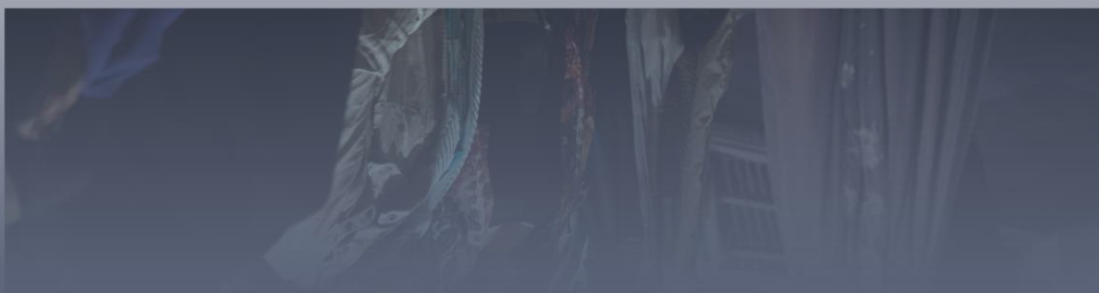# Branding the Public Art Museum Sector:
A New Competitive Model

February 2013

Report written by: Jody Evans and Kerrie Bridson

Executive Summary

Public art museums are an important segment of the non-profit, social, arts and heritage (NSAH) arena. Public art museums are cultural and educational facilities with intrinsic links to the community. However, with the increase in competition within the arts sector and from the broader leisure sector, public art museums need to review their community engagement ability. Brand management has been identified as a potential tool to enhance community engagement through an emphasis on communicating the relevance and accessibility of public art museums. Only limited extant research exists in the area of public art museum branding. The overall objective of this research study is to improve Victorian public art museums' community engagement skills using brand management principles. The research project has two primary objectives, firstly, to enhance the positioning of Victorian public art museums within the arts sector and the broader leisure market. Secondly, to improve the branding practices of Victorian public art museums as a group, the Public Galleries Association of Victoria (PGAV) as an advocacy body and individual art museum members. This study offers a novel and innovative approach to providing a snapshot of a public art sector at one point in time as a benchmark, and identifying how it can improve the level of community engagement through branding in the future. In this study we focus on brand management techniques relating to brand identity and brand image. Such techniques provide public art museums with tools to craft a compelling narrative that engages staff, key industry stakeholders and visitors for the future.

Action research methodology was employed to examine the current and potential brand image of the public art museum sector as well as individual public art museums and their brand management capabilities. Research data was collected in three key phases as presented in the diagram below. In facing the future, the public art museum sector must first understand the current perceptions of institutional and public stakeholders, as this forms the basis of the sector's brand image. Moreover, through an understanding of visitor experiences and perceptions they are able to identify key drivers of brand image and its inhibitors to reaching their full brand potential. Through the final phase of this research, directors within art museums were able to assess their institutions competencies and perceptions. The action research methodology employed in this study seeks to assist the public art museum sector in crafting brand strategies that address misconceptions and focus on increasing community engagement in the long-term.
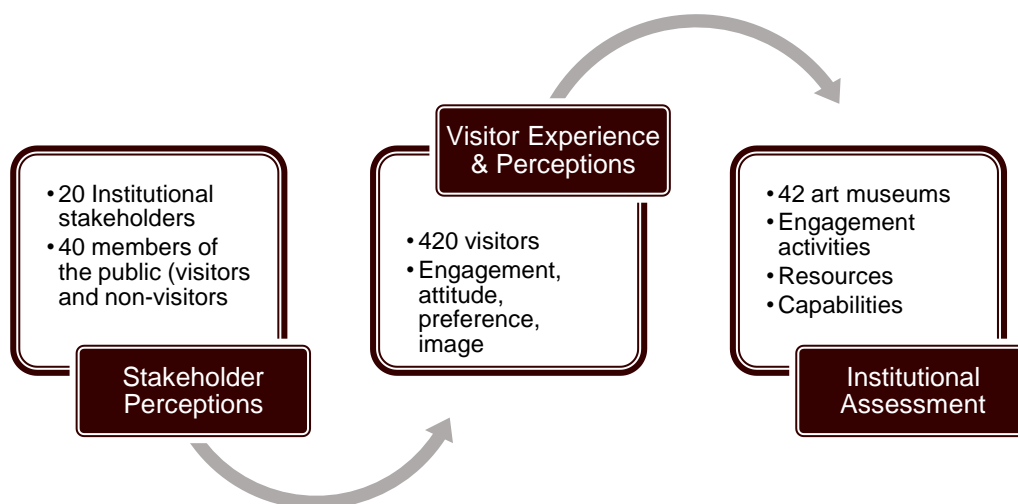
The findings and recommendations from the stakeholder research reveal a number of key issues regarding the image of public art museums in Victoria.

- From an institutional stakeholder perspective, public art museums are perceived to have a split personality. Whilst public art museums can be seen as relevant, accessible, interesting and exciting, they are also perceived to be elitist, stuffy, conservative and judgemental. This split personality, particularly the negative brand associations, is inextricably linked to the image stakeholders have formed of public art museum directors. Addressing the negative image of public art museum directors is, therefore, fundamental in any strategy focused on community engagement.

- In terms of visitor and non-visitor stakeholder findings, the brand image of public art museums is much more positive. Public art museums are overwhelmingly perceived as intelligent and dynamic, but somewhat old. The primary issue of concern were problems with accessibility. This presents public art museums with a significant challenge and attractive opportunity. A change in opening hours, as one possible strategy, would signal greater accessibility and would form an important component of any strategy focused on enhancing community engagement moving forward.

The findings and recommendations from the visitor experience and perception research phase reveal a disconnection between visitors' attitudes towards art museums and their preference for visiting them over other alternatives.

- In terms of visitor experiences, the study highlights a serious deficiency in the current engagement strategies of art museums and presents a real opportunity to affect change. Art museums can generate stronger brand preference in visitors if they offer more cognitively and emotionally engaging experiences. In particular, encouraging staff to interact more with visitors could substantially enhance the visitor experience.

- Visitors to all four art museums in the sample recorded very positive attitudes towards the institutions, but no real preference over other cultural attractions. This suggests that regardless of scale, resources or location, State Cultural Organisations, Metropolitan, Regional and University art museums all face the same challenge. Art museums need to focus on strategies that encourage repeat patronage as a means of generating stronger brand preference and loyalty. Part of the answer to this problem may reside in the development of more engaging experiences.

- In the absence of a deliberate brand image campaign, visitors have formed a somewhat positive image of art museums as educated, intelligent, imaginative, up-to-date and entertaining institutions. Moving forward, as a means of fostering deeper levels of community engagement, art museums should seek to also emphasise their nurturing and engaging qualities. Again, many of these qualities are best exhibited by staff, as the organisation's greatest brand ambassadors, and reinforce the importance of social interaction in the art museum experience.

The findings and recommendations from the institutional research phase provide further insights for the sector:

- The institutional assessment phase of the project identified some serious problems and substantial opportunities for the sector. The data regarding exhibitions, attendance, resourcing and capabilities reveal that many art museums are spreading their limited resources across too many exhibitions and without the necessary

capabilities. Offering fewer, but more targeted and well-resourced exhibitions may see a greater return on investment with the implementation of more efficient and effective marketing campaigns. In particular, without dedicated human resources to creating engaging experiences that afford a high degree of social interaction between visitors and staff and that emphasise an exciting, inspiring and nurturing brand, the sector will continue to struggle.

- Opportunities also exist in the areas of philanthropic funding, corporate sponsorship and commercial income streams. Such opportunities are inextricably linked to the sector's ability to develop a compelling and unique narrative that engages a wide range of stakeholders.

- Institutions were assessed in terms of a number of core capabilities (brand, entrepreneurial, marketing and stakeholder orientations). In terms of brand orientation, whilst many art museums have elevated the brand to a top priority and are committed to building the institution's brand, the ability to articulate the brand vision and share this amongst employees is less developed. This suggests that art museum directors may lack the necessary brand management tools to articulate their brand vision and engage staff in the process.

- The lack of a strong entrepreneurial orientation presents a serious risk for the sector in terms of its community engagement potential and sustainability. If art museums seek to improve their image then they must become braver, more proactive and innovative. Such an approach requires a deeper understanding of visitors' needs and the way in which competitors may be addressing such needs. Strengthening their market orientation may assist art museums in crafting a strong and distinctive brand image.

- Considering the sector's reliance on government and donor funding, a stronger focus on the needs of these stakeholders will also help to ensure the survival of public art museums. Moreover, given the trend towards the co-location of art museums with other cultural and leisure attractions, greater collaboration outside of the art museum sector could present interesting opportunities to engage with a larger and more diverse community.

- The incongruity between visitors' and art museum directors' image of the art museum brand reflects the lack of any deliberate attempt to craft a brand image for the sector. This corresponds with the split personality identified in the institutional stakeholders' phase of the research and the range of images presented in the public focus groups. In the absence of a deliberate and overt brand image strategy, individuals will form their own impressions. Whilst the image most people have of art museums is quite positive, it is not strong, compelling or unique.

In conclusion, the public art museum sector is, and can be perceived to be, nurturing, exciting and engaging. The sector is now presented with the opportunity to take control of its image and influence the perceptions of, not only visitors, but all stakeholders. The public art museum sector does have a unique and compelling story to tell, but it must be bold and take on the role of a town crier shouting this through the streets.

Contents

Acknowledgements

Partners

Melbourne Business School

Asia Pacific Social Impact Leadership Centre

The Asia Pacific Social Impact Leadership Centre (APSILC) is Melbourne Business School's hub for education, research and action in the field of social impact and innovation.

The centre aims to spark positive social change in Australia and across the Asia Pacific region by collaborating with the non-profit, business, philanthropic and government sectors. APSILC helps current and emerging leaders to solve some of society's most pressing problems. We do this through postgraduate and executive education, thought leadership, workshops and master classes, and a range of initiatives that connect MBS to the wider community.

APSILC's work is focused on four strategic areas:

1. Developing Aboriginal business

2. Capacity building in the third sector

3. Creating shared value

4. Pathways to work

Public Galleries Association of Victoria

Established in 1957, the Public Galleries Association of Victoria (PGAV) is the peak body representing the public art museum sector in Victoria. The PGAV provides leadership, development and promotion of its members through a range of targeted programs and initiatives. Its vision is for a well-resourced public art museum sector in Victoria, which provides enriching and rewarding cultural experiences for large and diverse audiences. The PGAV represents fifty-one public art museums across Victoria. Members range from large institutions such as the National Gallery of Victoria to university art museums and public art museums across metropolitan and regional Victoria. Member art museums provide a range

of cultural and educational experiences for visitors enhancing audience understanding, appreciation and engagement with visual art.

Margaret Lawrence Bequest

Margaret Lawrence, a collector of ceramics and supporter of the arts, set up a bequest in her will to provide a meaningful legacy to the Victorian community that reflected her own life interests. Over the last ten years, the bequest has provided support for the arts and the Victorian College of the Art's gallery in Margaret's name.

The Margaret Lawrence Bequest has generously supported the MBS Asia Pacific Social Impact Leadership Centre and this project.

Project Team

Lead Researcher: Dr Jody Evans is Associate Professor in Marketing at Melbourne Business School, The University of Melbourne. Jody completed a PhD in the area of International Marketing at Monash University in 2000. She has an Honours degree in Marketing and an Arts degree in English Literature and Psychology from Monash University. Jody has consulting and executive development experience in the retail and arts sectors and has worked with client organisations in the UK and Australia. She leads market research, strategic reviews and management development seminars and workshops. Most recently, Jody has worked with the Public Galleries Association of Victoria on their branding strategy and is now a member of the PGAV Board.

Jody's research interests include branding, retailing, arts marketing, museums, galleries and performing arts and international marketing. Her work has been published in a range of journals including the European Journal of Marketing, International Journal of Arts Management, Journal of Services Marketing, Journal of International Business Studies, and Journal of International Marketing. Current projects examine a range of issues including an international study of drivers and inhibitors of museum branding, brand identity and image in the arts and culture sector, co-creation of the visitor experience in the cultural sector, and the subsidiary role in international marketing strategy.

Lead Researcher: Dr Kerrie Bridson is a Senior Lecturer (Marketing) and Chair of Academic Progress Committee within Faculty of Business and Law, Deakin University. Kerrie's doctorate was completed in 2002 at Monash University, investigating retail brand orientation. Kerrie has been working closely with retailers and visual art institutions over the last 20 years in the development of successful business strategies that are built on understanding their visitors better. She is a regular media commentator on current trends and is seen often as an invited presenter at industry seminars and conferences across Australia and internationally.

Kerrie's major areas of research and consulting include branding, retailing, arts marketing and international marketing. Her work has been published in a range of journals including the European Journal of Marketing, International Journal of Arts Management, Journal of Services Marketing and Journal of International Marketing. Kerrie is involved in a range of current research projects including branding in the arts and culture sector, co-creation of the visitor experience in the cultural sector, co-production between museums and their

communities, artistic authenticity from an artist and consumer perspective, brand love within professional sport, stakeholder engagement with nation branding, social media usage and behaviour, and the purchasing behaviour of at risk youth.

Research Fellow: Dr Joanna Minkiewicz recently completed her PhD at Melbourne Business School, University of Melbourne. She received her Bachelor of Arts in Psychology and German and her Bachelor of Business in Marketing (Honours) from Monash University. Her areas of interest include culture and heritage, services and experience marketing and branding. Joanna's PhD research investigates the co-creation of a service experience in the context of Australian cultural industries. In light of an increasingly competitive marketplace and the increasing commoditisation of services, Joanna's research investigates the manifestations of co-creation at an organisational level, including potential hurdles and drivers of organisational co-creation strategies. Recognising that co-creation occurs in a network of stakeholders, Joanna's research also investigates the consumer, their propensity to co-create a cultural experience and potential outcomes of a co-created experience with a cultural organisation. Joanna has had her research published in top marketing journals such as the Journal of Services Marketing and the Journal of Marketing Management.

Research Assistant: Sarah Broadbent completed her Bachelor of Commerce from Deakin University majoring in Sport Management and Commercial Law. Sarah continued her studies at Deakin University achieving first class Honours in Sport Marketing and receiving the School of Management and Marketing Honours Scholarship. Continuing her research journey, Sarah has recently completed her PhD, also at Deakin University, where she explored the role of love in developing loyal sport fans. During her time as a PhD Candidate, Sarah has had the opportunity to enhance her research skills through working as a Consultant for a Market Research organisation where she has been involved in a number of qualitative and quantitative projects, with experience in B2C and B2B clients. In addition, she has worked on an extensive range of projects as a Research Assistant and taught within the Sport Management program at both Deakin University and La Trobe University.

Background

Significant changes in the operating environment have increased the importance of branding as a community engagement tool in the public art museum sector. The sector now faces strong competition from new retail and entertainment venues, destinations and leisure attractions (McLean, 1997) as well as traditional cultural institutions. 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 the sector stands for and what the individual institutional operators represent. The pressure many public art museums are placed under by governments and other stakeholders to reach specific visitor targets magnifies this challenge. Public art museums are also under increasing pressure to generate their own income and pursue greater self–sufficiency (McLean, 1997). Bennett (1994) 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, ticketed events and augmented offers including retail). As such, art museums are being driven to invest in entrepreneurial approaches to engage with diverse members of their community. We suggest that such factors have contributed to a cultural shift where branding has emerged as an important engagement tool.

"A brand is a customer experience represented by a collection of images and ideas; often, it refers to a symbol such as a name, logo, slogan, and design scheme. Brand recognition and other reactions are created by the accumulation of experiences with the specific product or service, both directly relating to its use, and through the influence of advertising, design, and media commentary." (AMA 2013). In this way the visual identity of the brand is an important tool in managing the external perceptions of an institution. Brands are part of the everyday human experience and organisations must recognise that visitors and supporters use brands as decision-making heuristics. A brand can be so much more than an external marketing communication device. It can play a critical strategic role in institutions and act as a compass for decision making (Evans, Bridson and Rentschler, 2012). The brand, in the sense of identity, encapsulates and expresses the institution's purpose, ambitions, values and culture. In this way the brand and brand management techniques provide the platform for institutions to craft a compelling narrative that can engage a range of stakeholders. It functions as psychological contract amongst staff, supporters and key stakeholders and establishes a shared understanding of the brand. Such an understanding can help maintain a clear focus in the institution's community engagement mission.

Branding in the public art museum sector has the potential to be a tool for fundraising. It is unlikely that the public art museum sector will see an increase in government funding in the

near future. Thus, it is paramount that they engage with members of their community that can assist in developing alternative income streams. Building a strong art museum brand that is compelling and unique may increase opportunities for fundraising, drive visitation and increase commercial income streams. In terms of attracting sponsorship and fundraising, potential sponsors are more likely to be attracted to sponsorship opportunities where their own corporate brand is enhanced through association with the art museum brand. A strong art museum brand can also play an important role in driving broader, long-term social impact goals related to community cohesion, health, well-being, creativity and education. A brand that is able to clearly articulate such goals and outcomes will potentially be more attractive to visitors, media outlets, government agencies, local councils and potential donors.

Branding is a concept well developed in the general marketing field and a growing body of literature suggests that branding is a meaningful construct for art museums (Caldwell, 2000; Evans, Bridson and Rentschler, 2012). Only limited extant research exists in the area of art museum branding. This study offers a novel and innovative approach to understanding how the art museum sector can improve the level of community engagement through branding. In this study we focus on brand management techniques relating to brand identity and brand image. Such techniques provide public art museums with tools to craft a compelling narrative that engages staff, key industry stakeholders and visitors.

Project Aims

The overall objective of the project is to improve Victorian public art museums' community engagement skills using brand management principles. The research project has two primary objectives:

- To enhance the positioning of Victorian public art museums within the arts sector and the broader leisure market.

- To improve the branding practices of Victorian public art museums as a group, the PGAV as an advocacy body and individual art museum members.

Project Approach & Data

The study adopts an action research methodology to examine the current and potential brand image of the public art museum sector as well as individual public art museums and their brand management capabilities.

Figure 1. Project approach & data
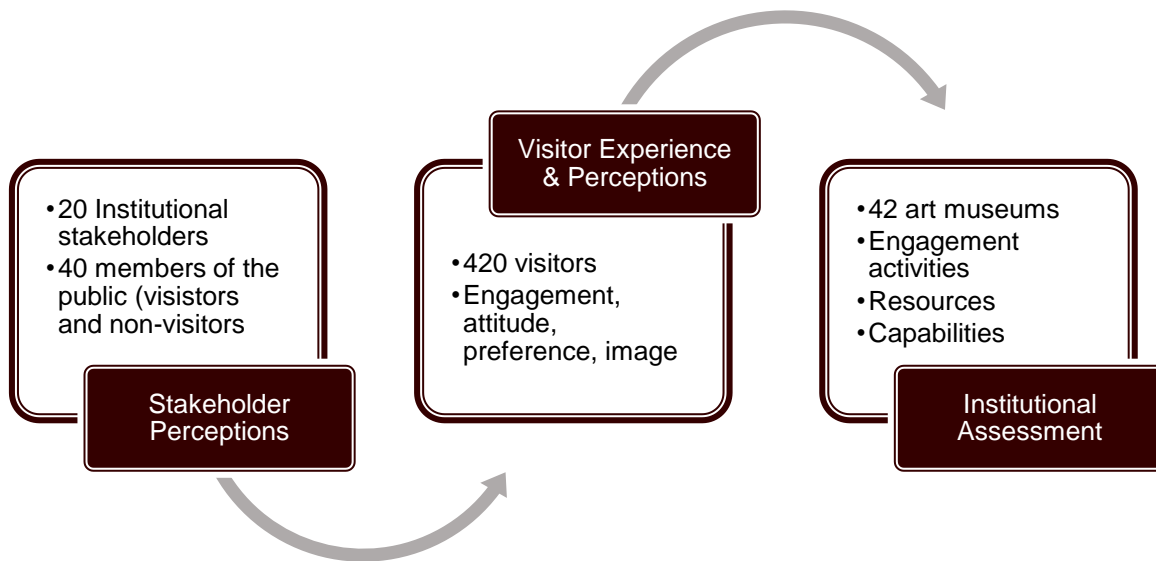
Stakeholder Perceptions Phase

The first phase of the research involved a qualitative study of key organisational stakeholders to determine the current brand image of the public art museum sector. Over twenty interviews were undertaken with stakeholders ranging from peak sector bodies, public and private funding organisations and government departments to media agencies, exhibition support services and marketing organisations.

Four focus groups complement this data from an audience perspective and were conducted with forty visitors/potential visitors. The first focus group was conducted with frequent art museum attendees and was labelled *The Art Lovers*. The second focus group was labelled *The Exhibitionists* and consisted of people who were frequent attendees at a broad range of arts events. The third and fourth focus groups consisted of non-attendees. Participants in focus group three had visited an art museum at least once in the past two years and were labelled *The Date Nighters*. Focus group four consisted of people who had not visited an art museum in the past four years and were characterised as *The Sports Lovers* (see Figure 2). Four focus groups have also been conducted with over forty directors of individual public art museums in Victoria to explore their internal sector wide view and as a research intervention strategy to provide them with feedback.

Figure 2. Focus group profiles

The Art Lovers	The Exhibitionists	The Date Nighters	The Sport Lovers
Male and Female	Male and Female	Male and Female	Male and Female
Age Range: 22-47	Age Range: 25-49	Age Range: 21-42	Age Range: 25-50
Frequent gallery attendees who visit more than 4X a year	Frequent arts attendees who visit at least once a year	Infrequent attendees who visit about once every 2-3 years	Non attendees who rarely visit
Passionate about art	Attracted to high-quality events and social occasions	Seeking opportunities for personal connections	Attracted to outdoor activities and passionate about sport
Life-long learners			

Visitor Experience & Perceptions Phase

The second phase of the study involved a survey of visitors to Victorian public art museums. Four art museums were specifically selected in order to capture the diverse experiences that visitors can have at public art museums. A State Cultural Organisation (SCA) was chosen to capture the experiences of visitors during a blockbuster exhibition. A Metropolitan Museum of Art (MMA) was running an in-house exhibition containing works from over 30 Australian and American artists. A Regional Museum of Art (RMA) was hosting a contemporary art exhibition that also incorporated live performances. Finally, a University Museum of Art (UMA) was hosting an exhibition of works shortlisted for a national art prize. Approximately, 100 visitors were surveyed at each art museum.

In terms of the profile of visitors to the four public art museums, the majority of visitors described themselves as either Cultural Companions or part of the Art Crowd. Overall, the majority of visitors were female and more than two thirds reside in Metropolitan Victoria. The Outsiders are younger with a high proportion of 18-24 years (31%). Visitors' propensity to attend for social reasons decreases with age with the Art Crowd representing the largest percentage of over 35 year olds. More than half of the respondents that attended on their own were from the Arts Crowd segment, where the social aspect was of less importance. For Cultural Companions, a high proportion attended with a partner (35%) or family group (excluding U16) (50%).

Figure 3. Visitor segmentation
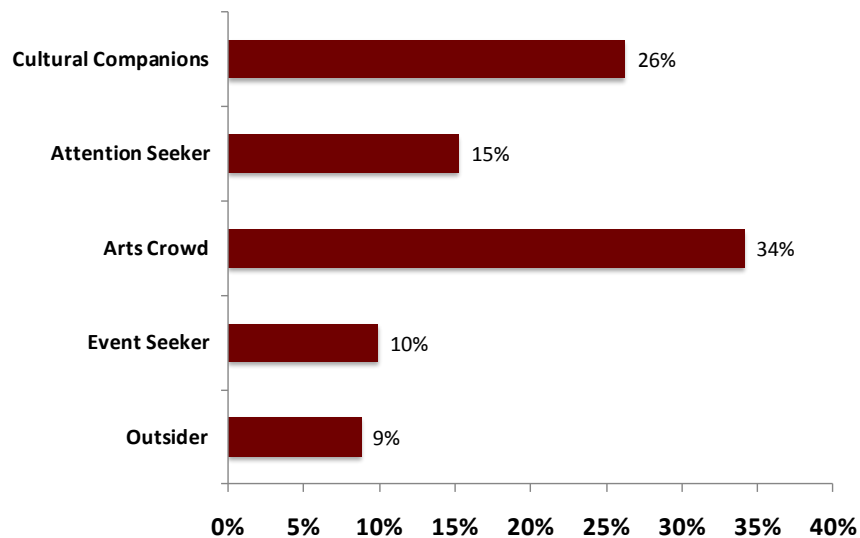
Cultural Companions: Like art, especially when shared with friends or family as part of a social outing that can be enjoyed together.

Attention Seeker: Art and cultural events are important. Enjoy the social aspect of being amongst like minded people at galleries and art exhibitions.

Arts Crowd: Art is important, both intellectually and emotionally. Happy to see the art alone and do not have much interest in the social aspects.

Event Seeker: Mainly attend art galleries when there is a major exhibition. Like the atmosphere of the big exhibitions – it's like taking part in a major event.

Outsider: Don't normally have anything to do with the arts and cultural events.

Table 1. Visitor profile

|	Total	Male	Female	18-24 years	25-34 years	35-44 years	45-54 years	55-64 years	65-74 years	75+ years	Victoria Metro	Regional	Interstate	International
Base:	420	165	245	59	98	81	90	56	22	3	307	33	44	29
Cultural Companions	26%	25%	30%	31%	34%	27%	26%	29%	14%	-	27%	24%	32%	38%
Arts Crowd	34%	36%	36%	17%	32%	37%	39%	48%	45%	100%	36%	42%	34%	28%
Attention Seeker	15%	18%	16%	5%	15%	21%	22%	16%	14%	-	16%	18%	18%	17%
Event Seeker	10%	10%	11%	17%	10%	7%	9%	7%	27%	-	11%	6%	11%	7%
Outsider	9%	12%	7%	31%	9%	7%	4%	-	-	-	9%	9%	5%	10%

	Total	Single never married	Single (divorced/ separated/ widowed)	Married/ de facto	Kids None	1	2	3	4	Family Group (incl U16)	Family Group (excl U16)	Partner or Spouse	Adult friend/s	Alone
Base:	420	135	38	242	223	41	99	37	10	69	18	133	145	49
Cultural Companions	26%	25%	16%	32%	27%	27%	28%	27%	40%	26%	50%	35%	23%	20%
Arts Crowd	34%	36%	42%	34%	35%	41%	35%	43%	30%	38%	33%	32%	32%	55%
Attention Seeker	15%	11%	24%	18%	15%	15%	19%	16%	10%	20%	6%	19%	16%	10%
Event Seeker	10%	11%	13%	10%	11%	12%	10%	11%	-	4%	6%	11%	14%	8%
Outsider	9%	16%	5%	6%	12%	5%	7%	3%	20%	12%	6%	4%	14%	6%

Institutional Assessment Phase

The third phase of the study surveyed directors of public art museums in Victoria to examine their community engagement, brand, marketing, entrepreneurial and strategic capabilities. Of the 50 members of the PGAV, 42 art museum directors responded to the survey (84% response rate). In order to present an accurate snapshot of the Victorian public art museum sector, the data reported does not include results from the National Gallery of Victoria. The 42 art museums are responsible for a collection of over 309,600 items. Over half of the respondent art museums (57%) are operated under local government, 21% are incorporated bodies, 12% are University art museums, 5% are operated under private trusts and 5% are Victorian state agencies. The majority (55%) of art museums have fewer than 5 full-time equivalent staff, whilst 24% employ between 5 and 10 staff and 21% have more than 10 employees. In terms of exhibitions, the majority of art museums held less than 15 exhibitions in 2011, however, 14% did hold over 30 exhibitions. A third of art museums (33%) received less than 10,000 visitors in 2011 and only 14% recorded over 100,000 visitors (see Figure 4.).

Figure 4. Exhibitions and attendance
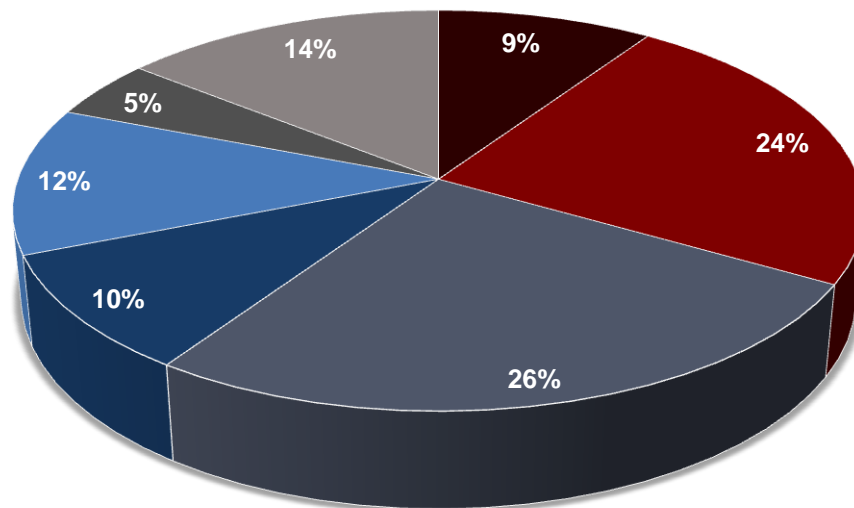
Legend:
- Less than 5 exhibitions
- 6-10 exhibitions
- 11-15 exhibitions
- 16-20 exhibitions
- 21-25 exhibitions
- 26-30 exhibitions
- Over 30 exhibitions
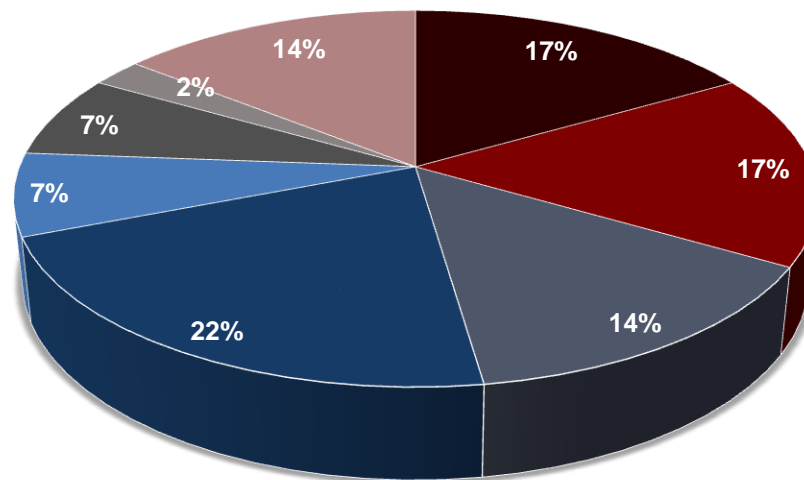
Legend:
- Less than 5,000
- 5,001 - 10,000
- 10,001-20,000
- 20,001-40,000
- 40,001-60,000
- 60,001-80,000
- 80,001-100,000
- Over 100,000

Institutional Stakeholders

The findings identify a range of critical challenges and opportunities for public art museums. In terms of challenges, institutional stakeholders identified a number of issues. Many of the challenges relate to the public art museum sector's current ability to articulate a compelling business case. Such a case is critical to engaging local councils, Board members, State government, private and public philanthropy, community groups and visitors. Institutional stakeholders also believed that, in the face of strong and diverse competition, the sector's ability to compete effectively was impeded by an image problem. Stakeholders were of the firm belief that public art museums were still seen as somewhat elitist institutions that were not easily accessible for members of their communities.
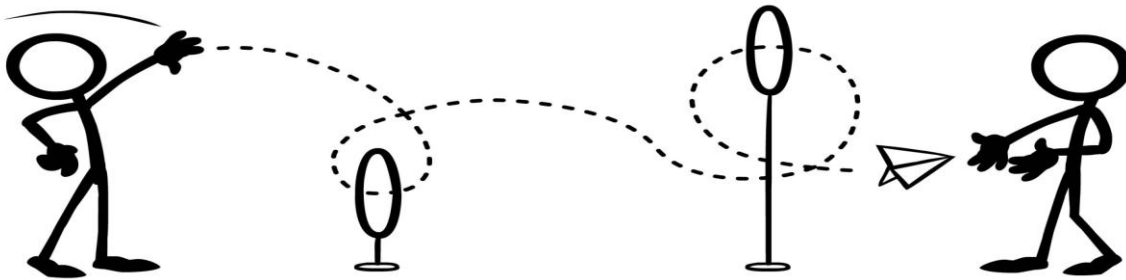
Challenges
▪ Attracting and retaining talent
▪ Career pathways
▪ Funding & resources
▪ Board and Council support
▪ Infrastructure and buildings
▪ Capacity of visual arts to stand up to rates, roads & rubbish; health, transport & police
▪ Need to constantly articulate the value of a well-resourced art museum to community
▪ Difficulty in measuring value
▪ Image problem – still perceived as elitist. Perpetuated by the sector, volunteers, friends of the art museum and Boards
▪ Competition – Strong and diverse
▪ Accessibility

Institutional stakeholders also felt that the public art museum sector was presented with a range of attractive opportunities. They believed that the sector had the opportunity and ability to offer fewer, but more targeted experiences that emphasised the accessibility of permanent collections and exhibitions. Many stakeholders wanted to see the sector embrace the lessons of the blockbuster exhibitions and, even on a smaller scale, offer experiences that would have popular appeal and commercial prospects. All stakeholders felt that the extent to which these opportunities could be exploited was dependent on a more proactive approach and higher degree of collaboration within the sector. For instance, stakeholders perceived many opportunities to collaborate on programming, marketing initiatives, community engagement strategies, funding applications and market research.
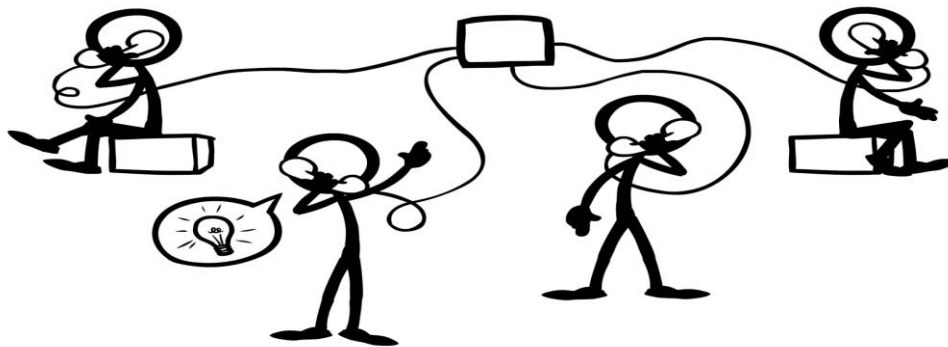
Opportunities
- Collaboration   - Programming   - Marketing   - Engagement   - Funding   - Audience profiling
Program less – target more
Develop a compelling business case
- Leverage equity of public art museums   - Community access   - Audience profile   "The best collection in Australia"
Pursue commercial opportunities more aggressively
"Popular should not be a dirty word!"
Focus on increasing accessibility

Findings from an institutional stakeholder perspective also revealed that the public art museum sector is suffering from an image crisis. Using a word cloud data analysis technique, the figures below illustrate the split personality of the sector. Stakeholders had a strong image of the sector that had many negative associations, such as elitist, stuffy, judgemental and insular. Some stakeholders felt that there was far too much focus on reverence and not enough focus on relevance. Unfortunately, this negative image dominated stakeholders' views of the sector. Stakeholders were more effusive when discussing public art museums where they had formed a positive image. However, such art museums were seen to be the exception to the norm. On the positive side, public art museums possessed an image incorporating relevance, accessibility, interesting, exciting, sensory experiences that were anchored by strong collections with a clear community focus.

Figure 5. Split Personality

A surprising finding was that the image of the sector was inextricably linked to the image stakeholders had formed of directors of public art museums. Stakeholders revealed both negative and positive images of art museum directors. The challenge for the sector is that, once again, the negative image dominated perceptions and the positive image was seen as rare. Many stakeholders, particularly those in funding positions, viewed art museum directors as fairly pessimistic, reactive individuals with a victim mentality that often led them to undermine the successes of others in the sector. There was a tendency to always highlight problems, rather than focusing on opportunities and successes. In contrast, art museum directors were also seen as dynamic, engaged and entrepreneurial individuals. There was a strong desire from many stakeholders for more art museum directors to cultivate some of these positive attributes. One stakeholder felt that the image of art museum directors and their inability to articulate a positive business case was the single most significant factor holding the sector back.

Figure 6. Image of public art museum directors

Stakeholders: Visitors and Non-Visitors

It was interesting to note that many institutional stakeholders believed that visitors and non-visitors still perceived public art museums as elitist, old-fashioned, conservative institutions. However, the focus group findings reveal a much more positive, dynamic and relevant image.

Figure 7. Visitors and non-visitors image of public art museums

Despite differences in attendance, leisure pursuits and priorities all four focus groups had formed distinct, but quite positive images of public art museums.

Figure 8. Four images of public art museums

The Art Lovers referred to public art museums as welcoming, dynamic, inspiring escapes. They had formed the image of a benevolent God-like being that was a great source of comfort in their daily lives. Both the Exhibitionists and the Date Nighters talked of public art museums as an old member of the family that they reconnected with at social occasions. One member of the Date Nighters group described the art museum as a distant cousin in a boring suit, who when you get talking to them is so entertaining and interesting that you think you must see them more often. Afterwards you forget about them and don't see them again until the next family event. For the Sports Lovers, public art museums were described quite fondly as a wise, conservative, affluent Old Soul.

The four groups revealed quite diverse motivations for attendance and non-attendance at public art museums. The *Art Lovers* are stimulated by visual art and come for an enlightening experience that has a sense of both freedom and escape. The *Exhibitionists* are there to be seen and are motivated to attend quality popular experiences and events. For the *Date Nighters*, public art museums are not currently part of their busy social calendars, but they could be. This group became incredibly excited by the notion of a date night at a public art museum. The *Sports Lovers* have not made a deliberate decision to avoid the visual arts; rather they lack personal knowledge and a reference group that could introduce them to public art museums.

Figure 9. Motivations

The Art Lovers	The Exhibitionists	The Date Nighters	The Sports Lovers
Permanent Collection	Blockbuster Exhibitions	Forgotten	Not on their radar
Education outside the traditional box	International status	Busy social calendar	Interest there, but accessibility issues
Greatest comfort in life	Word of mouth about events	Competes with other venues	Don't know enough
Eye candy	Looking for a great space and social event	Could be a bold date	Reference groups don't go
Opportunity for quiet reflection			

In terms of expectations, the four groups value different aspects of a public art museum experience and the two non-attendee groups possess a number of misconceptions about visiting public art museums. The *Art Lovers* expect a quality experience that presents them with opportunities for personal reflection. The *Exhibitionists* seek a high quality and grand event that tells an interesting story. The *Date Nighters* expect to be cognitively challenged by a public art museum and, therefore, feel that they need to be in the 'right' mindset to attend. The *Sports Lovers* perceived public art museums to be expensive and did not realise that it was free to experience the permanent collection.

Figure 10. Expectations

The Art Lovers	The Exhibitionists	The Date Nighters	The Sports Lovers
Peace and quiet	Big names and big buildings and grand scale	The great unknown	For tourists not locals
Quality curating	Guarantee of quality: reviews	Not open for me	Expensive
Layout and lighting	Mixed mediums	You need extensive time	Like a quiet library
Good seating	Stories behind the artwork and artists	Need to be in the right mindset	Difficult to keep interest for long
Approachable staff	Social events	Open to surprise and a great escape	Passive not active
Lecture series	Good food & wine		

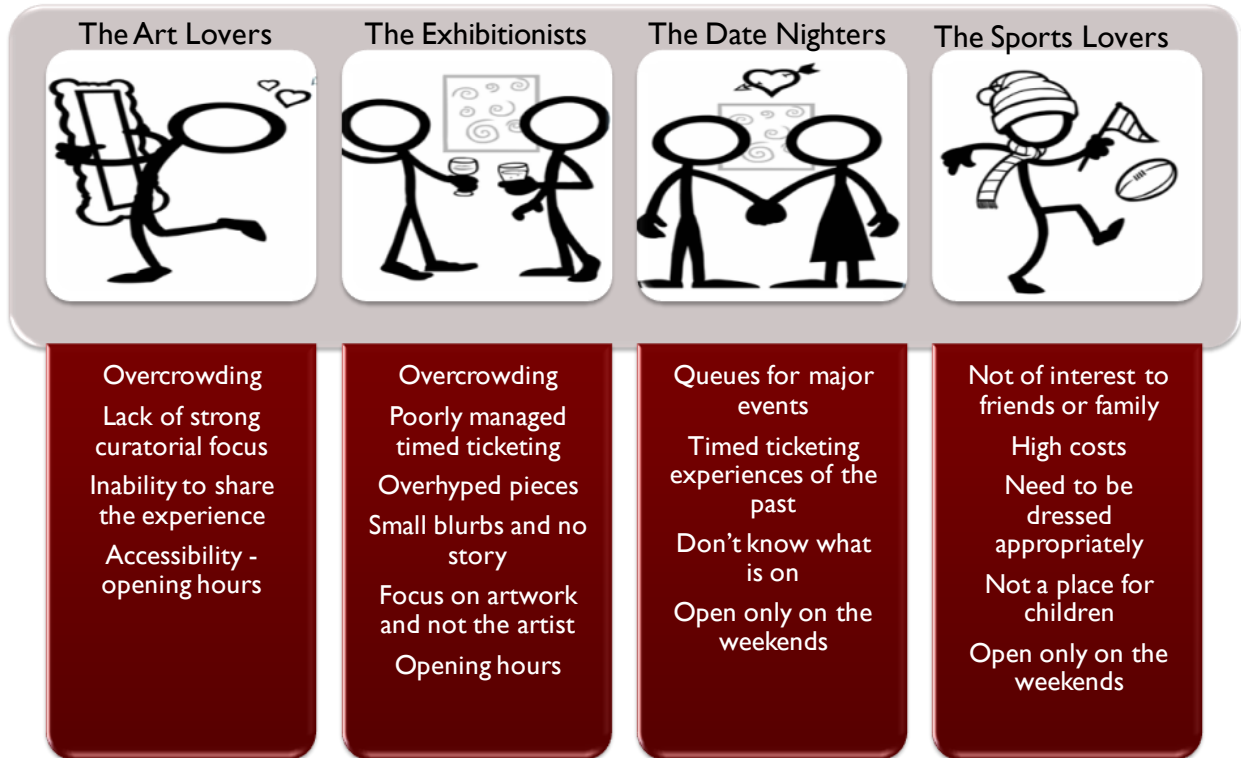In regards to sources of frustration and disappointment with public art museums, the groups converged on two issues. The first was the impact of overcrowding on the quality of the experience and the ability to truly engage with the visual arts. The second issue was the disappointment in opening hours. For nearly all participants, the limited opening hours presented a fundamental accessibility problem. For non-attendees the opening hours of public art museums signalled that they were really only open for tourists or on the weekends. These attendees already had many demands, both social and sports-related, on their weekend leisure time. Thus, public art museums face challenging competition if they want to secure a share of such limited leisure time. For the attendee groups, they were frustrated by the inability to share the experience with friends and family because of the limited opening hours. This represents one of the most significant opportunities for public art museums in increasing visitation.

Figure 11. Sources of disappointment

The Art Lovers	The Exhibitionists	The Date Nighters	The Sports Lovers
Overcrowding	Overcrowding	Queues for major events	Not of interest to friends or family
Lack of strong curatorial focus	Poorly managed timed ticketing	Timed ticketing experiences of the past	High costs
Inability to share the experience	Overhyped pieces	Don't know what is on	Need to be dressed appropriately
Accessibility - opening hours	Small blurbs and no story	Open only on the weekends	Not a place for children
	Focus on artwork and not the artist		Open only on the weekends
	Opening hours		

Sector Workshops

The preliminary findings from the stakeholder and visitor research were presented to art museum directors at a series of workshops during 2012. This research intervention was then used to prompt art museum directors to craft a meaningful narrative in the form of a brand mantra (Keller, 2008) for the sector. A brand mantra is an articulation of the 'heart and soul' of the brand, a short, 3-5 word phrase that captures the essence or spirit of the brand. Each group crafted a brand mantra that they felt represented the essence of public art museums in Victoria:

- Creating inspiring visual art experiences

- Sharing authentic experiences

- Sharing creative experiences for everyone

- Creating captivating visual art experiences

The directors of public art museums in Victoria then voted and agreed that the mantra *creating inspiring visual art experiences* will be adopted by the Public Galleries Association of Victoria. This mantra captures the dynamic and vibrant personality of public art museums in Victoria and highlights their focus on providing both cognitively and emotionally stimulating experiences through visual art.

The brand mantra will act as a compass for the public art museum sector to drive strategic initiatives focused on community engagement. The first sector-wide collaboration that is focused on community engagement will address the accessibility issue identified in the research. The public art museums in Victoria are developing a collective campaign incorporating late night openings on 'Winter Wednesdays'. The campaign will be anchored on a date night concept with a range of executions including 'bring your Mum on a date to the art museum', 'reconnect with old friends', 'reconnect with yourself' and 'bring the kids on an after-school date'. The campaign was suggested by an art museum director during the workshops and received widespread support from participants. The enthusiasm behind this campaign is an indication of the sector's recognition that it can achieve more collectively than it can individually. This signals a new mindset of art museum directors and is evidence of the extent to which they have internalised the stakeholder feedback and used it as a burning platform for change in the sector.

Findings: Visitor Experiences & Perceptions

The second phase of the project involved a survey of visitors to a range of public art museums (State Cultural Organisation (SCO), Metropolitan Museum of Art (MMA), Regional Museum of Art (RMA) and University Museum of Art (UMA)). The survey sought to capture the extent to which visitors were engaged in their experiences, their attitude towards, preference for and image of the art museum.

Visitor Engagement

Visitor engagement refers to the extent to which visitors are engaged in their experience at an art museum. It is a psychological state that is characterised by a degree of absorption, dedication, vigour and interaction (Patterson, Yu & de Ruyter, 2006). Absorption refers to the level of cognitive engagement and is reflected by the extent to which visitors paid attention to the exhibits, were engrossed in their experience and were prompted to think and use their imaginations.
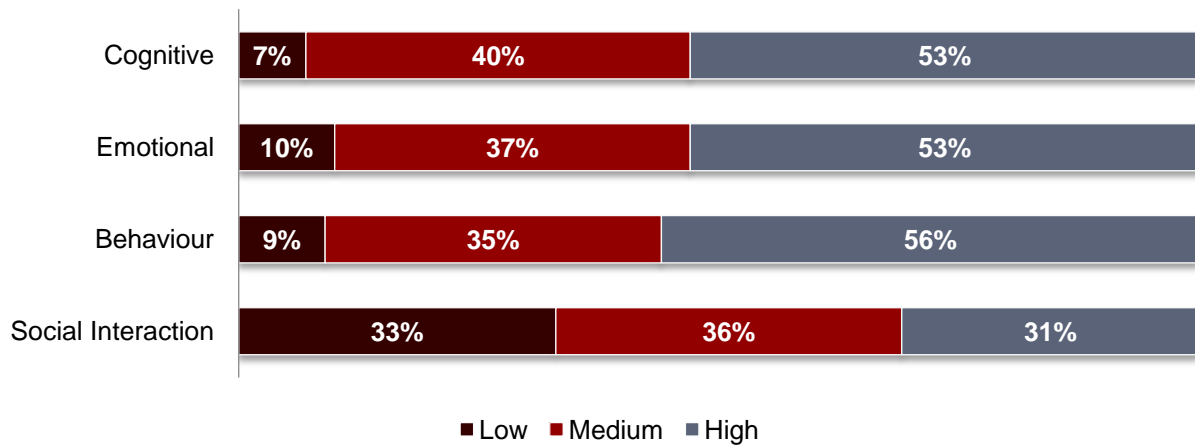

Dedication reflects visitors' emotional engagement and incorporates the extent to which visitors felt a personal connection with the art museum and were inspired and excited by their experience. Vigour relates to behavioural engagement and addresses the amount of

effort expended by visitors during their experience. It captures their amount of physical involvement and the extent to which visitors actively contributed to and participated in their experience. Interaction refers to the social interaction between visitors and art museum staff. It is reflected in the extent to which visitors engaged in conversation with staff and received useful advice and directions from staff.

Visitors were asked about their engagement in the art museum experience and their responses were categorised as low, medium, or a high level of engagement. It was surprising that only 50% of respondents were categorised as "high" for behavioural, emotional, and cognitive engagement. Moreover, only 31% of respondents were considered high for social interaction. This represents a significant opportunity for art museums to create experiences that are more engaging for a wider range of visitors. In particular, encouraging staff to interact more with visitors could substantially enhance the visitor experience.

Figure 12. Overall Visitor Engagement

	Low	Medium	High
Cognitive	7%	40%	53%
Emotional	10%	37%	53%
Behaviour	9%	35%	56%
Social Interaction	33%	36%	31%

■ Low ■ Medium ■ High

In terms of differences between the art museums, the MMA had the most cognitively and emotionally engaged visitors. The SCOs visitors were the most behaviourally engaged, followed by the RMA. Despite having significantly more staff, the SCO had the least amount of visitors socially interacting with staff to a high degree.

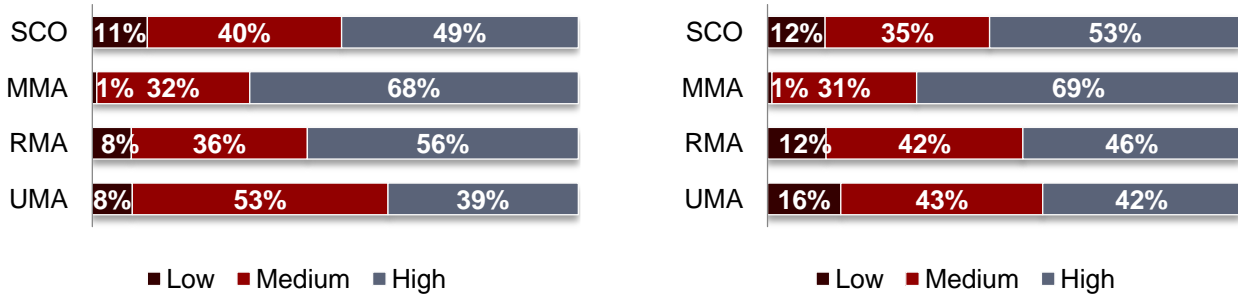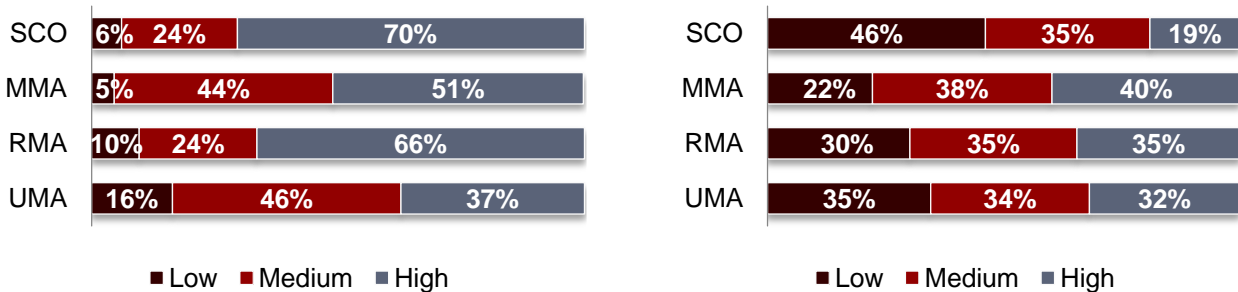**Figure 13. Cognitive Engagement**   **Figure 14. Emotional Engagement**

	Low	Medium	High
SCO	11%	40%	49%
MMA	1%	32%	68%
RMA	8%	36%	56%
UMA	8%	53%	39%

■ Low ■ Medium ■ High

	Low	Medium	High
SCO	12%	35%	53%
MMA	1%	31%	69%
RMA	12%	42%	46%
UMA	16%	43%	42%

■ Low ■ Medium ■ High

Figure 15. Behavioural Engagement   **Figure 16. Social Interaction**

	Low	Medium	High
SCO	6%	24%	70%
MMA	5%	44%	51%
RMA	10%	24%	66%
UMA	16%	46%	37%

■ Low ■ Medium ■ High

	Low	Medium	High
SCO	46%	35%	19%
MMA	22%	38%	40%
RMA	30%	35%	35%
UMA	35%	34%	32%

■ Low ■ Medium ■ High

Brand Attitude & Preference

Brand attitude relates to the strength of visitors' attitude towards the art museum's brand. It captures the degree to which visitors have a favourable/unfavourable, good/bad, likeable/unlikeable and pleasant/unpleasant attitude towards the art museum. Brand preference refers to the degree to which visitors prefer the art museum over other cultural attractions. Overall, visitors had a strong positive attitude towards the art museums. The majority of respondents had a very favourable, good, likeable and pleasant attitude towards the art museums. However, such a positive attitude did not translate into a strong preference for the art museums. In fact, the majority of visitors did not prefer the art museum over other cultural attractions. Only 15% of visitors demonstrated any preference for the art museums. This represents a significant challenge for art museums: to translate attitude into preference. The findings suggest that, whilst visitors *like* the art museum, they don't *love* it.

Figure 17. Overall brand attitude & brand preference
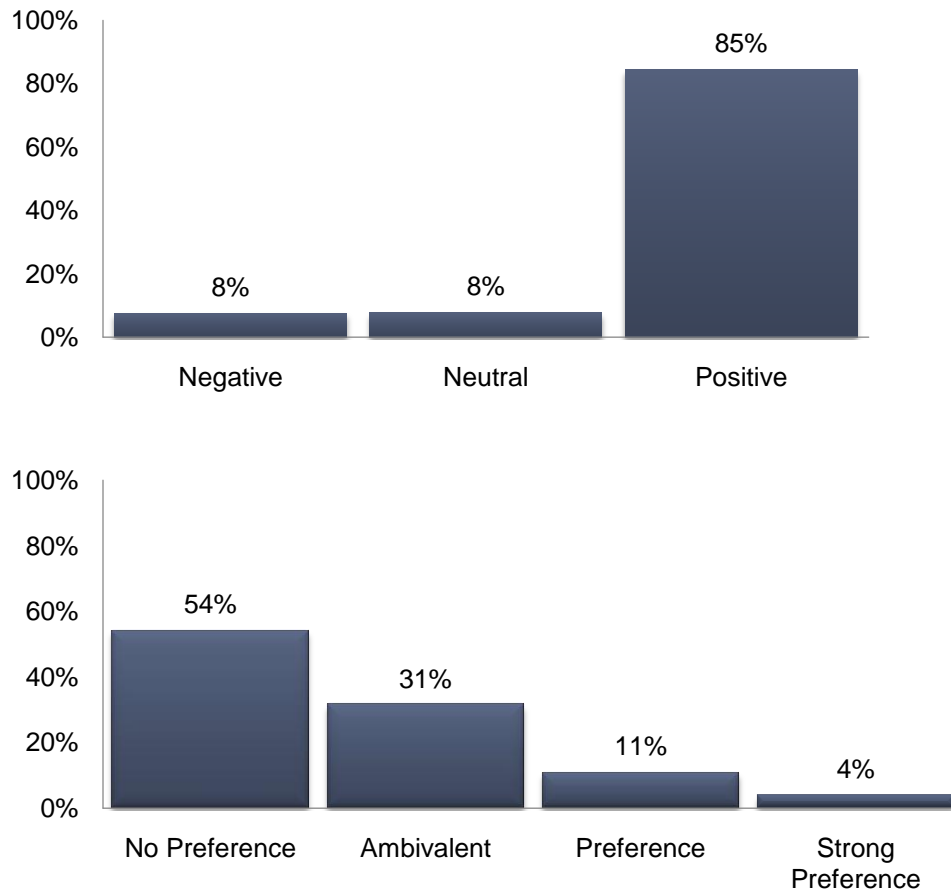
The results for each art museum reveal the same pattern. Visitors to all four art museums recorded very positive attitudes, but no real preference. This suggests that regardless of scale, resources or location, State Cultural Organisations, Metropolitan, Regional and University art museums all face the same challenge. Art museums need to focus on strategies that encourage repeat patronage as a means of generating stronger brand preference and loyalty.

Part of the answer to this problem may reside in the development of more engaging experiences.

Figure 18. Brand attitude by art museum
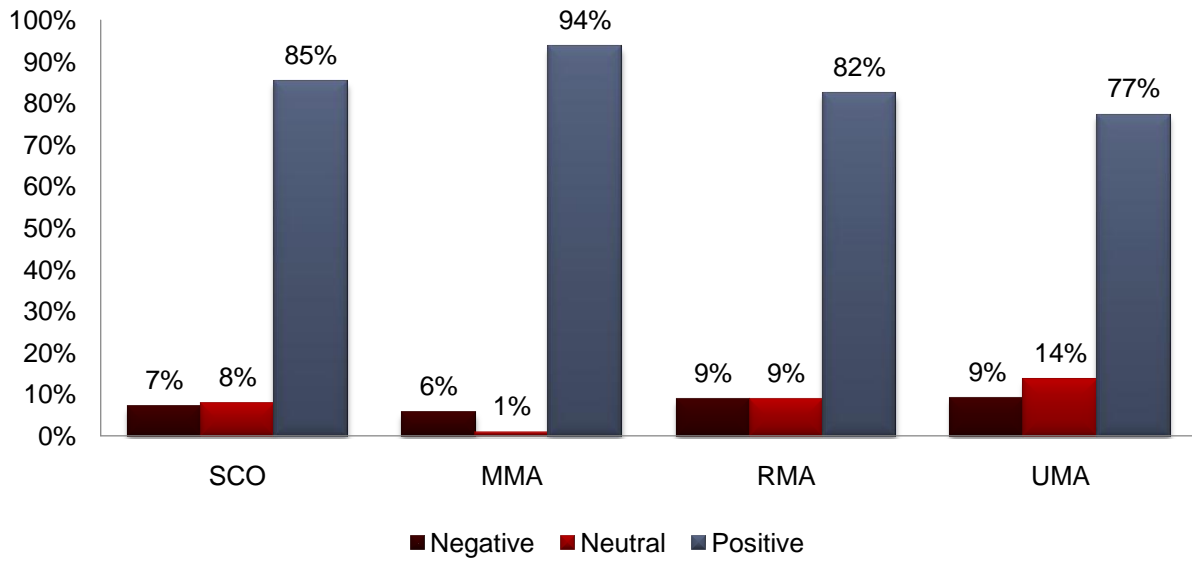
Figure 19. Brand preference by art museum
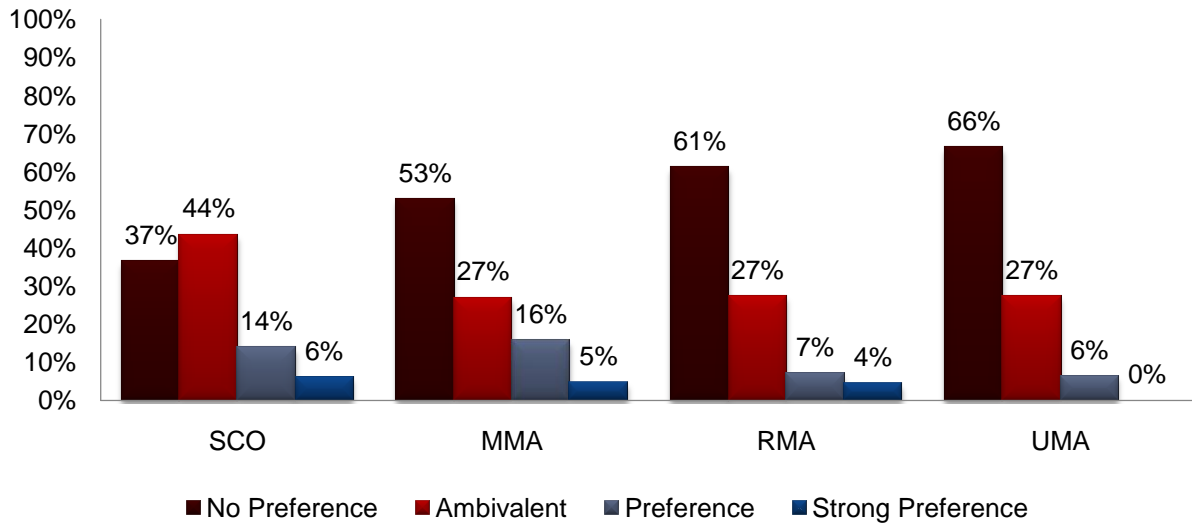
The results in Table 2 indicate that visitor engagement explains approximately 12% of the variance in brand attitude and 27% of brand preference. In particular, emotional engagement and social interaction are significant drivers of a positive brand attitude. Cognitive engagement, emotional engagement and social interaction are significant drivers of brand preference. These findings highlight a serious deficiency in the current engagement tactics of art museums and present a real opportunity to affect change. Art museums can generate stronger brand preference in visitors if they offer more cognitively and emotionally engaging experiences where staff are more eager to interact with visitors.

Table 2 Visitor engagement, brand attitude and brand preference

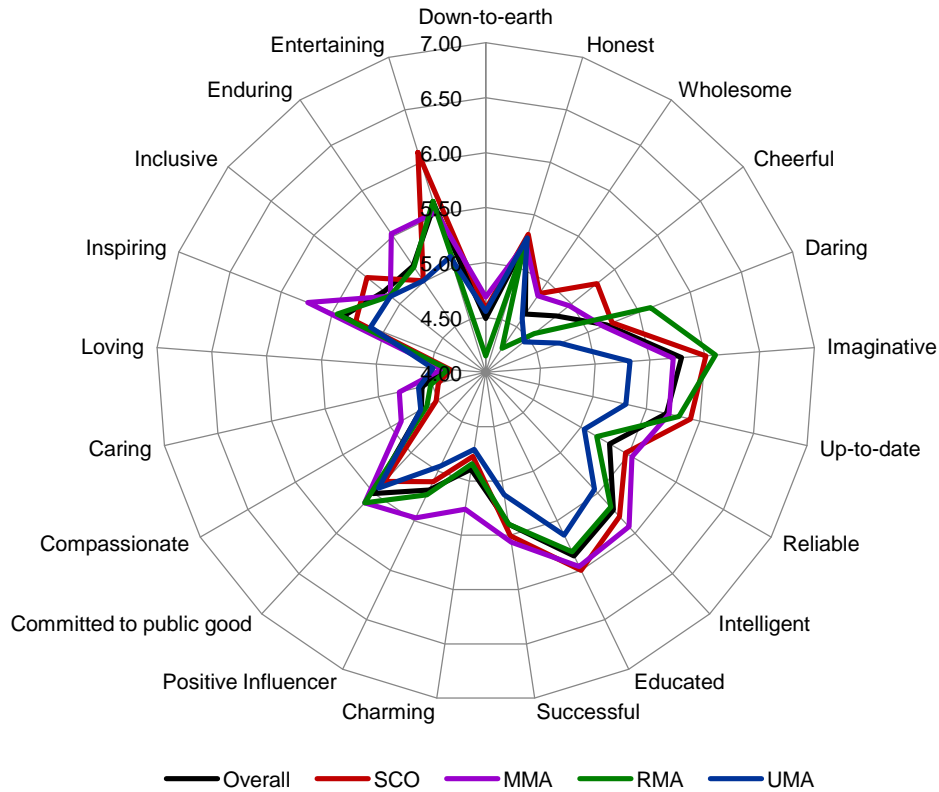|	Brand Attitude	Brand Preference
Cognitive Engagement	-.051	.102*
Emotional Engagement	.348***	.373***
Behavioural Engagement	.027	.035
Social Interaction	.072*	.104**
R^2	.126	.276
Adj R^2	.118	.270
F-Ratio	15.919***	42.083***

*p<.05; **p<.01; ***p<.001

Brand Image

Brand image, also referred to as brand personality, is generally defined as "the set of human characteristics associated with a brand" (Aaker 1997, p. 347). In this study we examine brand image traits associated with sincerity (down-to-earth, honest, wholesome and cheerful), excitement (daring, imaginative, up-to-date), competence (reliable, intelligent, educated, successful), integrity (charming, positive influencer and committed to the public good), nurturance (compassionate, caring and loving) and engaging (inspiring, inclusive, enduring and entertaining). The findings reveal a consistent pattern in the brand image for the four art museums. Overall, no single brand trait scored above 6 on a 7-point scale, which suggests that the art museum sector does not yet have a strong or distinctive brand image. The strongest characteristics related to competence (educated and intelligent) and excitement (imaginative and up-to-date). However, the characteristics most commonly associated with non-profit and public institutions, nurturance, sincerity and integrity, were relatively weak. This suggests that, in the absence of a deliberate brand image campaign, visitors have formed a somewhat positive image of art museums as educated, intelligent, imaginative, up-to-date and entertaining institutions. Moving forward, as a means of fostering deeper levels of community engagement, art museums should seek to also emphasise their nurturing and engaging qualities. Many of these qualities are best exhibited by staff, as the organisation's greatest brand ambassadors, and reinforce the importance of social interaction in the art museum experience.

Figure 20. Brand image

Figure 20 radar chart with axes: Down-to-earth, Honest, Wholesome, Cheerful, Daring, Imaginative, Up-to-date, Reliable, Intelligent, Educated, Successful, Charming, Positive Influencer, Committed to public good, Compassionate, Caring, Loving, Inspiring, Inclusive, Enduring, Entertaining. Legend: Overall, SCO, MMA, RMA, UMA.

Findings: Institutional Assessment

The member institutions of the PGAV were surveyed in 2012 about their activities in 2011. The 42 respondent art museums recorded over 3.3 million visitors in 2011 and held over 700 exhibitions. Four hundred and fifteen exhibitions were developed in-house and 99 were touring exhibitions. The art museums demonstrate their capacity and desire for community engagement through their strength in public programs and education programs. In particular, the art museums hosted over 165,000 school children and 5,400 school visits. The art museums also reached out to school communities, making 131 visits to schools. This pursuit of community engagement is all the more admirable in light of the lack of dedicated funding. Only 20% of art museums receive either

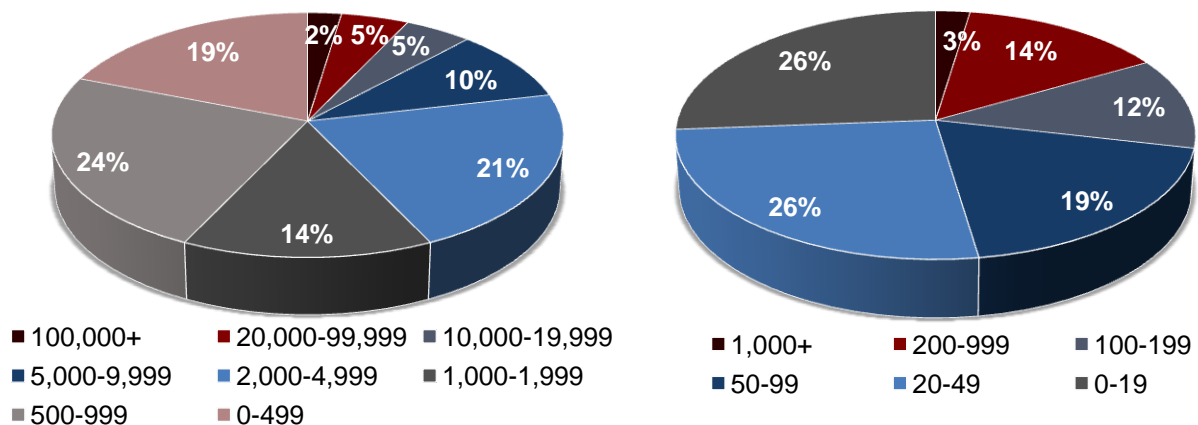philanthropic or DEECD (Department of Education and Early Childhood Development) funding for public and education programs.

Figure 21. Community engagement activities

3.3 million visitors

131 visits to schools

700 exhibitions

2763 education programs

5,400 school visits

165,000 children

1580 public programs
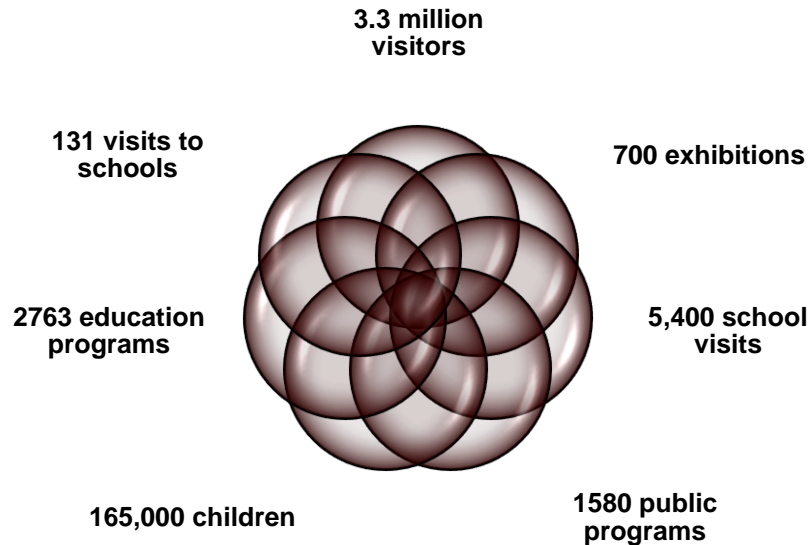
In terms of exhibition attendance, the findings indicate some areas for concern in the sector. Only 2% of art museums are achieving over 100,000 visitors per exhibition. As this is a typical benchmark for blockbuster exhibitions, it does suggest that only a few institutions are implementing a blockbuster strategy. A large percentage (43%) of art museums record less than 1000 visitors per exhibition. The figures for attendance by number of exhibition days are also concerning. Only 3% of art museums have over 1000 visitors per exhibition day, whilst the majority (52%) have less than 50 visitors per exhibition day. It is possible that many art museums are spreading their limited resources across too many exhibitions. Institutional stakeholders did highlight the opportunity for art museums to offer fewer, but more targeted and well-resourced exhibitions. Such a strategy may see a greater return on investment with the implementation of more efficient and effective marketing campaigns.

Figure 22. Attendance by number of exhibitions & number of exhibition days

Left pie chart:
- 2%
- 5%
- 5%
- 10%
- 21%
- 14%
- 24%
- 19%

Legend (left):
- 100,000+
- 20,000-99,999
- 10,000-19,999
- 5,000-9,999
- 2,000-4,999
- 1,000-1,999
- 500-999
- 0-499

Right pie chart:
- 3%
- 14%
- 12%
- 19%
- 26%
- 26%

Legend (right):
- 1,000+
- 200-999
- 100-199
- 50-99
- 20-49
- 0-19

Resources

The majority (55%) of art museums are operating with fewer than 5 staff members. Most employ a museum director or senior curator. In total, the sector employed over 1400 people in 2011. Only 6% of those employed in the sector are in a marketing role with just 33% of art museums employing anyone in a marketing position. Moreover, despite the large number of public and education programs offered by art museums across Victoria, the majority of institutions do not employ a dedicated public program or education officer. This suggests that art museum di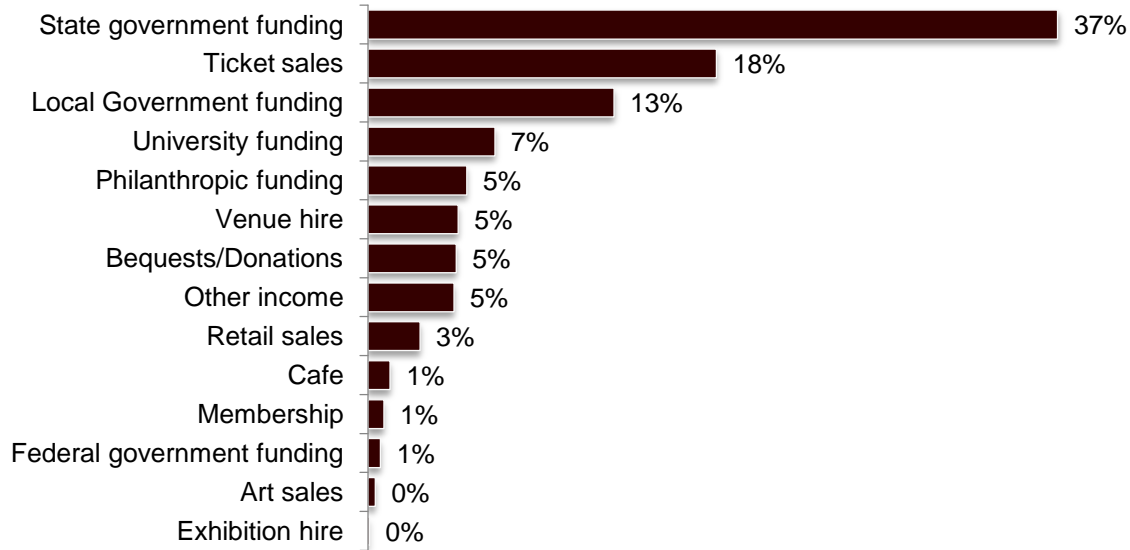rectors and their small teams have to play multiple roles and the image of a director curating an exhibition, writing the media release, fixing the faulty plumbing and running a free workshop for local school children would not be unusual. Perhaps this lack of support staff goes some way to explaining the weak brand image for the sector, particularly when 80% of art museums rely so heavily in volunteers. Without dedicated human resources to creating engaging experiences that afford a degree of social interaction between visitors and staff and that emphasise an exciting, inspiring and nurturing brand, the sector will continue to struggle.

Figure 23. Staffing resources
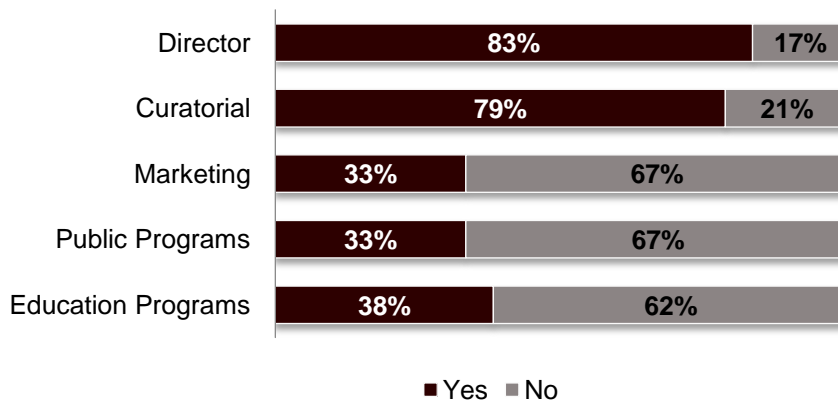
In terms of financial resources, the sector has a diverse funding base. The State Government of Victoria is still the primary source of funding for the sector, but many art museums are also dependant on local government and University funding. Only 5% of funds in the sector come from philanthropic sources. In terms of the sector's ability to generate its own funds, ticketed events generate 18% of revenue, but retail sales and cafe sales make up only 4% of revenue. Opportunities exist, therefore, in the areas of philanthropic funding, corporate sponsorship and commercial income streams. Such opportunities are inextricably linked to the sector's ability to develop a compelling and unique narrative that engages a wide range of stakeholders.

Figure 24. Sector Funding Sources

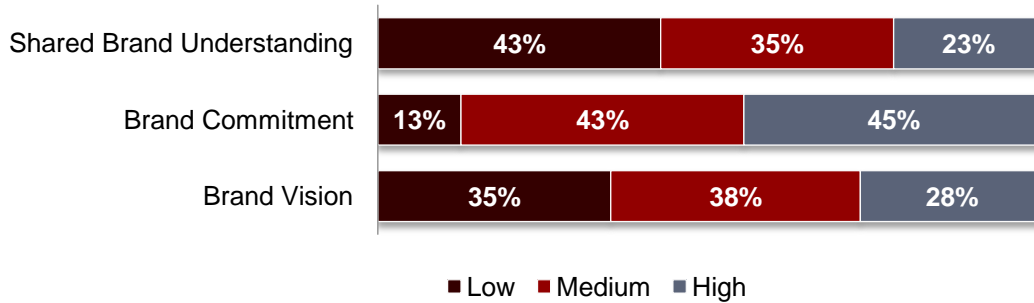| Funding Source	Percentage
State government funding	37%
Ticket sales	18%
Local Government funding	13%
University funding	7%
Philanthropic funding	5%
Venue hire	5%
Bequests/Donations	5%
Other income	5%
Retail sales	3%
Cafe	1%
Membership	1%
Federal government funding	1%
Art sales	0%
Exhibition hire	0%

Capabilities

Victorian public art museums were assessed in relation to a range of organisational capabilities. These include brand, entrepreneurial, market and strategic orientations. The orientations capture the extent to which the institutions are oriented towards specific values, priorities and activities.

Brand Orientation

Brand orientation is an emerging strength of many organisations both for-profit and non-profit in nature. It refers to the degree to which an institution has a brand vision, brand commitment and a shared brand understanding. A clear brand vision refers to having a brand principle, a short phrase, which articulates the brand promise. Brand commitment refers to the significance accorded to branding by the institution. It incorporates the public art museum's view that branding is critical to their institution's future and is an investment rather than an expense. Shared brand understanding signifies the degree to which the brand is understood by all the institutions' employees, their ability to articulate the brand vision and their involvement in developing objectives and strategies. Interestingly, the findings highlight that 45% of art museums demonstrated a high degree of brand commitment. This indicates that many art museums have elevated the brand to a top priority and are committed to building the institution's brand. The ability to articulate the brand vision and share this amongst employees is less developed, which suggests that art museum directors may lack the necessary brand management tools to articulate their brand vision and engage staff in the process.

Figure 25. Brand Orientation

	Low	Medium	High
Shared Brand Understanding	43%	35%	23%
Brand Commitment	13%	43%	45%
Brand Vision	35%	38%	28%

■Low ■Medium ■High

Entrepreneurial Orientation

Entrepreneurial orientation includes innovativeness, proactiveness and risk taking capabilities. Innovativeness characterises an institution based on the degree to which they are focused in developing and marketing new exhibitions and programs. Proactiveness refers to the extent to which the institution initiates actions which competitors respond to and is the first to introduce new initiatives. Risk taking capabilities relate to the institutions proclivity for low versus higher risk initiatives and the extent to which there posture exploits opportunities or is passive. The findings reveal that many respondents are conservative, risk-adverse and reactive. Very few art museums can be categorised as highly entrepreneurial. This presents a serious risk for the sector in terms of its community engagement potential and sustainability. The lack of a strong entrepreneurial orientation is reflected in the image institutional stakeholders have of the sector and art museum directors. If art museums seek to improve their image then they must become braver, more proactive and innovative.

Figure 26. Entrepreneurial Orientation

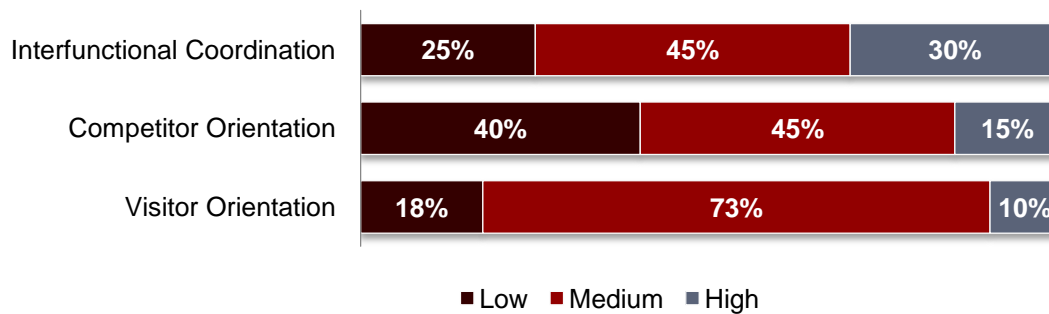|	Low	Medium	High
Risk Taking	40%	53%	8%
Proactive	50%	28%	23%
Innovation	23%	45%	33%

■Low ■Medium ■High
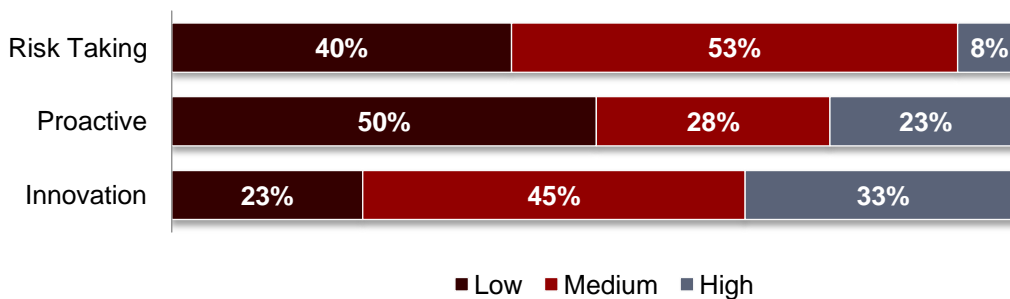
Market Orientation

Market orientation refers to an organisational culture consisting of three characteristics; visitor orientation, competitor orientation and interfunctional coordination. In this study, visitor orientation refers to the understanding of and prioritisation of visitor's needs. Competitor orientation refers to a detailed understanding of the strengths, weaknesses, capabilities and strategies of competitors to the art museum. Interfunctional coordination relates to the degree to which staff across departments and functions collaborate and work well together. Respondents were asked about the degree to which their institution engaged in specific practices. Given that art museums in Victoria are operated by small teams (less

than 5 employees), it is surprising that only 30% of respondents were characterised as high on interfunctional coordination. The lack of a strong competitor orientation is also concerning and suggests that the sector is quite inward focused. In general, the findings reveal that only a small percentage of art museums could be considered highly market oriented. This is of great concern if art museums are going to pursue a community engagement strategy. A deep understanding of visitors' needs and the way in which competitors may be addressing such needs is an essential component of a successful engagement strategy. Strengthening their market orientation may also assist art museums in crafting a strong and distinctive brand image.
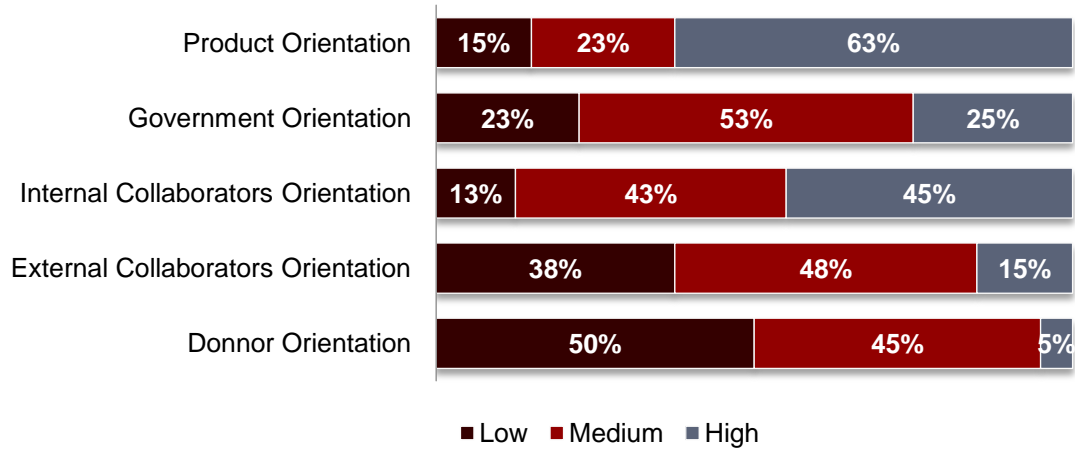
Figure 27. Market Orientation

Category	Low	Medium	High
Interfunctional Coordination	25%	45%	30%
Competitor Orientation	40%	45%	15%
Visitor Orientation	18%	73%	10%

■ Low ■ Medium ■ High

Strategic Orientation

Product orientation within public art museums relates to the institution's approach to their collection, exhibitions and programs and the extent to which they pursue new and innovative products. Government orientation refers to the extent to which the institution is cognisant of local and state government needs and seeks to satisfy such needs. Collaborative orientation is the extent to which the institution prioritises and exploits opportunities for cooperation within the art museum sector (internal) and broader leisure and culture sector (external). Donor orientation refers to the degree to which the art museum seeks to understand and satisfy donor needs. Unsurprisingly, the majority of respondents were characterised as highly product oriented. Such a strong focus on collections, exhibitions and programs has been instrumental to the success of art museums in the past. However, moving forward, it must be complemented by other capabilities. It is particularly concerning that so few art museums were highly government or donor oriented. Considering the sector's reliance on these two groups for funding, a stronger focus on the needs of government and donors will help to ensure the survival of public art museums. Finally, institutional stakeholders were clearly correct in identifying greater collaboration as an opportunity. Whilst some art museums (45%) prioritised collaboration within the sector, only 15% were highly oriented towards external collaborations. Given the trend towards the co-location of art museums with other cultural and leisure attractions, greater collaboration outside of the art museum sector could present interesting opportunities to engage with a larger and more diverse community.

Figure 28. Strategic Orientation

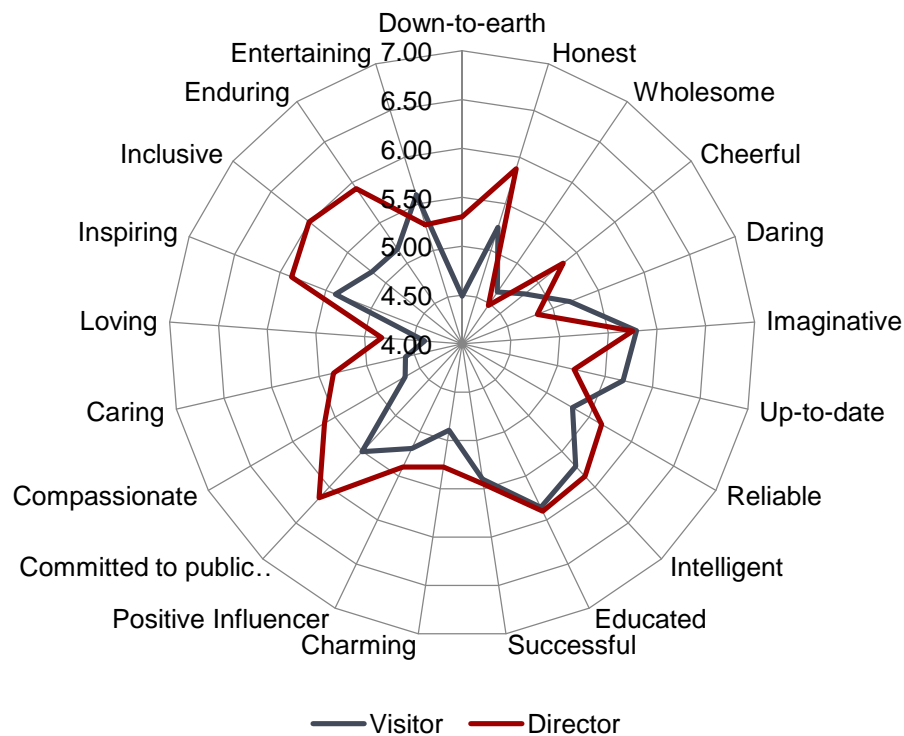|	Low	Medium	High
Product Orientation	15%	23%	63%
Government Orientation	23%	53%	25%
Internal Collaborators Orientation	13%	43%	45%
External Collaborators Orientation	38%	48%	15%
Donnor Orientation	50%	45%	5%

■ Low ■ Medium ■ High

Brand Image

Art museum directors were also asked to reflect on the image of their institution. Figure 29 maps the perceptions of directors with the perceptions of the visitors that responded in phase 2 of the project. It was surprising that the art museum directors did not identify any clear strength's in their institution's image. Only two characteristics, inclusive and committed to the public good scored above a 6 on a 7-point scale. The figure below reveals the incongruity between the visitors' assessment of the public art museum brand image relative to the directors' perspective. The greatest differences in perception relate to compassionate, inclusive, down-to-earth, caring, enduring, committed to the public good and honest. Art museum directors perceived their brand to be more sincere, nurturing and engaging than did visitors. In contrast, visitors perceived art museums to be more daring, up-to-date and entertaining than did art museum directors. It can be suggested that this incongruity reflects the lack of any deliberate attempt to craft a brand image for the sector. In such a vacuum, individuals will come to their own conclusions.

Figure 29. Director and visitor brand image

Down-to-earth, Honest, Wholesome, Cheerful, Daring, Imaginative, Up-to-date, Reliable, Intelligent, Educated, Successful, Charming, Positive Influencer, Committed to public…, Compassionate, Caring, Loving, Inspiring, Inclusive, Enduring, Entertaining

— Visitor — Director

Conclusion

In facing the future, the public art museum sector must first understand the current perceptions of stakeholders and visitors, as this forms the basis of the sector's brand image. The action research methodology employed in this study seeks to assist the public art museum sector in crafting brand strategies that address misconceptions and focus on increasing community engagement.

The findings from the stakeholder research reveal a number of key issues regarding the image of public art museums in Victoria. From an institutional stakeholder perspective, public art museums are perceived to have a split personality. Whilst public art museums can be seen as relevant, accessible, interesting and exciting, they are also perceived to be elitist, stuffy, conservative and judgemental. This split personality, particularly the negative brand associations, is inextricably linked to the image stakeholders have formed of public art museum directors. Addressing the negative image of public art museum directors is, therefore, fundamental in any strategy focused on community engagement.

In terms of visitor and non-visitor stakeholder research findings, the brand image of public art museums is much more positive. Public art museums are overwhelmingly perceived as intelligent and dynamic, but somewhat old. The primary issue of concern for all four groups was problems with accessibility. For the *Art Lovers* and *Exhibitionists*, opening hours impeded their ability to share the experience with family and friends. Limited weeknight opening hours presented a substantial obstacle to visitation for the *Date Nighters* and *Sports Lovers*. Both groups had competing demands on their weekend leisure time. This presents

public art museums with a significant challenge and attractive opportunity. A change in opening hours would signal greater accessibility and would form an important component of any strategy focused on enhancing community engagement.

In terms of the visitor experience and their degree of engagement, the findings reveal some significant opportunities. Art museums need to focus on creating experiences that encourage deeper levels of both cognitive and emotional engagement for a wider range of visitors. Moreover, art museum staff must be encouraged to interact more with visitors as a means of enhancing the visitor experience. Such strategies will be instrumental in improving visitors' brand preference. The brand attitude and brand preference findings reveal that, whilst visitors like art museums, they don't love them. One of the easiest ways to foster a closer bond with visitors is through social interaction and engagement.

The visitor survey findings also reveal that, in the absence of a deliberate brand image campaign, visitors have formed a somewhat positive image of art museums as educated, intelligent, imaginative, up-to-date and entertaining institutions. Moving forward, art museums should seek to emphasise their nurturing and engaging qualities. Many of these qualities are best exhibited by staff, as the organisation's greatest brand ambassadors, and reinforce the importance of social interaction in the art museum experience.

The institutional assessment phase of the project identified some serious problems and substantial opportunities for the sector. The data regarding exhibitions, attendance, resourcing and capabilities reveal that many art museums are spreading their limited resources across too many exhibitions and without the necessary capabilities. Offering fewer, but more targeted and well-resourced exhibitions may see a greater return on investment with the implementation of more efficient and effective marketing campaigns. In particular, without dedicated human resources to create engaging experiences that afford a high degree of social interaction between visitors and staff and that emphasise an exciting, inspiring and nurturing brand, the sector will continue to struggle.

Opportunities also exist in the areas of philanthropic funding, corporate sponsorship and commercial income streams. Such opportunities are inextricably linked to the sector's ability to develop a compelling and unique narrative that engages a wide range of stakeholders. Whilst many art museums have elevated the brand to a top priority and are committed to building the institution's brand, the ability to articulate the brand vision and share this amongst employees is less developed. This suggests that art museum directors may lack the necessary brand management tools to articulate their brand vision and engage staff in the process. The lack of a strong entrepreneurial orientation presents a serious risk for the sector in terms of its community engagement potential and sustainability. If art museums seek to improve their image then they must become braver, more proactive and innovative. Such an approach requires a deeper understanding of visitors' needs and the way in which competitors may be addressing such needs. Strengthening their market orientation may assist art museums in crafting a strong and distinctive brand image. Considering the sector's reliance on government and donor funding, a stronger focus on their needs will also help to ensure the survival of public art museums. Finally, institutional stakeholders were clearly correct in identifying greater collaboration as an opportunity. Given the trend towards the co-location of art museums with other cultural and leisure attractions, greater collaboration outside of the art museum sector could present interesting opportunities to engage with a larger and more diverse community.

The incongruity between visitors' and art museum directors' image of the art museum brand reflects the lack of any deliberate attempt to craft a brand image for the sector. This corresponds with the split personality identified in the institutional stakeholders' phase of the research and the range of images presented in the public focus groups. In the absence of a deliberate and overt brand image strategy, individuals will form their own impressions. Whilst the image most people have of art museums is quite positive, it is not strong, compelling or unique. The public art museum sector is, and can be perceived to be, nurturing, exciting and engaging. The sector is now presented with the opportunity to take control of its image and influence the perceptions of, not only visitors, but all stakeholders. The public art museum sector does have a unique and compelling story to tell, but it must be bold and take on the role of a town crier shouting this through the streets.

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