

**UNIVERSITATEA BABEȘ-BOLYAI CLUJ-NAPOCA**  
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# **Implementig the inovation process in museum marketing**

**Coordonator științific**  
**Prof.univ.dr. Dan-Cristian DABIJA**

**Doctorand Iulia Oana ENĂȘEL**

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## INTRODUCTION

Museums are non-profit organisations associated with the idea of knowledge, and can be considered "three-dimensional" encyclopaedias which, instead of ordering concepts, collect, classify and preserve objects and exhibit them to the interested public. The museum has a daily, constant presence in modern society, bringing added value both to the represented specialty and to local communities (Neamu, 2016, p.17). Due to its complex nature, the museum is defined in countless ways as a result of its evolution and societal changes.

With the increase in the number of museums, their role in society, i.e. in the market of educational and leisure activities, has also changed. Today, museum institutions have moved from performing what Message (2006) calls 'core activities', namely collecting, preserving, restoring and organising exhibitions, to performing cultural, social and economic activities. Very strong competition, financial pressures, increasingly fragmented target audience time and attention, and increasingly sophisticated preferences are forcing museums to find innovative solutions to adapt to the changing environment, to ensure their survival and even profitability (Damanpour & Evan, 1984; NEMO, 2023).

Innovation is a multidisciplinary activity (Søndergaard & Veirum, 2012), which consists of the ability of the organisation to offer new products and services and to respond proactively to changes in the environment (technological progress, economic development, social problems and challenges, etc.) (Camarero & Garrido, 2008). Its central role in the successful achievement of organisational goals (McDonald, 2007) gives an accelerated dynamic to the study of the innovation process at a global level. Museums, like other public and nonprofit organizations, resort to innovation implementation, predominantly focused on the influence of certain organizational characteristics and strategies on innovation adoption, implementation, and diffusion (Deshpande, Farley, & Webster, 1993; Burt & Taylor, 2003; Griffin, 2003; Mulgan & Albury, 2003; Hull & Lio, 2006; Camarero, Garrido, & San Jose, 2016).

The complex nature of innovation, the varied typology, in conjunction with the specificity of the cultural field underlines the need for a comprehensive approach to the innovation process in the museum sector. While the literature includes a number of studies that address innovation from the perspectives listed above, these cover either a broader sector - public (Mulgan & Albury, 2003; Trott, 2009), non-profit (Damanpour & Evan, 1984; Burt & Taylor, 2003) or entrepreneurial (Druker, 1954; Hann et al., 1998; Hult et al., 2004) - or other types of cultural institutions, such as theatres (Voss et al., 2006) or libraries (Marcum, 2008). At the same time, research on innovation in the museum field tracks innovation capacity (Camarero & Garrido, 2011b; 2012) or treats the process as a component of positioning (Camarero & Garrido, 2008) and/or strategic orientation

(Camarero & Garrido, 2010; 2011b; 2014), i.e. the promotion submix (Kidd, 2011). A number of empirical researches subsumed to the new museology paradigm (Vergo, 2006) result in grids assessing the social impact of the museum at local (Nawijn et al., 2002), global (MOI!, 2022) or organizational empathy (Jennings et al., 2018) levels respectively, which include innovation coordinates without treating them individually.

We thus identify the shortcomings of the literature in terms of a comprehensive definition of the innovation process in the museum institution and, at the same time, the lack of a definition of innovation in museum marketing, as well as the lack of a unified and coherent system to study and evaluate it. Based on these gaps, this paper is part of the efforts to identify the characteristics, vectors and effects of the innovation process in museums and aims to define a grid to assess the degree of implementation of innovation in museums. In order to achieve this aim, the following objectives are proposed:

- to elaborate the definition of innovation in museum marketing;
- The theoretical delimitation of the concept of innovation from the perspective of the museum sector;
- to extend the typology of innovation in museum marketing by taking up and exemplifying concepts identified in research carried out in related fields;
- Identifying a theoretical framework for the analysis of innovation in museum marketing, encompassing the premises, coordinates and effects/results of the studied process;
- proposing an effective research tool for data collection through the semi-structured interview method with professional elites in the museum field;
- Delineation of the concept of innovation in museum marketing from the perspective of managers and specialists in the international museum sector, as revealed by the inductive thematic analysis of the data obtained through the semi-structured interview method with elites;
- Identifying the coordinates of innovation in museum marketing pursued by managers and specialists in the international museum sector;
- Delineation of the concept of innovation in museum marketing as it emerges from the deductive thematic analysis of reports published by museum organisations;
- Identify the coordinates of innovation in museum marketing according to reports published by museum sector organisations;
- proposing a protocol for triangulation of qualitative research results adapted to the museum sector;
- increase the research validity of the museum marketing innovation process using triangulation.

In order to achieve the aim and objectives, the present paper comprises a part dedicated to the literature review, followed by empirical research on innovation in the sector by triangulating the results of the two qualitative researches carried out, according to the methodological approach to improve validity. This is followed by conclusions, theoretical contributions and managerial implications, and future research directions.

Chapter 1 presents the museum institution in its evolution, from its emergence to the present day, from the perspective of its adaptation to changes in the environment. The chapter is devoted to the conceptual delimitation of the museum through the lens of the museology and cultural marketing literature. In order to highlight the heterogeneous nature of the museum field and the diversity of tangible and intangible cultural heritage, the typology of museum organisations is presented in detail. Analysing the specificity of the museum field from the perspective of the new museology, the wide range of functions exercised by these cultural organisations over time is illustrated, detailing the most relevant ones in the current context: collecting and researching the cultural heritage held and educating the public.

The *Second chapter* deals with innovation and its typology, initially seen as a whole, at the public, non-profit and entrepreneurial levels. In the context of the development of knowledge, the continuous adaptation of the role assumed by the institution in the evolution of society highlights the innovative component of the museum's positioning. The chapter goes on to present the characteristics of the innovation process and the specificities relevant to the museum field and continues with the development of innovation models, emphasising the role and importance of formalising the dimensions of the innovation process in order to take up and implement it.

The third chapter focuses on the innovation process in museums. The three models of museum policy: continental European, British and American, are presented from the perspective of funding mechanisms, degree of interventionism and features relevant to the present research, followed by a foray into the implementation levels of innovation in museums. The literature review focuses on synthesising definitions of innovation appropriate to the non-profit sector in general and museums in particular. The last part of the chapter describes and exemplifies the typology of innovation in the museum sector and ways to stimulate the process.

The empirical research methodology on the implementation of the innovation process in museum marketing is presented in the fourth chapter. The paper conducts a multi-method research, combining two types of qualitative research, the results of which are processed by triangulation to improve validity. The first research uses the semi-structured interview method, applied to a sample of museum professional elites (managers and specialists from Europe and the United States), composed on the basis of the researcher's reasoning. The interview guide is based on the literature and the interview topics follow the seven innovation coordinates identified in the research

literature. The final form of the research instrument was determined following a consultation process with three cultural experts, followed by pre-testing on five additional members of the research population. The interview technique was ladder-climbing and the results, once transcribed, were subjected to the inductive thematic analysis procedure.

The *second research* consisted of a deductive thematic analysis of documents issued by specialist museum organisations. The conceptual framework of the deductive thematic analysis was developed on the basis of the literature review. According to it, the criteria matrix for identifying data items, as well as the thematic diagram and coding memorandum were established. According to the three identified themes, the premises were formulated and subsequently tested by going through the document dataset.

The triangulation protocol involves sorting the data obtained from the two thematic analysis processes, inductive and deductive, in order to perform convergent coding. Following the objectives of the research, the convergence assessment of the data as a whole was carried out by analysing the concepts and their description, respectively their coordinates and documenting the segments that do not show full agreement. Subsequently, the integrity assessment included the identification of any additional elements contributing to the description of the themes and the integrity of the research perspective found exclusively in one of the datasets.

The *Fifth chapter* presents the results of the two qualitative researches carried out. The results obtained from the inductive thematic analysis of the interview dataset are structured according to the themes identified in the final thematic diagram: innovation in museum marketing (sub-themes: concept of innovation; purpose of innovation implementation in museum marketing; levels of innovation implementation); typology of innovation in museum marketing (sub-themes: soft innovation; technological innovation; process innovation); open innovation (sub-themes: museum education-the educational function of museums; learning orientation; cooperation vs. competition).

The results of the deductive thematic analysis process of the document dataset are structured based on the data items. Out of a total of 21, 18 premises were validated in at least half of the items included in the dataset. The three premises with fewer validations were subjected to an additional analysis process resulting in full validation of the formulated premises.

Discussions based on the interpretation of the research results according to the theoretical framework resulting from the literature review and the objectives of the present research are presented in chapter six. According to the results of each research, following the analysis and rationale, a definition of the innovation process in museum marketing has been proposed. Discussions on the results of the semi-structured interview revealed 89 coordinates of innovation, structured into four categories: the organisation and internal environment of the museum; the



cultural heritage held; identifying and meeting the needs/desires of the audience categories; the external environment. At the same time, on the basis of the results of the deductive thematic analysis of the documents, 70 coordinates were identified, divided into three categories: open innovation; cooperation orientation - products and services adapted to the needs of the public categories; learning orientation and making the museum's work more efficient.

The seventh chapter presents the implementation, results and discussions resulting from the triangulation protocol. The results of the convergent coding are highlighted in tabular form, following the proposed objectives. Following the convergence and integrity assessment, the definition of innovation in museum marketing is formulated and its relevant coordinates are identified, structured into eight themes: meeting social objectives; meeting economic objectives; cultural heritage conservation policy; heritage research policy; educational function of museums; learning orientation; marketing orientation; cooperation orientation.

This paper concludes with a section on conclusions, theoretical contributions, managerial implications and future research directions. The most relevant theoretical contributions are the elaboration of the definition of innovation in cultural marketing, as well as the overall approach to the process, which aims to corroborate, adapt and exemplify certain research findings from related fields. It is also worth mentioning the extension of the typology of the studied process and the inclusion of six new types of innovation originating from other research fields.

An important contribution, from the theoretical as well as from the managerial perspective, is the development of a scale for assessing the degree of implementation of innovation in museum marketing. It presents an overview of the organisation's marketing strategy, providing an opportunity to identify the current state of innovation in the organisation and future directions for development. Alongside these elements, the chapter presents the findings and contributions of the present research in detail.

## **CHAPTER 1 THE MUSEUM - CONCEPTUAL DELIMITATIONS**

### **1.1. Definitions of the museum**

Museums are non-profit organisations associated with the idea of knowledge. They can be seen as 'three-dimensional' encyclopaedias which, instead of ordering concepts, collect, classify and preserve objects and exhibit them to an interested public. The museum has a daily, constant presence in modern society, bringing added value both to the specialty represented and to local communities (Neamu, 2016). Due to its complex nature, evolution and societal changes, the museum is defined in countless ways. Traditionally it was defined by the functions and activities carried out (Van Aalst & Boogaarts, 2002): collecting, conservation and restoration, research and exhibition organisation; with the evolution and opening of the institution to the citizens, the central

element of the museum concept has become its role in society (Weil, 1990; Thompson, 1998; Pop, 2017), its leadership and its relationship with the visitor (Rentschler, 2007).

The most complex and current definition of museums is that formulated by the International Museum Council (ICOM): 'a museum is a permanent, non-profit institution in the service of society, dedicated to researching, collecting, conserving, interpreting and exhibiting tangible and intangible heritage. Open to the public, accessible and inclusive, it encourages diversity and sustainability. Museums operate and communicate in an ethical and professional manner with the participation of diverse communities. They offer their audiences varied experiences for the purposes of education, delight, reflection and knowledge sharing" (RNMR, 2023).

The evolution of the definition of the museum and the participatory process of its formulation highlights the importance attached to adapting to the evolution of society and maintaining the relevance of the institution, i.e. awareness of the heterogeneous nature of the field. The initiatives contribute to making marketing strategies more effective and to developing new research directions. Summarising the defining concepts of the museum, they can be framed in the synthesis proposed by Aarts (2010): the museum is a permanent institution, an enterprise; the museum manages a set of objects, i.e. the collections; the museum organises activities aimed at a broad (segmented) public.

## 1.2. The emergence and development of museums at global, European and local level

Museums developed in their present organisational form as socio-cultural institutions for members of society and local communities (the general public) in the late 18th century (Hetherington, 2006), although in their early organisational form they had existed since antiquity. Figure 1 summarises the evolution of the marketing mix of the earliest forms of museum exhibition from antiquity to the establishment of the museum institution itself.

**Figura 1. Evoluția mixului de marketing pe parcursul istoriei muzeului**

	Antichitate	Evul Mediu	Renaștere	Sec al XVII-lea	Sec al XVIII-lea
Servicii de vizitare	expoziții în aer liber, în scopul delectării și întăririi statutului național	expoziții în lăcașurile de cult ale Bisericii Catolice, subordonate discursului religios	expoziții în aer liber (trimestrial în Roma), în scopul delectării și vânzării lucrărilor	expoziții realizate din colecții private, în spații private ale nobilimii	expoziții realizate din colecțiile regalității/ tezaur național
Produse/ Servicii complementare	catalog de expoziție și documente de cercetare a patrimoniului	ritualuri, rugăciuni etc	Picturi și sculpturi comercializate în vederea colecționării (și a emergentă de artă, concurență)	-	documente cuprinzând rezultatele cercetării identității și patrimoniului național
Preț	acces liber	acces fără cost financiar direct	acces liber, fără cost financiar	preț exorbitant și bariere de acces (educație și avere)	acces liber, fără cost financiar
Distribuție	artefacte (unele provenind din cuceriri) plasate la intrarea în cetate sau în spații amenajate,	obiecte de cult realizate pentru Biserică sau pentru clerici, expuse exclusiv în lăcașuri de cult	producători (artiști) europeni aduceau artefactele la punctele prestabilite de expunere cu vizitare	castele sau conace private, cu circuit închis, în care artefactele provenite direct de la artiștii epocii erau prezentate unei publice selecționate	palatele regale erau deschise tuturor cetățenilor conform unui orar prestabil pentru a admira artefacte provenite direct de la artiști
Evidențe fizice	expunere în aer liber (Imperiul Roman) sau spații special amenajate (Grecia Antică)	biserici, capete, alte spații ale clerului	neadaptate: spații de expunere alese în funcție de vadii de consumatori (vizitatori)	spații de expunere proiectate special pentru expunerea colecțiilor și etalarea luxului	spații de expunere proiectate pentru a fi decorate cu artefacte și a etala bogăția
Personal	-	clerul utiliză dignitatea creștină în procesul de mediere culturală	Artiștii erau curatori, custozii, vânzătorii și mediatorii ai experienței culturale și de vânzare	curatorul supraveghea artefactele și limita accesul din rațiuni de conservare	curatorul supraveghea artefactele

Sursa: prelucrare proprie.

If the 18th century contributed to the development of public museums as exponents of coercive power, the following century completed their collections, shaped them, democratised them and recognised (without defining them) their influence in society. Malraux (2006) considers that the nineteenth century 'fed' on them, with the museum imposing on the visitor a new relationship with the work of art through the ways in which it relates to reality. By transforming 'exhibits' into 'masterpieces' through their endowment with meaning, this museum-visitor relationship has been continually intellectualised. The twentieth century brings with it a wave of technological innovations that give rise to cultural markets (Sacco, 2016). After 1980, the emergence of the "post" trend in art and culture was noted, immediately transposed to museum collections: postwar, postcolonialism, postmodernism, postcommunism. The contemporary period continues the process of evolution through which museums help individuals to perceive and understand the collective societal current (Bishop, 2015).

### **1.3. Classification of museums**

Museums have various forms of manifestation and organisational structures determined by legislative factors or by conjunctural situations (donations by collectors; conversion of buildings into memorial houses; pop-up museums). The variety of their features can be highlighted and systematised on the basis of classification criteria, the easiest one probably being that given by the thematic specificity of the heritage held (art, history, archaeology, ethnography, village museum, etc.). Analysing the literature, the present research retains nine criteria for systematising the classification of museums (Nicolescu, 1975; Brown & Goode, 1986; Maroevic, 1998; UNESCO, 2015), described and exemplified from the perspective of the innovative practices implemented by the respective categories of institutions: profile; thematic field; organisational structure; form of ownership; display of collections; collection characteristics; audience; type of heritage; museum rank.

### **1.4 Museum functions**

The literature highlights a large number of museum functions, among which those considered as "core activities" are: collecting, conservation-restoration and exhibition organisation (Message, 2006). Initially, the collecting function was the focus of museum activity. Since 1970, the two branches of the new museology have been extending the role of these institutions to the social level, with an emphasis on understanding and meeting the needs of the public and other stakeholders (Vergo, 2006), and on direct involvement in community development (Teruggi, 1972). The paradigm shift leads to a clarification of the functions of museums and their placement within the PRC system, in which conservation, research and communication (van Mensch, 1992) are interdependent, non-hierarchical and combined with openness to the diversity of audiences

(Maiese, 2023). Updating and integrating museum functions contributes to the process of adapting to the needs, requirements and expectations of society in general and of local communities and citizens in particular. At the same time it directs the actions of the institution and, regardless of how they are grouped, they are concerted and interdependent (Rentschler, 2007). In accordance with Romanian legislation (Law 311/2003), the present paper details the functions of collection, research and education respectively.

## **CHAPTER 2 THE INNOVATION PROCESS IN THE KNOWLEDGE SOCIETY**

### **2.1. The museum, the evolution of society and the development of knowledge**

The democratisation of access to information and the development of knowledge are driving social, economic and technological change at an accelerating pace. Museums have adapted to changes in the market environment in which they exist, similarly to living organisms, transforming and reinventing themselves in the digital age and in cyberspace. Although considered anachronistic or even alienating from a temporal and/or evolutionary perspective (Hetherington, 2006), their survival proves that museums have a specific role in society that cannot be taken over by other organisations (Kotler et al., 2008; Hein, 2005; Aarts, 2010). As public cultural institutions, responsible for preserving and presenting heritage to citizens, as well as research and educational entities, museums are increasingly competing with various private organisations in the market for leisure and recreational services (Message, 2006; Camarero & Garrido, 2008; Kotler, Kotler & Kotler, 2008). Museums face numerous limitations and challenges due to legislative restrictions, financial allocations and the need to adapt to the evolving expectations of target groups.

Under the action of socio-cultural and technological factors, organisational change is occurring in museums (Yim-Teo, 2002) which is changing the authoritarian, one-way discourse of curators and the way artefacts are displayed into an inclusive one. The information society transforms museums into cultural databases (Tsolis, 2013), in which the true legitimization of value is provided by the public (Pagel & Donahue, 2013): spaces filled (by tradition) with asymmetries, museums become forums, are recognized as democratic, contact zones (Kidd, 2011), which pay attention to the needs, preferences and expectations of the target audience, but seek above all active involvement in co-creating value (Weide, 2013). This positioning implies taking political, cultural, social risks, which can be minimized by implementing innovation. Organizations able to innovate constantly and quickly adapt better to changes in the market environment and societal transformations, and especially to the preferences and expectations of visitors, who increasingly display a polyvalent behavior, seeking both qualitative culture and transient kitsch (Pop & Dabija, 2008; Voicu, Dragomir, 2016; Croitoru, Becuț, 2017). At the same time, innovation enables the

development of competitive advantages and performance improvement (Agarwall, 2003; Hull, 2004).

## **2.2. Definitions of innovation**

The process of innovation (in Latin to modify, to renew, to reconstruct), was first defined by Schumpeter (1934) as "a new way of combining knowledge, resources, equipment or other factors of production - existing or previously unused - that results in new products, processes, raw materials, etc.". Later, he proposes the concept of creative disruption, according to which the march of the economy is constantly interrupted from within by innovations that, by introducing new ways of producing goods and services, reconfigure it and increase productivity (Schumpeter, 1950) and identifies the entrepreneurial function of innovation (Shah et al., 2015).

According to modern models of economic growth, innovation plays as important a role as the other factors of production, but unlike them, it does not decrease marginal productivity, but leads to an increase in the optimal level of output and thus welfare (Cowen & Tabarrok, 2015; Feige, 2015). The frequency of ideas and the degree of implementation of innovations are dependent on institutions (property rights; legal system, contractual freedom; political (in)stability; government; market characteristics; cooperation; trust; fairness) and incentives in the economic environment (Mankiw, 2017). The commercial mechanism of exchange is the source of the necessary impetus for collaboration, specialisation and hence incremental progress in science, capable of overcoming environmental obstacles (Ridley, 2011b). In order to become more efficient, research collectives develop their multidisciplinary and transnational character (Mansfield, 1995; Hicks & Katz, 1996). Collaboration and interdisciplinarity generate an information network, referred to by Ridley (2011a) as the 'shared brain', whose complexity increases the speed of innovation.

## **2.3. Innovation - a holistic approach**

The fundamental importance of the innovation process in economic development (Schumpeter, 1950), coupled with the need for cooperation (Riddley, 2011b), leads to the formalisation of the research framework in the field through the development of definitions and guidelines. This paper considers relevant the Romanian legal framework, which defines the process and delimits product innovation from technological innovation (Law 324/2003), as well as the most recent versions of the Oslo (OECD/Eurostat, 2018) and Frascati (OECD, 2015) Manuals, the two working tools that establish, at international level, the general framework, definitions and methodology of innovation research, in order to develop a relevant international statistical infrastructure.

## **2.4. Innovation features**

Research on the adoption of innovation in organizations identifies a wide range of characteristics, among which compatibility, relative advantage and complexity appear recurrently in the literature reviewed (Zaltman & Lin, 1971; Boyne et al., 2005; Damanpour, Schneider, 2008). From the perspective of the efficiency of the innovation process, cost categories show the strongest influence, along with the ease and clarity with which innovation can be communicated to users (Zaltman & Lin, 1971; Johannessen & Olsen, 2011; Ye et al. 2015).

## **2.5. Classifications and typologies of innovation**

The typology of innovation found in studies on process implementation in marketing presents four categories: performance, process, paradigm, positioning (Schumpeter, 1934; Menor et al., 2002; Francisc & Bessant, 2005; Rowley et al., 2011; Kogabayev & Maziliauskas, 2017). In order to reduce generality and analyse the concept in depth, we have extended the literature search to types of innovation specific to related fields, presented below.

### **2.5.1. Open innovation and closed innovation**

Open innovation is the use of ideas from inside and outside the organisation and common pathways for market entry and exploitation of benefits to develop technologies (West, et al., 2005). Information transfer occurs through processes (Gassmann & Enkel, 2004; 2010): inside-out (knowledge transfer); outside-in (information retrieval from customers, suppliers, consumers, the general public or other unconnected entities); combined (cooperation and strategic partnerships).

### **2.5.2. Hidden innovation**

Hidden innovation, specific to the medical field (Hicks & Katz, 1996), refers to the amount of innovation that is incompletely or not reported at all and does not appear in official statistics (NESTA, 2007). In studies of the creative industries, Halkett (2007) identifies four types of hidden innovation: in the cultural product/service; in the cultural concept; in the customer interface; in the delivery process. Correlating these four categories with the essential differentiation between innovation and creativity, we identify the characteristics of the concept of silent innovation. Used in nanotechnology research (Andersen, 2011), it is defined as a type of innovation that is not communicated to the market due to: the risks associated with implementing that innovation and/or a potential reputational issue; the lack of adequate codification of the newly discovered dimension making it poorly defined or unclearly understood; uncertainty about the market value of the innovation.

### **2.5.3. Hard, soft, formal and stylistic innovation**

Hard innovation encompasses the totality of technological transformations that impact organisational performance and have visible and measurable effects (Tether & Howells, 2007; Stoneman, 2010). Soft innovation is the totality of aesthetic improvements that have a sensory or intellectual impact on the consumer (Stoneman, 2010).

Studies on non-functional innovation published prior to the introduction of the concept of soft innovation focus mainly on the fashion and designer goods industry. Bianchi and Bartolotti (1996) identify formal innovation, which consists of the modification of aspects related to the form of a product, without there necessarily being a change in the functionality of the product or the production process, and is generated by the processes of spontaneous creativity; planned creativity (based on trend research); the basic creative process.

Stylistic innovation is the result of changing the aesthetic characteristics of an existing product, leading to the emergence of a new product in the physical sense, but also a new associated social construct (Cappetta et al., 2006). Complementary to technological innovation, stylistic innovation has creativity at its core and contributes to performance differentiation (Tran, 2010).

## **2.6. Innovation models**

Progress in conceptualising innovation allows the identification of five generations of innovation models (Rothwell, 1992), the most recent being continuous innovation by integrating ecosystem elements and improving adaptive capacity (Tidd, 2006). Analysing the innovation process as a whole, Sengupta (2014) identifies fundamental innovation as the main generator of growth, spontaneously driven by dynamic shocks in the market; secondary innovation, a routine procedure that contributes to risk mitigation in the environment; the set of organisational knowledge and skills; plus social pressure and expectations, which may differ from market signals (Tidd & Thuriaux-Alemán, 2016).

The current state of knowledge encompasses a single model of innovation in museums, according to which the museum is a vector of social change, aware of current challenges, actively engaged in finding solutions (Eid, 2016). It is based on three major concepts: open innovation (Chesbrough, 2003); social enterprise pursuing profit, social impact and sustainability (SEA, 2018); social innovation (CSI, 2018).

# **CHAPTER 3 IMPLEMENTATION OF THE INNOVATION PROCESS IN MUSEUMS**

## **3.1. Innovation context - museum policy models**

The economic, political and social context has led to the emergence of state-specific museum policy models. Depending on the degree of interventionism and cultural specificity, these

government practices fall into three categories (Zimmer & Toepler, 1999; Toepler, 2006; Opreș, 2008; Vicente et al., 2012). The continental European model is a statist one, in which funding comes from the state budget, with major expenditure in culture subject to official and political control. The British model is distinguished by its low level of interventionism. Relatively small grants are directed to intermediate, semi-independent bodies of cultural experts who seek to depoliticise the arts. The American model, unsubsidised and less interventionist than the British system, is characterised by a reliance on self-regulating market mechanisms, which has encouraged the development of entrepreneurial initiative in the production and funding of cultural activities, including museums.

### **3.2. Stages for implementing innovation in museums**

The coordinates of Society 5.0 drive the museum to harmonize the fulfillment of its core mission (Message, 2006) with the increasingly sophisticated behavior and tastes of the contemporary individual (Richins & Dawson, 1992; Kotler & Kotler, 2007). The proactive response of the organization aims at implementing innovation and entrepreneurship models (Della Corte et al., 2009).

#### **3.2.1. The evolving role of the museum in society**

Since the 18th century, the positioning of the museum institution has evolved from that of custodian and conservator of collections to that of educator of the citizen-visitor (Camarero & Garrido, 2008) to the conceptualization of the New Museum (Mairesse, 2023), which competes in the market of recreational activities (Message, 2006), implementing innovative ideas by giving meaning to the past (Jordanova, 2006).

#### **3.2.2. Strategic orientation of museums**

The strategic orientation of museums has evolved from a focus on collecting, conservation, restoration to more complex market orientation approaches. In order to make the strategy more effective, cultural market orientation aims at external targeting of relevant audiences, interdepartmental integration and coordination within the institution, and long-term relationship management with clients (Alvarez et al., Societal orientation expands the scope of action by encompassing orientation towards stakeholders, competitors, cooperation and coordination between functions of the organisation (Liao et al., 2001). Complementary, learning orientation supports the implementation of innovation, contributing to improved economic and social performance (Camarero & Garrido, 2008; 2010; 2011).

#### **3.2.3. Museum offer. Ways of relating to cultural heritage**



The paradigm of the New Museology (Varine-Bohan, 2015) leads museums to replace hermetic discourse, addressed exclusively to educated elites, with strategies of integrated and ethical valorisation of cultural heritage. The effective fulfilment of museum functions aims at protecting cultural heritage, responsible musealisation, educating audiences, actively engaging with society and encouraging participatory action (Blanchot, 2003; Malraux, 2006; Lord et al., 2012).

#### **3.2.4. The museum's target audience**

Concern with identifying visitor characteristics preceded the opening of museums to the public. Initially documented in artistic representations, observation of their behaviour was used as a research method in the 18th century (Louvre), but the implementation of the results was only found in physical evidence (Robinson, 1928). The adoption of consumer orientation since the second half of the 20th century (Mairesse, 2023) supports the development of the contemporary museum, which practices the segmentation of heterogeneous, diverse and active audiences (Davidson, 2015) in order to satisfy, develop and educate them (Mairesse, 2023).

### **3.3. Defining innovation in the museum sector**

The literature is sparse on the definition and typology of innovation in museums (Nilssen, 2014; Stubbotina, 2015). This paper reviews the definitions of innovation in the public, non-profit, cultural and museum sectors. Following the analysis, we note the chronological evolution: the first definitions aim at adapting to change, overcoming constraints and implementing novelties extended, as knowledge progresses, towards meeting organisational goals, performance and value creation. Recognition of the museum's creative and innovative role in the experience-based economy contributes to the adoption of proactive strategies (Søndergaard & Veirum, 2012). At the same time, the analysis confirms the lack of a unified definition: innovation is seen as reaction, process, tool or sum of techniques, not harmonised with the meanings set out in the Oslo Manual (2005): process - outcome. The explanation identified by Tobelem (1997) lies in the semantic differences between the cultural products offered by institutions, but also in the different level of development of museums.

### **3.4. Stimulating innovation in the museum sector**

Hull and Lio (2006) show that nonprofit organizations have a low tolerance for risk, which accounts for the low adoption and implementation of museum innovation reflected in the statistics (Hansen and Birkinshaw, 2007). In order to stimulate innovation, various cultural consortia award prizes accompanied by prize money, generating competition between museums - competition for

resources and for a place in the consumer's mind (e.g., "The Museum of the Arts", "The Museum of the Arts", "The Museum of the Arts", "The Museum of the Arts", "The Museum of the Arts"). Heritage on the Move Award, Europa Nostra; European Academy of Museums Award; Excellence Award, Art Fund). This contradicts Tobelem's (1997) assertion that there is no direct competition between the products and services offered by a museum due to their diversified nature.

Formulating a set of criteria for the awards creates and imposes a standard of quality, but also provides an opportunity for internal and external evaluation of museum practices. Competition incentivises museums to achieve their economic and social goals as effectively as possible, and innovations should support the fulfilment of the organisational mission (McDonald, 2007; Vicente, Camarero & Garrido, 2015). This consideration is also reinforced by Søndergaard and Veirum (2012), who argue that innovation in cultural institutions is primarily a social process. Creating a system of standards supports museums as social agents, facilitating inclusion, cohesion, conflict prevention and mediation (NEMO, 2018).

### **3.5. Typology and adoption of innovation in museums**

Innovation is a multi-disciplinary concept that involves more than the meeting of technological progress with economic precepts (Søndergaard & Veirum, 2012). Associated often to the point of overlap with innovation, technology is a key component of strategic innovation, leading to the consolidation of competitive advantage (Neuhofer, 2012). Jaw, Chen and Chen (2012) show that innovation in the cultural domain is not only technological in nature, but is a broader phenomenon that takes place beyond the product and/or process level. Marchetti and Valente (2013) note the blurred focus of technology implementation in museum strategies, and Bakhshi and Throsby (2012) draw attention to the discontinuous nature of the innovation process. In the absence of a clearly defined mission and objectives, there is a danger of falling into the technology trap (Parry, 2005): the uptake and/or adoption of technological innovations without a clear objective.

Identifying and analysing the types of innovation as thoroughly as possible helps to make innovation strategies more effective. Following the analysis of the innovation typologies identified in museums, we consider Dawson's (2008) approach, which proposes the following dimensions: offer, platform, solutions, consumers, experience, value proposition, processes, organisation, supply chain, present, relationship, brand.

## **CHAPTER 4 RESEARCH METHODOLOGY**

### **4.1. Research problem. The purpose of the research**

*Research aim:* to define a grid for analysing the degree of implementation of innovation in museums.

*Research objectives:*

- To propose an efficient research tool for data collection through the semi-structured interview method with professional elites in the museum field;
- To delineate the concept of innovation in museum marketing from the perspective of managers and specialists in the international museum sector, as revealed by the inductive thematic analysis of the data obtained through the semi-structured interview method with elites;
- Identifying the coordinates of innovation in museum marketing pursued by managers and specialists in the international museum sector;
- Delineation of the concept of innovation in museum marketing as it emerges from the deductive thematic analysis of reports published by museum organisations;
- Identify the coordinates of innovation in museum marketing according to reports published by museum sector organisations;
- proposing a protocol for triangulation of qualitative research results adapted to the museum sector;
- increase the research validity of the museum marketing innovation process using triangulation.

## **4.2. Research design**

Multi-method/mixed-methods research: use of two research methods: semi-structured interviews applied to a sample of museum managers and specialists, and analysis of relevant documents on the implementation of innovation in museums published by international museum organisations. In order to improve the quality and reliability of the data obtained, data triangulation was used.

## **4.3. Research 1 - Semi-structured interview**

Interview method: The choice is justified by the research aims and objectives and informed by the literature (Dobni, 2008; Malhotra & Birks, 2008; Rowley, 2012) which specifies the use of the interview as the preferred method of data collection for specialists. Type of interview: semi-structured because the flexible format allows for a large amount of information to be obtained (Zohrabi, 2013).

Interview guide: following the operationalization of the concepts identified through the literature review, seven innovation coordinates were identified, corresponding to the interview themes: definition and typology of innovation in museums; context of innovation implementation; museum mission and vision; strategic orientation; innovation generating activities; expenditure on

innovation generating activities; economic and social performance. The guide was pretested in the form of face-to-face discussions with five experts and questions were structured as in Annex 1.

Population of interest: decision-makers working in museums, cultural institutions, research organisations or providing museum consultancy in Europe and the United States in 2019-2022. Based on profile - specialist skills, high professional degree (McDowell, 1998), position (Natow, 2019), access to information (Goldman & Swayze, 2012) - they represent professional elites in the museum field.

Sampling method: non-probability, based on the researcher's reasoning.

Final sample structure: six specialists from Romania, two specialists from the UK, one each from Germany, Finland and Bosnia and three specialists from the USA.

Interview method: ladder-climbing technique. Duration of interviews: four years (2018-2022)

Processing of the interview dataset using inductive thematic analysis (ITA): based on the ITA protocol developed by Braun & Clarke (2006), following the processes of reflection and interpretation (according to the thematic diagrams presented), three final themes were also identified in the dataset: innovation in museum marketing; typology of innovation in museum marketing; open innovation.

#### **4.4. Research 2 - Deductive Thematic Analysis (DTA) of the document dataset**

Deductive thematic analysis of the documents: The choice is justified by the objectives of the present research which explores the theme of innovation, benefiting from the opportunity to identify new aspects specific to practical activities (Gale et al., 2013). The analysis follows the seven-step protocol proposed by Pearse (2019)

The conceptual framework groups the innovation coordinates identified from the literature review into three categories: internal and external organisational environment; innovation; museum organisation (inputs; outputs).

The final thematic diagram was developed following an iterative process of analysis and reflection (as per the intermediate thematic diagrams presented), based on the theoretical considerations emerging from the literature review. It can be summarised in the three main themes below, on the basis of which 21 premises were formulated:

1. Open innovation contributes to the effective achievement of social goals and thus to the development of society.
2. Cooperative orientation supports the development of more competitive museum products and services.

3. Learning orientation supports the personnel policy and contributes to the efficiency of the activities and the achievement of the social and economic objectives of the organisation.

The coding scheme comprises 42 codes identified on the basis of the premises, following the structure of the thematic framework. Each code has been assigned: label, definition, description of occurrence, acceptance/exclusion conditions; example.

The selection of documents subject to ATD is based on the eight criteria, formulated according to the theoretical framework (final thematic diagram, premises and coding memorandum) and contained in the criteria matrix.

Data collection: according to the criteria, 13 documents published by the most important international organisations in the field (AAM, WAM, ICOM, NEMO), their affiliated bodies (CFM, Art Fund) and international consortia (InDICES, Cultural Heritage in Action) from 2017-2022 were selected.

#### **4.5. Cercetarea 3 – Research 3 - Protocol for triangulation of the concepts obtained from the thematic analysis (inductive and deductive) of the two data sets**

In order to improve the validity of the present research, the results of the ATI processes of the interview dataset and the ATD of the document dataset respectively were subjected to a triangulation process, based on the protocol followed by Farmer (2006).

Data sorting: in the case of definitions, the datasets have the same structure: proximate genus; specific differences. The datasets containing the innovation coordinates have different structures, so they have been restructured according to the following eight common themes: social objectives; economic objectives (purpose of innovation); heritage conservation policy; heritage research policy; educational function of the museum; learning orientation; marketing orientation; cooperation orientation.

Convergent coding: comparing the content of the items, taking into account the meaning, themes and examples present in the two datasets and determining the level of convergence: total agreement (T); partial agreement (P); disagreement (D); no relationship (L).

Convergence and integrity assessment involves documenting segments that do not show full agreement, i.e. identifying additional elements found exclusively in one of the datasets. The results and discussion of this research are presented in Chapter 7.

## **CHAPTER 5. RESULTS OF THE RESEARCH CARRIED OUT**

### **5.1. Research 1 - Results of the inductive thematic analysis of the interview dataset**

The results of the inductive thematic analysis of the interview dataset follow the structure of the themes and focus on the definition of innovation in museum marketing, i.e. the coordinates of innovation:

1. Innovation in museum marketing - is a complex process implemented at different levels of marketing strategy to improve the economic and social performance of museums. Sub-themes: concept of innovation; purpose of innovation implementation in museum marketing; levels of innovation implementation.

2. Typology of innovation in museum marketing - varied, manifested in form and content, adapted to the diverse and inhomogeneous nature of the museum sector. Sub-themes: Soft innovation; Technological innovation; Process innovation.

3. Open innovation - involves the collaborative use of internal and external ideas and communication and distribution channels to streamline activities and achieve organisational goals. Sub-themes: Museum education-the educational function of museums; Learning orientation; Cooperation vs. Competition.

## **5.2 Research 2 - Results of the deductive thematic analysis of the document dataset**

Following the deductive thematic analysis, the premises were assigned one of three pre-determined values (yes/no/no) based on the occurrence of codes in the document dataset. The analysis process did not lead to the denial of any premise. With three exceptions, all premises were validated by at least half of the items included in the dataset and can be subject to the next analysis steps. After further reflection, the three premises were also validated.

## **CHAPTER 6. DISCUSSIONS**

### **6.1. Research 1 - Inductive thematic analysis of the interview dataset**

#### **6.1.1 Defining innovation in museum marketing**

Based on the interview dataset, taking into account the marketing definition (Kotler, 2006) and the updated version of the definition of museums adopted by ICOM (Mairesse, 2023), the following proposed definition of innovation in museum marketing (D1) was developed:

Innovation in museum marketing is a process of (re)organising new or existing human, financial and information resources to develop partly or entirely new products and/or services that are aesthetically, intellectually or functionally superior, that contribute to meeting the needs of education, enjoyment, participation, reflection of categories of the public, diversification of ways of preserving and researching heritage that contribute to the protection and transmission of tangible and intangible cultural heritage to future generations, respectively to the development of knowledge, supporting economic progress and marginal productivity. The implementation of

innovation ensures the continuity of the institution's functioning through its proactive capacity to respond to accelerated changes in the external environment.

### **6.1.2. Dimensions of innovation in museum marketing**

In order to establish the framework and dimensions of the innovation implementation assessment grid in museums, the information obtained from the interpretation of the interview dataset was subjected to an additional analysis process. The resulting concepts and corresponding coordinates were structured into four categories (directions of innovation implementation): the museum's internal organisation and environment; the cultural heritage held; identifying and meeting the needs/desires of the audience categories; external environment. The four categories do not fully overlap with the three themes identified from the inductive thematic analysis of the interview dataset, as the results were restructured following the objectives of this research.

## **6.2. Research 2 - Deductive thematic analysis of the document dataset**

### **6.2.1. Definition of innovation in museum marketing**

Based on the thematic framework identified in the literature and the propositions validated by the deductive thematic analysis of the dataset consisting of documents published by international museum professional organisations, which focus on the implementation of the innovation process in museum marketing, the following proposed definition of innovation (D2) was developed:

Innovation is the process of continuous (re)organisation and two-way transfer of material and information resources, through cooperation with all categories of stakeholders, carried out by the human resource, in order to more effectively preserve heritage, research and disseminate research results, i.e. identify categories of audiences and develop products and services that meet their needs for education, participation, reflection and enjoyment, contributing to the development of knowledge and attracting economic benefits. The implementation of innovation aims at redefining the role of the museum and adapting to the characteristics of Society 5.0 and contributes to the protection of tangible and intangible cultural heritage for the benefit of future generations.

### **6.2.2. Innovation coordinates in museum marketing**

Based on the thematic framework and the propositions validated by the deductive thematic analysis, a number of dimensions of the innovation process have been identified, which come from the application of the codes on the data items analysed and keep the structure of the thematic framework: open innovation; cooperation orientation; learning orientation. In the following, these will be triangulated with the results obtained from the analysis of the interview dataset.

## **CHAPTER 7. APPLICATION AND RESULTS OF THE TRIANGULATION PROCEDURE**

### **7.1. Convergent coding of datasets subject to the triangulation protocol**

The application of the triangulation protocol involves convergent coding of the data sets under analysis. In order to streamline the convergence and integrity checking procedure for each data item, the application of the coding scheme was performed using a tabular structure of the data, marking the convergence level of each segment (T/P/D/L).

### **7.2. Results of the convergence and integrity assessment process of the data sets subjected to the triangulation protocol**

Following the analysis of the data items subject to the convergence assessment process, all segments were documented according to the type of agreement identified in the previous step. Subsequently, the integrity assessment of the datasets was carried out by looking for any additional items found exclusively in one of the datasets. In the case of the present research, this additional analysis stage did not reveal any aspects that would allow a higher level of understanding of the problem under study. No additional dimensions of innovation were added, which highlights the coherence of the results obtained and therefore their integrity.

### **7.3. Discussion**

#### **7.3.1. Defining innovation in museum marketing**

The application of the triangulation protocol on the two datasets obtained from the ATI (D1) and ATD (D2) processes, respectively, led to the identification and validation of relevant data segments for the definition of the studied process. Based on the research conducted, this paper considers that the innovation process in museum marketing can be defined as follows:

Innovation is the process of continuous (re)organization and bidirectional transfer of new or existing material and information resources, through cooperation with all categories of stakeholders, carried out by human resources, in order to develop partially or entirely new products and/or services, aesthetically, intellectually or functionally superior, which contribute to meeting the needs of the public for education, enjoyment, participation, reflection, diversification of ways of preserving and researching heritage which contribute to the protection and transmission of tangible and intangible cultural heritage to future generations, and to the development of knowledge, supporting economic progress and marginal productivity. Implementing innovation ensures the continuity of the institution's operation by proactively responding to accelerated changes in the external environment and redefining the role of the museum in Society 5.0.



### **7.3.2. Coordinating the innovation process in museum marketing**

Following the triangulation process, the coordinates of innovation in museum marketing were validated, grouped into the eight themes identified after processing the results of the two qualitative researches conducted (sub-chapter 4.5.1). They are found at the level of the marketing strategy stages, respectively of the organisational activity specific to the museum field, where the implementation of innovation contributes to improving the performance of the cultural institution.

The validated concepts were discussed and grouped based on their content, characteristics and connections in order to develop a grid for assessing the implementation of innovation in museum marketing: 1. Achievement of social objectives (knowledge development, persuasive power for welfare development; social cohesion and development); 2. Achievement of economic objectives (lobbying; entrepreneurship and economic development); 3. Preservation of cultural heritage (digitisation; preservation standards); 4. Cultural heritage research (research and accessibility; sustainable approach); 5. Museum education (educational programmes; education for heritage and society; participatory learning); 6. Learning orientation (staff; processes; organisational climate); 7. Marketing orientation (segmentation, targeting, positioning; marketing mix development; cooperation); 8. Co-operation orientation (making assets accessible; making work more efficient).

The graphical representation and explanation of the evaluation grid are presented in the conclusions (Figure 2).

## **CONCLUSIONS, CONTRIBUTIONS, LIMITATIONS AND FUTURE RESEARCH DIRECTIONS**

Although innovation is a component of the organisational strategy of museums, the literature does not provide a framework for assessing the level of the process. Eid's (2000) research proposes a model of innovation, focusing on open innovation, focusing on social performance improvement and social entrepreneurship, this omits the other types of innovation as well as the stages of marketing strategy. Carried out in the complex and dynamic environment presented above, the research approaches of the present work aimed at formulating a definition, i.e. developing a grid to assess the implementation of the innovation process in museum marketing. To this end, two qualitative research studies were carried out (Research 1: semi-structured interviews with museum professional elites, dataset processed using inductive thematic analysis, and Research 2: deductive thematic analysis of a dataset of documents, published by research bodies and organisations of museum professionals). In order to increase validity, the results thus obtained were subjected to the third process of analysis and processing, using triangulation as a methodological approach. Based on the literature and empirical research carried out, the present

paper proposes a grid for evaluating the implementation of the innovation process in museum marketing. Adapted to the organisational structure and specific activities of museums, it follows three directions: organisational performance; cultural heritage and organisational strategy.

**Figure 2. Innovation implementation grid for museum marketing**

**Evaluarea gradului de implementare a inovării în muzee  
în vederea eficientizării activității instituției și a îmbunătățirii performanțelor sociale și economice ale instituției**

Muzeele prezintă caracteristici diverse, chiar eclectice uneori. Aceste instituții se află într-un continuu proces de evoluție și adaptare la macromediul în care își desfășoară activitatea. Caracterul eterogen al domeniului muzeal, lipsa resurselor (financiare, materiale și mai ales umane), presiunea de a deveni auto-sustenabile financiar le împiedică să direcționeze eforturile instituționale spre identificarea oportunităților de implementare a inovării. Inovarea de dragul inovării, alegerea unor soluții tehnologice costisitoare și neadaptate specificului patrimoniului deținut reprezintă greșeli frecvente la nivelul sectorului muzeal, care pot fi evitate prin definirea conceptului de inovare și oferirea unor instrumente de implementare și monitorizare a acestui proces.

Grila de evaluare a gradului de implementare a inovării permite managerilor și specialiștilor să determine nivelul actual al organizației în raport cu evoluția procesului de inovare la nivel global. De asemenea, aceasta oferă o perspectivă de ansamblu asupra inovării și permite identificarea etapelor viitoare de direcționare a resurselor organizaționale (materiale, informaționale sau umane).

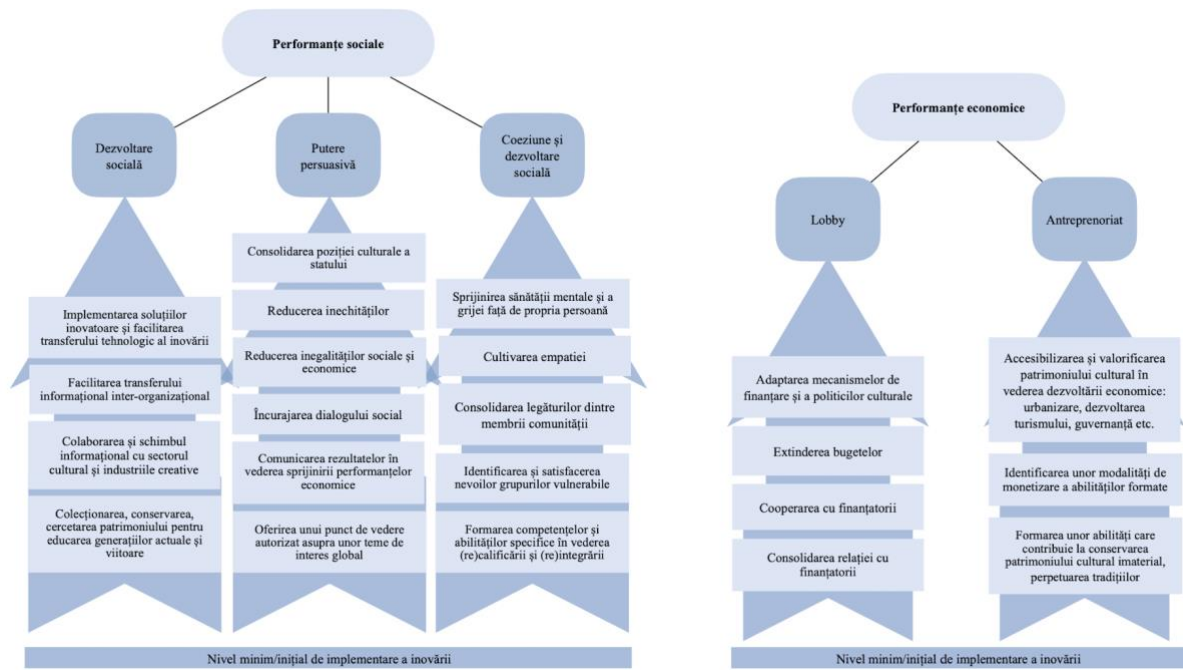
**Inovarea în marketingul muzeelor**

Inovarea reprezintă procesul de (re)organizare continuă și transfer bidirecțional a resurselor materiale și informaționale, noi sau existente, prin cooperare cu toate categoriile de stakeholderi, realizat de către resursa umană, în vederea dezvoltării unor produse și/sau servicii parțial sau integral noi, superioare estetic, intelectual sau funcțional, care contribuie la satisfacerea nevoilor de educare, delectare, participare, reflecție a categoriilor de public, diversificării modalităților de conservare și cercetare a patrimoniului care contribuie la protejarea și transmiterea moștenirii culturale materiale și imateriale către generațiile viitoare, respectiv la dezvoltarea cunoașterii, sprijinind progresul economic și productivitatea marginală. Implementarea inovării asigură continuitatea funcționării instituției prin capacitatea proactivă de a răspunde schimbărilor accelerate din mediul extern și prin redefinirea rolului muzeului în Societatea 5.0.

**I. Performante organizaționale**

Conform definiției muzeului (ICOM, 2023), a cadrului legal (Legea 311/2008), dar și a rolului asumat de muzee odată cu dezvoltarea societății (Message, 2006; Camarero & Garrido, 2008; Neamu, 2010; Mairesse, 2023), instituțiile formulează obiective sociale și economice. Din punct de vedere social, muzeul reprezintă un sistem informațional (Lantham, 2012), care asigură continuitatea și îmbogățirea patrimoniului cultural. În contextul global, instituția oferă, din perspectiva specificului său, puncte de vedere autorizate cu privire la probleme sociale, și folosește mijloace specifice (educaționale, expoziționale, prelegeri, evenimente) pentru a asigura bunăstarea comunităților și a consolida legăturile dintre membrii acestora (Jordanova, 2006). Măsurile sunt proiectate la nivelul întregii societăți sprijinind discursul civic și puterea persuasivă a muzeelor (Lord & Blackenberg, 2015).

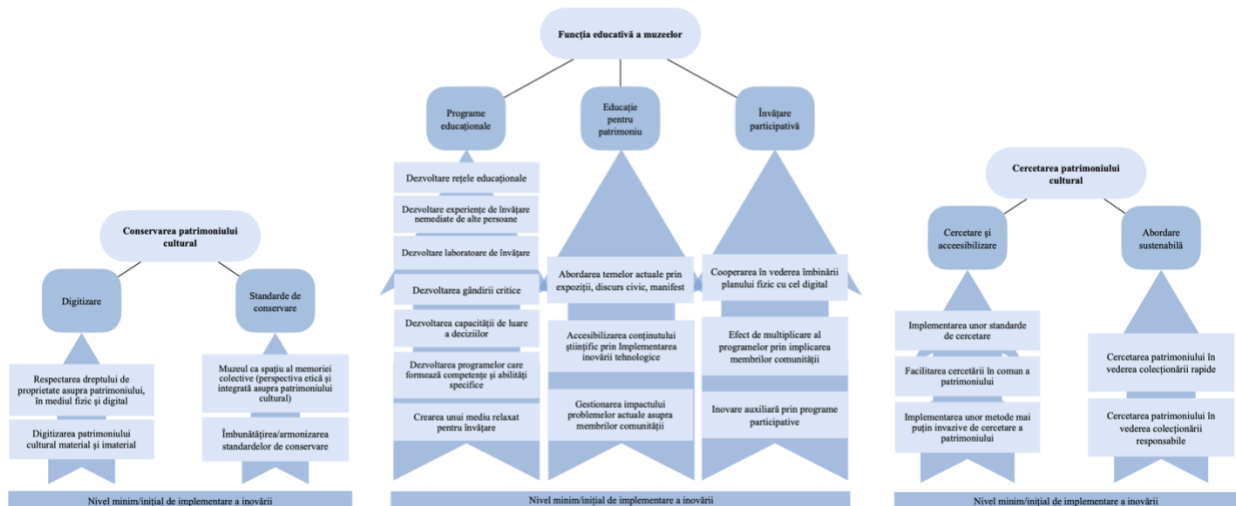
Odată cu creșterea numărului muzeelor, s-a modificat și rolul acestora în societate, respectiv pe piața activităților de ocupare a timpului liber și de loisir (Camarero et al., 2016). Pentru menținerea competitivității, muzeele și-au dezvoltat și eficientizat activitatea economică. Pe termen scurt, vizează adaptarea ofertei la profilul vizitatorului în vederea creșterii numărului de vizitatori și utilizarea efectului de levier al performanțelor sociale pentru atragerea resurselor financiare. Pe termen mediu și lung, acestea desfășoară activități de lobby (Neamu & Enășel, 2021) și implementează modele de antreprenariat (Eid, 2016), care contribuie la îmbunătățirea performanțelor economice, dar și la dezvoltarea economică (Baumol, 1990; Neamu, 2016).



## II. Patrimoniul cultural

Paradigma noii muzeologii (Varine-Bohan, 2015) abordează patrimoniul cultural dintr-o perspectivă integrată, conform căreia muzeele colecționează și conservă artefactele și totodată împărtășesc cunoașterea distribuind imagini ale trecutului și implicii și ale prezentului, într-un mod relevant pentru fiecare interacțiune (Lepik & Carpentier, 2013). Pentru a direcționa activitățile instituției înspre îmbogățirea experienței vizitatorului (Hein, 2000) înspre educare, delectare, participare și reflecție (ICOM, 2023), literatura de specialitate (Noble, 1970; van Mensch, 1992; Message, 2006; Bogan et al., 2018) identifică funcțiile muzeului, concertate și interdependente (Rentschler, 2007). Cercetarea de față consideră drept funcții de bază ale muzeelor conservarea, cercetarea și educarea membrilor categoriilor de public.

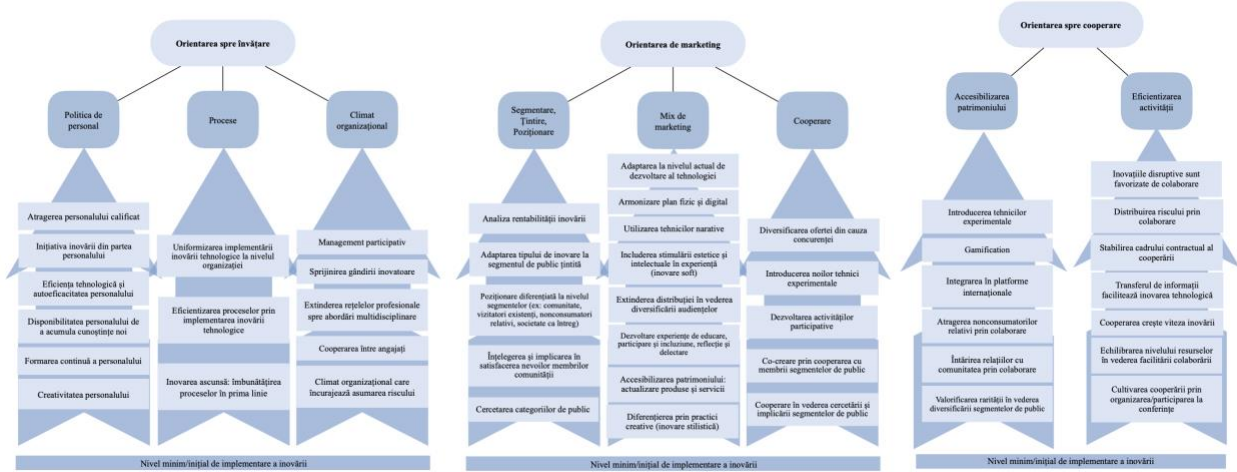
Implementarea inovării la nivelul conservării patrimoniului se concentrează în special pe utilizarea noilor tehnologii, care permit implementarea unei abordări integrate, sustenabile și etice. Cercetarea patrimoniului vizează implementarea graduală a mijloacelor noninvazive și încurajează accesibilizarea și formarea grupurilor interdisciplinare care facilitează transferul informațional și dezvoltarea cunoașterii. Diseminarea rezultatelor cercetării și a specificului patrimoniului cultural deținut are ca scop educarea publicului. Eficientizarea funcției educaționale presupune abordarea procesului pe trei paliere: *programe educaționale*, care reprezintă o formă a educației nonformale cu obiective de învățare prestabilite, conectate cu informațiile de specialitate oferite de instituție; *educația pentru patrimoniu*, care abordează, prin prisma patrimoniului, utilizând instrumente specifice (expoziții, conferințe) teme de interes; *învățarea participativă*, care presupune implicarea membrilor categoriilor de public în toate nivelurile procesului de educație nonformală și transformarea lor în agenți de multiplicare a programelor.



### III. Orientarea strategică

În vederea eficientizării îndeplinirii obiectivelor sociale și economice și a exercitării funcțiilor muzeelor, instituțiile trebuie să stabilească orientarea strategică, pe care să o implementeze consecvent, prin intermediul instrumentarului specific de prelucrare a pieței (Griffin, 2003; Camarero & Garrido, 2009). Literatura prezintă o varietate de orientări care pot fi adaptate sectorului cultural. Cercetarea de față se realizează rezultatelor studiului efectuat de Camarero & Garrido (2008a), conform cărora complementaritatea orientărilor determină îmbunătățirea performanțelor instituționale. Grila de evaluare urmărește abordarea integrată a trei categorii de orientări: spre învățare, de marketing și spre cooperare, fundamentate pe principiile inovării deschise (Chesbrough, 2003; West et al., 2005).

Orientarea spre învățare vizează implicarea activă în transferul informațional dintre organizație și mediu, realizată la trei niveluri: politica de personal, prin disponibilitatea angajaților de a acumula cunoștințe noi și de a rămâne conectați la stadiul de evoluție al domeniului; îmbunătățirea proceselor cu sprijinul angajaților (inovare ascunsă) și uniformizarea implementării inovării, respectiv menținerea unui climat organizațional care încurajează creativitatea, experimentarea și toleranța ridicată la risc. Orientarea de marketing vizează etapele strategiei de marketing prin cercetarea nevoilor și dorințelor categoriilor de public și adaptarea mixului de marketing prin cooperarea cu vizitatorii și alte organizații de profil. Incluziunea cooperării în strategia organizațională vizează atât accesibilizarea patrimoniului, cât și eficientizarea proceselor organizaționale.



Sursa: prelucrare proprie.

## **Theoretical contributions**

The literature includes a number of definitions of innovation tailored to the public sector (Mulgan & Albury, 2003; Voss et al., 2006; Xue et al., 2008; Piening, 2011), the nonprofit sector (Damanpur & Evan, 1984; Burt & Taylor, 2003; Hull & Lio, 2006; McDonald, 2007), and the cultural sector (Stubotina, 2015). Although research on innovation in museum marketing highlights some characteristics of this process, there is no exhaustive definition of the innovation process in museum marketing. Based on inductive thematic analysis of the results of semi-structured interviews with museum managers and experts conducted internationally and deductive thematic analysis of reports issued by international museum organisations, the present research proposes such a definition.

Marketing studies published to date highlight a varied typology of the innovation process. Building on these, this paper extends the literature research by addressing holistically and multidisciplinary types and characteristics of this phenomenon. Accordingly, a classification of the types of innovation found in museum marketing is established (Figure 5), extended on the basis of research and explanation of the specifics, composition and outcomes, by incorporating the following types of innovation specific to other fields:

- Social innovation (CSI, 2018), originally defined by Fairweather (1967) as an alternative way of solving social problems and included in social entrepreneurship models (WEF, 2018) and later taken up by Eid (2016) in the museum innovation model;
- Ancillary innovation (Damanpour, 1987), taken from studies in public libraries, defined as customer involvement in service delivery;
- stylistic (Cappetta et al., 2006), formal and aesthetic innovation (Bianchi & Bartolotti, 1996; Tran, 2010), referring to the totality of improvements made to the form of a product in the fashion industry, without intervening in their functionality;
- hidden innovation (Hicks & Katz, 1996; NESTA, 2007), originally introduced in the medical field, is based on creativity and includes all innovations implemented and not reported in official statistics;
- Silent innovation (Andersen, 2011), identified in the field of nanotechnology, encompasses aspects that, although identified, are not communicated to the market for ethical or economic reasons, are still unclear, or replication involves several cost categories.

The detailed theoretical analysis of the innovation process is grounded in both the marketing literature (Mulgan & Albury, 2007; Camarero & Garrido, 2008b; Camarero et al., 2011; Vicente et al., 2012), as well as studies from related fields (Drucker, 1954; Han, et al., 1993; Mulgan & Albury, 2003; Hult et al, 2004; Marcum, 2008; Xue et al., 2008; Piening, 2011), and European innovation research and reporting reports and standards (OECD, 2018b; OECD/Eurostat, 2018; NESTA, 2019). This integrated approach has led to the development of an innovation implementation framework (Figure 15), which encompasses, alongside the typology of innovation, the environmental characteristics that drive/facilitate the implementation of the innovation process; the organisational levels where implementation produces beneficial effects; and the social and economic performance achieved. By documenting and analysing the coordinates of these four categories, this paper provides an overview of the process and opens up a number of new research perspectives.

### **Contributions on empirical research**

Regarding the empirical research conducted in this paper, it uses triangulation as a methodological approach to increase the validity of the research. The literature is scarce in relation to describing the protocol of data analysis using mixed methods. By taking, adapting and applying the methodology to the analysis of two datasets collected using two different methods, the present paper contributes to the development of triangulation methodology. Furthermore, the broad nature of the two qualitative research studies on which the triangulation methodology was applied brings together several elements of the typology: triangulation of research, concepts and data sources.

Similarly, by taking up, adapting, implementing and describing in detail the protocol of inductive and deductive thematic analysis respectively, the present research contributes to the enrichment of the literature on qualitative research methodology in museum marketing. The approach is also supported by the elaboration of a qualitative research tool (semi-structured interview guide) appropriate to the investigated topic, by taking validated items from the museum marketing literature as well as from other multidisciplinary studies and/or related fields.

### **Managerial implications**

The study of the implementation of the innovation process in museum marketing contributes to the identification of sources, i.e. activities generating innovation. Determining the degree of implementation of innovation at the institutional level contributes to improving organisational strategy and the efficient use of resources. Thus, improving the economic and social performance of the museum institution results in positive outcomes for the museum community (increased education, welfare, etc.), contributes to increasing the competitiveness of the cultural

sector (through implementation of innovative solutions, transfer of best practices, efficient use of resources) as well as to economic growth (by stimulating the entrepreneurial orientation of museums, supporting creative industries, etc.). Cultural development brings added value to society as a whole.

This paper connects theoretical and empirical issues, using practical examples and explanations throughout. This provides managers and cultural specialists with an overview of the innovation process in museum marketing, as well as a detailed overview of its constituent elements. By developing the evaluation grid, the present research provides a useful tool for practitioners to determine the current situation of the institution in relation to the level of development of the museum sector. It also projects the directions of development as well as the steps to be taken. These are clearly formulated so that they can be incorporated into the strategy, while remaining fluid enough to adapt to institutions with different profiles, different missions (depending on the model of museology in which they fit, their aims and objectives), different sizes (in terms of the size of their collections, the number of staff, the volume of resources), and therefore different levels of development and different missions. The tool developed provides an overview of the museum's marketing strategy and the direction in which innovation can be implemented in each of its elements.

### **Research limitations**

The limitations of the present work stem from the sometimes poor access to the literature and the dearth of qualitative research conducted in the field of museum marketing. Also, from the perspective of the sample of managers and specialists interviewed, the limitations are the high rate of non-response and the subjectivity shown by the elites. The size and geographical distribution of the interviewed sample as well as the sample of documents under analysis diminish the representativeness of the results. Although validity was strengthened by implementing a multi-method research, these are limitations of the research.

### **Future research directions**

The development of a grid sets directions for the implementation of innovation within the museum institution. Future research aims to build on the exploratory results of the current research and follow two complementary research directions, qualitative and quantitative. The qualitative research aims to use grounded theory to complement the innovation coordinates identified so far. It involves repeatedly interviewing a sample of specialists, alternating with analysis of the results in order to analyse the themes studied in depth. Subsequently, quantitative research, using the questionnaire as a tool, aims to develop indicators for measuring innovation and organisational development strategies based on the results provided by the indicators.

At the theoretical level, future research directions aim to define the types of innovation taken from other fields and to identify the specific coordinates of museum marketing.

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## Annex 1: Ghid interviu

### Ghid de interviu

Acest interviu face parte din cadrul tezei de doctorat care are ca tema implementarea inovării în muzee și are ca scop elaborarea unui set de indicatori pentru măsurarea gradului de implementare a inovării în muzee. Studiul empiric își propune și formularea unei definiții a inovării în muzee.

Vă rugăm să acordați o parte din timpul Dvs. prezentei cercetări și să răspundeți argumentat la următoarele întrebări. Vă informăm că datele colectate în cadrul acestui interviu sunt confidențiale.

**Vă mulțumim pentru timpul acordat!**

<b>I. Definirea și tipologia inovării</b>	
<b>1.</b>	<b>Sunteți familiarizat cu conceptul de inovare? Ce înțelegeți prin inovare în contextul unui muzeu? Vă rugăm detaliați răspunsul.</b>
<b>2.</b>	<b>Ce inovații ați implementat la nivelul produselor și serviciilor muzeului Dvs. în ultimii trei ani? Ce schimbări au produs acestea la nivelul activității și performanțelor muzeului?</b>
2.1.	Ce obiective considerați că ar trebui să îndeplinească implementarea inovațiilor în activitatea muzeului? În ce fel?
2.2.	Care este sursa inovațiilor tehnologice pe care le implementați? Sunt dezvoltate de angajații muzeului, prin colaborări sau sunt achiziționate de la terți?
2.3.	În ce fel considerați că inovațiile la nivelul strategiei de marketing influențează performanțele muzeului? Vă rugăm exemplificați.
2.4.	Din ce domenii provine echipa de conducere a muzeului Dvs., respectiv angajații muzeului Dvs.?
2.5.	Considerați că implementarea inovațiilor tehnologice în experiența de vizitare îmbunătățește calitatea experienței pentru vizitatori sau reprezintă o barieră? Vă rugăm detaliați.
<b>3.</b>	<b>Cum considerați că schimbul (liber) de informații și colaborarea cu alte organizații din mediul în care activează muzeul influențează îndeplinirea misiunii muzeului?</b>
<b>4.</b>	<b>În ce măsură considerați că este important să acordați atenție componentei estetice a inovațiilor implementate de muzeu?</b>
<b>5.</b>	<b>Ce indicatori folosiți pentru măsurarea inovării în muzeul Dvs.? Ce indicatori ați adăuga?</b>
<b>II. Contextul implementării inovării</b>	

<b>6.</b>	<b>Ce efecte au schimbările din mediu asupra muzeelor? În ce fel considerați că bunele practici ale unor muzee și/sau impunerea unor standarde influențează activitatea muzeului Dvs.? Dar a muzeelor în general?</b>	
	6.1.	Care considerați că sunt caracteristicile unui muzeu adaptabil la schimbare?
	6.2.	Considerați că există legătură între dimensiunea muzeului și capacitatea sa de inovare? Vă rugăm detaliați.
	6.3.	Care sunt sursele (interne sau externe) care considerați că generează idei inovatoare implementabile în muzee?
	6.4.	Care considerați că sunt abilitățile și atuurile unui manager care contribuie la dezvoltarea capacității de inovare a muzeelor?
	6.5.	Considerați că există legătură între sursele de finanțare a muzeului și capacitatea sa de inovare? Care considerați că sunt sursele cele mai potrivite de finanțare a inovării?
	6.6.	Care considerați că sunt cele mai mari bariere în calea inovării?
<b>III. Misiunea și viziunea organizațională</b>		
<b>7.</b>	<b>Muzeul Dvs. are o misiune motivantă și clar formulată? În ce fel considerați că misiunea organizației influențează îndeplinirea obiectivelor muzeului?</b>	
	7.1.	În ce fel considerați că misiunea organizațională a muzeului influențează atitudinea organizației față de risc?
	7.2.	În ce fel considerați că misiunea organizațională influențează gradul de implementare a inovării în muzeu?
	7.3.	Considerați că există o legătură între viziunea organizației împărtășită de membrii organizației și gradul de implementare a inovării în muzee?
<b>IV. Orientarea strategică a muzeelor</b>		
<b>8.</b>	<b>Considerați că preocuparea muzeelor pentru nevoile și așteptările publicului influențează procesul de inovare? De ce? Ce acțiuni întreprinde muzeul care adoptă această orientare spre consumator?</b>	
	8.1.	În ce măsură considerați că preocuparea muzeelor pentru învățare influențează procesul de inovare? De ce? Ce acțiuni întreprinde muzeul pentru a adopta orientarea spre învățare
	8.2.	Considerați că muzeul ar trebui să investească constant în identificarea soluțiilor pentru rezolvarea problemelor?
	8.3.	Considerați că angajații și colaboratorii muzeului contribuie la găsirea și implementarea ideilor inovatoare? Vă rugăm detaliați.
	8.4.	În ce fel considerați că preocuparea muzeului pentru conservarea patrimoniului influențează procesul de inovare? Vă rugăm detaliați.
	8.5.	Considerați că diferențierea și orientarea muzeului spre implementarea activităților de marketing influențează procesul de inovare? Vă rugăm detaliați.
	8.6.	Considerați că muzeul ar trebui să cultive competiția sau cooperarea cu concurenții din mediul în care activează? Ce fel de acțiuni întreprinde muzeul în acest sens? Dar cu ceilalți actori din mediul în care activează?
	8.7.	În ce măsură considerați că este important ca muzeul să investească în relațiile cu donatorii și membrii săi? Ce acțiuni considerați că ar trebui să întreprindă muzeele? Vă rugăm detaliați.
<b>V. Activități generatoare de inovare</b>		
<b>9.</b>	<b>În funcție de care considerente alegeți acțiunile care urmează să fie implementate? Cum determinați potențialul inovator al unei acțiuni a muzeului?</b>	
<b>VI. Cheltuieli cu activități generatoare de inovare</b>		
<b>10.</b>	<b>Care sunt activitățile generatoare de inovare care cauzează cele mai mari cheltuieli muzeului Dvs.?</b>	
<b>VII. Rezultatele implementării procesului de inovare</b>		
<b>11.</b>	<b>În ce fel considerați că sunt influențate performanțele muzeului în care lucrați de implementarea proceselor de inovare?</b>	
	11.1.	În ce fel considerați că sunt influențate performanțele economice ale muzeului în care lucrați de implementarea proceselor de inovare?

	11.2.	În ce fel considerați că sunt influențate performanțele sociale ale muzeului în care lucrați de implementarea proceselor de inovare?
12.	<b>Considerați că este important ca muzeele să fie preocupate de problemele globale care afectează societatea? Ce acțiuni ar trebui să întreprindă?</b>	

