

Approaching Museum Shop Marketing from a Strategic Perspective

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Abstract

According to its contribution to the museum's revenue, retailing has become an important function in museums. The dual character of a federal museum's public contract and various changes in the education and leisure markets strongly impact the shop's marketing strategy and consequently the deployment of marketing instruments. This paper investigates visitor behavior in the store of the Kunsthistorisches Museum Vienna by non-participant observation and aims to advance understanding of the problems and consequences of applying an integrated marketing strategy to museums and their shops. The findings show significant differences between visitor groups in exploring products, identify an almost interaction-free sales situation and consequently demand for a comprehensive examination of the cornerstones of both, the shop's and the museum's marketing strategy.

Keywords: Museum, Retailing, Museum Store, Strategic Marketing

Approaching Museum Shop Marketing from a Strategic Perspective

Introduction

The concept of marketing was firmly placed in the context of museums by Rentschler (1999; Rentschler and Hede, 2007; McLean, 1994, 1995, 1997), the merits of its application and two related management styles, the custodial and the marketing approach or the shift from the museum's educational to a recreational function have been widely discussed (e.g. Kottasz, 2006; Rentschler and Gilmore, 2002; Rentschler, 2001; Sargeant et al., 2002; McPherson, 2006; Anheier and Toepler, 1998; Stephen, 2002; Mottner and Ford, 2005). Over the years the importance of museum stores in the overall life of a museum has changed (Mottner, 2007, p.141; Addison, 1993, p.4; Yorke and Jones, 1984, p.98; Goulding, 2000) from a small "afterthought" to an important museum function (e.g. a service supplier, Schaper, 1999, p.61) which has resulted in major revenue production in many cases (Mottner, 2007, p.141; for the German literature see e.g. Klein 2007, p.221f; Hütter and Schulenburg, 2004; John, 2000). Since one core objective of museums is to provide an education experience (McLean, 1997), shop managers are expected to support the museum's mission through appropriate retailing marketing strategies, i.e. the supply of products and services that aid in education, enjoyment (e.g. Kim and Kim, 2008) and the extension of the visitors' relationships with the museum (Kotler et al., 2008; Theobald, 2000). But instead of exploiting the shops potential as a part of the museum's overall marketing strategy, the strategic perspective has been widely neglected (Guintcheva and Passebois, 2009, p.4). In the corresponding literature museum shop marketing is mostly theoretically discussed and authors strongly agree upon the following vertices (Kotler et al., 2008; Mottner and Ford, 2005; Theobald, 2000): a museum shop should (1) be seen as an integrative component of the museum, in a sense the calling card of the organization; (2) support the achievement of the museum's educative aims and enable visitors to take away information about the collections and the museum; (3) consider its visitors' expectations; (4) address its activities to the broad public; and (5) contribute financially to the museum. A marketing strategy for the museum and hence its shop is defined as positioning so that it is customer focused, with appropriate orientation towards the marketplace (Andreasen and Kotler, 2003). Summarizing the particularities of the marketing situation of museum shops and given their important institutional role (Flam and Horst, 2004), it must be mentioned that European museum shops mostly are not subject to the same market forces as retail stores. Public funding and sponsorship alleviates the market forces and cause a specific marketing environment. Museums have to deal with dual objectives -financial and educational (Kotler et al, 2008, p.335)-, and for federal museums, the educational objective might explicitly be put first by law (e.g. Austria). Yet, these requirements shape the management's room for maneuver and influence a museum's shop marketing strategy essentially. Additionally, changes in consumer behavior (e.g. variances in people's leisure time spending; see Mottner, 2007, p.141f; Slater, 2007, p.94; Awoniyi, 2001; Guintcheva and Passebois, 2009; Thyne, 2001) and the relationships with other stakeholder groups have to be considered. Basically, the process of defining the marketing strategy for a museum shop has to start off with sound knowledge about the current visitorship.

Methodology

Museum marketing research is dominated by the collection of operating figures (for exceptions see Goulding 2000) and museum shops per se are very rarely of note. However, much of this research still can be criticised for not integrating the results in a coherent frame-

work (Gilmore and Rentschler, 2002, p.747). The questions for this field research were to identify how the visitors of the Kunsthistorisches Museum (KHM) in Viennaⁱ behave in the museum's shop and to discuss how the findings could assist in strategic shop management and its contribution to the museum marketing strategy. The museum store under investigation is located in the main building, can be entered after having passed the ticket-counter, and covers a sales area of 200 m² on two levels. Currently, the shop contributes well to the revenues (11% in 2007; KHM, 2008, p.265).

By means of non-participant observation, in the tradition of spatial trackingⁱⁱ, on a rough floor plan of the shop the movements of 749 visitors and their activities in the shop were manually recorded.ⁱⁱⁱ The sample consists of 93% adults and 7% young adults, whereas age was estimated and young was categorized as "definitely not a kid". As detailed in the following findings & discussion section, five parameters were considered to be of particular interest for analyzing the potential and the actual contribution of the KHM shop to translate the museum's mission into action: length of stay, exploration rate (number of physical contacts with products), interaction rate (number of interactions between visitors and sales assistants), welcoming and farewell (numbers of greetings by sales assistants) and number of buying acts (for behavioural research at the POS see Silberer, 2009).

Findings & Discussion

The KHM Shop Visitors' Characteristics & Behavioural Patterns

Explorers, buyers & non-buyers. The increase of the length of stay in a retail outlet is still seen as an important objective of store layout although a differentiated view particularly asks for the increase of product contacts and the boost of the exploration rates^{iv} (Scheuch, 2001, p. 236; Granbois, 1968). Anyhow, both parameters might be indicators for interest and a tendency to buy. The data reveals that 70% of the visitors leave the store within 10 minutes, and 40% are not staying longer than five minutes. On the weekends visitors are lingering significantly longer than on the weekdays. The buyers (37%) are staying significantly longer than the non-buyers. The total number of product contacts of the visitors is 6,445; with an average of 11.7 per buyer (1.0 per minute) and 6.8 per non-buyer (0.9 per minute). The length of stay correlates positively with the exploration activity; this fits well with the findings of Buber et al. (2004, p. 111ff). As shown in Figure 1, the most frequently investigated products are impulse items (Verplanken and Herabadi, 2001) and postcards (21% each), followed by art books (16%) and books about the KHM (10%). Interestingly, promotion articles of all categories arise very little interest (2% or less). Visitors who step in and out quickly (one to five minutes) mainly explore postcards (31%), impulse items & souvenirs (24%) as well as books about the KHM and its collections (13%), while the visitors who are lingering longer show a tendency to pick more art books and related literature. Considering that consumers under time pressure are more likely to purchase impulsively and based on their memories and experience (Iyer, 1989; Mattson 1982), retailers have to place those products in the front and in the back of the store which can be picked quickly and without particular cognitive efforts ("buy-time"; Sorensen 2003, p.34). The data indicates that exploring art books and specialist books takes more time. Hence, a convenient shop layout following the principles of evolutionary psychology (see e.g. Buber et al., 2004) as well as a product placement in the centre of the shop (Sorensen 2003, p.34) might be favourable.

Men & women. Although the empirical evidence about gender differences in buying behaviour is little, one is drawn to the conclusion that gender is an important variable for

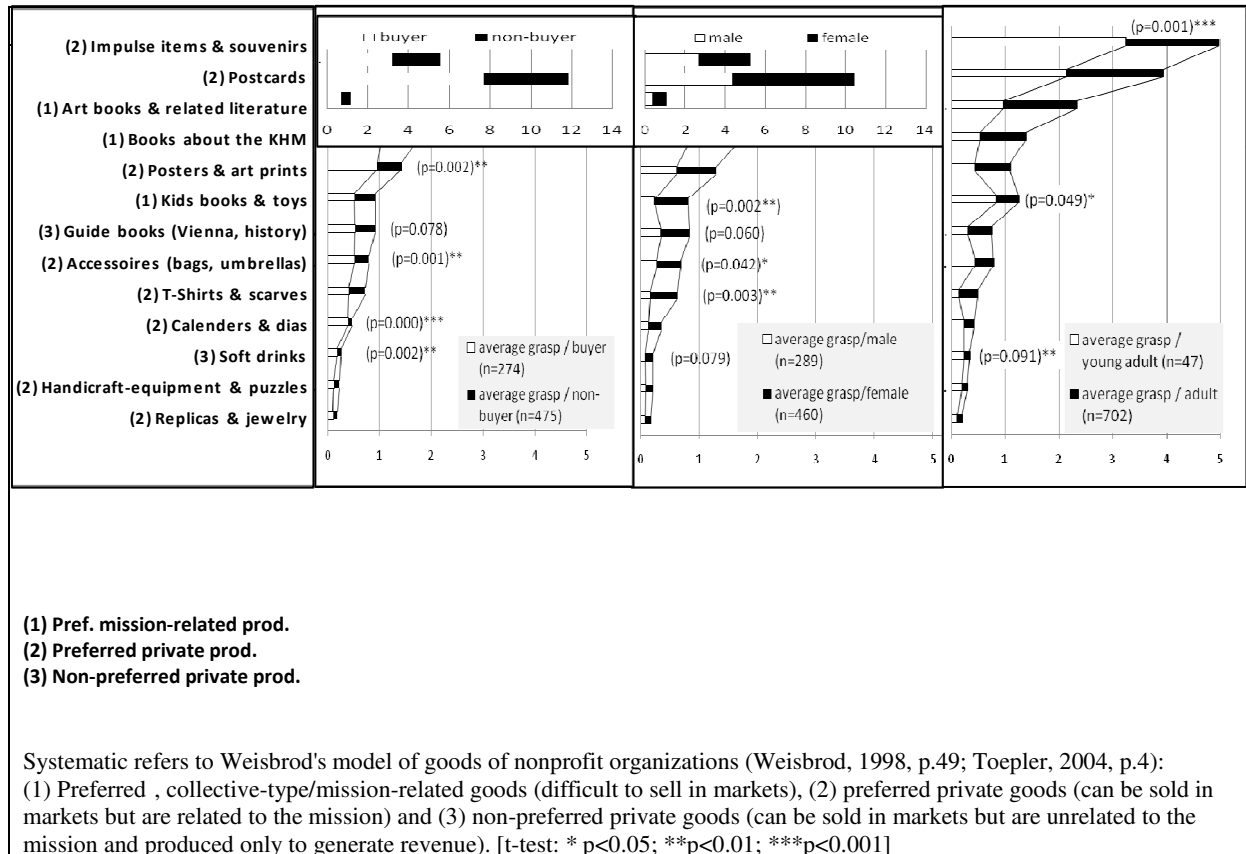


Figure 1: Exploration of products by the groups of buyers/non-buyers, males/females and young adults/adults.

shopping pattern analysis and for segmentation decisions anyway (e.g. Underhill, 1999). The majority of the KHM shop visitors are females (61%). On the average, women (61%) are exploring products more frequently (8.3 times/1.0 per minute) than males (7.4/0.9) and show a slightly higher purchase-ratio than the males (39:32%). All visitors share an average length of stay of nine minutes, but more men (47%) than women (37%) are leaving the shop within five minutes. The findings do not show a significant difference, but following Underhill (1999, p.99) it can be hypothesized that men in general might have a lower pass-through rate than women. Even so, contradictory results reported in the literature (e.g. Baldauf et al. 1997, p.108; Scheuch, 2001, p.195) indicate that the results are highly dependent on contextual factors like the retail sector, the type of store and culture-specific aspects. The majority of the men grasps five times or less (56%), while the majority of the women grasps six times or more (56%). Women grasp highly significantly more often at postcards ("pictorial" souvenirs, Anderson and Littrell, 1995, p.331; Littrell, Anderson and Brown, 1993), kids books/toys and textiles and significantly more often at guide books and accessories (Figure 1) and hence show a gender specific interest in particular product categories.

Young adults & adults. Data analysis shows a minor representation of the young (7%), and more than two thirds of them (67%) are female. They have the same buying ratio as adults (37%) and show no difference in the time spent in the shop but are engaged differently with the products. Their exploration rate is higher (average of 9.3:8.6 grasps; 1.1:0.9 per minute) and as Figure 1 clearly portrays, the young grasp significantly more the impulse items, kids books/toys and soft drinks than adults. These results might be considered as an indicator for little discretionary income (impuls items mostly feature high souvenir value and low prices, see Mottner and Ford, 2005, p.833) as well as for quite low interest in 'serious' art-related

items. Beside the requirement of a deeper knowledge about appropriate product contents and product designs (see below), shop managers might also have to rethink the presentation of the product-mix with respect to the needs and wants of young people (for suggestions see e.g. Rajogopal, 2009).

Marketing Strategy Implications

Market orientation - segmentation. Currently, the KHM shop misses out on attracting the young which accounts for about 25% of the museums visitors (KHM, 2009). If the shop is considered important for sustainable museum experiences in general and for the young in particular, alternatives in approaching different audiences are necessary, e.g. teachers could actively be treated as opinion leaders or fostering the “word-of-mouth advocacy” could be aimed (Helm and Kuhl, 2006). More basic research is needed to investigate the expectations and needs of the young and more effort has to be made to define appropriate services to support the museum's educational and commercial objectives for this target group and other groups as well. The analysis of museum visitor groups (e.g. the “existential”, the “aesthetic” and the “social” visitor identified by Goulding, 2000, p.843f; see also the description of audience research by Kelly, 2004; the audience building strategies discussed by Kotler and Kotler, 2000, p.275ff; or the discussion of values to position a museum by Scott, 2007, 2008) offers appropriate starting points in that respect. Knowing more about the museums visitors' satisfaction with the services, the collection's presentation, the facilities etc. (Harrison and Shaw, 2004) must be seen as the basis for working on a segmentation concept. To go beyond the fairly stable visitorship that includes regular visitors, tourists, and school groups (Kotler et al., 2008, p.335), non-visitor research (Kirchberg, 1996, 2000) might play a prominent role in the future. Additionally, from the market's point of view, the competitors positioning strategies (Voss and Voss, 2000) and instruments to improve the repeated visits (Burton et al., 2009) are also of concern.

Product orientation – assortment, store design, pricing. Empirically grounded data is necessary for a customer-oriented mix of services and products particularly for young people but also for other segments, e.g. families, which is ideally embedded in a long-term audience development strategy and in accordance with the segmentation's aims and needless to say with the mission. According to Weisbrod (1998), it is assumed that managers have preferences towards mission-related goods and might shy away from non-preferred or even preferred private goods to avoid negative utility from activities that might detract from the pursuit of the mission (Toepler, 2004, p.4; for details see Figure 1). However, these preferences would have to be evaluated in accordance with the museums mission, the assortment and the deployment of marketing instruments in the shop. In the case of the KHM shop, the preferred private products are not only the biggest but also the most explored (63%) group while appr. one third of all grasps is aimed at preferred mission-related goods (Figure 1). Given the appropriateness of the current product-mix, aspects of product placement, shop design, atmospherics (e.g. lighting, background music, colours) and customer personality-related issues (e.g. self-regulation, Babin and Darden, 1995; Baumeister, 2002; Sommers and Kernan, 1965/66) come into play and again have to be discussed regarding the museum's (shop's) marketing strategy aims. Additionally, store performance research (e.g. Kumar and Karande, 2000) undertaken for example by varying product placements in combination with pricing/promotional offers in the style of common experiments could help to learn more about the effectiveness and efficiency of museum shop marketing (e.g. Rentschler et al., 2007, p.168f, discussed the specific characteristics of price setting in the museum context). Summarizing, it can be hypothesized that via the shop's assortment the museum's contents

can be deepened, the educational aim of the museum can be supported, and the development of the museum brand can be boosted. It also emphasizes positioning the institution as visitor-oriented and allows to positively differentiate from the competitors' offers ("value added service").

Sales orientation – communication concept. Besides tour guides, shop assistants are often the only visible representatives of the museum (McLean, 1995) who in the course of a sales conversation allow for promoting the shop's assortment in order to push sales as well as advocating the museum's educational mission by helping the visitors to access the museum's collection through the respective products of the store. The findings reveal that the shop assistants interact with a strikingly low number of visitors (15%) which corresponds with Underhill's observations in other retail sectors (1999, p.37). In fact, 83% of all conversations in the KHM shop are initiated by the customer. The greeting behaviour of the sales people boosts that impression even further: 85% of the visitors are not greeted when entering the shop, and except of the buyers who usually get a farewell (86%), 90% of the non-buying visitors are leaving the shop without. Even in the checkout-procedures, 81% of the interactions between buyers and cashiers happen very briefly, almost without any interpersonal communication. Of the small group of buyers who are talking longer to the sales assistants at the checkout (19%) approx. two thirds are female. These findings in combination with previously discussed data (e.g. the length of stay data) allow for a deepened debate whether the lived sales concept consorts with the museum's mission, the positioning objectives and the visitors' expectations or if an enhanced proactive and customer-oriented approach of the sales personnel would contribute more to the financial as well as the educational mission of the museum. A comprehensive reflection on retail relationships needs to include the relationship between customers and the store itself as well as the brands that the store carries (Beatty et al., 1996; Macintosh and Lockshin, 1997). Summarizing, the shop and its communication concept can help to decrease the fear of entering the museum, to increase the publicity and in concurrence with the integration of new technologies it can lengthen the visitors' stay and intensify the exploration of products, social interaction and talk which impacts on the quality of visitors' experience of the museum as a whole (Lehn and Heath, 2005).

Limitations and Further Research

This paper clearly has limitations. Adding insights from the qualitative part of the study about the interviewees' attitudes towards the shop atmosphere, assortment, sales personnel etc. would lead to a broader and deeper understanding of the visitors' behaviour and allow for a richer explanation of the findings of the observation data. As there is a high likelihood that the customer is not separating the store experience from the museum collection experience (Mottner and Ford, 2005, p.833), the analysis of both would be needed to uncover their interplay. Last but not least, internal competition between the shop and other units of the museum has to be considered (Maltz and Kohli, 2000) because it "will necessarily have an effect on the manner in which museum resources are utilized, the nature of the museum strategies employed and consequently the performance outcomes realized" (Mottner and Ford, 2008, p.178; see also Izquierdo and Samaniego, 2007, 824f; Camarero and Garrido, 2008). Hence, the outlined discussion focuses the very first step of the development of an institution-based marketing strategy of a museum store. Further case study research on the practices of marketing strategy concepts could help to continuously develop a theory-based and empirically grounded framework for museum managers.

ⁱ KHM is Austria's most important art museum (1,298,572 visitors in 2007; 619,318 in the main building; bmukk, 2007), holds eight collections with its affiliated institutions and was listed 29th in The Art Newspaper's annual ranking of museums (Morris et al. 2008, p.24).

ⁱⁱ Because of rapid development of electronic data gathering techniques, studies on shopping paths more frequently deploy RFID technology (Path Tracker^R System, Sorensen, 2003; Larson et al., 2005), ComMeter^R (Buber et al., 2004), closed-circuit television (CCTV) (Newmann and Foxall, 2003, p.592) or use data from store's security cameras. However, in the KHM shopping carts or baskets are not offered and security cameras are not installed. Therefore electronic devices could not be applied unbiased.

ⁱⁱⁱ In addition, 581 interviews with shop visitors were carried out to learn about their attitudes towards the shop.

^{iv} Statistic data analysis: (1) Visitors' average length of stay on Weekdays=8.56 min.; Fri/Sat/Sun=9.73; t-test: $p=0.031$. (2) Buyers' average length of stay=11.49 min; non-buyers=7.74 min; t-test: $p=0.000$. (3) Grasping at products: $n=6,445$; average per person=8.6; most haptic person: 79 picks; average grasps per minute=0.94; $m=0.88$; $f=0.98$; buyer=1.02; nonbuyer=0.88; young adult=1.07; adult=0.94. (4) Length of stay and grasping correlate positive: $p<0,001$; $r=0.739$ Spearman's rho.

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