

Social marketing for museums: an introduction to social marketing for the arts and culture sector

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Abstract

Purpose – The paper aims to introduce social marketing (SM) as a tool to overcome the low cultural participation, a problem of the arts and culture sector that has worsened in the post-pandemic scenario.

Design/methodology/approach – The study uses a multidisciplinary literature review (SM, museum marketing, museology and cultural policy) to address the problem of museums and other cultural heritage institutions, at both the macro-level (prevailing cultural policies and antecedents, barriers and consequences to cultural participation) and micro-level (challenges faced by museums in the 21st century and marketing as a management instrument).

Findings – The downstream, midstream and upstream approaches can be used to design and implement SM interventions intended to address the problem of low cultural participation in museums. The three approaches should be considered holistically, with their synergetic and recursive effects.

Research limitations/implications – Due to its introductory and conceptual nature, the study provides a comprehensive intervention framework to be used as a platform for future theoretical and empirical research. Further investigations may expand on the specificities of each approach (down, mid and upstream) and extend the framework to other nonprofit cultural institutions beyond museums, such as libraries and archives, cultural heritage sites and theater, music and dance companies.

Practical implications – The paper proposes a comprehensive SM intervention framework that integrates three interdependent approaches (downstream, midstream and upstream).

Originality/value – The paper provides a starting point for the holistic application of SM in the arts and culture sector. It also encourages researchers, cultural policymakers and cultural heritage professionals to investigate, design and implement SM programs that better understand, expand and diversify the audience and strengthen the legitimacy and relevance of cultural actors and activities to transform them into inclusive, accessible and sustainable institutions.

Keywords Social marketing, Cultural participation, Museum marketing, Arts and culture, Downstream, Midstream and upstream approaches

Paper type Conceptual paper



1. Introduction

The pandemic has caused a major economic disruption and severely damaged the culture and tourism sectors, leading to social isolation, the shutting of external borders and the suspension of non-essential activities, resulting in the closure of 90% of the museums around the world (UNESCO, 2020). In Europe, museums reopened after relaxed social isolation rules, with reduced capacity, timed entry, mandatory use of masks and maintaining physical distance. Despite this, the maximum attendance was 30% of the visitation rates in 2019, which is considerably below the number of people allowed as per security measures (Siegal, 2020). Due to the second and third waves of the coronavirus in 2021, only half of the world's natural and cultural heritage sites are fully open to the public (UNESCO, 2021).

However, even before the pandemic, museums, galleries, heritage sites, libraries and other cultural institutions (hereafter, museums) have suffered continuous cuts in public funding (ICOM, 2018; ICOM Brasil, 2019), as well as low visitation rates and perceived relevance, especially among the most vulnerable social groups (Ibope-Inteligência, 2018; Leiva & Meirelles, 2018). The present paper considers this to be an urgent social problem that needs to be addressed, especially because participation in cultural activities is recognized as beneficial to human beings, both individually and collectively, as well as being a fundamental human right. As stated in the Universal Declaration of Human Rights (UDHR):

§1- Everyone has the right freely to participate in the cultural life of the community, to enjoy the arts and to share in scientific advancement and its benefits. §2- Everyone has the right to the protection of the moral and material interests resulting from any scientific, literary or artistic production of which he is the author. (United Nations General Assembly, 1948, Paper 27°).

As the basis for several international treaties and national constitutions, the UDHR inspires and pressures governments to guarantee, via regulatory measures and public policies, people's participation in cultural activities. It also states that everyone has the right to freedom of expression (Paper 19), rest and leisure (Paper 24) and education (Paper 26), which are associated with the right to cultural participation (UNESCO-UIS, 2012).

This paper presents the arts and culture sector as a novel area for the application of social marketing (SM) and proposes the investigation and the utilization of SM to mitigate low participation in cultural activities, particularly museums. To this end, this paper uses a multidisciplinary literature review to address the problem at both the macro-level (prevailing cultural policies and antecedents, barriers and consequences to cultural participation) and micro-level (challenges faced by museums in the 21st century and marketing as a management instrument). Subsequently, SM is introduced as a tool to overcome the problems faced by museums through a comprehensive intervention framework that interrelates downstream, midstream and upstream approaches. Finally, the paper presents pathways for further theoretical and empirical research on SM applied to the nonprofit arts and culture sector.

2. Understanding the social marketing application field: the arts and culture sector

When marketing was still a burgeoning discipline of study and action (Kotler & Levy, 1969; Levitt, 1960), discussions in the field focused on the usage scope of concepts and techniques originally created for the consumer goods sector and whether they could be used to sell services, ideas, people and social causes. Consequently, social (cause) marketing has emerged as a "promising framework for planning and implementing social changes" (Kotler & Zaltman, 1971).

Initially, the SM focused on the expansion and application of marketing concepts for the acceptance of ideas, causes and social programs (Mazzon, 1982). As the discipline has matured, the central goal evolved to influence the voluntary behavior of priority audiences (Andreasen, 2003), i.e. to incite the voluntary acceptance, rejection, modification or abandonment of a behavior for the benefit of individuals and society (Lee & Kotler, 2019).

Fifty years after being introduced, SM is currently facing critiques and demands for further progress, particularly with regard to freeing itself from the conventional, commercial marketing theories and techniques (Edgar, Huhman, & Miller, 2017; Gordon, Tapp, & Spotswood, 2013; Peattie & Peattie, 2003; Silva & Mazzon, 2018; Wood, 2008) and extending its areas of study and application. Since its inception, SM has primarily focused on public health (Dahl, 2010; Truong, 2014; Truong, Garry, & Michael Hall, 2014), which has gradually expanded to environmental and social issues, such as biodiversity protection, climate change and social belonging (Biroscak, Scott, Lindenberger, & Bryant, 2017; Merritt, Kamin, Hussenöder, & Huibregtsen, 2017).

Despite the extensive literature on SM and museology, there is no body of research combining those two major themes. In general, studies on access, enjoyment and participation in cultural activities and their implications on equity and social inclusion, urban regeneration and quality of life, are undertaken by sociology, education, political science and architecture and urbanism (Dean, Donnellan, & Pratt, 2010).

A manual identification and classification of papers published, between January 2015 and May 2020, in the two leading SM international journals, indicate that health (44%) remains the primary focus of SM, followed by environmental issues (18%). None of the 247 papers analyzed address contemporary problems related to the arts and culture (Table 1). This paper draws attention to the sector and initiates the filling of this gap.

2.1 Cultural policies: the macro scenario

The definition, roles and value of the museum as a cultural phenomenon have changed over time and with political, economic and social contexts (Ambrose & Pain, 2012), for example, depending on how the public authorities view and operate in favor of or against regarding the arts and culture sector.

At present, there are two major Western paradigms of cultural policy: cultural democratization and cultural democracy (or democratic culture) (Mulcahy, 2006). The first concept emerged in the mid-20th century and aims to preserve and disseminate the cultural heritage to all, regardless of social class and promote access to the traditional high culture and to the art legitimized by the cultural industry (e.g. mainstream movies and music shows), by fostering an aesthetic conscience and by supporting the production of standard

Table 1.
Central themes in papers published in the *Journal of Social Marketing* and *Social Marketing Quarterly* between 2015 and 2020

	Total of publications	Public health and medicine	Environment and sustainability	Social issues	SM concepts and development	Editorials and communications
<i>Journal of Social Marketing</i>	128	59	13	34	20	2
<i>Social Marketing Quarterly</i>	119	51	31	7	15	15
TOTAL BY THEME	247	110	44	41	35	17
% BY THEME	100%	44.5%	17.8%	16.6%	14.2%	6.9%

Source: Developed by the author using the semantic search tool Academic.microsoft.com

classical works-of-art (Rubim, 2009). The central tool of cultural democratization is free (or cheap) admission to exhibitions and shows, i.e. public funding to mitigate unequal access.

The cultural democratization model was used in the re-democratization processes of most Latin American countries (Canclini, 1987, p. 46). Despite its undeniable importance, there has been much criticism of the inaugural paradigm (Botelho, 2001; Bourdieu & Darbel, 1991 [1969]; Canclini, 1987; Canedo, 2006; Rocha, 2016): it is centralizing, vertical and paternalistic (the State decides what is cultural and worthy of allocating resources to); elitist and social discriminatory (the “culture” is produced by intellectuals and consumed by the people); and limited (i.e. lacking diversity) and limiting (it invests resources in erudite or mass cultural assets and does not promote popular expressions). By believing that providing access would be enough for the for the population to appreciate, participate and “cultivate” itself (Canedo, 2006), the cultural democratization model ignores the complex structural issues of economic, educational and cultural inequality.

Advancing from the criticism of the cultural democratization orientation, the cultural democracy model utilizes a more decentralized and less vertical approach. In this model, which emerged in the last decades of the 20th century, the state’s role is re-examined and the other sectors of society are included in the formulation, management and execution of cultural programs and projects (Calabre, 2014). Additionally, it is a more inclusive model because it recognizes the diversity of audiences, styles and expressive formats and legitimizes all individuals as producers of culture (Calabre, 2007; Faria, 2003). For example, in Brazil, the cultural democracy policy was implemented in the early 2000s following the reorganization of the Ministry of Culture, resulting in the implementation of public programs to promote popular culture, such as “Cultura Viva” and “Pontos de Cultura” (Calabre, 2019; Rubim, 2013), among other actions.

In addition to the aforementioned ideological issues, the economic context directly impacts the development and implementation of policies and the public access and engagement in cultural activities. For instance, the economic recession of 2007–2009 is perceived to be the cause of a strong decline in cultural participation in Europe (European Commission, 2007, 2013), which took nearly ten years to be reversed (European Commission, 2017).

2.2 Cultural participation in numbers: antecedents, barriers and consequences

It is well established in the literature that the level of education has a positive impact, both directly and indirectly (through socioeconomic position), on individuals’ attendance of cultural. As a recent illustrative example, a survey conducted in capitals cities in Brazil indicated that only 31% of Brazilians had visited at least one museum during the 12 months prior to the survey, whereas 30% had never visited a museum (Leiva & Meirelles, 2018) – half have, at most, completed elementary education. The primary reason for the low (or non-existent) museum visits is “lack of interest”: about 30% “does not like it” (Leiva & Meirelles, 2018). The lack of financial resources (26.8%) and of time (26.4%) are also cited as reasons.

Specifically in the city of São Paulo, 28% of the respondents did not consume or attend any cultural activities in 2018 (Ibope-Inteligência, 2018). These respondents comprised mostly low-income families, with low education, and were primarily women (vs men), black (vs white) and over 55 years (vs children, youth and adults). However, the lack of financial resources does not completely justify museum non-attendance among this group, as 45% of individuals from the C class have gone to the movies, which is a cultural activity neither free nor cheap. Only 11% of the C class have visited museums in the same period (Table 2).

The lack of money, low level of educational attainment and difficulty in accessing cultural facilities do not fully explain the low cultural participation in Europe either. Despite the best social indexes in the world, only 31% of Europeans has participated in traditional

Table 2.
Participation in
cultural activities in
the city of São Paulo,
in 2018, by social
class

	Cinemas		Theatres		Museums		Libraries		Cultural centers		Music shows		Street Fairs and Parties		Arts and craft Events		Classical music concerts	
	A	B	A	B	A	B	A	B	A	B	A	B	A	B	A	B	A	B
Social class A & B participation	80%	72%	42%	31%	37%	32%	44%	28%	44%	42%	57%	41%	42%	42%	48%	42%	23%	11%
Social class C & D/E participation	C	D/E	C	D/E	C	D/E	C	D/E	C	D/E	C	D/E	C	D/E	C	D/E	C	D/E
	45%	26%	10%	6%	11%	5%	15%	5%	18%	4%	23%	12%	32%	21%	15%	4%	1%	
Total participation	55%	19%	19%	19%	19%	20%	20%	27%	30%	34%	29%	7%						

Source: Developed by the author from [Ibope-Inteligência \(2018\)](#)

cultural activities (visiting museums, concert halls and monuments) in the 12 months preceding the survey (European Commission, 2017). The rates are lowest in Southern and Eastern Europe, especially Portugal (17%), Romania (18%), Italy (19%) and Poland (20%). Lack of interest is a significant barrier in visiting museums and was cited as the primary reason by 31% of Europeans.

The studies do not deny the barriers that arise from socioeconomic inequality but indicate that the vulnerable social strata devotes time and/or money to engage in *certain* cultural activities. Thus, low attendance in museums could be addressed by SM programs using a downstream approach, i.e. through campaigns aimed at influencing the individual behaviors of individuals who rarely or never visits museums, especially individuals from minority groups at a socio-cultural, economic, educational, political, ethnic, physical, religious, sexual or gender disadvantage.

Moreover, the relationship between low education levels, socioeconomic disparity and limited attendance demonstrates that low cultural participation is a complex social problem that demands political interventions and medium- and long-term intersectoral public investment. In this regard, SM programs could be developed in an upstream approach (Kennedy, Kemper, & Parsons, 2018), i.e. aimed at influencing pro-culture attitudes and behaviors in politicians, decision-makers and regulators of the cultural sector, as well as mainstream media. When these players devalue or redirect resources from the arts and culture sector, they deprive society of the benefits of the arts and culture on individual and collective well-being.

Attending exhibitions in museums and galleries; watching or practicing dance, music, theater and plastic arts; and visiting libraries, fairs, popular festivals and other events has a positive impact on an individual's subjective well-being (Bryson & MacKerron, 2017; Grossi, Blessi, Sacco, & Buscema, 2012; Kim & Kim, 2009; Siu, Kwan, Zhang, & Ho, 2016; Teater & Baldwin, 2014; Wheatley & Bickerton, 2017); is associated with better cognitive and emotional development (Newman et al., 2010; President's Committee on the Arts and Humanities, 2011; Wavell, Baxter, Johnson, & Williams, 2002); and leads to better health conditions (Bygren, Konlaan, & Johansson, 1996; Staricoff, 2004). Furthermore, collectively, engaging in cultural activities leads to greater social cohesion and civic engagement (National Statistics for Scotland, 2009; NEA, 2009); to community development and social inclusion (Grodach, 2010; Nakagawa, 2010; Research Centre for Museums and Galleries, 2000; Sandell, 1998); and to economic development (labor, employment, income) (UNESCO, 2014). The Brazilian Government estimates that in 2010, the cultural and creative sectors constituted about 4% of the national gross domestic product (GDP); however, there is no standardized measure for cultural participation in Brazil's GDP (Ministério da Cultura, 2017). In 2016, American museums contributed US\$15.7bn directly to the GDP and generated 372,100 jobs (American Alliance of Museums, 2017).

2.3 Museums in the 21st century: the micro scenario

The word "museum" is used to define venues and collections – physical or virtual – that possess historical, aesthetic, scientific, environmental or social meaning and is derived from the Greek *mouseion*, meaning the mythological "home of the Muses," the nine daughters of Mnemosyne (Memory) and Zeus (the king of gods). During the Roman Empire, the word was used to indicate places where philosophical discussions were held (Lewis, 2019) but evolved in Europe between the 15th and 17th centuries to describe collections of art and "cabinets of curiosity" belonging to the aristocracy and high clergy, which were accessible to a privileged few (Chhabra, 2009). It was only during the 18th and 19th centuries that museums

were established as institutions for the preservation and exhibition of cultural material to the public, although still in an elitist manner and not as a right of all people (Hudson, 1975).

In the 20th century, the museums gradually became more accessible and were positioned as major collectors (object-oriented) under a positivist and paternalistic ideology, with the European colonizers as custodians of universal truth. A renewal began in the 1970–1980s with the New Museology, which was influenced by the social criticisms of the 1960s and the politics of cultural democratization (Duarte, 2014; Gouveia, 2014). New Museology inaugurated the public-oriented mission, conceiving the idea of the museum as an interdisciplinary, decolonized and decolonizing instrument of social change and a *locus* of community participation and symbolic exchanges (Mayrand, 2014; Santos, 2002).

To date, the principles of New Museology have not yet been fully put into practice, as highlighted by museum activist demands (McCall & Gray, 2014; Simon, 2010). Current debates focus on redefining the museum, as the current definition is criticized for neither responding to the cultural democracy policy demands, nor expressing the responsibilities and challenges of the 21st century:

A museum is a non-profit, permanent institution in the service of society and its development, open to the public, which acquires, conserves, researches, communicates and exhibits the tangible and intangible heritage of humanity and its environment for the purposes of education, study and enjoyment. (ICOM, 2007).

Recently, the International Council of Museums – ICOM (2019) proposed a definition of museums as “democratizing, inclusive and polyphonic spaces for critical dialogue about the pasts and futures” [. . .] “to contribute to human dignity and social justice, global equality, and planetary well-being” (Marshall, 2020). However, delegations of most European countries considered it a generic, fashionable and aberrant definition (Noce, 2019). The committee-in-charge and the president of ICOM have since resigned.

Following the 2007 definition, museum management must ensure the fulfillment of the multiple functions of a museum: acquire (collect, document), conserve (classify, safeguard), research (produce knowledge) and exhibit (disseminate, educate) their collection. Owing to the competition museums are facing from the educational, leisure and entertainment sectors, for the attention, time and money of consumer-visitors (Komarac, Ozretic-Dosen, & Skare, 2017), marketing has become an indispensable tool in museum management. Additionally, marketing strategies and tactics can assist museums to address the post-pandemic challenges, which are demanding a sustainable and collaborative restructuring of the tourism and cultural sectors (Gössling, Scott, & Hall, 2020; Haywood, 2020).

2.4 Museum marketing

The application of marketing in museum management emerged in the 1960’s, as documented in the classical text *Broadening the concept of marketing* by Kotler and Levy: to change the perception of museums as “cold marble mausoleums that house miles of relics that soon give way to yawns and tired feet,” the director of The Metropolitan Museum of Art of New York, explored the marketing tools to increase attendance (Kotler & Levy, 1969).

Between the 1980s and 1990s, the professionalization period of museum marketing research and practice, studies have focused on data collection and the recognition of the applicability of the discipline in the management of artistic and non-profit institutions. Most comprehensive studies emerged at the turn of the millennium (Kotler & Kotler, 2000; McLean, 1994; Rentschler, 1998; Tobelem, 1998) along with those that examined strategic specificities, such as exploring audience segmentation (Doering, 1999), visitor satisfaction

(Harrison & Shaw, 2004), museum brand management (Caldwell, 2000; Scott, 2000) and methods of measuring museum perceived social value of museums (Scott, 2002).

However, marketing continues to face resistance in the museum space (Bridson & Evans, 2007; Evans, Bridson, & Rentschler, 2012; Mendes, 2015) and is a conflicting aspect of the museological practice. For example, some museologists highlight the negative consequences of a market-oriented restructuring, such as through the commoditization of museums (DesRoches, 2015), the misallocation of resources from the acquisition, preservation, research and educational purposes to entertainment (Dean et al., 2010) and the production of expensive exhibitions (Fernandes & Araujo, 2020). However, this conflict indicates the need for SM to address low participation in museums, particularly to destroy the “monoliths of meaning,” which is a typical barrier to solving complex problems (Carvalho, 2019).

In addition to the downstream (to influence the behavior of the public) and the upstream (to influence the behavior of decision-makers and regulators) approach, a midstream approach is necessary to influence the behavior of organizations and their staff (Russell-Bennett, Wood, & Previte, 2013). Thus, SM midstream programs could be developed and used to reduce the negative biases of museum managers towards marketing and better equip museums for public-oriented management.

Despite the resistance towards marketing, there are numerous examples of museums successfully exploring marketing tools, especially the strategic brand management. Known as superstars museums (Frey, 1998), these are internationally acclaimed institutions with a large number of visitors and various sources of financing (e.g. venue rental, museum store, restaurant, etc.), brand licensing (e.g. MoMA, Van Gogh Museum, The Met), brand extension (e.g. Tate Britain, Tate Modern, Tate Liverpool, Tate St. Ives, Tate Store) and franchise programs (e.g. Solomon Guggenheim of New York, Guggenheim Museum Bilbao, Guggenheim Abu Dhabi, Peggy Guggenheim Collection in Venice; Louvre Paris and Louvre Abu Dhabi). As result, these institutions have improved their reputation, broadened their financial resources and conducted state-of-the-art teaching and research, thus collaborating for the innovation of museum studies and practices via offering open libraries, conferences, courses, workshops, scholarships, awards and educational laboratories (MoMA, 2020; Tate, 2020; Van Gogh Museum, 2020).

From a marketing perspective, the museum *Product* is the overall experience provided to the visitor. Thus, the product is the intangible emotions, sociability and learning the museums promote, which cannot be stocked (explicitly demonstrated through the financial losses incurred during the COVID-19 lockdowns); and is inseparable from the *People* (the fifth P), including the frontline staff (receiving, instructing, guarding) and the back-office team (administration, curatorship, maintenance).

While a museum’s core offering refers to its collections and exhibits, the expanded product includes a myriad of items and activities, such as events (courses, lectures), artistic presentations (music, films, performances), cafeterias and restaurants and gift stores and souvenirs (McLean, 2003). The presence and quality of the support services, facilities and infrastructure components (toilets, cloakroom, seating, parking, lighting, signage, audiovisual guides, etc.) are as important as the exhibitions and contribute to the satisfaction of visitors (Falk & Dierking, 1992, Chapter 6). Following the advances in information and communication technologies (ICTs), museums are integrating augmented reality, virtual reality, games, mobile applications (apps) and other interactive equipment to the visitor’s experience design, which has been of emerging interest to researchers and museum professionals (Loureiro, Guerreiro, & Ali, 2020).

Traditionally, the museum experience occurs in the physical headquarters (the *Place*, which is highly intertwined with the museum *Product*) and its branches – in the case of

expansions or franchises. The building is a valued feature, particularly after the success of the Guggenheim Bilbao museum, which opened in 1997 and led to the “Guggenheim Effect” or “Bilbao Effect” (Rybczynski, 2002). With its iconic architecture, the museum has become a recognized tourist attraction, bringing over one million visitors (and millions of euros) to the region annually and transforming a decadent port city into an example of urban regeneration through cultural tourism (Plaza, Tironi, & Haarich, 2009).

The digital channels, initially developed to support and improve the physical visits (e.g. information on schedules, address, prices, programming, maps, booking and ticket sales), are today an important part of the museum–public interaction and also provide exclusive online services, including information about the collection and exhibitions, interactive games and distance learning courses (Hume & Mills, 2011). When appropriately designed, used and tested, websites and mobile applications foster interest in museums, increasing the number of visitors and creating unique experiences (Kabassi, 2017).

As the only mode of visiting during the pandemic, the online *Place* is a faster and safer alternative, allowing the public to explore the museum in a photographic or 3D reconstruction and to shop at the online store, any time of the day, from anywhere in the world. Although not yet universally available, nor equally adopted by museums, the digital presence has become mandatory and normative, configuring the era of the postdigital museum (Parry, 2013).

Given that museums are non-profit organizations with a social function, establishing the *Price* – the cost of the museum experience to the visitors – encompasses educational and cultural policies, economic viability and perceived value of the museum. Recent studies have emphasized that the entrance fee of a museum does not radically alter the profile of visitors (Rushton, 2017), whereas others have maintained that free admission is vital for a more diverse and fair access and increases the attendance rates of paid museums within the same area (Cellini & Cuccia, 2018). Between the two extremes, strategic pricing based on segmentation is a useful tool for balancing accessibility and the financial demands of museums (Rentschler, Hede, & White, 2007). This could include, for example, granting the admission of students, retired individuals and members from vulnerable social strata (socio-demographic segmentation); creating annual membership programs for repeated visits (behavioral segmentation); and charging additional fees from those who opt for special attractions and services (psychographic segmentation), such as the opening of temporary exhibitions, light shows, skip-the-line tickets, etc.

ICTs have also changed the way museums relate with the audiences through the *Promotion*: besides the traditional advertising, promotional activation, public relations (PR) and direct marketing, museums can explore the interactive modes of communication and interaction with the public, such as through social media, (video) blogs and apps, among others. In today’s hyper-connected world, organizations are no longer the only big disseminator of information about themselves and their offerings; consumers, tourists and citizens are co-creators of the brand meanings and experience through commenting, reviewing and sharing opinions and stories (Swaminathan, Sorescu, Steenkamp, O’Guinn, & Schmitt, 2020). It is no different with museum brands.

Museums and their audiences co-construct each other (Gronemann, Kristiansen, & Drotner, 2015): while visitors rethink and reaffirm their identity narratives, e.g. via selfies with works of art (Kozinets, Gretzel, & Dinhopf, 2017), museums use interactive, transmedia storytelling (Mateos-Rusillo & Gifreu-Castells, 2018) to attract and engage the internal and external public, redefining their purpose, use and relevance (Nielsen, 2017). A recent example of the co-creative bonding are the Instagram and Facebook pages depicting photographic recreations of famous art pieces (e.g. @tussenkunstenquarantaine) produced and posted by people during the social isolation period of COVID-19. Some of the superstar

museums have embraced the idea and encourage followers to continue the practice (Metropolitan Museum of Art, 2020; Rijksmuseum, 2020).

3. Social marketing applied to the problems faced by museums

As discussed, the problem of low cultural participation in museums can be addressed via SM programs that focus on changing the behavior of the downstream, midstream and upstream targets. A comprehensive intervention framework, that integrates the three interdependent approaches, is presented below (Table 3).

The downstream approach can be used to design and implement SM interventions intended to change the behavior of individuals that rarely or never visit museums, especially those in social minority groups. This approach has the most theoretical and empirical background since it targets the same audience as museum marketing (Section 2.4), which is a 50-year-old sub-discipline. Besides, the majority of research and cases on the use of marketing for social causes is focused in the downstream approach, such as segmentation strategy (Walsh, Hassan, Shiu, Andrews, & Hastings, 2010), branding (Keller, 1998; McDivitt, 2003; Naidoo & Abratt, 2018), product (Edgar et al., 2017) and communication strategy (Key & Czaplewski, 2017; Thackeray, Neiger, Hanson, & Mckenzie, 2008). However, most exemplary examples of SM are applied to public health.

Despite its advantages, downstream SM interventions will face complex social problems, such as socioeconomic inequality, which are associated with low cultural participation (Falk & Katz-Gerro, 2016). Recent studies and successful practices in increasing attendance rates indicate that museums should be oriented to the needs and expectations of visitors, offering welcoming, supportive, engaging and rewarding environments for fun, socialization and learning (Black, 2018). Museums should also reinvent themselves as participatory platforms (Simon, 2010) and as a social space for the circulation and co-creation of content and experiences before, during, and after the visit (Antón, Camarero, & Garrido, 2018). This new orientation would require a change in the paradigm of museum management.

To make such a change feasible, this paper also proposes midstream SM interventions, dedicated to influencing the behaviors of organizations and their staff – in this case, directors, managers, curators and other museum professionals – whose performance is fundamental to the (co-) creation and communication of museum services, together with and for the public (Wood, 2016). Here, the objective is to encourage museums to adapt and apply marketing strategies and tactics to their needs, while taking into consideration the specificities of the museum as a cultural phenomenon as well as contemporary social issues. This can be achieved through marketing courses, seminars and workshops in partnership with higher education museology institutions and museum organizations, such as ICOM, Network of European Museum Organizations, the American Alliance of Museums and the Brazilian Institute of Museums, among others.

The primary barrier to changing the midstream behavior are the intrinsic differences between marketing and museology, which result in distinctive standpoints and forms of action. For example, what marketing usually calls “consumer,” museology calls “visitor” or “audience,” whereas marketing focuses on the process of exchange between the museum and its stakeholders (e.g. STP strategy and the 4 Ps), museology dedicates its efforts to the other museum’s traditional activities (acquisition, conservation, research) in addition to exhibition and dissemination to the public. Moreover, as discussed earlier, marketing is not fully accepted in the museological practice.

Confirming the need for a midstream intervention, the museum sector has been organizing an increasing number of projects and training courses. Notable examples include “Digital skills for museum professionals” (MuSA, 2017, funded by the European Commission), “Museum

Table 3.
SM intervention
framework to
overcome the
problems faced by
museums

Approach	Downstream	Midstream	Upstream
Target audience	Infrequent visitors and non-visitors; Social minorities	Museum professionals (directors, managers, etc.), researchers and students	Cultural sector decision makers; politicians, regulators, etc.
Desired behavior	Modify the lack of interest in museums (attitudinal); Adopting the habit of visiting museums (behavioral)	Abandonment of prejudices regarding marketing (attitudinal); Adoption of marketing strategies and tactics in a public-oriented museum management (behavioral)	Modify the low valuation of the arts, culture, and of museums (attitudinal); Abandoning resource cuts for the arts and culture (behavioral)
● New attitudes and behaviors of the target audience			
Main barrier(s)	Lack of interest in museums; Lack of money and time	Discrepancies between marketing and museology	Self-interest, power relations, political party (and ideological) biases
Competition	Participate in other cultural, educational, leisure and entertainment activities	Commitment to the other functions of the museum (acquisition, conservation, research), more focused on the collection than on the public	Allocate resources to other areas of state intervention (and not to the arts and culture)
Product: the social proposition	Subjective well-being (entertainment, socialization, learning); Collective well-being and health (better quality of life in society)	Increase of attendance rates;	Public recognition/approval;
● The benefit (value) to the target audience		Better museum overall reputation (awareness, interest, appreciation, perceived value)	Personal satisfaction for promoting development and well-being;
Price: the costs of involvement	Cost of admission and transportation;	Costs of courses and consulting on marketing;	Being (re)lected and/or (re)appointed to positions and functions
● The monetary and non-monetary costs of the desired behavior, to the target audience	Dedicate time, cognitive and emotional effort, to the museum; Change of habit ("to visit"); Impact on personal and social relationships	Cognitive effort (learning and changing the current practices of museum management)	Financial cost of cultural policies and pro-culture actions;
Place: the accessibility	Physical and digital museums (postdigital museums), mixing physical and virtual experiences	Museum organizations; Educational institutions; Specialized consultancies	Political costs (e.g. articulation, negotiation) and public opinion (to please/displease voters)
● Where the desired behavior occurs			
Promotion: the social communication	Emphasis on the interactive digital media (websites, social networks, apps, etc.)	Emphasis on sponsorships of courses, conferences and other events at/from museum's associations (ICOM, NEMO, AAM, etc.)	The political arena: Executive (e.g. ministries, secretariats), Legislative (parliaments) and Judiciary (courts) powers.
● In a hyper-connected world			Regulatory agencies, councils, public banks Lobbying; Public relations (PR); (Net)activism campaigns

Source: Developed by the author

branding” (MuSEaum, 2018, in Portugal), “Attracting underrepresented minority audiences” (Open Up Museums, 2017, in the United Kingdom) and “Environmental, economic, cultural and social sustainability of museums” (Ibermuseum, 2020, in Ibero-American countries).

Finally, upstream SM interventions are also required to mitigate low participation in museums, since the approach focuses on influencing the behavior of decision-makers and regulators at the local, regional and national levels. This is a difficult-to-access audience, whose decision-making processes are conditioned by self-interest, rules and incentives, power relations, ideals and political parties, public opinion and media interference (Souza, 2006). In addition, investigating and implementing SM programs under this approach is likely to require studies in political science and public law, among other fields.

For the upstream target, which includes politicians, and commissioned officials of the arts and cultural sector, the most valuable benefits to encourage them to change their behaviors (e.g. stop cutting funds to arts and culture) would be their (re)election or (re)nomination to the position of interest. However, no SM program can guarantee these results in political arenas. PR and collective mobilization actions – including in its digital, informational and media version, i.e. net-activism (Di Felice, 2013) – may influence the public opinion and, therefore, indirectly impact upstream behavior (Gordon, 2013). Pro-museum campaigns can also be carried out through lobbying (advocacy with decision-makers) for the promotion of ideas, interests and claims in democratic regimes (Santos, Mancuso, Baird, & Resende, 2017).

The three approaches, described separately, should be considered holistically, with synergetic and recursive effects. Effective upstream interventions (aiming towards pro-culture resolutions on public contributions from the decision-makers) support and improve downstream programs (with political and financial resources) dedicated to increasing the interest in museums and the visitation rates. Conversely, an effective downstream intervention increases the perceived value of the museum among citizens, who will mobilize the society and pressure the decision-makers to invest resources in museums. Additionally, an effective midstream intervention (intended for the optimum adaptation and adoption of marketing techniques in museum management) bridges the gap between upstream and downstream programs, allowing better employment of the political and financial resources (from the upstream level) in downstream programs.

4. Conclusion

Twenty years ago, Castells (2001) warned that “museums can become mausoleums of historical culture reserved for the pleasure of a global elite or they can respond to the challenge and become cultural connectors for a society which no longer knows how to communicate.” With the current lack of interest and low museum attendance rates, activists, artists, curators, managers and researchers know that the survival of museums depends on their ability to reconnect with the public. This can be achieved by a rethinking of public cultural policies, museum management models and the role of the museums in the contemporary society. Furthermore, with the pandemic, this realignment has gained global urgency (UNESCO, 2020).

As a conceptual work, this paper meets this urgency through the identification, discussion and interconnection of multidisciplinary and state-of-the-art literature in SM, museum marketing, museology and cultural policies. Due to its introductory nature, the study provides a comprehensive intervention framework, to be used as a platform for future work (Table 3). Further theoretical and empirical research may expand on the specificities of each approach (down, mid, and upstream) and extend the framework to other cultural institutions beyond museums, such as libraries and archives, cultural heritage sites and theater, music and dance companies.

Additionally, researchers can study on the cognitive (body of knowledge, tools and goals), normative (norms and values implied and/or to be created) and instrumental dimensions (guidelines of implementation and evaluation) (Santos, 2019) of SM when applied to the nonprofit arts and culture sector. For instance, in the downstream approach, further research could help gain insight into the participation in the arts and culture, such as the needs and motivations of infrequent visitors and non-visitors when searching for and choosing educational and entertaining activities; the perceived value and relevance of the arts and culture in a particular community or region; and using new tactical tools, such as influencer marketing, gamification and social media storytelling, in increasing individuals' interest in museums and cultural activities.

In the midstream approach, novel SM investigations could map the adoption or rejection of marketing techniques in museum management and curatorship; clarify norms-/values-based impediments and incentives for the complete integration of museology and marketing; and guide museum professionals to develop and manage strong brands.

Further studies in the upstream approach could examine the regulatory and technical structures of the arts and cultural sector that need to be addressed in a SM intervention; the moral, ethical and legal aspects of persuasive appeals to be used to influence politicians, policymakers and regulators; and how to implement and monitor SM programs intended to change the system structure beyond changing the behavior of decision-makers at the individual level and changing cultural policies, social norms and cultural values.

Conclusively, this work provides a starting point for the holistic application of SM in the arts and culture sector. Moreover, it encourages researchers, cultural policymakers and cultural heritage professionals to develop SM programs that better understand, expand and diversify the audience and strengthen the legitimacy and relevance of cultural arts and activities to transform them into inclusive, accessible and sustainable institutions.

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