Brand Audit for Cultural Institutions (BAC) – Model and Practical Application

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Marina Kaluza
Nicole Lohrisch
Agenda

- Motivation and research goal
- Definition and literature review
- BAC: framework, process, and output
- Practical applications and validation
- Conclusion
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"A true story": Please present your brand management!
Motivation and research goal
Definition and literature review
BAC: framework, process, and output
Practical applications and validation
Conclusion
“A brand audit for cultural institutions (BAC) is a comprehensive, systematic, independent, and periodic examination of the brand of a cultural institution (e.g., museum, theatre) with the aim to determining problem areas and to develop recommendations for improving the brand strength.”*

*: similar to the marketing audit definition by Kotler/Gregor/Rodgers (1977)
## Literature review: Marketing and Brand Audit

<table>
<thead>
<tr>
<th></th>
<th>Marketing Audit</th>
<th>Brand Audit</th>
</tr>
</thead>
</table>
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BAC: Framework

Brand Inventory

Brand facilitating factors

1. Brand orientation
   (Organisational culture, Leadership)

2. Brand positioning

3. Brand strategy

4. Brand organization

5. Internal brand management

6. Brand tools
   (brand controlling, cd guidelines)

Brand touchpoints

7. Branding

8. Pivotal and additional services

9. Communication
   external (media)
   personal
   location based

10. Participation opportunities

11. Shop & Catering

12. Brand leveraging

Brand Payoffs

Brand performance

13. Brand strength (visitors)
   - Brand awareness
   - Brand image
   - Brand attitude
   - Brand loyalty

14. Brand strength (public)

15. Number of visitors

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### BAC: Process & Organization

#### Construction of BAC
- Scoring model (3 categories, 15 dimensions, 83 items, 5-point scale + comment field)
- Expert validation (completeness and weighting, n=18)

#### BAC conduction by an external, independent brand audit team
- Secondary research (homepage, publications, marketing material, evaluation data etc.)
- Open interviews (director level, chief of marketing, PR, HR)
- Own observation (field visits)
- Employee and visitor survey (optional)

#### Evaluation by the audit team
- Multiple-source approach, audit team
- Calculation of the BAC Index

#### Communication of the BAC results
- Workshop (results, impulses for improvement of the brand management)
- Feedback and check of the implementation of improvement measures (4-8 weeks later)
### Dimension 3: Brand strategy

<table>
<thead>
<tr>
<th>Fortification of the corporate brand</th>
<th>... offers all products and services with a strong and clear link to the corporate brand of the cultural institution.</th>
<th>All products and services show a clear link to the corporate brand.</th>
<th>Most products and services show a clear link to the corporate brand.</th>
<th>Temporary offers (e.g., special exhibition) show only a moderate link to the corporate brand.</th>
<th>Most products and services show only a moderate link to the corporate brand.</th>
<th>All products and services operate more or less with independent product brands.</th>
</tr>
</thead>
<tbody>
<tr>
<td>...</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Cultural institution**

<table>
<thead>
<tr>
<th>5 (positive)</th>
<th>4</th>
<th>3</th>
<th>2 (negative)</th>
<th>sources &amp; justificat ion</th>
</tr>
</thead>
<tbody>
<tr>
<td>...</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**BAC: Process & Organization**
BAC: Output

Brand performance (34%)
Number of visitors
Brand strength (public)
Brand strength (visitors)
Brand orientation
Facilitating factors (36%)
Brand positioning
Brand strategies
Brand organisation
Internal brand management
Branding
Additional services
Communication
Participation opportunities
Shop & Catering
Brand leveraging

Brand Touchpoints (30%)

0-49 %
50-75 %
more than 75 %
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Practical application I: Validation of BAC

- Conduction of BACs for different cultural institutions
  - 4 museums
  - 1 theatre
  - 1 vaudeville theatre

<table>
<thead>
<tr>
<th>Differences between the two BAC audit teams</th>
<th>BAC 1</th>
<th>BAC 2</th>
</tr>
</thead>
<tbody>
<tr>
<td>0</td>
<td>64%</td>
<td>59%</td>
</tr>
<tr>
<td>1</td>
<td>32%</td>
<td>31%</td>
</tr>
<tr>
<td>2</td>
<td>4%</td>
<td>3%</td>
</tr>
<tr>
<td>3</td>
<td>0%</td>
<td>8%</td>
</tr>
</tbody>
</table>

- High level of intercoder reliability: around 90 % of all evaluations are identical or only one point difference
Practical application II: QuickCheck

1. QuickCheck website for brand orientation in the cultural sector.
2. Welcome page of QuickCheck, explaining its purpose to measure market leadership in a simple way.
3. Dimension 4: Brand and Marketing Organization.
4. Process diagram showing the steps of the QuickCheck method: diagnosis, analysis, and results.
Practical application II: **QuickCheck**

- **anne frank**
- **TATE**
- **MoMA**

**BAC-Index**

- Brand performance (public) 34%
- Number of visitors
- Brand strength (public)
- Brand strength (visitors)
- Brand orientation
- Brand positioning
- Brand strategies
- Brand organisation
- Brand tools
- Internal brand management
- Branding
- Additional services
- Communication
- Participation opportunities
- Shop & Catering
- Brand leveraging
- Brand touchpoints (30%)
- Brand touchpoints
### Practical application III: QuickCheck as a validation measurement of BAC

#### Type of cultural institution
<table>
<thead>
<tr>
<th>BAC 1</th>
<th>QuickCheck 1</th>
<th>BAC 2</th>
<th>QuickCheck 2</th>
</tr>
</thead>
<tbody>
<tr>
<td>Middle sized museum of photography</td>
<td></td>
<td>Independent and performance art theatre</td>
<td></td>
</tr>
</tbody>
</table>

#### Brand facilitating factors

<table>
<thead>
<tr>
<th></th>
<th>BAC 1</th>
<th>QuickCheck 1</th>
<th>BAC 2</th>
<th>QuickCheck 2</th>
</tr>
</thead>
<tbody>
<tr>
<td>Brand orientation</td>
<td>89%</td>
<td>88%</td>
<td>61%</td>
<td>56%</td>
</tr>
<tr>
<td>Brand positioning</td>
<td>100%</td>
<td>100%</td>
<td>45%</td>
<td>100%</td>
</tr>
<tr>
<td>Brand strategy</td>
<td>100%</td>
<td>88%</td>
<td>75%</td>
<td>100%</td>
</tr>
<tr>
<td>Brand organization</td>
<td>94%</td>
<td>75%</td>
<td>50%</td>
<td>58%</td>
</tr>
<tr>
<td>Internal brand management</td>
<td>69%</td>
<td>63%</td>
<td>38%</td>
<td>25%</td>
</tr>
<tr>
<td>Brand tools</td>
<td>71%</td>
<td>75%</td>
<td>38%</td>
<td>63%</td>
</tr>
</tbody>
</table>

#### Brand touchpoints

<table>
<thead>
<tr>
<th></th>
<th>BAC 1</th>
<th>QuickCheck 1</th>
<th>BAC 2</th>
<th>QuickCheck 2</th>
</tr>
</thead>
<tbody>
<tr>
<td>Branding</td>
<td>89%</td>
<td>92%</td>
<td>70%</td>
<td>100%</td>
</tr>
<tr>
<td>Pivotal and additional services</td>
<td>88%</td>
<td>88%</td>
<td>75%</td>
<td>100%</td>
</tr>
<tr>
<td>Communication</td>
<td>90%</td>
<td>94%</td>
<td>56%</td>
<td>94%</td>
</tr>
<tr>
<td>Participation opportunities</td>
<td>88%</td>
<td>100%</td>
<td>31%</td>
<td>50%</td>
</tr>
<tr>
<td>Shop &amp; catering</td>
<td>46%</td>
<td>50%</td>
<td>17%</td>
<td>50%</td>
</tr>
<tr>
<td>Brand leveraging</td>
<td>75%</td>
<td>75%</td>
<td>80%</td>
<td>75%</td>
</tr>
</tbody>
</table>

#### Brand performance

<table>
<thead>
<tr>
<th></th>
<th>BAC 1</th>
<th>QuickCheck 1</th>
<th>BAC 2</th>
<th>QuickCheck 2</th>
</tr>
</thead>
<tbody>
<tr>
<td>Brand strengths (visitors)</td>
<td>83%</td>
<td>75%</td>
<td>88%</td>
<td>88%</td>
</tr>
<tr>
<td>Brand strength (public)</td>
<td>50%</td>
<td>75%</td>
<td>75%</td>
<td>88%</td>
</tr>
<tr>
<td>Number of visitors</td>
<td>77%</td>
<td>75%</td>
<td>50%</td>
<td>50%</td>
</tr>
</tbody>
</table>

#### BAC Indices

<table>
<thead>
<tr>
<th></th>
<th>BAC 1</th>
<th>QuickCheck 1</th>
<th>BAC 2</th>
<th>QuickCheck 2</th>
</tr>
</thead>
<tbody>
<tr>
<td>Index Brand facilitating factors</td>
<td>88%</td>
<td>82%</td>
<td>52%</td>
<td>67%</td>
</tr>
<tr>
<td>Index Brand touch points</td>
<td>82%</td>
<td>85%</td>
<td>60%</td>
<td>85%</td>
</tr>
<tr>
<td>Index Brand Performance</td>
<td>71%</td>
<td>75%</td>
<td>71%</td>
<td>74%</td>
</tr>
<tr>
<td>BAC-Index</td>
<td>80%</td>
<td>81%</td>
<td>61%</td>
<td>75%</td>
</tr>
</tbody>
</table>

*Traffic model*: 0-49 %: red; 50-74 %: yellow, 75 – 100 %: green; **: no information
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Summary

- BAC is a systematic and independent tool for the evaluation of a brand in the cultural and art sector
- BAC is based on a holistic understanding and framework of brand management (3 brand categories, 15 brand dimensions, 83 items)
- BAC is based on a scoring model and a multi-method approach (‘triangulation’)
- BAC is a tested and empirical validated tool (two independent teams, BAC and QuickCheck)
- BAC is a pedagogical tool to teach brand management in the cultural sector
Limitations & Further research

- Low number of considered institutions: six institutions in one German city (Berlin) and focus on museums
  - Additional and diverse cultural institutions (e.g., festivals, institutions with more than one brand)
  - Conduction in different countries

- Evaluation by an audit team: Subjectivity of the assessments
  - Two independent teams per BAC
  - Integration of different experts in the audit team

- Costs of BAC: Audit team, different information sources (primary research, interviews with the staff of the institution etc.)
  - QuickCheck (online, self evaluation, lower number of criteria etc.)
  - www.mo-kultur.de

- Balance between standardization and consideration of the concrete institution
  - Constancy of the framework
  - Discussion with the staff of the cultural institutions prior to the BAC and optionally adaption of BAC (e.g., items)
Brands in the arts and culture sector

Special issue call for papers from Arts Marketing

Branding

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