, other data sources were used. Secondary data included institutional documents, annual reports and marketing plans. These documents were used to assess the positioning of the brand in terms of institutional priorities and to gauge the allocation of resources to brand-related activities. Observations of museum brands in situ were conducted using the triggers from the case study protocol. Such observations were used to establish brand prominence in visual terms and the degree of consistency in brand presentation. Conceptual ordering (Strauss and Corbin, 1998) was conducted whereby the data were organized into discrete categories according to their properties and dimensions and then using description to clarify those categories. Employing the constant comparative method (Strauss and Corbin, 1998), data were collected, coded and analyzed concurrently for similarities, differences, general patterns and relationships. Through this analysis the key issues were identified and modeled.

Findings

**RQ1. How is brand orientation manifested in a museum context?**

In regards to RQ1, the findings suggest that all museums in the study are brand-oriented to some degree. This supports the contentions of Chong (1999), Caldwell (2000), Scott (2000) and Colbert et al. (2000), who all found that numerous institutions, such as the Tate, the Guggenheim and British Museum, are clearly identifiable to their markets as brands and are considered to reflect the characteristics of brands. A dominant theme emerged with many respondents noting that branding activities and the brand in general had been elevated in the institution's list of priorities. As one respondent stated:
It's critically important. You can see that from the last three strategic plans how our brand has been elevated structurally and how it's positioned and about construction (case 5).

The annual reports and strategic plans obtained from institutions supported this assertion. Sophisticated brand architectures were established and tracking brand health was emerging as an important performance metric. Many respondents viewed this new focus on the brand as part of a cultural revolution within the institution. This is typified by the response of one art gallery “[…] we have a political opportunity here to change the culture of an organization steeped with a lot of tradition and baggage” (case 1). This highlights the recognition within the sector that the brand is more than a marketing tool and that it functions at an organizational cultural level.

The brand's ability to act as a compass and guide the strategic direction of the institution (de Chernatony, 1999; Mosmans and van der Vorst, 1998) was almost universally acknowledged:

It's not just marketing against curatorial, it's really having a balanced discussion about what we're here for and how we achieve our goals (case 16).

Institutional documents revealed that brand stories were a typical starting point where institutions utilized the assistance of consultants to conduct a series of internal workshops that resulted in a document that articulated the essence of the brand. Such documents were then used to guide a range of decisions from resource allocation, to the development of new programs and events. A common catchphrase used in many institutions was whether a particular activity was “on brand”. Taking a philosophical view of business orientations, this aligns with Deshpande and Webster's (1989) view of market orientation and Hankinson's (2001b, 2002) approach to brand as an orientation. Deshpande and Webster (1989) suggest that for a firm to be market oriented, it must place the customer at the centre of the firm's strategic thinking and operations. Similarly, for an organization to be brand-oriented it must prioritize the brand and use it as a compass to guide the strategic direction of the organization. Such guidance stems from the ability of all employees to articulate the brand's values and that the organization as a whole has a clear sense of what the brand stands for.

The difference in the degree to which museums have embraced the brand relates to the range of decisions that are brand-led. In the social history and science museums the brand was a strong compass for decisions ranging from store design and program development to acquisitions and exhibitions. As one UK social history museum noted: “Elements of the brand should be reflected throughout everything we do and I think everyone is very much signed up to it” (case 13). Some art galleries had progressed to a point where curatorial decisions were made with the brand as a strong reference point. For one US art gallery the brand had become an all-encompassing driving force: “We needed something more specific to drive the property decisions and the curatorial decisions; it's really truly a mantra here” (case 17). However, for many art galleries this was still an aspiration. This was particularly the case for the larger iconic galleries, as typified by the response from one UK art gallery: “What there's never been is a sense of common purpose […] this is what we are now just starting to put in place” (case 8). This highlights another important difference between institutions in the study; the larger and often older museums were much slower in adopting a brand orientation. Such museums had to tread more gently and, as will be discussed later, faced greater obstacles to implementing brand-oriented values and practices. It is important to note that using the brand as a compass for decision-making does not equate to the Marketing function dictating major collection and exhibition decisions. This point was strongly made by many respondents and typified by the following statement from a UK history museum: “It's
not just the marketing department being the branding police; everyone has signed up to what we are and what we're about” (case 13). Thus, the findings do not support Wong and Merrilees' (2005, 2007, 2008) marketing-focused view of brand orientation.

Brand orientation was also manifested in the day-to-day activities and practices of the museums. In a general sense, the case studies support Hankinson's (2001b) brand orientation concept. Museum marketers show a deep understanding of the brand and focus their efforts on communicating it both internally and externally. The findings, however, offer even greater specificity. With reference to the brand orientation framework proposed by Bridson and Evans (2004), four brand behaviors can be identified. We would not go so far, however, as to classify these behaviors as capabilities. A capability is usually considered a bundle of assets or resources used to perform a specific business process. In this sense, we would argue that brand orientation represents the capability, which is manifested at a philosophical level through culture and compass attributes and at a behavioral level through the brand's distinctive, functional, augmentation and symbolic roles.

All museums were devoting resources to establishing the distinctiveness of the brand. As one Australian respondent stated: “The key thing really was establishing that XYZ stood for [gallery full name]” (case 1). This was also evidenced through observational research with many institutions displaying their logo's prominently on the exterior of buildings, exhibition signage, store merchandise and restaurant menus. For many, brand distinctiveness was closely related to the institution's architecture. One UK museum stated: “The X brand to a certain extent is also characterized by the building itself which is a major landmark in […]” (case 11). In general, the primary focus of such brand activities was the deployment of resources to communicate the uniqueness of the brand. One Australian museum asserted that one of the reasons they were investing in their brand was “uniqueness, being able to define your uniqueness, to differentiate yourself from the market […]” (case 5).

Of great concern to many respondents was that the brand needed to symbolize the core experience: “I think it's about evidence really and just to be able to, in a snapshot in an instant, to communicate the kind of experience that the X can provide” (case 1). In line with Bridson and Evans (2004), this functional role focused on the brand's ability to manage audience expectations. In particular, this was manifested through the brand's ability to communicate two key functional benefits. First, accessibility was an important brand message. As one science museum noted, their brand needed to symbolize that “from a visitor perspective it's a museum that's going to be good for their kids” (case 10). Second, relevance was a dominant theme in the branding activities of many institutions, but particularly those marketing art collections.

Many respondents also referred to a range of strategy decisions that were viewed as part of a long-term investment in building a strong brand. An Australian respondent was focused on the value of investing in the brand: “the value of this unique brand could be incredible. So you've got to know how to define and add value” (case 5). Brand augmentation activities, such as brand extensions, web site improvements, virtual exhibitions, new programs and the museum shop were viewed as critical initiatives to enhance the value of the brand. Moreover, the hosting of special events and the creation of destination restaurants were recognized as
important in a revenue-generating sense, but were also seen as critical brand-augmentation activities.

Finally, the symbolic quality of the brand was something to which all respondents aspired. As discussed by one UK art gallery “I think [venue brand] has had a large effect on [institution brand] in particular because it's almost bigger than the art” (case 9). When discussing the attributes of their brand, many respondents used quite emotive language that suggested their desire to foster a strong personal connection between the brand and the visitor. The symbolic quality of a US art gallery's brand was described as:

[…] a dynamic place where there's always something new to see and do, a place to get away from the hustle and bustle of everyday life, but also a place to go for excitement and to be with friends. I'd like for people to see it as something that really helps round out and fulfill them (case 18).

In general, respondents wanted visitors to feel a sense of ownership of the brand. As an Australian art gallery stated: “We want to go towards something like ‘It's my XYZ’” (case 1).

RQ2. What drives a museum to adopt a brand orientation?

In regards to RQ2, many discussed the need for a bridge, particularly between curatorial and commercial priorities (Rentschler and Gilmore, 2002), was an important motivator for the establishment of a brand orientation. A US art gallery expressed that the desire to create a more brand-oriented culture was motivated by the need to give all departments a common purpose:

[…] the museum itself represents something different to everybody who works here and that's why it is so important to do this branding process because, the way it is right now, every little department in the museum has its own view or its own perspective of what the museum is (case 18).

In terms of other drivers of brand orientation, two aspects of leadership are found to drive the adoption of a brand-oriented business philosophy. The first is that elevating the brand's importance within the priorities of the institution is a senior executive decision. As an Australian art gallery stated, brand orientation is a “philosophy that is driven from the chief executive down” (case 4). Another respondent from a UK art gallery focused on the importance of the senior leadership team:

The director of communications is on the same level as gallery directors so they have equal say. And yet you've got a lot of other galleries that are run by curators and there's a marketing manager trying to get their voice heard and trying to get their thought across, but it's not going to work like that unless it's actually built into the business structure (case 9).

The second aspect of leadership is that, for many museums, more resources were allocated to both internal and external branding activities because of a change in leadership. At one UK science museum it was recognized that the focus on branding was part of a stronger commercial focus introduced by a new director that came from the corporate sector:

Our new director, who I think is really good, is a museum buff, he's worked in large businesses; he's managed big projects. We're no longer an ivory tower (case 10).

For another US art institution, the adoption of a brand orientation was primarily attributed to the personal business philosophy of a new director: “we have a new director. I think quite honestly it's his philosophy” (case 18). It became evident that the new directors typically
were recruited from outside the museum arena and, as a result, introduced a new business philosophy to the institutions. These findings support Kotter and Heskett's (1992) contention that endorsement by senior management is essential for any change process. This is also in line with Gilmore and Rentschler's (2002) argument that, as managerial demands have risen and the climate has become more competitive, the director's role is more critical than ever before.

External pressures also heavily influenced the increasing importance of branding in the museum sector. In recognition of more intense competition for funding, visitors and staff the museums turned to branding as a new competitive weapon. As one Australian art gallery commented:

It's very competitive in terms of vying for brand leadership. To be the market leader in terms of audience. We compete for the attention of the press all the time. We compete for visitors obviously and for their time. We compete for staff (case 6).

In the UK in particular, the branding activities of competitors within the sector and the leadership position that some had achieved had driven many others to adopt a brand orientation.

We've all had to run quite hard to keep up with the Tate's branding, because they've been so comprehensive and strict about it and we've seen the benefits that that's reaped (case 12).

Competition outside of the museum sector was also seen as a major driver of brand orientation. Consistent with McLean (1997) and Bennett (1994), participants in the study universally endorsed the need to build a strong brand to compete more effectively in the wider leisure and tourism industry. This sentiment is typified by the comments of a historical museum:

You're also then competing with retailers, hotels, restaurants, any sort of leisure interest that somebody might want to do in their free time. So one of the biggest challenges is trying to get your brand out there and think about how to place it there among the rest of those things (case 13).

Yet another critical driver of brand orientation was the recognition by museum marketers that brands are part of the consumer psyche and, therefore, have great value. The drive for museums to generate their own income and pursue greater self-sufficiency has been evident for the past two decades (McLean, 1995b). Using brand as a capability to enhance competitiveness and generate higher levels of visitor-based revenue, however, is a relatively recent practice for the museums represented in this study. Brands are part of the everyday human experience and museums now recognize that their visitors use brands as decision-making heuristics. A UK art gallery commented:

I've spent a lot of time here saying to people whether you like it or not you have a brand and you have an image. You can either choose to manage that image or you can ignore it and let people deduce what they will, because they will, even if it's based on no knowledge whatsoever (case 8).

Moreover, the comments of a UK science museum suggest that the recognized value of the brand, as an asset and as a major driver of museum attendance, has prompted the institution to devote more resources to brand-oriented activities.
It's to draw in a crowd because people are excited by it, they want to come and see us at the museum, they want to work here at the exhibition, they want the logo on their products, they want the endorsement. It's such a powerful, strong asset that we have (case 10).

Finally, many respondents were motivated to establish a distinctive and symbolic brand as a means of overcoming the generic museum stereotype. This was particularly important for museums where the name of the institution did not necessarily connote an accessible or relevant experience. An historical museum commented that:

Our biggest challenge, is overcoming misconceptions as to what we're about and what museums are about because of its title and because of its brand effectively (case 13).

It must be noted that this driver was more dominant in the Australian and UK cases than it was in the US cases. This may be due to differences in the funding models in Australia and the UK. Museums in Australia and the UK rely heavily on government funding. Such funding is often linked to visitor targets that require institutions to draw visitors from lower socio-economic groups. When targeting this demographic, there appears to be a stronger focus on competing in the wider leisure market and focusing on branding as a source of competitive advantage. While US museums did not face this same overt pressure, they also acknowledge a need to broaden their appeal in order to drive their visitation in general.

**RQ3. What impedes a museum from adopting a brand orientation?**

While the importance of branding was a strong theme throughout the cases, the adoption of a brand orientation was not without its obstacles. Funding was a major constraint for any new initiatives. Museums were faced with difficult choices as to how to allocate limited resources. For Australian and UK museums the funding problem was related to the public nature of the institutions. However, US museums, which rely more on private sources of funds, also faced a resource shortage. As a smaller specialized art gallery lamented:

Foundation support seems to be pretty low or diminishing. The sponsorship in New York is declining […] Some museums seem to be able to go to their boards. We are working on building a board, but we don't have endowments. That's the big challenge (case 19).

While funding was a significant challenge to be overcome in any costly branding exercise, the primary impediment related to the traditional tensions between the curatorial and commercial bureaucracies (Rentschler and Gilmore, 2002). In particular, those institutions that characterized themselves as curator-dominated at a senior leadership level found it more difficult to introduce branding as a business orientation. This supports Kotter and Heskett's (1992) assertion that senior management can frustrate the organizational change process through a lack of endorsement or an inability to persuade others of the need for change. This was a much greater obstacle to be overcome for the larger and more established institutions. It was evident that a tradition of a strong curatorial orientation has established a climate of distrust and suspicion regarding museum branding. A large iconic UK art gallery revealed:

[…] an atmosphere whereby people fundamentally didn't believe in gallery branding. In an organization certainly like this and, I think many other galleries and museums that are not marketing led whatsoever, they're academically led by curators and by academics who, not always, but I’ll slightly exaggerate it to make the point, but who quite often feel that it's slightly a bit vulgar really to be overtly branded and a little bit commercial. You know don't bring your nasty commercial work into our beautiful gallery. Don't Tate us (case 8).
Such attitudes are also exacerbated by the power struggles between curatorial and commercial departments. A specialized UK art gallery noted the manner in which the silo structure has frustrated the development of a strong brand orientation:

We've got a number of different departments and they do operate in a very independent silo minded way and it's quite difficult to get everybody to collaborate (case 12).

The task of establishing a common purpose was made more difficult for some museums by their complex organizational structure. A number of institutions were operating multiple brands and venues, which impeded the ability to adopt a unifying vision with one master brand, while maintaining the distinctive identities of the venue brands. The comments of a large national UK museum exemplify this challenge:

I do think we have a challenge because there are five different branches and five different buildings and five different experiences. So, yes, it does get complicated when we talk about the X as a whole because there's no one person monitoring and looking after that brand (case 13).

Finally, the move towards a more brand-oriented institution represents a radical change for many museums. In some cases, the museums were long-established institutions with deeply entrenched attitudes and beliefs. For instance, a science and social history museum reflected:

The history; I mean how often is anyone starting with a blank sheet of paper and that's a difficulty. That's a hurdle to be overcome; the fact that there are existing brand marks and attachments to those and understandings of those (case 2).

**Emergent conceptual model**

Based on the findings from the 20 case studies, there was strong evidence to suggest that museums are pursuing brand orientation, which is reflected in their organizational philosophy and behaviors. Figure 1 presents the emergent brand orientation conceptualization and depicts the critical antecedents to brand orientation in a museum context. Six attributes are presented that include brand as an organizational culture and compass for decision-making and four brand behaviors (distinctiveness, functionality, augmentation and symbolism). We argue that the brand must first be established at the philosophical level, which then drives the four brand behaviors. Both curatorial and commercial orientations are considered important antecedents of brand orientation. A strong curatorial orientation is proposed to have a negative relationship with brand orientation because of the inherent climate of distrust and suspicion of museum branding. A strong commercial orientation will have a positive relationship with brand orientation because the commercial division will use the brand to enhance the competitive of the museum and as a bridge between the curatorial and commercial divide. The complexity of the institution's structure, its size and age are proposed to negatively influence brand orientation, whereas, strong new leadership and the availability of financial resources are proposed to positively influence brand orientation. The findings of this study also suggest that environmental factors influence the development of brand orientation. It is proposed that the intensity of competition both within the museum sector and in the broader leisure sector will motivate museums to develop a brand orientation. Visitor behavior, in terms of sophistication and the extent to which they use brands as a decision-making heuristic, will also encourage museums to devote resources to brand-building behaviors. Branding activities can be resource-intensive and, as such, funding scarcity or limitations in accessing both private and public funding sources is proposed to negatively affect the development of a strong brand orientation.
Conclusion

This paper has sought to address a gap in both the brand orientation and museum marketing literature. While the body of work exploring brand orientation has grown, there has been a general failure to build on extant research and generate an holistic brand orientation concept (Bridson and Evans, 2004; Ewing and Napoli, 2005; Hankinson, 2002; Urde, 1994; Wong and Merrilees, 2008). Extant research tends to utilize either a philosophical or a behavioral approach to brand orientation. We would argue, however, that both approaches are necessary in order to capture the construct fully. We find support for Hankinson's (2001b) continuum perspective, as museums varied in the degree to which they had adopted and implemented brand-oriented values and behaviors. Thus, in reconciling the philosophical and behavioral approaches to business orientations we define brand orientation as the extent to which the organization embraces the brand at a cultural level and uses it as a compass for decision-making to guide four brand behaviors; distinctiveness, functionality, augmentation and symbolism. The findings reveal that the brand operates at a philosophical level, as an organizational culture and compass that guides decision-making. This then turns the focus on the types of decisions that are brand-led and the roles that the brand plays. These four behaviors (distinctiveness, functionality, augmentation and symbolism) have much in common with Bridson and Evans' (2004) conceptualization of brand orientation, but we dispute that they are capabilities in their own right.

It is evident in a museum context that four groups of brand behaviors are prevalent. First, one important indicator of how highly an institution values its brand is the focus on establishing the brand's distinctiveness. The brand is an identifiable logo, symbol or word that differentiates the institution from competitors and, therefore, acts as a decision-making heuristic for visitors. Second, a brand-oriented institution also utilizes its brand as a means of satisfying consumers' basic needs (Park et al., 1986). This is termed brand functionality and relates to the degree to which the brand communicates to audiences that the museum will provide superior utilitarian benefits. Such benefits in a museum context refer to practical issues including relevance of the experience and accessibility of the collection. Third, brand augmentation refers to the practices the museum employs to augment the rudimentary functional benefits communicated by the brand. A brand-oriented museum may exhibit this through the addition of service and quality features to enhance the museum experience. Brands can also be distinctive enough to be extendable to other venues, merchandise, exhibitions and even retail stores. These augmentation activities are an investment in the long-term future of the brand and are directed by a desire to communicate a superior brand image. Fourth, museums also recognize the brand's ability to embody more than the collection and exhibitions it represents. It was part of the fabric of people's lives and provided a unique and special experience for each individual visitor. In this way brand symbolism creates a personal connection between the institution and the visitor and helps to establish the brand as a unique cultural icon.

Moreover, limited attention has been paid to the critical antecedents to developing a strong brand orientation (Urde, 1994; Wong and Merrilees, 2008). This is particularly important in a museum context, given that brand values and behaviors are relatively new phenomenons that are part of existing institutional tensions (Rentschler and Gilmore, 2002). We provide a model depicting the drivers and impediments to brand orientation. The findings suggest that internal drivers and facilitators of brand orientation include a strong commercial orientation, new and decisive leadership and financial resources. However, the degree to which a curatorial orientation dominates the institution, the complexity of the organizational structure
and its institutional history impede the development of a strong brand orientation. The turbulence of the external environment equally affects museums. In this way, museums have much in common with many other consumer-based businesses. The increasing intensity of competition and changing visitor behavior have forced museums to seek new sources of competitive advantage. Funding constraints, in terms of both private and public sources, however, greatly impede the extent to which museums can implement brand-oriented behaviors.

The implications for museum managers are the ability to identify how brand orientation manifests itself within their institutions. If museums seek to establish a strong brand orientation or strategically reposition their brand they must devote resources to establishing the brand as a dominant organizational philosophy that guides decision-making. In addition, brand-oriented museums must establish the brand as a distinctive asset that communicates relevance and accessibility and invest in augmentation initiatives that enable the institution to connect with visitors on a personal level. It is apparent that many of the museums in this study have developed a brand orientation or are on the path to doing so. If museums with substantial resource constraints, competing needs of multiple stakeholders and increasing market turbulence can achieve such significant organizational change then this sector presents an interesting exemplar for many other non-profit organizations.

Limitations and future research

We deliberately chose to investigate the research questions from the perspective of those responsible for marketing or commercial operations. While this may be a limitation of the study, they were the most appropriate informed sample able to discuss branding and brand orientation. However, given the significance of the curators and other strategic areas of museums, future qualitative research with these parties would provide a useful extension. This exploratory study provides a foundation for future brand research by offering a holistic brand orientation concept and identifying the primary antecedents. Future empirical research will seek to establish a reliable and valid scale of brand orientation and assess the degree to which institutions are brand-oriented. Such research can also examine the explanatory potential of brand orientation in relation to key performance outcomes. Museums are investing in brand-oriented values and behaviors. It is, therefore, worth investigating the return on this investment. Finally, by focusing on brand orientation in museums, the context influences the antecedent factors. While many of the antecedent factors are relevant to a range of non-profit organizations, other contexts would provide insight into the drivers and inhibitors to brand orientation. For instance, curatorial orientation is specific to museums whereas product, innovation or marketing orientation may emerge as critical antecedents in other sectors such as fast moving consumer goods (FMCG) and retailing.
Figure 1 A model of brand orientation: dimensions, internal and external antecedents in a museum context
### Table I Respondent characteristics

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<td>Head of communications</td>
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<td>Historical</td>
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### References


Further Reading


About the authors

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