COMMUNICATING MARKETING PRIORITIES IN THE NOT-FOR-PROFIT SECTOR: A CONTENT ANALYSIS OF AUSTRALIAN STATE-MUSEUMS' ANNUAL REPORTS

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Abstract

This paper analyses the marketing priorities evident in the annual reports of Australia's six not-for-profit state-museums (who represent the largest and most influential not-for-profit heritage organisations in the country). The study provides insight into the marketing communication priorities in leading not-for-profit heritage organisations, and offers a finer-grained understanding of what is required for such organisations to effectively manage such priorities. Based on a content analysis of the annual reports, the paper proposes a Marketing Priorities Model for Not-for-Profit Organisations more generally. The Model reflects two important findings: firstly, that the communication of marketing strategies has emerged to play a central role in the annual reporting of the leading not-for-profit organisations in Australia; secondly, that there are several key facets of the organisation's marketing strategies that must be communicated to internal and external stakeholder groups. The Model consequently provides a framework for not-for-profit organisations to adopt in order for them to effectively identify and communicate marketing practices to salient stakeholder groups.

Keywords: Not-for-profit, State-museums, Marketing, Annual Reports

JEL Code: M31, M40

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1 Introduction

Not-for-profit heritage organisations (e.g., museums, art galleries, historic buildings, cultural community festivals and events, etc.) have emerged as an increasingly significant segment of national and regional economies, and are now considered important drivers of economic and social development, particularly through cultural tourism (Cultural Ministers Council Statistics Working Group, 2010; Garrod and Fyall, 2000; Harrison, 2002; Heaney and Salma, 2003; McKercher, 2004; Stylianou-Lambert, 2011; Travers, 2006). In 2009 in Australia, for instance, visitors to heritage sites injected approximately USD$9 million into the economy. In addition, the average amount spent per trip for those participating in heritage activities was USD$1000, almost double the average of USD$500 per trip for those who did not participate (Australian Bureau of Statistics, 2011). Recognition of the contribution that not-for-profit heritage organisations make to regional economic and social development has been recognised by governments and heritage organisations alike (Heaney and Salma, 2003; Hossain, Heaney and Carter, 2005; Tourism Research Australia, 2009; Wray et al., 2010), and there has been a call to increase the marketing capabilities of the sector to maximise this impact further (Lehman and Roach, 2011; Rentschler, 2007; van Aalst and Boogaarts, 2002).

No actor in the not-for-profit heritage sector in Australia has had more pressure to improve the scale and scope of their contributions to economic and social development than that of the largest and most influential organisations – the six state, publically owned and operated museums (hereafter, 'state-museums') (Adams, 2010; Lehman, 2009; Scott, 2005). Internationally, change in the sector began in the mid-1970s, which has been identified as the time from which museum management in Europe, the US and Australia began to incorporate contemporary practices from the wider management field (Kawashima, 1997; McLean, 1993; Rentschler and Geursen, 1999; Weil, 2000). Following this watershed period, there was considerable pressure for museums in Australia—as there was globally—to expand their revenue streams from non-government sources, either by developing new target audiences (Casey and Wehner, 2001), by seeking new funding sources, commercial opportunities, and/or sponsorship (Lehman, 2009; Rentschler, 2004). In addition, in recent years there have been demands for accountability of public monies around the world, with the area of arts and cultural funding no exception (International Federation of Arts Councils and Culture Agencies, 2004). As Weil (2000) states, the result has been an:

…increasing need for government funders, corporate sponsors and other donors to be assured that the considerable sums they were pumping into museums were being well-employed and for the purposes intended.

In short, the museums have been forced to move away from being government-run, publicly-funded agencies to instead become market-driven and innovative organisations responsible for satisfying the needs of an expanding array of salient stakeholder groups (Lehman, 2009; Scott, 2003). The requirement to achieve these greater returns has resulted in not-for-profit museums becoming more akin to for-profit organisations (i.e. competing for market share, customer patronage, and long-term economic and social marketing) (Gurel and Kavak, 2010; Kotler, Kotler and Kotler, 2008). As such (and consistent with almost every other major industry sector), the concept of ‘marketing’ has become a core legitimising characteristic for the museum sector; the concept has found its way into the professional discourse (see Smithsonian Institution 2007; Victoria and Albert Museum, 2014) and has been the subject of recent academic study (see Chung, Marcketti and Fiore, 2014; Lehman and Roach, 2011; Slater and Armstrong, 2010).

Given the increasing importance of ‘marketing’ as a driver of museum success (and for the wider not-for-profit heritage sector, generally), understanding what constitutes the most effective set of marketing policies and practices in the sector would seem to be vital in the present environment (Carson, Gilmore, Mario, and Fawcett, 2004; Cooperative Research Centre for Sustainable Tourism, 2008). Furthermore, as has been demonstrated in a series of case studies assembled by Industry Canada (2011), effectively communicating marketing policies and practices has implications across an organisation’s entire supply chain. To address the paucity of research in this area, this paper seeks to analyse the marketing priorities evident in the annual reports of Australia’s six state-museums. Our overall aim is to provide both an insight into the development and communication of marketing priorities in the not-for-profit heritage sector, and develop a finer grained understanding of what is required for organisations in the sector to effectively manage such priorities into the future.

2 Literature review

Each of Australia’s six state-museums were established in the mid-19th century by their colonial (and subsequently state) governments, and centrally located in the states’ capital cities (see Table 1) (Griffin and Paroissien, 2011). Collectively, the original function of the six museums was to support the economic growth of the colonies, and to research and export ‘local flora and fauna specimens’ back to Britain. In the earliest days of colonial Australia, attempting to attract funding to such intellectual and cultural pursuits as museums was difficult; government and business priorities were concentrated on tasks associated directly with commercial development and nation building (Anderson and Reeves, 1994). Kohlstedt (1983, p.11) noted that the minimal financial support provided to museums was given in part because of the promise of “…practical results in mining and agriculture”. Similarly, Australia’s loyalties at the time tended to lie with England (i.e. the ‘mother country’); for Australian museums, that meant that their “reference points” and management priorities were heavily influenced by the British Museum model. As Anderson and Reeves (1994, p.83) noted:

For at least the first 60 years of settlement, Australian scientists cheerfully and uncritically dispatched the most interesting specimens to the country most of them still called home.

Nonetheless, the latter half of the nineteenth century witnessed a substantial change in the profile of the museum sector; through the establishment of both ‘art’ and ‘science and technology’ museums, the priorities of the colonial institutions became focused on the examination and collection of Australian knowledge and culture (Anderson and Reeves, 1994). Victoria’s Industrial and Technological Museum (est. 1869), for example, had a strong education focus, and was essentially the first attempt at a technical school for young people in the colony, and was considered at the time “…to offer the working classes the opportunity for instruction taken for granted by other groups in society” (Rasmussen, 2001, p.81). By the turn of the century (and with the advent of Australian Federalisation in 1901), the colonial museums became ‘official archives’ and ‘influential research centres’ in each of the ‘new’ Australian states (Harris, 1965). The newly federates states of Australia were solely responsible for the governance and funding of their respective museums, and all were heavily influenced by the diversity of funding models, the ‘tyranny of distance’ issues experienced at the time, and the rampant parochialism evident. One early review of

Australian museums even went so far as to state that from 1830 to the early 1900s:

There was not only no co-operation among museums, but rather a state of complete and utter indifference between them, part of which was undoubtedly due to the local jealousies of the period (Markham and Richards, 1933, p.7).

Given such a competitive environment, it is not surprising that for the first half of the 20th century, the state-museums focused their collections and research efforts in terms of their home state. Similarly, state government control of the museums (i.e. all were established under state-based legislation) meant that they became de facto government departments, with restricted opening hours, and a narrow view of the role museums might play within society. For instance, for a considerable period of time museums were only open during weekdays when most of the general population were at work (Anderson and Reeves, 1994).

Table 1. Australian state-museums

Museum	Established	Location
Australian Museum	1827	Sydney
Museums Victoria	1854	Melbourne
Queensland Museum	1862	Brisbane
South Australian Museum	1861	Adelaide
Tasmanian Museum and Art Gallery	1852	Hobart
Western Australian Museum	1891	Perth

In the period following World War II it has been said that Australian cultural life underwent "…something of a renaissance" (Anderson and Reeves, 1994, p.103), with the federal government accepting a limited role in the funding of the arts. Very little, though, changed in the museum sector, particularly in the way museums viewed their role in society (Casey and Wehner, 2001). In contrast, the 1960s saw a rapid growth in historical museums, predominately in the regional areas of Australia. This has been attributed to both a renewed interest in Australian history and the constraints placed on the major state museums by cautious trustees and reduced budgets (Pigott et al., 1975). The 1960s were also a time when the increasing profile of the marketing profession was impacting on the way museums viewed visitors (Casey and Wehner, 2001), with visitor surveys becoming increasingly significant in providing data for policy and strategy development. The increasing importance of marketing culminated in a series of government-led reviews of the state-museum sector (regarding their 'scope of operations' and 'reliance on public funding') during the 1970s (NB: the first of these reviews being the famous Committee of Inquiry on Museums and National Collections, headed by P.H. Pigott (1975)). Inter Alia, the various reviews' conclusions that:

…[the] better performing museums are those where the executive has strong domain knowledge, and where there is at least a reasonable degree of separation from government through substantial delegation of responsibilities to shape resource allocation and performance (Griffin, 2008, p.44)

culminated in recognition that the sector needed to adapt to increased marketplace competition and respond to challenges inherent to the onrush of globalisation (Condé, 2011). The increased importance of competition and market-based decision capabilities (and the need for greater accountability and transparency) led to significant change in the sector. Most obviously, these changes manifest in new governance mechanisms, increased reporting requirements, the recruitment of specialist managers, and the adoption of 'for-profit' business practices across the sector. In Australia this rise in professionalism has been evidenced by what Rentschler and Geursen (1999, p.13) call "…a shift of authority from the layperson to the professional director". The changes reflected the new expectation that the state-museum sector would be able to transition to one that was much more responsive to consumers and to market demand generally, and be capable of making a greater contribution to their own funding (Lehman, 2009; Rentschler, 2007). Over the past two decades, senior museum staff have had to become steadily more professional, not only in the narrow scope of the individual museum's discipline areas, but also more broadly in the fields of 'business management', 'conservation', 'collection management', 'communications', 'public programming', and 'marketing' (Hudson, 1998). In Australia, the 'corporatorisation' of the state-museum sector culminated in the National Standards for Australian Museums and Galleries (National Standards Taskforce, 2011) report, which was produced collaboratively by Arts Tasmania, History SA, the Museum and Gallery Services Queensland, Museums and Galleries NSW, Museums Australia (Victoria), and the Western Australian Museum. At the core of the National Standards document is the concept of 'marketing' as it relates to the interaction and management of salient stakeholder groups:

The National Standards for Australian Museums and Galleries are focused on key areas of activity common to organisations that care for collections and provide collection-based services to the community. The National Standards have been developed with the aim of supporting Australian museums and galleries in carrying out their day-to-day activities, meeting their responsibilities to their various stakeholders, attracting support, and achieving their other organisational objectives (National Standards Taskforce, 2011, p.8).

Within the National Standards document's core and supporting principles, ten marketing principles (i.e. two internal-marketing and eight external-marketing principles) can be identified:

- Principle #1: The museum defines its key roles and tasks, and recruits and appoints suitable people for specific roles
- Principle #2: The museum defines and communicates the duties, rights and responsibilities of the museum and its workers
- Principle #3: The museum carries out its activities as part of a broader community and contributes to community events
- Principle #4: The museum selects significant collection areas, stories or themes to highlight, based on what is most relevant to its purpose and audiences
- Principle #5: The museum knows who its current and potential audiences are and has strategies to attract and retain them
- Principle #6: The museum promotes its collection, key attractions, programs and services.
- Principle #7: The museum provides information to help visitors locate the museum and find their way around while they are there
- Principle #8: The museum offers visitors a welcoming experience, and its workers respond appropriately to visitor enquiries and feedback
- Principle #9: The museum's public programs are as accessible as possible to people of all ages and abilities
- Principle #10: The museum makes its collection accessible in digital formats and in online environments, as resources permit

These marketing principles serve to focus management's attention on the efficient allocation and integration of a wide variety of organisational resources (e.g. human, infrastructural and economic resources) (Baidya and Basu, 2008; Olaru, 2009). This is particularly the case in the not-for-profit state-museum sector, which is expected to be an exemplar of leading management practices given their high level of professional and scientific knowledge (Museums Australia 2003). Similarly, the National Standards for Australian Museums and Galleries report noted above explicitly includes marketing as a core organising principle for effective management. The development of such standards is evidence of the museum sector attempting to establish benchmarks for best practice as regards their marketing strategies. An important facet of best practice for the not-for-profit heritage sector is how organisations communicate their marketing priorities, given the importance of stakeholder collaboration in the sector (Landorf, 2009). Certainly, it has been recognised in the business sector that a key component of a firm's marketing policies is to:

…develop meaningful reports for internal management and stakeholders, outlining the enterprise's sustainable development objectives and comparing performance against them (International Institute for Sustainable Development, 2013).

With respect to not-for-profit heritage organisations, Donohoe (2012, p.138) has noted that "…transparent communications and best-practice reporting" are critical components of effective marketing and management practices, as they enable them to identify and fulfil stakeholder groups' expectations. It is appropriate, then, that an analysis of the marketing priorities communicated by the most significant not-for-profit heritage organisations in Australia—the state-museums—takes place. Exploring how marketing practices are communicated in Australian state-museums' annual reports will help establish the 'baseline of best practice' emerging in the not-for-profit heritage sector, and will provide guidance to researchers and practitioners in the sector going forward. Consequently, this paper seeks to address the following research question: What marketing priorities are evident in the annual reports of Australian state-museums (2001 – 2010)?

3 Method

In order to address this research question, this study undertook a content analysis of the annual reports of the six Australian state-museums published between 2001/2 and 2010/11. The Australian state-run museums were selected as the sample on the basis of their role as pre-eminent cultural organisations, both nationally and in their respective states—their size and consequent influence means they dominate the cultural heritage landscape in Australia. In addition, they have a continuous and well-documented history; they provide an example of the tension between the potentially conflicting multiple roles within society (for example, in recent years, museums have developed new roles as economic development 'engines' within communities, and as tourist destinations in cultural precincts driving income and employment) (Kotler and Kotler, 2000). As the pre-eminent cultural institutions, each Australian state-museum faces pressure from many stakeholders to remain relevant, viable and sustainable institutions (Adams, 2010; Lehman and Roach, 2011; Museums Australia, 2003). The rationale for using the state-run museums' annual reports, therefore, is two-fold: firstly, the document is mandated by statute to be published by each of the museums, and must include financial and social measures of performance; secondly, each museum has full control over the content and framing of their marketing activities in this document, which itself is aimed at addressing salient stakeholder groups' priorities.

In total, 60 annual reports were collected for scrutiny; each of the annual reports (downloaded from the respective museum's official websites) was subject to a rigorous content analysis process that followed the five-stage protocol identified by Finn, White and Walton (2000), Hodson (1999) and Neumann (2003). In the first stage, the aims and objectives of the research were identified, and the first round coding rules were developed. Coding refers to the process of converting information into contextual values for the purposes of data storage, management and analysis allowing theme identification (Ticehurst and Veal, 2000). Using the literature review as a guide, we decided to initially organise the data by the broad marketing variables established by the National Standards document (see Table 2).

Table 2. First-Round Coding Variables

Category	1st Round Coding Rules:
Internal Stakeholders	• Any museum communications concerning its key roles and tasks, • Any museum communications concerning its recruitment and appointment processes • Any museum communications concerning the duties, rights and responsibilities of the museum and its workers
External Stakeholders	• The museum's activities as part of a broader community and contributions to community events • The museum's activities concerning the selection of collection areas, stories or themes based on what is most relevant to its purpose and audiences • The museum's activities concerning its interaction with current and potential audiences • The museum's activities concerning the promotion of its collection, key attractions, programs and services • The museum's activities concerning their visitors' experience • The museum's activities concerning its public programs and their accessibility to people of all ages and abilities • The museum's activities concerning the digitisation of its collections for access in the online environment

Note: National Standards Taskforce, 2011

In the second stage of the content analysis, all of the data in the annual reports were converted into MS Word® format, and entered into the codified database. At regular intervals, inter-coder reliability checks were undertaken to ensure that the data were coded consistently with the rules set in Stage One. Where inconsistencies were detected in the coding of specific elements of text, the coding rules were further refined to accommodate the variance in coding practices. In the third stage of the content analysis, the coded data were further interrogated to detect any significant themes in the reporting of marketing issues and priorities over time. The trends and emergent themes detected in the analysis formed the basis for establishing the second round of data categories (see Table 3, Column 1). As was the case in Stage One, the second round of coding rules were developed prior to the coding of the data itself (to maintain a consistent approach between researchers), and to provide a protocol for others to follow should they wish to replicate the analysis.

In the fourth stage of the content analysis, the second round coding categories were populated with data according to the new coding rules and the inter-coder reliability protocols developed during Stage Two (see Table 3, Column 2). The interpretation of the data during the second round of coding, and the verification of the conclusions, was facilitated by the use of the NVIVO (Version 10.0) software package. In the method literature, it is emphasised that computer software programs such as NVIVO, are of significant value in qualitative analysis and any subsequent theory building (Kelle, 1995; Richards and Richards, 1995; Weitzman and Miles, 1995). Where it was appropriate, data were allocated to more than one node for analysis; using the NVIVO software, the contents of each of the initial index nodes were reviewed to identify common themes that arose in the data pertaining to marketing priorities. In the final stage of the content analysis, the results of the second round coding were refined and the research findings finalised. In order to facilitate the theory building process, memos were maintained about the data, their categories, and the relationships between them as they emerged. NVIVO has a facility for the creation and retention of such memos for later consideration and analysis. Utilising the memo capability within the NVIVO package, memo reports were generated by the software after 'Stage Two' coding. From these reports, the trends and emergent themes became clearer. The themes emanating from the 'second round' of coding form the basis of the discussion section that follows.

Table 3. Marketing Priorities Detected in the State-Museums' Annual Reports

Category (2nd Round Coding)	Sustainability Priorities (3rd Round Coding/Memos)
Marketing Strategy	• Market position and 'corporate branding' • 'Corporate' image • Merchandising effectiveness (retail sales maximisation) • Target marketing • Target market feedback
Collaboration	• Partnerships with other museums • Alliances and Joint Ventures with a range of heritage-based organisations • Networking with experts in the area of heritage and culture • Publications with external organisations/institutions
Extension of the museum	• Online presence • Outreach programs • Diversification of services (e.g. catering, venue hire etc.) • Educational service provision (linked to schools and colleges) • Consistency of experience across museum places
Internal marketing	• Full-time, Part-time and Casually paid staff members • Visiting experts • Volunteer groups • Employee development and training
Pricing	• Focus on viability of 'business operations' within the museum • Outsourcing of non-core business activities

4 Results

The first round coding of the annual report data demonstrated that, by the end of the ten-year study period, nine of the ten National Standards Marketing Principles were collectively addressed by the state-museums. Table 4 summarises the number of state-museums to report on the individual National Standards marketing recommendations over the ten-year period, and demonstrates a pattern of increased sensitivity to, and reporting of, the marketing issues now considered the benchmark for 'for-profit organisations' annual reports.

Table 4. Number of SRMs Reporting National Standards Marketing Principles

1st Round Coding Rule	2001/2	2002/3	2003/4	2004/5	2005/6	2006/7	2007/8	2008/9	2009/10	2010/11
Principle #1	2	1	2	1	1	1	1	2	2	2
Principle #2	0	0	0	0	0	0	0	0	0	0
Principle #3	0	1	1	3	3	2	3	3	3	4
Principle #4	2	2	2	2	2	3	2	3	3	4
Principle #5	2	3	2	4	4	4	4	4	4	4
Principle #6	3	3	3	3	3	3	4	4	4	4
Principle #7	3	3	3	3	3	4	3	3	4	4
Principle #8	2	2	2	2	3	3	3	4	5	5
Principle #9	3	3	3	3	3	3	3	4	4	4
Principle #10	1	1	1	2	2	2	4	5	4	4
Total incidence	**18**	**19**	**19**	**23**	**22**	**25**	**27**	**32**	**33**	**31**

The frequency data indicated that in the first year, data relating to the National Standards Marketing Principles were detected a total of 18 times in the six annual report documents. Both the number of sustainability recommendations detected in the annual reports (and the level of their incidence) increased markedly over the sample period; by the final year of the sample, 9 of the 10 Marketing Principles were detected, with an incidence count of 31 times in the six annual reports for that year (i.e. an increase of 172 per cent over the base year, and at an average increase of 7 per cent year-on-year over the entire sample period). Table 4 details the number of state-museums' annual reports to address the individual National Standards Marketing Principles across the sample period, and demonstrates a pattern of increased reporting of, and sensitivity to, the marketing issues now considered the benchmark in 'for-profit organisations'. (NB: The only National Standards Marketing Principle not detected was that concerning 'the communication of the duties, rights and responsibilities of the museum and its workers', which may be explained by the fact that it represents an internal training issue, and not one specifically relevant to an annual report document.). These findings are consistent with the state-museums' espoused strategy to attract and secure non-government funding sources, and to demonstrate to their financial stakeholders the necessary transparency and the 'returns on investment' achieved in each financial year.

5 Discussion

Along with the five marketing priorities summarised in Table 3, the second-round coding of the data captured the first reference to marketing as an organising principle in each of the state-museums' annual reports (see Table 5). In all but two of the state-museums, marketing principles were present in the Mission and Vision-statement sections of their 2001/2 annual report, demonstrating their importance as organising (and reporting) principles for those museums from the start of the sample period. The two other state-museums adopted marketing principles into their Mission and Vision statement sections soon after (i.e. in their 2002/3 and 2003/4 reports respectively).

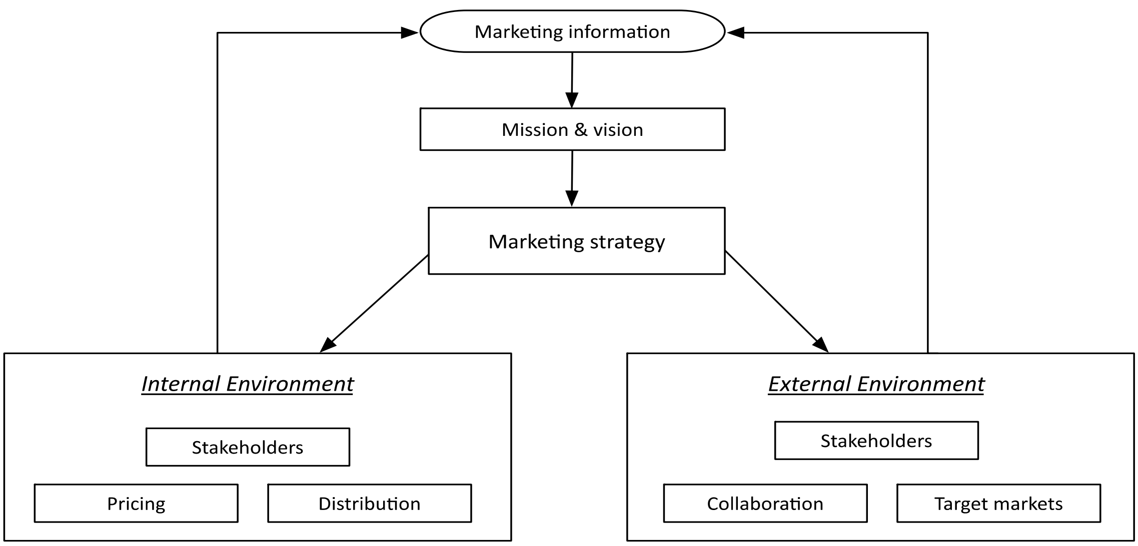
Table 5. Reference to Marketing Priorities in the Not-for-Profit Mission/Vision Statements

Museum	The first reference to marketing priorities (and year)
Australian Museum	Marketing Committee: The Committee considers and provides feedback to the Museum on marketing and development of the Museum's profile and brand name (2003)
Museum Victoria	Museum Victoria undertakes Marketing, Public Relations, Fundraising, Development and Market Research. In addition, it has a vibrant Members Program (2001)
Queensland Museum	Through effective brand management, advertising and public relations, the Queensland Museum will be positioned as a provider of unique educational experiences that entertain and inform. Market research and audience evaluation will ensure that Museum products and services meet the needs and wants of its visitors (2001)
South Australian Museum	With improved marketing the Museum has continued to build its reputation as an attractive location for corporate and private functions. In addition, the Museum has been pleased to assist a number of not-for-profit organisations by providing its facilities for fundraising functions and activities (2002)
Tasmanian Museum and Art Gallery (TMAG)	A concerted effort has been made to raise the profile of the TMAG and increase public awareness of the diversity of public programs and activities undertaken (2001)
Western Australian Museum	Position and promote the Museum throughout the state as an expert, responsive and engaging institution; position and promote the Museum as a major educational centre that integrates teaching and learning theories in the Museum's programs (2001)

The inclusion of marketing priorities in the mission and vision statements of the annual reports - central to the museums' 'corporate' communication strategies - demonstrates the central importance of the concept across the six state-museums (i.e. it demonstrably sets the tone for the annual reports generally, as well as the agenda for the manner in which staff and management interact with salient stakeholder groups). Importantly, the core statements explicitly link the organisations' marketing priorities, as set out in Table 3, to (a) the internal stakeholders of the organisations (i.e. human resource management practices relating to paid staff, external experts, and volunteers), and (b) the external stakeholders of the organisation (i.e. market positioning, target customer groups, business-to-business collaborations, and expanding the museums' product concept).

In addition to this, Table 4 demonstrates the increased emphasis that the six state-run museums placed on reporting their marketing priorities over the ten-year sample period. In the first year of the sample (i.e. 2001/2), only 30 percent of the annual reports included reference to the National Standards Marketing Principles (i.e. 18 incidence of the marketing principles were detected from a possible 60 opportunities to do so); by 2010/11, this number doubled to 52 per cent of the annual reports. The increased emphasis demonstrated in Table 4 is commensurate with the increased pressure on the museums to become market-driven and innovative organisations responsible for satisfying the needs of an expanding array of salient stakeholder groups. The two internal-marketing National Standards Marketing Principles that were not widely detected in this research despite the increased emphasis demonstrated may arguably be absent for two main reasons: firstly, that Human Resource Management activities are not yet fully recognised as marketing issues in these types of organisation; secondly, that the issues inherent to these National Standards Marketing Principles are not priorities of the museums' salient stakeholder groups (and therefore, not reflected in the priorities of management). More generally, the range of data in Table 4 indicates that the National Standards Marketing Principles were not initially considered 'core/general reporting priorities' of the state-museums, and that their recognition coincided with increased exposure to market forces. Similarly, it suggests that the capacity to report marketing priorities grows incrementally inside heritage tourism organisations (such as museums), and that it takes time and management expertise to recognise salient stakeholder groups, ascertain their priorities, and change the structure and culture of the organisation to serve them effectively. The increasing emphasis on marketing principles evident in the data is, therefore, directed in a particular fashion towards the needs of the not-for-profit state-museum sector. However, as was noted above, the state-museums are the dominant influence in Australia's cultural landscape, and can be considered as providing best practice guidelines to the not-for-profit sector, in this case in the development and communication of marketing priorities. With this in mind, we present a Marketing Priorities Model for Not-for-profit Organisations (see Figure 1), based on our analysis of the data. As such, this model both provides an overview of the communication of marketing activities of Australia's pre-eminent not-for-profit heritage organisations, and provides a 'best practice' framework for other organisations in the sector to follow.

Figure 1. A Marketing Priorities Model for Not-for-Profit Organisations



The Model demonstrates that the communication of marketing practices has emerged to play a central strategic role in the annual reporting of the leading not-for-profit heritage organisations in Australia; given the commercial pressures placed upon Australia's six state-museums over the past two decades, the adoption of 'marketing' as part of their Mission and Vision Statements mirrors that which has been present in 'for-profit' corporate annual reports since the 1980s. As with the 'for-profit' sector, it would appear that not-for-profit heritage organisations now must take measures to clearly define 'who and what' they represent and serve in a given marketplace; that is, they must consider constructing Mission and Vision statements to identify and connect with a wide array of salient stakeholder groups in order to remain viable. Importantly, the model indicates that, in the not-for-profit heritage sector, these groups can be collaborative stakeholders (i.e. other museums, other cultural-heritage organisations and/or government agencies) and internal stakeholders (i.e. paid staff, external experts and volunteer support groups). This supports the notion that 'marketing' in the not-for-profit heritage context must be widened to include the allocation and utilisation of a wider range of resources (e.g. relationships with other entities related to the sector, volunteer groups, external experts etc.) that are not controlled directly by the not-for-profit organisation, yet are critical to the marketing process. The model also demonstrates that the concept of marketing has become 'routinised' as a management practice in the state-museum sector, and (given the power of isomorphic pressure to conform to 'best-practices') is likely to become a core legitimising characteristic for the not-for-profit heritage sector as a whole.

6 Conclusion

The purpose of this paper was to provide insight into the best-practice communication of marketing priorities in not-for-profit organisations, and offer a finer grained understanding of what is required for such organisations to effectively manage their marketing priorities. Given the increasing levels of competition for non-government funding and market-relevance that this sector has experienced, providing managers of not-for-profit organisations with a framework for connecting with their stakeholder groups in a more effective/competitive manner in this regard is a timely addition to practice in the sector. Analysis of the data suggests that our Marketing Priorities Model for Not-for-profit Organisations is one that can assist not-for-profit organisations identify and communicate an optimal mix of marketing practices (and related strategies) to their salient stakeholder groups. The data also suggests, however, that not-for-profit organisations necessarily possess operational idiosyncrasies that management must remain cognisant of in order that they not be overlooked in the marketing process. In other words, there appears a danger that not-for-profit organisations that rigidly adhere to marketing frameworks originally designed for for-profit sectors (without due consideration for their own circumstances, resources, and capabilities) may not be in a position to formulate the most effective marketing strategies.

The wide array of organisation and institutional types in the heritage sector, however, poses a challenge for researchers to extend our Model beyond the (albeit) influential state-museum sector. For example, it has been recognised that visitors to ‘art galleries’ and ‘museums’ represent distinct sub-sets of the ‘heritage’ segment, in as much as they are seeking specific types of experiences (e.g. a ‘fine arts experience’ (Stylianou-Lambert, 2011)). Similarly, ‘historical sites’ and ‘attractions’ (where the cultural tourist is immersed in a location as part of their experience) have quite a different set of attributes to other not-for-profit organisation types (Leighton, 2007); in such cases, there is little scope to regularly schedule new exhibitions, and therefore little opportunity to revitalise the product offering. Widening the scope other not-for-profit sectors (e.g. charitable organisations, sporting clubs etc.), there is an opportunity to explore how the mix of marketing principles varies across sectors. As a result, a number of potential research questions suggest themselves: Do not-for-profit organisations in niche heritage sectors possess the same marketing priorities as their larger counterparts?; To what extent does a not-for-profit organisation’s resource constraints affect their marketing priorities; How do not-for-profit organisations manage their relationship and network resources in the business-to-business context most effectively? Do resource-poor organisations have the same pressures in communicating their marketing priorities as the larger resource-rich organisations? etc. While there are numerous avenues of potential research, we see our Model as a base-line from which research in to the development and communication of marketing priorities can be viewed, and subsequently built on in the not-for-profit sector.

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