

Marketing Exhibitions: Will They Come?

June 2002



Smithsonian Institution

Office of Policy and Analysis
Washington DC, 20560-0405

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900 Jefferson Drive

Room 1278

Washington, DC 20560-0405

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FOREWORD

This paper is about the marketing of exhibits. It is a paper in a series of publications that focus on exhibits. It should come as no surprise that it is descriptive. There are no prescriptions, explicit or implied, relating to any of the approaches and methods described in this paper.

Over the past four months many people, both at the Smithsonian and throughout the United States, cooperated to make these reports possible. Museum staff in many institutions generously assisted the study. They provided information about their institutions, offered suggestions and recommendations for improving practice, and recommended other individuals and sources. We also want to acknowledge the many individuals who took the time to answer our questions and share their experiences and insights. The institutions are listed in Appendix C.

In the Office of Policy and Analysis, David A. Karns assumed overall responsibility for the study. Interviews were primarily conducted by Zahava D. Doering, who also assisted David with the writing of this paper. Andrew J. Pekarik reviewed a draft and offered many suggestions. Cynthia Kaufmann assisted with the bibliographic search and paper preparation. Jeff Sutton and Rebecca Riccitello also helped in the production of this effort.

Carole M. P. Neves, Director
Office of Policy and Analysis

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Introduction

One exhibition at a mid-sized art museum had 233,000 visitors while a second exhibition at the same art museum had 100,000 visitors and a third had 10,000. Why? A large part of the answer lies in marketing.

The first exhibition was the only regional showing of a collection of Egyptian gold treasures. As part of a joint effort, other local museums and botanical gardens presented IMAX films and exhibitions with the Egyptian theme. More than a quarter of the visitors to the treasures exhibition came from metropolitan areas more than a hundred miles away, all of which have their own art museums. The second exhibition was a traveling exhibition of Impressionist watercolors from a variety of Impressionist artists, mostly minor works. Most of the visitors lived in the local area. The third exhibition displayed a wide range of artworks by African-American artists. The exhibition curator was a well-known, African-American artist; the art was from his personal collection. Another art museum, in a comparable metropolitan area, showed the same African-American artworks. It followed a promotion strategy that included

\$300,000 in on-air advertising time and promotion through local LINKS chapters, an African American women's cultural association. A total of 53,000 visitors attended. The three exhibitions described here had different contents, different markets, and used different marketing approaches.

The subject of this paper, one in the Office of Policy and Analysis's (OP&A) series on exhibitions, is a discussion of "marketing" as defined by practices in museums, other not-for-profit organizations, and for-profit organizations. The focus of this paper is on incorporating marketing as an integral part of the exhibition-making process.

Marketing: The Concept

The American Marketing Association defines marketing as “...the process of planning and executing the conception, pricing, promotion, and distribution of ideas, goods, and services to create exchanges that satisfy individual and organizational objectives.”¹

In museums, marketing, often confused with advertising, encompasses: (1) designing exhibitions and other products to attract audiences; and (2) designing a promotion strategy to make potential visitors aware of the exhibitions and other programs through advertising or promotions (museum-paid or unpaid).

Marketing is not just advertising. The essence of a marketing orientation in museums is the effort to align the ways collections are exhibited to audience interests and behaviors, as well as to seek

the best ways to inform potential visitors that the museum has an exhibition that they will appreciate. Marketing is an ongoing process at a museum with a marketing orientation, since audience demographics, attitudes, and non-museum environments are constantly changing. For example, youth today have a very different education and lifestyle background from youth in the early 1960’s. The generation of Baby Boomers relates to organizations differently from the generation who were young adults during World War II, who expanded museum memberships in the 1970’s and 1980’s, and who are now dying off as museum members.²

¹ Dictionary of Marketing Terms, 2d edition, edited by Peter D. Bennett, published by the American Marketing Association, 1995. Definition is on the AMA’s website.

² The subject of dividing markets into segments is important in target marketing. Segmentation is described in more detail in Appendix A.

When Does Marketing Enter the Exhibition Process?

Our study shows that museums have three distinct approaches towards the role of marketing and the “market appeal” of exhibitions to visitors. At the top level, market appeal enters very early into the exhibition planning process and exhibition budgets include substantial paid advertising. These are museums with a “marketing orientation.” At an intermediate level, market appeal enters the exhibition planning process only in connection with an ambitious paid advertising and promotion strategy (paid and unpaid). This is the “advertising orientation.” The third, and lowest level, called here the “non-marketing orientation” does not consider market appeal and relies on unpaid promotions. These are the most unpredictable, since the museums do not control their placements. An occasional, limited purchase of advertising is also possible.

Museums, and commercial sources of museum exhibitions, that are most successful in attracting large audiences tend to have a “marketing orientation.” Marketing is a senior level position and is at the table when the senior leadership makes the decision to develop an exhibition. We did not find any examples where marketing vetoed initiatives; however, some marketing directors noted that poor market appeal made an exhibition idea less attractive to museum leadership. In a few cases, exhibitions were rented or developed primarily because of their market appeal.

Some saw this as a way of generating extra funds for the museums—funds that could be used to develop exhibitions on topics with “less market appeal” but closely related to the museums’ missions or important in relation to the museums’ images.

In contrast, museums with an “advertising orientation” wait until the exhibition opening approaches and then purchase advertising in the media that are most likely to reach potential visitors. Such museums tend to be successful in attracting large audiences for selected exhibitions, especially if marketing controls a large, central advertising budget that it can spend on the most popular exhibitions rather than allocating advertising expenses to all exhibitions. Museums with a “non-marketing orientation” occasionally deliver a large audience with the right exhibition and major unpaid promotions.

Smithsonian museums are, for the most part, non-market oriented with respect to exhibitions. The largest marketing budget for a Smithsonian developed exhibition was \$500,000 for *The American Presidency*, or five percent of the budget. Major campaigns at the Freer/Sackler Galleries of Art spent \$30,000 or less on advertising, including one exhibition that was marketing driven, *Sand Mandala. Xu Bing* at the Freer/Sackler Galleries of Art had a marketing budget of \$15,000. The promotional budget for a positioning campaign, *Zen in the City*, was

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\$30,000. The Smithsonian American Art Museum (SAAM) spent \$60,000 in promoting a *Sam Maloof* exhibition at the Renwick Gallery. If fully funded, SAAM will spend \$100,000, but more likely \$50,000, to promote its *George Catlin* exhibition. In contrast, another museum hosting the same exhibition plans to spend \$250,000.

Not surprisingly, some of the most well attended special exhibitions at the Smithsonian, such as *The Brain* and *Microbes*, both produced by Clear Channel, Inc., had advertising budgets over \$300,000. These amounts should be viewed in the context of the budgets of museums elsewhere. Museums consistently indicated that their advertising budgets for special, “blockbuster” exhibitions were about 25 percent of the total exhibition budget. For example, an exhibition like *Titanic* that costs less than one million dollars to rent has an advertising budget exceeding \$300,000.

Museums that regularly have well attended exhibitions tend to share certain institutional characteristics. One important characteristic is the location of the marketing function.

- In an audience driven museum organization, marketing enters the exhibition planning process early, helping to determine the market potential for exhibitions. The marketing function is at the senior level of museum management and may include public affairs, communications, and, possibly,

membership and development, i.e., functions that relate to external visibility in the world outside the museum. This organizational structure, the “External Affairs” model is present in about one-third of art museums but dominates in science museums and zoos. The key characteristic is a primary emphasis on attracting visitors. Some exhibitions are selected because of visitor attractiveness. Lack of market attraction, however, is never viewed as the sole reason to reject an exhibition because of longer-term agendas.

- In a more traditional museum organization, marketing enters later in the exhibition process, perhaps six to nine months before the exhibition opens, as part of the communications or public affairs strategy aimed at promoting the exhibition. In this case, marketing typically is located within a communications, public affairs, or development office.

Of course, there are exhibition production companies, e.g., Clear Channel, Inc., that deliver turnkey “blockbuster” exhibitions to client museums in part because the company has a marketing orientation, does the necessary up front research and spends sufficient promotional money to extend their market shares.

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Marketing in Museums That Do Not Charge Admission

Corporations use marketing to sell goods. Athletic teams and theaters use marketing to generate income by selling their available seats. Orchestras and operas also use marketing to raise income. Even colleges and not-for-profit social service organizations market. Increasingly, many museums have advertised special exhibitions, especially blockbuster exhibitions, to generate income that is used to mount more major exhibitions.

The typical performance measure of marketing success for admission-funded exhibitions is generating sufficient revenue to cover the cost of advertising and promotion and to pay for museum operations. The Smithsonian does not charge for admission or special exhibitions. Why should the Smithsonian museums market its exhibitions since the only direct pay-off to re-coup marketing expenses is income from stores, theaters, and food service?

Three Smithsonian museums are the three most visited museums in the world. Each year, millions of visitors come to Washington to visit the capital and see monuments, museums, and icons of America. This paper starts from an axiom that marketing will probably not greatly increase the number of Americans, or visitors from other countries, making major trips to visit Washington. The Smithsonian—located in the nation's

capitol—is a tourist destination, and additional marketing is unlikely to make the Smithsonian more of a destination. National and international visitation, constituting three-quarters of Smithsonian visits, is primarily driven by vacation cycles and trips to Washington rather than Smithsonian exhibitions. On the other hand, most local visitors are repeat visitors and one-third of non-local visitors are repeat visitors. Some Smithsonian museums would like to increase visits or to diversify audiences. The findings in this paper can help smaller Smithsonian museums think of strategies that will increase visits, especially of repeat visitors and visitors who live within a reasonable day trip distance from Washington. The findings can also help Smithsonian museums consider ways to attract new, non-traditional museum visitors and, thereby, further diversify audiences.

The director of external affairs at a major art museum summarized his view of the need for marketing as follows: “Our museum exists for the collections. Stewardship of the collections requires two things: Conservation and preservation of course, but also to let the collections do what they were created for, that is to provide the artist's view of the world. If we fail to encourage access to our collections, then we have failed in one of our two tasks.”

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The Decision to Visit an Exhibition

Marketing is designed to make visitors decide to visit an exhibition. The decision to visit a museum exhibition needs to be considered within the context of general consumer decision-making. Consumers consider three qualities of products when making a decision:

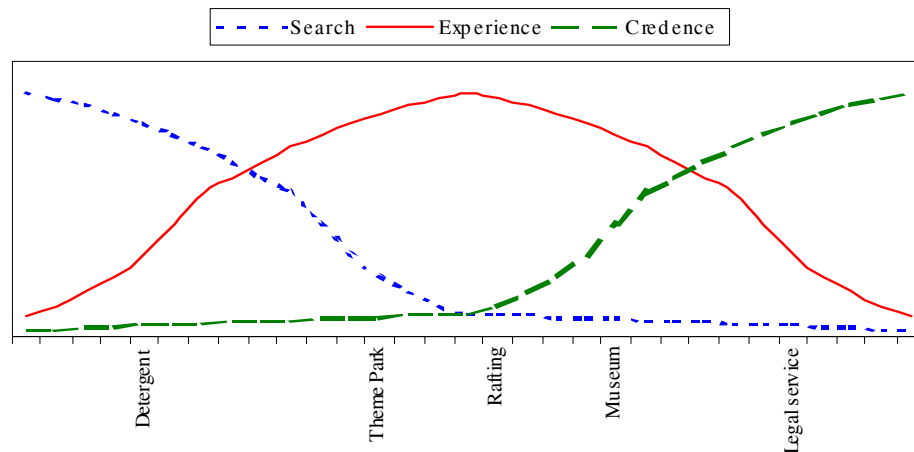
- **Search qualities.** These are specific features and benefits of a product or activity that can be easily and accurately evaluated before a purchase or decision. Such features may include price, size, capacity, time, and familiarity. The risk of making the wrong choice is small because an individual feels confident about his or her decision.
- **Experience qualities.** These are qualities that can be characterized only

after using a product or participating in an activity such as fun, engaging, spiritual, educational, and so forth. The risk of making the wrong choice is greater than with search qualities but less than with familiar experiences.

- **Credence qualities.** These qualities may be difficult to evaluate accurately even after using a product or participating in an activity. For example, an ordinary consumer would find it difficult to determine if professional services, such as medicine and law, could have been better. The psychological risk of making the wrong choice is high.

Museum exhibitions involve all three qualities, as do all products, activities and

Figure 1
Search, experience, and credence characteristics of consumer products



Source: Based on Figure 2-1 in Zeithaml and Bitner (2000), p. 31.

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services, but experience qualities dominate. (See Figure 1.) Visitors know upon leaving an exhibition whether they had good experiences and whether these fit with what they anticipated. Since they know what to expect, products in which the search qualities dominate are easy to evaluate and pose the least risk. Since they can predict whether they will or will not enjoy their experiences, an exhibition of Impressionist paintings is relatively easy for potential visitors to evaluate. Identifying an exhibition as Impressionist increases its search quality so that, along with price and location, a potential visitor can decide whether to visit or not.

A beautiful art object or an Impressionist painting or a dinosaur or the *Spirit of St. Louis* are things that a visitor can see and appreciate (search qualities). The visitor who feels that the admission charge is too high may avoid a museum. A visitor who does not like contemporary art or snakes or dead, stuffed animals may avoid a museum that is known to show such things (also search qualities). An exhibition of contemporary art, or other unfamiliar subject, may depend mostly on the exhibition's credence quality because a potential visitor does not understand the exhibition (lacks search characteristics) or does not have previous experiences with the art (lacks experience characteristics). The potential visitor has to place substantial trust in the decisions of the exhibition curator that the art is important to see.

One reason people visit a museum is to see the objects that experts have designated as "worth seeing." Better museums have "better" collections because their experts collect "better objects." The ordinary visitor accepts the authority and legitimacy of museum exhibitions, a form of credence or trust. The visitor is more likely to visit museums that he or she trusts more.

Independently of the relative significance of the search qualities and credence qualities, experience qualities determine visitor satisfaction. As in the case of credence qualities, a museum's experience qualities are informed by prior experiences, descriptions of the experiences, and expectations about the types of experiences provided by a museum.

According to Zeithaml and Bitner (2000), a product, i.e., an exhibition, that emphasizes experience qualities or credence qualities rather than search qualities affects the decision process used by potential visitors to search for information and evaluate alternatives:

- Information searches tend to rely more on personal sources, such as, word-of-mouth and recommendations, rather than advertisements.
- Information searches tend to be constrained by the increase in perceived risk of choosing an exhibition that will not be a satisfying experience.
- Visitors do not consider unfamiliar or "no-name" museums in planning visits.

- Emotion and mood influence decisions more than facts.

The objective of a museum that is attempting to use a marketing orientation to

increase visitation is to increase the number of potential visitors who primarily use search qualities in their visit decision. Two ways that museums have tried are blockbusters and branding.

The Blockbuster: Special Exhibition Attraction.

The philosophy of shifting attention from credence and experience qualities to search qualities lies behind the “blockbuster” phenomenon. The content of blockbusters is generally familiar to most Americans. In addition, the limited time that a blockbuster is scheduled creates sense of urgency, since it has to be seen before it disappears. Such exhibitions encourage word-of-mouth promotion as they become news events.

Starting with the “King Tut” exhibition in the 1970’s, most large museums have tried to schedule regular major exhibitions that frequently travel from one museum to another. Once an exhibition has been scheduled, the museum (or exhibition operator) prepares a communications plan to increase awareness in the target market and undertakes promotion activities. The museums have usually spent large sums of money to promote these major exhibitions. Interviews with museum marketing directors suggest that the promotion budget for a blockbuster exhibition will range between 15 percent and 25 percent of the total exhibition cost.

A major goal of a blockbuster exhibition in museums that charge for admissions is to generate revenue from four sources: (1) admissions; (2) store and restaurant sales; (3) membership; and (4) corporate sponsorship. The evidence is clear. Blockbuster exhibitions increase attendance and memberships by visitors who want to

short-cut general admission lines and receive discounted tickets. They also increase store sales and corporate sponsorships.

While many museums in the United States have had blockbuster exhibitions that attracted hundreds of thousands of visitors, Smithsonian museums rarely have exhibitions that greatly increase attendance beyond average seasonal visitation. Part of the reason is that it is difficult to significantly increase visitation in a museum with more than six million visits annually. For example, a blockbuster that attracts 250,000 visitors in a three-month period in a museum with an annual visitation of 500,000 is considered an extraordinary success. A similar increase in attendance at the large Smithsonian museums would hardly be noticed.

An alternative to what is generally considered a blockbuster is the presentation of an exhibition that is somewhat out of kilter with the museum’s normal fare and using it as an audience “hook.” In those cases, increasing museum success results from either attracting larger numbers of visitors in current audiences or adding visitors from additional audiences. For example, *Star Wars: The Magic of Myth* originated at the National Air and Space Museum. In addition to NASM, the exhibition traveled to seven museums. Five were art museums (San Diego Museum of

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Art, The Minneapolis Institute of Art, Museum of Fine Arts, Houston, Toledo Museum of Art, and Brooklyn Museum of Art), one was a natural history museum (Field Museum of Natural History), and one was a science /design museum (Powerhouse Museum).

Some of the art museums tempered criticism for accepting the *Star Wars* traveling exhibition by tying their permanent collections to the exhibition theme. As the Museum of Fine Arts, Houston website says, “Take a free, self-guided tour titled The Journey Continues..., and explore paintings and sculptures in the MFAH collection that echo the universal themes and symbols of The Magic of Myth.” The Minneapolis Institute of Art (MIA) also used this strategy. Minneapolis consciously opted for the exhibition because the museum leadership felt that their normal visitation was biased towards women and did not include large numbers of children. *Star Wars* would attract men, especially some who would visit with their sons, a market that was under-represented in the museum’s normal visitor profile. The strategy worked. MIA expanded visitation by drawing a new market segment with this exhibition.

Many museums are seeking alternatives to “blockbusters.” However, one public relations/marketing executive at a major art museum sees a sharp discrepancy between “the philosophy that museum directors and curators believe and espouse and the strategy they implement.” He went on to say

that his art museum needs either one blockbuster a year—an exhibition that draws 40 percent above normal—or several mini-blockbusters to make ends meet. He is looking for exhibitions that “are guaranteed to bring in 250-300,000” to increase attendance from 1.3 million to about 1.8 million, especially since September 11.

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Branding Museums: an Alternative to Special Exhibitions

Many museum marketing directors feel that blockbuster exhibitions have oversold the “unique, time-limited” experience, and devalued “everyday” experiences derived from permanent collections. The evidence is clear that blockbusters have trained museum visitors to look for spectacular and extraordinary exhibitions. Implicitly, as the San Francisco Museum of Modern Art (SFMoMA) marketing director, Jay Finney, contended, at the 2001 American Association of Museums convention, blockbusters have devalued the permanent collections in the minds of museum visitors. Visitors come to a blockbuster and join, but the museum staff that OP&A staff interviewed, universally felt challenged to sustain visitation and membership without blockbusters. One effort to move from the blockbuster phenomenon has been museum “branding.” Essentially, branding is a way to convert credence qualities and experience qualities into search qualities.

A branded commercial product can charge a higher price than a generic product because consumers trust it. Consumers know what to expect; what the product promises. Naill Cladwell said in writing about museum brands, “The essence of a successful brand is its high level of name awareness and the positive associations which attach to the name and are called to mind by the name. ... The equity value embedded in the name gives a guarantee (in a weak sense) that the

... experience offered will be of a certain quality.”¹

Consumers use their familiarity with brands in making decisions, especially whether to ignore or screen out some brands from consideration.² Museums as a whole are a brand, specific types of museums are a brand, and the individual museum is a brand. Thus, visitors to an exhibition have screened their visit on the basis of the museum brand, the type of museum brand, and the individual museum brand, even before thinking about the exhibition. Among regular museum-goers, it is not difficult to elicit a description of the image, or brand essence.

“Branding” is a hot buzzword in the museum profession. All museum branding efforts, identified in the course of this study, involve an integrated communications strategy so that all communications from a museum look like they came from the same source. In addition, some museums have adopted, or are considering, guidelines for exhibitions, signage, and visitor services to visually produce a single mental image. The branded museum attempts to project a single image in the minds of audiences, that is, a coordinated message about the type of experiences that the museum will provide. The goal is to build on positive associations in potential visitors’ minds to make it easier

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for exhibition promotions to get through the brand screen.

Commercially, branding includes the design of products and services that are congruent with the essence of a brand's image in the minds of consumers and employees. As museum branding efforts advance, they also include exhibitions, films, stores, and buildings, as well as communications that support their brand essence.

One director of external affairs of a major Midwestern museum is using branding to move towards season-long visitation similar to a symphony subscription and away from large blockbusters. Her goal is to use special exhibitions to secure members who will be active yearlong. She is selling subscriptions to the entire year's exhibitions. Her approach appears evangelical. Rather than spending money calling members about renewing, telephone numbers are collected from non-members who are contacted within a few days of visiting. The conversion rate is roughly 50 percent. In this scenario, the attempt is to even out visitation throughout the year and use blockbusters primarily to stimulate new memberships, and steady, continuing income, rather than to generate a large share of operating income episodically. She's converting experience qualities into search qualities, by promising that future visits will provide equally satisfying experiences as the first visit did. The overall quality that is being sold is to see the world through the eyes of different artists so that a visitor can

experience artworks from diverse periods and schools.

During interviews, several art museums were mentioned frequently as having done a good job of branding: Guggenheim, Museum of Modern Art (MoMA), Metropolitan, Museum of Fine Arts, Boston, Getty, Whitney. The Guggenheim's original branding centered on its distinctive, Wright building combined with an integrated communications strategy. As the Guggenheim felt pressure from growing collections and space constraints, it opted to spread its collections across several new "Guggenheim" museums around the world and, thus, became a world brand. All the offshoots have the same name, to enhance worldwide recognition for the newer museums. The other art museums cited in this paragraph remained one museum but extended their brands to cover retailing operations rather than franchising.

Other museum organizations operate differently. For example, the Carnegie Museums of Pittsburgh has four museums, three of which are called Carnegie (Art Museum, Natural History Museum, and Science Center) and the Andy Warhol Museum. As the Carnegie website says, "Individually, each of the Carnegie museums displays and interprets the world through its own unique lens of art, science, and natural history. Together, we share a common vision: To set, with uncompromising quality, the national standard among museums for integration

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into the communities we serve, for our mutual advancement.”³ Each of the museums has its own marketing director and its own distinctive image, while the central office markets the totality.

The names of the museums reflect how much using the “brand” name strengthens the market attraction of an individual museum. For example, in the case of the Carnegie Museums, the Andy Warhol Museum draws a different audience than the other museums and has its own, unique presence within its core market.

Within other industries, companies make similar decisions whether to uniformly use the brand name for all subsidiaries (Six Flags), allow distinctions between subsidiaries but attach the brand as a tag (Paramount’s Kings Dominion or Courtyard by Marriott), or to use separate names for subsidiaries (Jaguar and Ford). The choice of how to use the master brand as compared with subsidiary brands is called the “brand architecture.”⁴ The brand architecture essentially depends on two questions: (a) does the subsidiary museum appeal to a distinct audience? and (b) how much should the subsidiary museum share central values and design philosophies?

The answers to these two questions determines whether museums primarily draw on the master brand to attract audiences (e.g., Carnegie Museum of Art), primarily draw on its own brand to attract audiences (e.g., Andy Warhol Museum), or

draw its own audiences while drawing additional audiences because of its connection to the master brand (e.g., The Carnegie Science Center). The same two questions apply to how other non-museum operations such as traveling exhibitions, education programs, membership programs, catalogs, magazines, stores, and restaurants are tied into the “brand architecture” to maximize attraction across all operations associated with a museum brand.

Management of a museum’s overall image and market position should be part of its exhibitions philosophy. Should a Smithsonian unit emphasize the Smithsonian brand or its individual identity? What is the Smithsonian brand? What quality can be or should be associated automatically with every use of the Smithsonian name? According to the head of a leading academic advertising center, the Smithsonian brand stands for “authority, authenticity, and large scale.” If this is true, museums that want to use the Smithsonian brand to attract visitors need to be faithful to the master brand and should be authoritative, authentic, and large. It will take research to verify that this is the brand and to detail exactly what is meant by “authoritative” and “authentic.” Museums that wish to establish and maintain their own brands would be free to deviate.

Likewise, smaller museums can acquire some of the aura of the Smithsonian brand through programs such as the Smithsonian Affiliations Program. Affiliate museums may themselves be small or new, but they

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can draw on large, authentic, and authoritative resources.

¹ Cladwell (2000), p. 29-30.

² Johnson, et. al., (1997).

³ Carnegie Museums of Pittsburgh web site.

⁴ Interview with David Martin.

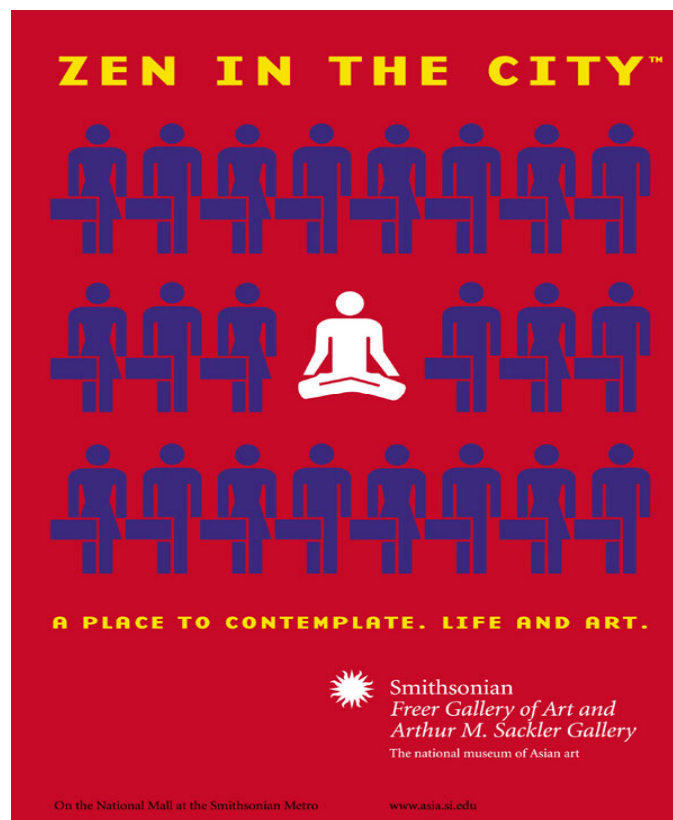
Experience Marketing as an Overall Strategy

Many marketers have accepted the view that marketing success results from letting consumers have an “experience” in using a product. This “experiential marketing” is postulated as the basis of the success of significant brands such as Nike, Virgin Airlines, British Air, and Four Seasons Hotels. Marketers in the hospitality, entertainment, and education sectors attempt to emulate their successes by giving

consumers satisfying, total experiences.

Experience marketing moves beyond the assumption that visitors are rational decision makers who weigh the relative costs and benefits of visiting a museum by evaluating search, experience, and credence qualities. Experience marketing seeks to engage as many of the five senses (seeing, touching, hearing, smelling, tasting) as possible to

Figure 2
Bus stop poster from “Zen in the City” experience marketing campaign



Source: Freer/Sackler Galleries of Art

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support “feeling a connection” to a product or brand. Customer loyalty is built on an irrational commitment that derives from that feeling.

Experience has played an important role in the marketing of outdoor leisure activities such as white-water rafting, skiing, and spelunking. Outdoor retailers like Recreational Equipment, Inc., (REI) and Cabella’s build mountains in their stores to help customers achieve an outdoor experience, perhaps by climbing the mountain face. Attractions like Colonial Williamsburg try to immerse visitors in an “authentic experience” of the past. Disney offers entertaining, comforting, reinforcing, validating, happy, nostalgic (but not challenging, transforming or threatening) experiences. Disney attempted to minimize all factors that might detract from the visitor’s overall satisfaction, e.g., creating an underground network of tunnels to supply food service stations so that visitors would not see trucks and carts.

The Canadian Museum of Civilization, an early adopter of the “Disney” approach in the museum world, emphasized improving the entire visitor experience. A recent survey of museum websites showed that almost half of the sites (42%) indicated that visitors would have “experiences.” Most of these are science or children’s museums although even some art museums are now marketing “experiences.”

Some Smithsonian museums have actively marketed experiences. The Freer Gallery of Art and Arthur M. Sackler Gallery have positioned themselves as “a place for reflection, contemplation, and relaxation” with the tagline, “Zen in the City.” (Figure 2) A very popular, visitor oriented exhibition recently involved the construction of a sand “Mandala of Reconciliation” in the gallery by Buddhist monks. The construction was shown on a web cam. Each day, the construction started with prayers. This exhibition attracted 46,000 visitors over two weeks. Visitors were lined up outside the museum hours before opening to see the conclusion of the mandala and its destruction.

Focusing on the total experience of a visitor, rather than the content of a museum, puts an exhibition visit into a larger context involving environmental aspects such as cleanliness, construction, lighting, materials, crowding, temperature, seating, sounds, smells, and so forth. It also raises questions about amenities that can affect a visitor’s perceived overall experience in an exhibition (e.g., parking, staff attitudes, restrooms, food facilities, and wayfinding in the museum). This experience context, sometimes called the servicescape,¹ has been shown to greatly affect customer satisfaction and behavior in retail stores. There is reason to believe that museum visits are equally impacted.

Several challenges face museums that market themselves as experience venues.

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Museums can offer a range of experiences to visitors but should maintain a mix of experiences in exhibitions. Some types of satisfying experiences may be incompatible in the same space. For example, a space that accommodates reflective experiences for some visitors may not be able to support social experiences for other visitors. Exhibitions designed to satisfy the cognitive needs of some visitors may not support the desires of other visitors for pure object experiences. In addition, visitors will seek to construct a variety of experiences even if an

exhibition is designed to support only one experience type.

If visitors are led to expect a wonderful, satisfying experience in a museum exhibition, the museum needs to meet the expectations by delivering promised experiences. Disappointed visitors will be less likely to visit in the future.

¹ Zeithaml, et. al., (2000), chapter 10.

New Directions: Viral or “Guerilla” Marketing

Internet marketing is a rapidly growing activity, especially as museums try to attract younger visitors. One version of Internet marketing requires the collection of email addresses from visitors or potential visitors. Bulk mailings of notices about exhibitions and events can be sent inexpensively and targeted to personal subject matter interests using opt-in lists. The lists can also be used to send communications to maintain a continuing relationship. Several museums are currently collecting visitor addresses through email post cards sent from the museum. The Smithsonian Associates (TSA) has found that sending email notices of upcoming events, produces ticket sales before general catalog mailings.

Another, more interesting variant of Internet marketing is called “viral marketing.” The National Park Conservation Association (NCPA) was involved in fighting to prevent unlimited snowmobile use in Yellowstone National Park. An NCPA staff member saw the potential of using a game to draw visitors to the NCPA website and be exposed to information about the danger of snowmobiles. In turn, visitors might write letters in opposition to a proposed environmental impact study that would permit snowmobiles. The Yellowstone part of the NCPA website developed a game that allowed visitors to move a bear around and throw snowballs to destroy marauding snowmobiles. NCPA’s hope was that website visitors would become engaged with

the game and mail the bear URL to other users. New users would also see the Yellowstone information and either go to the main NCPA site or write letters. Thus, the NCPA website could spread its message like a self-replicating virus without any further NCPA action. While the NCPA does not have any direct information about the effectiveness of its viral marketing strategy, many visitors first hit on the game and then link to the main site. In addition, the number of letters opposing the environmental impact statement increased after the bear game was put on the NCPA site. The game only cost about \$7,000 to create.

A few museum organizations (such as the National Zoo, the Bronx Zoo and the Art Institute of Chicago) have put games on their websites. Some museums have websites that are designed to “lure” visitors through information and fun. The Bronx Zoo game website, “Kids Go Wild!” has been selected as a “best pick” environmentally friendly game for children by CARE2, an environmental advocacy organization. Roughly 7,000 of the 12,000 unique visits to the Bronx Zoo website enter directly through the game. In addition, the zoo has tied a game to its *Congo* exhibition and plans to do the same with its proposed *Jaguar Mountain* exhibition. Although commercial firms have been using viral marketing for several years, there is little information to confirm its effectiveness in bringing visitors to an exhibition. The Getty

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used a website to promote its exhibition, *Devices of Wonder: From the world in a box to images on a screen*. The website allowed visitors to “play with an array of the exhibition’s artful eye machines.”

Viral marketing is a way to reach one market segment that traditionally visits themed parks and entertainment and outdoors activities more than museums, i.e., young adults. It may also be more effective in reaching young adults than another set of tools used by museums: advertising.

Communications to Target Market Segments

Museums use a mix of promotional activities and tools and strategies to reach the target markets for exhibitions. Different promotion strategies based on brand architecture and target market segment may be used to increase visitor attraction. The mix combines six types of promotional strategies:

- **Marketing to organized groups**, such as tour, school, and other groups.
- **Promotions** that are free, or relatively inexpensive, to the museum but may be controlled by other organizations. These may include public service announcements, barter arrangements, free static displays at bus stops, free media, music or family events not at the museum, outreach efforts through community and neighborhood groups, and cause-advertising (sponsor-paid and identified).
- **Strategic marketing alliances** with convention bureaus (Washington Convention and Tourism Center or Virginia Tourism Corporation), hotels, media (Discovery Channel or History Channel), other local museums and tourist attractions (Mount Vernon, Colonial Williamsburg, or America's Aviation Adventure), and other not for profit organizations (National Geographic or American Association of Retired Persons).
- **Point-of-visit (POV) activities** including exterior banners, signs, and

on-site information kiosks. Museum-sponsored events at the museum or another location also are included in this category such as family days. POV promotions do not draw visitors to the museum, but rather, can modify the exhibition preferences of visitors who are on-site. The primary value of a POV promotion is in increasing visitation to long-term, less visited exhibitions rather than increasing museum visits.

- **Direct response marketing** in which the museum communicates directly to a potential visitor one-on-one. Examples include direct mail, telemarketing, coupons, and Internet and web communications. Only one museum that the study team contacted used direct mail in its local area to promote a temporary exhibition. Another bought membership lists from major museums within a day's drive and mailed exhibition announcements. At the same time, most museums buy address lists as part of member recruitment.
- **Paid advertising** including newspaper, radio, television, magazine, billboards, static displays, direct mail, printing brochures/flyers, and events.

The core of each of these strategies is to create "buzz" about the exhibition, essentially word-of-mouth promotion in which potential visitors do the promotional activity for the museum.

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All marketing directors use a mix of promotion types. Traditionally, advertising and promotion strategies are believed to increase awareness followed by persons deciding to visit. Any type of promotion that increases awareness should increase exhibition visits. The major consideration is reaching a large number of potential visitors with some interest in the exhibition and the opportunity to visit.

The promotion mix will consist of promotions that are paid and unpaid by the museum. The museum can specify the placement and nature of its paid promotions. Unpaid promotions may be well placed or poorly placed at the discretion of whoever is paying. For example, public service announcements (PSA) have been a traditional standard for non-profits since PSA's are free. Unfortunately, the announcements may be run at off-times when the media have airtime that has not been purchased by advertisers. Similar conditions hold with regard to free signs on the backs of bus stops. Co-marketing or sponsored advertising where a corporation purchases an advertisement for a museum with the corporate logo attached will normally be placed where awareness of the relationship between the museum and the corporation will do the most good for the corporation.

Smithsonian museums have depended on unpaid promotions such as critical reviews and free metro signs, rather than large amounts of paid advertisements.

Smithsonian promotion budgets for museum-marketed exhibitions tend to be quite small. Even institutional promotion budgets are small compared to other museums and organizations.

In general, paid promotions are more effective in attracting audience, but not necessarily more cost effective than unpaid promotions. The cost of advertising is tied to the number of persons that will see the advertisement, that is, its Gross Rating Points (GRP). Of course, a prime time advertisement during a first run episode of "Friends" or "60 Minutes" costs more than an advertisement on early morning cable because the GRP is greater.

Every museum marketing director that we interviewed said that advertising works in increasing exhibition attendance. All claimed to believe that the effectiveness is a factor of the number, placement, and frequency of advertising. A detailed discussion of advertising alternatives, e.g., newspapers and media, is in Appendix B.

Observations

It is possible to attract significant audiences to special, temporary exhibitions. Effective exhibition marketing involves:

- Determining the target audience and determining visit potential early in the exhibition planning.
- Researching exhibition aspects that will attract the target audience. Such research includes evaluations of prior exhibitions.
- Determining the mix of advertising and unpaid promotions that will reach the target audience.
- Spending an adequate amount of money on advertising to create market awareness throughout the exhibition's run, but not spending too much advertising money on exhibitions with limited audience potential.
- Advertising to increase brand awareness and generate visits to the permanent exhibitions.

An effective marketing plan for a successful exhibition answers six questions.

1. What is the indicator (and target level) of a successful exhibition? That is, what are the audience, revenue (admissions and store sales), and other targets?
2. What are the exhibition's target markets? That is, who is likely to be interested in the exhibition?
 - How large is each target market and where is it located?

- How likely is it that the target market will visit the exhibition? What is the right target group?
 - What about the exhibition will attract the target market by filling a perceived need or providing a desired experience? What is the right message to reach the target group?
3. How does the exhibition fit into the overall brand image of the museum?
 4. What mix of promotion tools will be used to create awareness in the target market?
 - How effective are the promotion tools in reaching the target markets?
 - How much will the overall mix cost?
 5. What is the total budget that will be available for promotion activities?
 - When will the money be available for expenditure?
 - Where is the money coming from?
 - Who has responsibility for reprogramming expenditures if necessary?
 6. What are the projected attendance and visitor services requirements?

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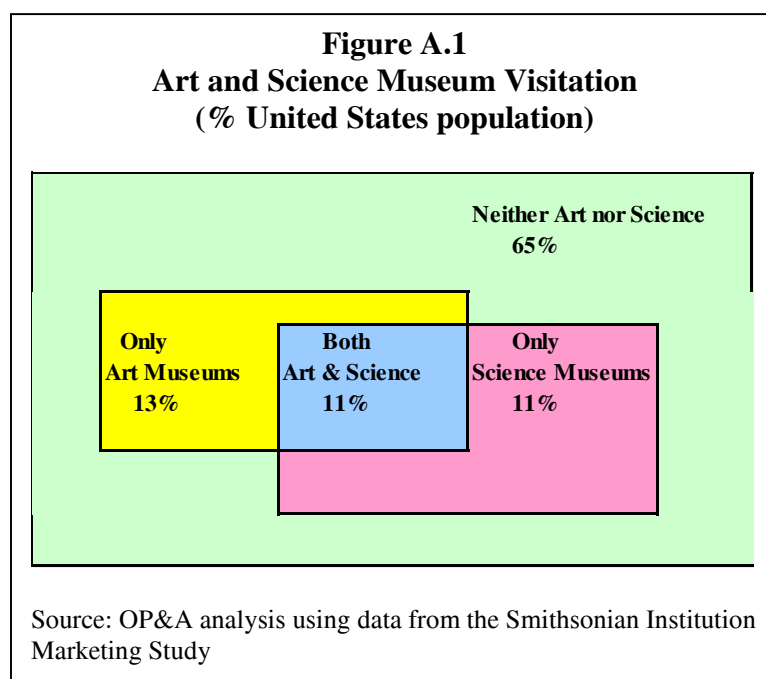
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Appendix A

Segmenting Museum Audiences

Museums open their doors to all people, but visitors do not divide their museum visits equally among the different types of museums, e.g., between art and science museums. A 1994 national telephone survey found that 65 percent of the adults interviewed had not visited any science or art museum during the previous year. However, 11 percent attended both types at least once and equal percentages, about 12 percent visited one type, but not the other. (See Figure A.1) The survey also showed significant differences among the types of museum visitors who attended each of the four major museum types (art, science, natural history and zoological parks/aquaria) with respect to education, age, attendance at sporting events, etc., However, the greatest differences were between persons who never visited at all and those who visited at least one of the two types. (See Tables A.1-A.4)

Because, as data show, some groups of people are more or less likely to consider visiting a specific museum type than others, museums often focus on a few potential audience “segments.” The strategy of dividing up populations by into smaller groups defined by one or more of several audience characteristics is called “segmentation” in marketing; the groups are called “segments.” Those segments are expected to be easier and less expensive to attract.



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Table A.1
Education by visitation to an art museum or science center

Education	Art and Science Museum Visits			
	Neither (%)	Art (%)	Science (%)	Both (%)
No high school	31	14	19	8
HS graduate	40	22	29	21
Some college	11	21	12	19
Assoc degree	5	6	9	7
Bachelor degree	9	23	19	29
Advanced degree	4	13	12	17
Total	100	100	100	100

Note: Totals may add to more or less than 100% because of rounding.

Table A.2
Topics of major or special interest by visitation to an art museum or science center

Special interests	Art and Science Museum Visits			
	Neither (%)	Art (%)	Science (%)	Both (%)
Business	13	14	12	9
Liberal Arts	46	54	48	61
Science	45	37	58	45
Health	12	11	17	9
Education	4	4	3	5
Fine arts	7	16	3	9

Table A.3
Age by visitation to an art museum or science center

Age	Art and Science Museum Visits			
	Neither (%)	Art (%)	Science (%)	Both (%)
18 to 19	4	4	9	4
20 to 29	19	24	18	22
30 to 39	20	15	27	23
40 to 49	14	17	23	24
50 to 59	12	8	10	9
60 & over	31	32	13	18
Total	100	100	100	100

Table A.4
Activities during the past year by visitation to an art museum or science center

Activities during the past year	Art and Science Museum Visits			
	Neither (%)	Art (%)	Science (%)	Both (%)
Visit historical museum	25	52	53	69
Go to natural history museum	6	19	29	51
Visit zoo or aquarium	35	57	71	69
Go to commercial art gallery	8	28	14	33
Make arts, crafts, pottery	30	35	38	34
Attend classical music	11	39	23	51
Attend live jazz performance	10	30	20	33
Attend sports event	38	52	61	64
Take part in sports activity	40	50	61	68

These segments are used to understand motivations and to plan more effective communication strategies. Among the most important segmentation characteristics are:

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- **Benefits.** Many museums implicitly segment markets by offering choices among benefits that are offered. Discounts appeal to bargain hunters and value seekers. Privileged access to curators appeals to sophisticated persons. Member publications appeal to information seekers. Cooperative admission and discount packages with other museums appeal to travelers. Discounts with neighborhood businesses appeal to local residents. Formal balls appeal to persons who enjoy conspicuous cultural connections. Great exhibitions appeal to visitors with topical interests. For example, the Cooper-Hewitt, National Design Museum considered negotiating discount packages with neighborhood restaurants and stores to attract more local members. The Chicago Park District asks museums to have one free day per week as a condition of continuing funding.

- **Demographics.** Studies of museum audiences consistently find that museum visitors are more educated than the general United States population. Consequently, college graduates are often targets for membership, fund raising, and advertising. In addition to education, museums use age, gender, ethnicity and race, income, marital status, occupation, and children as ways to select targets for appeals.

- **Consumer behavior.** Not-for-profit organizations have exchanged or sold membership lists to other organizations because they felt that each other's members are good prospects. For example, art museums often buy (or share) lists of local symphony subscribers or public radio members. This also occurs when a museum advertises in selected media such a hip-hop radio station or alternative publications (*City Paper*, *Time Out*, etc.)] The Museum of Modern Art, San Francisco (SFMoMA) designed a segmentation strategy that divided audiences into three groups that differed by level of modern art sophistication (SFMoMA members, Culturally Active, and Entertainment Seekers). SFMoMA then developed a media campaign to attract Entertainment Seekers.

Results from the 1994 Smithsonian marketing survey (presented in Figure 1) support the belief that people who go to a science museum (but not an art museum) share more characteristics with art museum audiences than they do with people who do not go to museums. Segmenting populations by museum visitation is an effective way to define another museum's most likely visitors. The most likely visitor to a Smithsonian Institution museum on the Mall is someone in another museum on the Mall.

- **Geography.** Museums frequently use direct mail or mass media to reach persons living in a certain community or neighborhood. Some specifically target geographical areas in attempting to stimulate exhibition attendance, e.g., by advertising in the *New York Times*.

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More museums use local newspaper sections or inserts to reach people living in a specific area, especially during membership campaigns.

- **Lifestyle.** Lifestyle and psychographic clusters are presently used by very few museums to develop audiences. However, several museum marketing directors commented that they, or their marketing partners, are considering cluster segmentation. Beginning in the 1980's, commercial research organizations began to use the increasing power of computers, increasing amounts of consumer information from banks and other firms, and census data to develop lifestyle/psychographic segmentation models based on consumer attitudes and purchase patterns. The models identified lifestyle "clusters." Clusters were tied to geographic areas based on research showing that people behave more like people who live near them than people who live in very different areas. With increasing computer power, the geographic areas that could be identified became smaller, going from zip codes down to census block groups and single buildings or blocks.

Some museums have used lifestyle segmentation to target individuals who would be most likely to visit or join. For example, the Smithsonian Associates identified likely members using segments defined by a commercial firm (MicroVision) and then purchased a list of residents who were most likely to be prospective members. A southern science museum mailed a promotion to persons living in areas that matched its member profile. Both efforts were successful.

Museums segment markets to reduce the costs of marketing to people who are unlikely to visit. As marketing sophistication increases in museums, they are more likely to target appeals to smaller groups based on a combination of lifestyle, specific benefits, and geography using database marketing or "continuing relationship marketing" (CRM). CRM is widely practiced by banks and groceries. The company constructs a history of products bought by a customer by using a grocery "valued-customer" card. With the information, the company has a better idea of what products should be clustered together, because they are frequently bought together. In addition, the company can target specific promotions to specific customers. OP&A staff did not identify any museum that is currently using this sophisticated approach. However, in an earlier OP&A paper,¹ we concluded that several art museums will soon be able to implement CRM. These museums are able to collect data on member visitation and purchases in a marketing database.

¹ Smithsonian Institution, Office of Policy and Analysis (October 2001) "Audience Building: Marketing Art Museums."

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Appendix B

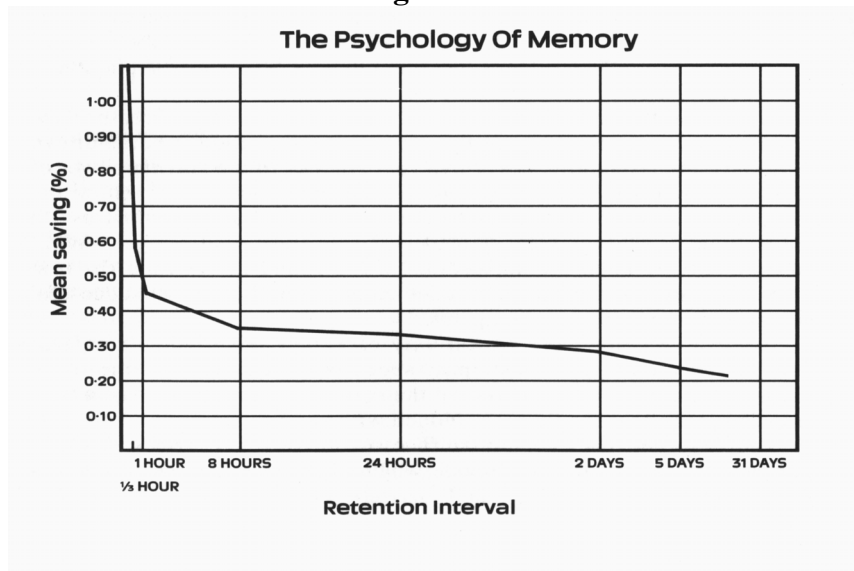
The Power of Advertising

Advertising, that is, museum controlled creation and placement of paid messages in newspapers, magazines, radio, and television is the most effective means of increasing awareness of exhibitions. It also is expensive.

The New York Times, and other newspapers of record, plays an interesting role in the advertising of exhibitions. Several marketing directors indicated that major museums must advertise in *The New York Times* to establish legitimacy as major actors in the museum world regardless of whether the advertisements generate additional visitation. One marketing director said that the *Times* worked better in attracting symphony patrons from a New Jersey community than the local newspaper, in part because of its elitist position. Another director indicated that inserts in the local distribution of the *Times* in an upper Midwest community stimulated local exhibition attendance.

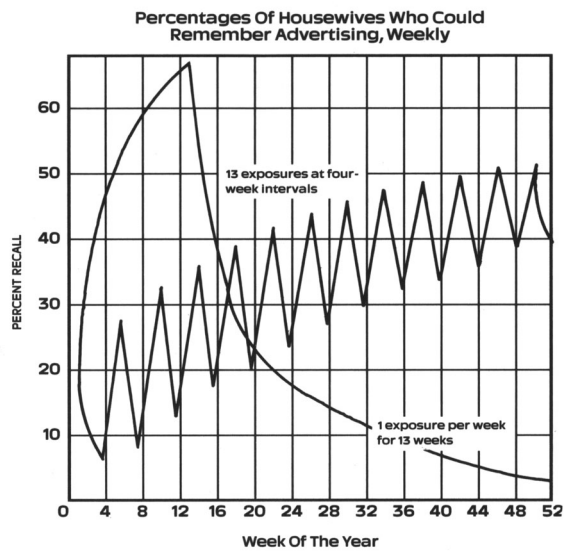
The advertising literature demonstrates that visitation (sales) is directly and positively correlated with an advertisement's Gross Ratings Points (GRP) and the length of time since an advertisement appeared. As Figure B.1 shows, people tend to forget advertisements shortly after they have been seen. Advertising recall continues to decrease with time unless the advertisement moves a potential visitor to take action such as writing a date on a calendar, clipping a coupon for a discount, or calling to buy a ticket. As David Martin shows in Figure B.2, exhibition awareness increases over an exhibition period if advertisements are run throughout an exhibition (the rising saw-toothed line) while awareness increases rapidly, but drops to a low awareness if the same amount of money is spent during the first part of the exhibition.

Figure B.1



Source: David N. Martin, *Romancing the Brand*, p.94.

Figure B.2



Source: David N. Martin, *Romancing the Brand*, p.142.

Interviewees ideally spend part of their budget around the exhibition opening, but retain part to provide one or more ‘kicks’ with additional advertising later in the exhibition run. The largest commercial museum organizer puts a significant amount of money into promotions in the month or two before an exhibition opens, spends more during the opening, and spends the rest later when needed to stimulate additional visitation, and some near the end to attract laggards before they miss the exhibition.

Museum marketers can use a variety of media to reach audiences through advertisements. Major media include newspapers, radio, billboards, static and mobile displays, direct mail, and television. Even these modes can be further distinguished. For example, newspapers encompass national papers of record (*The New York Times*), local dominant papers (*The Washington Post*), community papers (*Montgomery Gazette*), and alternative papers (*The City Paper*). Radio encompasses a wide variety of formats (talk, sports, classical, country, religious, hip-hop, public, etc.). Television includes network programs and cable stations. Each type of format: newspaper, radio, and television, reaches a substantially different audience from the others.

Commercial exhibition firms frequently include promotional expenses in the rental fee for an exhibition and control the buying and placement of advertising. Usually, museums begin with a heavy commitment to newspaper advertisements and billboards early in an exhibition, partly to encourage contributions of extra advertising. As the exhibition continues, the museums may shift to targeted radio advertisements combined with additional newspaper advertising. Radio is especially effective in reaching young adults; thus, the Philadelphia Museum of Art markets its Wednesday evening social events only on radio.

The success of advertising is a function of the amount of money spent and advertising repetitions that effectively reach the appropriate target markets for an exhibition. Of course, attendance is also a function of the size of the appropriate market as well as the effectiveness of advertising in reaching that target market.

Clearly, advertising expenditures force ticket prices upward. The advertising cost may add three dollars or more to the cost of tickets if the exhibition expense is to be covered fully from ticket sales, excluding membership subscriptions. On the other hand, a commercial firm knows that advertising will pay off by drawing more visitors if the exhibition is positioned properly and the correct media are scheduled at appropriate times. As indicated earlier, the number of visitors is a function of a mix of promotion strategies, including advertising. A museum without advertising allows critics, well-wishers, members, and other people to determine its exhibition attendance.

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Appendix C

Museums and Organizations Contacted

Museums Contacted

Arizona Science Center
Art Institute of Chicago
Bronx Zoo
Carnegie Museums of Pittsburgh
Chicago Historical Society
Cincinnati Art Museum
Cincinnati Museum Center
Colonial Williamsburg
Detroit Institute of Arts
Discovery Place
Field Museum of Natural History
Fort Worth Zoo
Great Lakes Science Center
Maryland Science Center
Museum of Television and Radio
Museum of Science and Industry, Chicago
Nelson-Atkins Museum of Art
New Jersey Historical Society
New Orleans Museum of Art
Orlando Science Center
Philadelphia Museum of Art
Virginia Museum of Fine Arts

Non Museum Organizations Contacted

AdCenter, Virginia Commonwealth University
Martin Branding
National Parks Conservation Association

Appendix D

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