INTERNATIONAL MARKETING **TRENDS** CONFERENCE

PARIS, JANUARY 18TH – 20TH 2018

16TH INTERNATIONAL MARKETING TRENDS CONFERENCE

Marketing Trends Congress: Research Sessions
January 19th – 20TH 2018

The Marketing Trends Congress offers a great variety of research sessions. The authors come from 50 countries and include experienced academics as well as a number of younger researchers. The papers are presented in English, French, German, Italian and Spanish. This has resulted in a rich cross-fertilization of ideas and perspectives.

Doctoral Colloquium: New Trends in Research in Marketing
Thursday 18th January 2018

The Doctoral Colloquium is dedicated to outstanding doctoral students at an intermediate or advanced stage of their dissertation process, that are interested in new trends and developments in research in marketing.

Marketing Trends Award
Friday 19th January 2018

The Marketing Trends Award is an international award that aims to honour researchers for their overall achievements in the field of Marketing Trends. The award is officialy handed to the laureates at the Marketing Trends Conference.

Best Thesis Award - Marketing Trends
Thursday 18th January 2018

The International Best Thesis Award - Marketing Trends is given to recognize and encourage Ph.D. in marketig and emphasize their talent.
The International finalists are invited
to present a 20 minutes oral defense of their thesis in English.
The conference fees are covered by the organizing committee (Transports and accomodation costs are not included in the conference fees.).

Marketing Strategy Forum: A Call for Change
Friday 19th January 2018

The Marketing Strategy Forum is more specifically dedicated to business and operational issues. The speakers of the Marketing Strategy Forum are all top business managers who come and share their experiences and their views with the conference participants and researchers.

Post-Doc Forum
Saturday 20th January 2018

The Post-Doc Forum is open to Ph.D. students at an early stage of their career in marketing.

Workshop Sessions: Major Changes in Marketing Paradigms
Saturday 20th January 2018

The special workshop sessions on the major changes in marketing paradigms and new fields of research are chaired by leading scholars coming from all over the world.

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- VENICE, JANUARY 2019
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MAY 2017 VOLUME 4 / NUMBER 2
DIGITAL ISSUE - MARKETING OF ARTS

P.15 // EDITORIAL
MARKETING OF ARTS, CULTURAL AND CREATIVE INDUSTRIES in Turin (Italy) – Sept. 23-24
> Jean-Claude ANDREANI, Françoise CONCHON, Chris HALLIBURTON, Torben HANSEN, Abraham KOSHY, Taihong LU, Chieko MINAMI, Jean-Louis MOULINS, José MUGICA, Alberto PASTORE, Donald SEXTON, Klaus-Peter WIEDMANN

P.17 // OPERA
Exploring how market identity shapes hybridity: empirical evidence from the field of Italian opera
> Giulia CANCELLIERI, Bocconi University, Milano, Italy

Cultural Marketing in the Digital Age: The Influence of Place and Media on the Brand Image of Live-Operas
> Julia ROLL, Jutta EMES, Sven-OVE HORST, Bauhaus-Universitaet Weimar, Faculty of Media, Weimar, Germany

P.39 // DIGITAL STORYTELLING
Transmedia Experience and Narrative Transportation
> Maud DERBAIX, Kedge Business School, Bordeaux campus, Dominique BOURGEON-RENAULT, Université de Bourgogne, Dijon, Élodie JARRIER, Université d'Angers, Christine PETR, Université de Bretagne Sud, France

P.49 // MUSEUM
Positioning of the museum supply for children at world level
> Bénédicte LE HEGARAT, Béatrice CANEL – DEPITRE, Normandie Université, UNIHAVRE, France

Fine Arts Museums at a Crossroads: Between Core Mission and Adaptation to New Tourist Clients
> Michel ZINS, FSA, Ulaval, Université Laval, Quebec Canada

P.65 // PAINTING
When painting is part of the tourism imaginary: the example of Normandy and 19th century painting
> Isabel BABOU, BABOU Conseil,Paris, France

P.71 // ANTHROPOMORPHISM
The anthropomorphic features of a virtual agent: social presence and confidence generators to a website
> Ahmed ANIS CHARFI, European Business School-Paris, France

P.85 // CRM
CRM's contribution to the outcome of an appropriate assessment to CUSTOMERS and tailored to their expectations: value added CRM within the company
> EL AMRANI Lamiae, BENBBA Ibrahim, Université ABDELMALEK ASSAADI, École Nationale de Commerce et de Gestion Laboratoire : Marketing et logistique, Tanger, Morocco

P.97 // CULTURAL HERITAGE MANAGEMENT
The value generation process in art restoration companies
> Tonino PENCARELLI, Emanuela CONTI, Department of Economics, Society and Politics, University of Urbino "Carlo Bo", ITALY

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Over the past 15 years, the International Marketing Trends Conference has welcomed researchers and professionals from more than 72 countries to investigate and discuss major trends in Marketing and Marketing Strategies. In the recent years, Arts, Cultural Goods and Creative Industries have emerged as a key topic of the conference and the idea of creating a dedicated symposium has appeared as a natural move. **The symposium was focused on "MARKETING OF ARTS, CULTURAL AND CREATIVE INDUSTRIES IN THE DIGITAL ERA. the SYMPOSIUM on the Marketing of Arts, Cultural and Creative Industries, took place in Turin (Italy) on September 2016.**

The symposium was officially sponsored by the AIMAC (International Association of Arts and Cultural Management) and the SIM (Societa Italiana Marketing) .

The idea of developing a Marketing Trend Radar

- As part of the International Conference Marketing Trends, we have created **research Symposium** (and a research program called **Marketing Trends Radar.** The objective is to get a clear view ranging from a big picture to a more detailed understanding of the main trends both in the field of marketing science and of marketing management. **We have created the "Radar Paper" series which is a special issue of the *Journal of Marketing Trends (JMT)*** publishing **papers across the entire spectrum of marketing,** which bringing customers, consumers, community, stakeholders, companies, to marketing structures and processes**.**

- In this digital issue we are developing radar papers. Marketing Trends papers are especially **relevant to researchers and managers** concerned with how marketing is evolving and in new marketing perspectives and approaches. They aim at being a focus for scientific debate based upon rigorous research, dealing with the changing marketing paradigm. They participate to knowledge development on the major trends in marketing.

- With the goal to **make marketing "science" more "scientific",** marketing thinking was profoundly dominated by the empiricist world view and the logical empiricist paradigm. Since then many different scientific orientations (empiricism, constructivism, and criticism),have emerged.

Reviewing process organized in a Two Stage peer-review

- **The review process** of the *Journal of Marketing Trends* **is: local and international/ or specialty. The first step is the country level, or the symposium level and its schools of thought**. While there are international standards, experience has shown that with research on Marketing Trends, symposium reflect their local orientations. The authors may use another language than English in their explanations and nuances with reviewers belonging to their community. The Journal of Marketing Trends (JMT) publishes papers in both the language of the author and in English. So far five languages were published: English, French, German, Italian and Spanish. The goal is to open up new opportunities for marketing research (7), to validate new ideas and to attract authors around the world.

- For each paper, **the Board of Editors** gives its approval for publishing: to be published (with minor revisions), to be resubmitted again (major revisions), no to be published. The final decision and final manuscript preparation are communicated to authors.

- Marketing trends papers are expected to give a clear explanation and justification of the chosen research process, a true demonstration which guarantees the results and discussions and which provide academic debate and knowledge about trends in marketing thinking, practice and research methods. Not only are they properly validated, but they lead to a critical evaluation of the findings.

- Each issue of the *Journal of Marketing Trends (JMT) has* developed new ideas, to encourage new research perspectives, and to explore new trends in marketing, seeking to preserve the diversity of different points of view – diversity of marketing topic; of theory and practice (and the links between the two); of cross-industry or cross-country context; and especially of future trends or new thinking in marketing. It is not easy to make.

In 2010, 10 marketing scholars (1) Prof. Jean-Claude Andreani (ESCP Europe, Paris campus), Prof. Umberto Collesei (Università Ca' Foscari , Venice, Italy), Dott.sa Françoise Conchon (market research institute, Insemma, Paris) , Prof. Chris Halliburton - (ESCP Europe, London campus), Prof. Abraham Koshy (IIMA Ahmedabad, India), Prof. Taihong Lu (Sun Yat-Sen University, China), Prof. Jean-Louis Moulins (Aix-Marseille Université, France), Prof. José Mugica (Universidad Pública de Navarra, Spain), , Prof. Tiziano Vescovi (Università Ca' Foscari , Venice, Italy), Prof. Klaus-Peter Wiedmann (Universität Hannover, Germany) decided to launch *the Journal of Marketing Trends* (JMT) in 5 Languages : English, French, German, Italian, Spanish and to print it in two languages (author language + translation in English).

In 2016, *the Journal of Marketing Trends* (JMT) was ranked by European Academic Associations (such as the **French Foundation for Management Education, FNEGE)** supported by 24 academic associations **and by *affiliates of ENQA (*** European Association For Quality Assurance In Higher Education) such such as **Anvur** in Italy ***(****Agenzia Nationale di Valutazione del Sistema Universitario e della ricerca)* using the following criteria : international recognition of the quality of the journal, the international character of the editorial board, the quality of the review process, respect for academic standards of evaluation (double blind), selectivity, welcoming original contributions.

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Exploring how market identity shapes hybridity: empirical evidence from the field of Italian opera

Abstract

In this paper we examine how the extent to which organizations' market identities embody dominant audiences' expectations and coalesce into well-defined exemplars affects their ability to recombine the expectations of audiences' driven by divergent goals through category spanning. Using the case of major Italian Opera Houses and the tension between divergent audiences' expectations that challenges their programming strategies, we hypothesize that a steadfast adherence to the codes of a category that incarnates prevailing audiences' prescriptions in the past creates incentives for organizations to contaminate it with oppositional normative expectations. In addition, we hypothesize that organizations' efforts to eclipse the emblematic and recognizable exemplars of a category imbued with dominant prescriptions positively influence their willingness to pursue hybrid strategies as well, in particular when organizations benefit from a high status positioning. This study contributes to literature on market identity and category spanning by offering a novel theorization of the identity-based determinants of category spanning under conditions of audience heterogeneity.

Keywords: hybridity, (un)conventionality, identity, status, opera and arts.

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INTRODUCTION

Categories have traditionally been defined as the boundaries of markets, allowing producers to identify their rivals (Porac et al., 1995) and consumers to evaluate different groups of offerings (Shrum, 1991). Membership in categories defines organizations' market identity by clarifying what to expect from organizations and their products (Jensen, Kim and Kim, 2011). Whether focused on horizontal product categories or vertical status categories (Jensen, Kim and Kim, 2011), research on categories suggests that by conforming to well-accepted standard categories firms enhance the legitimate and purist traits of their identities (Zuckerman, 1999; Hsu, Hannan and Koçac, 2009). Conversely, firms may sometimes decide to mix the characteristic features of existing categories, a phenomenon called category spanning.

Research in this tradition has pointed to the lack of incentives for organizations to span categories, convincingly showing that spanning leads to social and economic penalties as it creates blurred market identities and confuses the audience (Zuckerman, 1999; Hsu, 2006). Most of the existing studies on category spanning, however, have investigated this phenomenon under conditions of audience homogeneity (Durand and Paolella, 2012). When dominant audiences' prescriptions are challenged by competing ones (Glynn and Lansbury, 2005), the satisfaction of heterogeneous audiences' tastes (Scott and Lane, 2000; Durand and Paolella, 2012) represents a powerful incentive for firms to merge categories infused with divergent normative prescriptions (Rao, Monin and Durand, 2005), giving rise to hybrid products. However, the investigation of how firms' willingness to recombine divergent categorization systems through hybridity is influenced by specific traits of their past and present market identities is still under-examined.

In this study, we focus on a particular form of spanning that occurs when a category imbued with dominant normative prescriptions is contaminated with the codes of a divergent category that reflects oppositional sets of expectations. We analyze how the extent to which firms' past identities are centered on that category and their current identities eclipse its emblematic exemplars affects their ability to undertake hybrid strategies. We then examine whether and how the latter relationship is altered by organizations' vertical status positioning. A central argument in market identities studies is that straddling different categorical systems hampers firms' ability to reconcile different audiences' tastes because by mixing categories firms risk satisfying neither of their audiences and therefore being evaluated negatively (Kim and Jensen, 2011; Zuckerman, 1999; Hsu, 2006). Thus, firms have scarce incentives to recombine categories imbued with divergent audiences' expectations.

In this paper we shift focus from what constraints the blending of categories infused with conflicting audiences' expectations to what enables firms to recombine heterogeneous tastes through hybrids. First we argue that a steadfast adherence to the codes of a category that incarnates prevailing prescriptions in the past creates incentives for firms to pursue hybridity in the future. Indeed, it confers organizations enough legitimacy (Hannan, Polos and Carroll, 2007; Hsu, Hannan and Koçak, 2009) to protect hybrid practices from the sanctions of dominant audiences. At the same time it makes category spanning be perceived by divergent audiences as organizations' attempt to exploit their taken for granted membership in a category infused with dominant prescriptions to satisfy conflicting interests and expectations (Rao, Monin and Durand, 2003). As a result, hybridity is perceived as responding to the need of different audience segments, which in turn drives organizations' willingness to pursue it. Second, we contend that organizations' efforts to de-emphasize the conventional, emblematic aspects of a dominant category (Durand and Kremp, 2015) positively affect their ability to merge it with divergent social codes. Indeed, by subtracting clear benchmarks of comparisons that render the category recognizable in the eyes of different audiences, organizations make the hybridization process less subject to external criticism and social penalties. Finally, we posit that by enhancing the external perception of quality of organizations that display unconventionality (Durand and Kremp, 2015), an increased organizational status confers these organizations more opportunities to gain positive rewards and success from hybridity which in turn reinforces their incentives to span divergent categorization systems.

This study contributes to research on market identities and category spanning (Jensen, Kim and Kim, 2011; Hsu, Hannan and Koçac, 2009; Durand and Paolella, 2012; Negro, Hannan and Rao, 2010), by shedding light on how the extent to which organizations' market identities embody dominant audiences expectations and coalesce into well-defined exemplars affect their ability to recombine the expectations of audiences driven by conflicting goals through spanning.

In this regard, our study goes beyond the blanket assumption of audience homogeneity that pervades much work on category spanning, (Durand and Paolella, 2012). Although spanning categories violates the prototypical dimension of what being a member of a category is, organizations still have incentives to pursue it when their identity and status enable them to reconcile conflicting societal expectations through hybridity.

We test our hypotheses with data on the Italian opera market from 2004 to 2011. We begin by providing a review of the literature on category spanning and its identity based-determinants. We then theorize how hybridity is shaped by the degree to which organizations' past and present market identities are infused with dominant prescriptions and focused on exemplars of categories that embodied these prescriptions. We finally theorize how the latter relationship varies according to organizational status. We end our study by discussing the implications of our findings for research and practice, examining limitations and making suggestions for future research.

MARKET IDENTITY AND CATEGORY SPANNING

Categories function as the 'cognitive infrastructures' of the market (Schneiberg and Berk, 2010; p. 257; Durand and Paolella, 2012). By driving external beliefs and expectations about organizations' characteristics and behaviors, membership in categories shapes organizations' market identities (Jensen, Kim and Kim, 2011). External constituents (e.g., clients, critics, rivals, regulatory bodies) use categories to classify organizations and evaluate their behaviors against clear benchmarks of comparison, which enables them to assess conformity and provide legitimacy (Meyer and Rowan, 1977). Practices that conform to the social codes inherent in established categorization systems are easier for market audiences to identify. Thus, by developing products that conform to well-accepted standard categories firms enhance their legitimacy and prospect of success (Zuckerman, 1999; Hsu, Hannan and Koçac, 2009).

Conversely, firms may sometimes decide to mix the characteristic features of existing categories, simultaneously positioning their offer across multiple product categories, a phenomenon called category spanning. Spanning occurs at two levels. First, spanning can occur at the portfolio level. A recent study by Negro, Hannan and Rao (2010) examined the diffusion of this phenomenon in the wine industry, where the production of Barolo and Barbaresco wines can be accomplished by following a traditionalist, a modernist or a hybrid process that mix both styles. Producers can either decide to be specialist by focusing on one style or embrace generalism by spanning multiple production styles (Negro, Hannan and Rao, 2010).

Second, organizations can span categories at the single product level, providing new dimensions to traditional categories through the recombination of commonly understood and established categorization systems (Haveman and Rao, 2006; Hsu, Negro and Perretti, 2012).

This blending mechanism is widely regarded as a source of innovation (Rao, Monin and Durand, 2005) and fosters the development of products with high fuzziness, weaker boundaries and partial memberships because members of one category may be exposed to elements belonging to other categories (Hannan, Polos and Carroll, 2007; Negro, Hannan and Rao, 2010). For example Rao, Monin and Durand (2005) analyzed blending processes in the French Haute cuisine, exploring the erosion of categorical boundaries that divided classical and nouvelle cuisine as a result of a borrowing process that blurred the boundaries between these categories by binding together their elements and techniques. Similarly, the establishment of the new "Indian modern art" (Khaire and Wadhwani, 2010) was initiated by the mixing of traits from "Indian" and "modern Western" categories.

A large body of works has explored category spanning. In this regard, these studies mainly focus on the negative consequences of multiple category membership which in turn disincentivize firms to span categories. Since category spanning weakens the boundaries of established categorization systems, most scholars argue that borrowing elements from a different category can compromise the authenticity of a membership in a specific category (Rao, Monin and Durand, 2005, Negro, Hannan and Rao, 2011). Organizations that mix categories may be more difficult to make sense of than category purists, and, as a result, are often ignored or explicitly devalued by targeted audience members (Negro, Hannan and Rao, 2010). Market actors thus preserve social boundaries by strictly complying with the norms and expectations entrenched in categories.

Most of these studies, however, investigate spanning under conditions of homogeneous expectations by the external audience about how firms should behave in a market (Durand and Paolella, 2012). We shift attention, accordingly, from the examination of category spanning under conditions of audience homogeneity to the investigation of the system of incentives for firms to pursue hybridity when heterogenous audiences' preferences give rise to conflicting normative expectations. As noted by Kim and Jensen (2011) straddling different product categories is a risky strategy for firms that are simultaneously exposed to divergent prescriptions.

However, studies also suggest that incompatible prescriptions may sometimes be recombined in hybrid practices and product categories. For example, Rao, Monin and Durand (2003; 2005) showed the weakening of boundaries between the oppositional expectations of conservation and experimentation embodied in the codes of classic and nouvelle cuisine. Glynn and Lounsbury (2005) documented that in the context of US symphony orchestras, the conflict between market and aesthetic prescriptions led to the integration of mainstream cultural influences into symphonic performances through a pop interpretation of classic music. This ultimately resulted in the blending of the aforementioned prescriptions.

We hypothesize that the extent to which organizations are encouraged to recombine conflicting normative expectations through category spanning is contingent on specific traits of their identities and social status. We focus on a particular form of product-level spanning that occurs when a category imbued with dominant normative expectations is contaminated with the codes of a divergent category that reflects oppositional prescriptions. The extent to which firms' past identities are centered on that category and their efforts to put spotlight on its emblematic, visible exemplars engenders significant variations in their ability to alter its codes through hybridity. A core claim in theory on category spanning is that by conforming to the taken for granted codes of widely established categories firms enhance the legitimate traits of their identities which in turn protects them from negative evaluations and increases opportunities for survival and success (Hannan, Polos and Carroll, 2007; Hsu, Hannan and Koçac, 2009). An increased legitimacy in turn reduces the skepticism around actions that challenge established expectations (Rao, Chandy and Prabhu, 2008; Dowling and Pfeffer, 1975). We add that, by making the legitimacy of the firm unquestionable in the eyes of dominant audiences, a strong commitment to the codes of a taken for granted category imbued with dominant normative prescriptions lowers the sanctionability that stems from altering the codes of that category in the future. This in turn decreases constraints toward hybridity.

At the same time, steadfastly adhering to the codes of one cateory in the past makes it easier for organizations to leverage taken for granted codes and expectations in the service of oppositional prescriptions (Rao, Monin and Durand, 2003). In this scenario, organizations can exploit the foundation of a category infused with dominant prescriptions to promote oppositional expectations as it occurred when the nouvelle cuisine activists exploited the foundation of classic cuisine for their experimental projects (Rao, Monin and Durand, 2005). This in turn makes hybridity be supported and received as more favorably by divergent audiences.

We also contend that an excessive emphasis on the most salient, emblematic features of a category imbued with dominant prescriptions enhances the potential penalties faced by organizations that pursue hybridity. When firms emphasize the recognizable, emblematic attributes of a category infused with dominant audiences' expectations (Baron, 2004), incentives to contaminate that category with divergent external prescriptions are scarce. In this scenario, hybridity can delegitimize these identities more readily in the eyes of both dominant and divergent audiences which reduces the incentives for firms to recombine conflicting norms through hybrids. For example, when a restaurant offers dishes emblematic of a revered culinary school (e.g., Durand, Rao and Monin, 2007), when an orchestra company programs only the most salient works of a specific music tradition (Durand and Kremp, 2015) or when an opera house selects their repertoires focusing on the most representative operas of a particular genre (Jensen and Kim, 2011), mistakes are more egregious (Durand and Kremp, 2015) and exposure to potential penalties for failing to comply with external expectations higher. By contrast, de-emphasizing the conventional aspects of a category infused with dominant prescriptions makes more difficult for external audiences to perceive a drift in relation to wellestablished cases because firms' resources are assigned to areas where quality is not so easily assessable and comparable. For example, in the orchestra field, different audience segments of critics and concert-goers can less easily recognize and evalutate the performance quality of unfrequently heard masterpieces and compare them against other orchestras' performance (Durand and Kremp, 2015). On these grounds, we argue that lowering the conventionality of a widely established category reduces the possibilities for different external audiences to negatively evaluate actions that challenge its purity. However, organizations' commitment to unconventionality also toughens their ability to gain recognition for the quality of their products (Sgourev and Althuizen, 2014), obstructing opportunities to gain positive rewards and achieve exceptional success. In this respect, we argue that as status enhances the perception of superior quality of an organizations' products (Jensen, Kim and Kim, 2011) having status enables organizations that de-emphasize the conventionality of a category infused with dominant prescriptions to increase their reputation for quality. This in turn boosts incentives toward hybridity because organizations that are simultaneously unconventional and high status benefit from a reinforced protection of their hybrid practices from external criticism while also increasing the chances of gaining positive rewards from them.

Shifting focus from general arguments on the identities-based determinants of category spanning to their influence on opera houses' willingness to pursue hybridity, we will now discuss why opera houses with distinct identities traits and status positions are differentially propense to merge oppositional normative prescriptions through category spanning.

IDENTITY-BASED DETERMINANTS OF CATEGORY SPANNING IN THE OPERA FIELD

The empirical setting of this study is the Italian opera market from 2004 to 2011. Italy is the birthplace of opera and opera is part of the cultural heritage of the country. Not surprisingly, Italian opera houses' programming strategies mainly revolve around the preservation of historically established Italian operas. Table I shows the most frequently represented operas in Italy from 2004 to 2011: the masterpieces of Puccini and Verdi, the most important composers of the Italian opera tradition, are at the top of the ranking. As well-expressed by Martorella (1977, p.358) and Jensen and Kim (2013), La Bohème and Madama Butterfly continue to be the "Opera ABC" for commercial success, as their inclusion in the repertoire satisfies the taste of a wide audience for "opera warhorses".

Table I. Mainstream Italian operas.
Top 30 operas in Italy and number of productions. 2004-2011

Ranking	Title	Composer	Number of productions
1	*La Bohème*	Puccini	50
2	*Madama Butterfly*	Puccini	50
3	*Tosca*	Puccini	49
4	*La Traviata*	Verdi	48
5	*Il Barbiere di Siviglia*	Rossini	42
6	*Rigoletto*	Verdi	41
7	*Carmen*	Bizet	36
8	*Turandot*	Puccini	36
9	*Aida*	Verdi	31
10	*L'Elisir d'Amore*	Donizetti	31
11	*Pagliacci*	Leoncavallo	29
12	*Don Giovanni*	Mozart	28
13	*Il Trovatore*	Verdi	28
14	*Cavalleria Rusticana*	Mascagni	25
15	*Nabucco*	Verdi	25
16	*Lucia di Lammermoor*	Donizetti	22
17	*Così Fan Tutte Ossia la Scuola degli Amanti*	Mozart	21
18	*Manon Lescaut*	Puccini	21
19	*La Cenerentola*	Rossini	20
20	*Le Nozze di Figaro*	Mozart	20
21	*Norma*	Bellini	20
22	*Don Pasquale*	Donizetti	19
23	*Gianni Schicchi*	Puccini	18
24	*Falstaff*	Mozart	17
25	*Macbeth*	Verdi	17
26	*Il Flauto Magico*	Mozart	16
27	*Il Ratto del Serraglio*	Mozart	14
28	*L'Italiana in Algeri*	Rossini	13
29	*Werther*	Massenet	13
30	*La Forza del Destino*	Verdi	12

However, as tax-exempt, government-funded organizations, Italian opera houses have an obligation to society to design their programs not only on the basis of the audience's actual tastes (i.e., the box office), but also on the basis of what experts regard as 'good' or 'necessary' for cultivating audience tastes, for future generations of spectators and for the development of the opera field itself. Opera houses, therefore, find themselves in a difficult balancing act and experience a trade-off between oppositional normative prescriptions (artistic originality, experimentation vs. commercial accessibility). These prescriptions are embodied in the codes of the antagonist categories of modern and traditional operas. Indeed, modern 20th century operas define themselves as a divergent and oppositional genre whose intent is to challenge the conservativism inherent in traditional operas through disruptive and innovative aesthetic canons (Lindenberger, 2007; Jensen and Kim, 2013).

Opera houses can recombine conflicting audiences' tastes by offering productions characterized by both artistic originality and commercial accessibility, bridging elements of traditional and modern operas. For example, theatres can offer modern staging of traditional operas of the past by merging pre-20th century music and contemporary visual experiences. By putting 'old wine in new bottles', opera houses can add a modern meaning to a traditional music (Heilbrun and Gray, 1993). This gives rise to hybrid staging experiences: giving a contemporary twist to the 19th century opera La Traviata, by setting the opera in the present and making the protagonists feel contemporary (Loomis, 2013) is an example of hybrid strategy. The aim of hybrid strategies in the opera field has been clearly expressed by Stephane Lissner, the former chairman of La Scala theatre in Milan: "setting side by side the repertoire and the modern day is part of the Scala's mission, not repeating the same show as the conservatives would like" (Biennie, 2013). In a similar vein, the former chairman of Teatro dell'Opera in Rome noted "we're trying to merry traditional Italian opera with a more modern vision of what a theater can be, recovering our credibility and searching for different audiences in the meantime" (Povoledo, 2013).

On the one hand, merging traditional and modern operas enables opera houses to achieve novelty through the recombination of different categorization systems. On the other hand, it is also particularly risky for organizations whose identity revolves around the codes of a wellestablished market category of traditional operas. Hybridity implies a violation of tradition which in turn may expose opera houses to social and economic penalties. Indeed, conservative audiencesegments condemn modern staging of traditional operas as a disrputive attempt of theatres' managers and stage directors to violate the code of the Italian operatic tradition searching for a succès de scandale that will fill the opera house. Not surprisingly modern stagings are often negatively received by the most conservative fractions of the audience who are reluctant to accept contemporary visual reinterpretations of a classic repertoire.

Despite the potential negative effects of hybridity, opera houses still pursue this strategy. What therefore enables opera houses to perceive the blending of categories infused with divergent prescriptions as a less risky and more rewarding strategic path? Strenghening their compliance with conservative audiences' expectations by reaffirming their link to tradition is a source of legitimacy in front of conservative audience segments that functions as a driver for actions that embrace divergent prescriptions (Jensen and Kim, 2013). In this respect, enhancing their legitimacy by steadfastly adhering to the purity of the codes that defines traditional, pre-20th century operas provides theatres with a source of unquestionable consensus (Cancellieri and Turrini, 2016) that empowers their future ability to redefine the boundary of tradition by incorporating modern features inside traditional repertoires.

The higher opera houses' commitment to a traditional opera category in the past, the higher their willingness to establish the acceptance of hybrid practices in the future by making hybrids be perceived in a positive way from multiple perspectives: on the one hand, they are created by theatres whose legitimacy is unquestionable (Poisson and Normandin, 2009; Sicca and Zan, 2005) which in turn defends opera houses from the potential criticism of dominant audiences.

On the other hand, opera houses' reinforced loyalty to tradition in the past makes the future production of traditional operas in a hybrid form be perceived by divergent audiences as a more shocking and provocative attempt to exploit a traditional music patrimony for experimental and innovative purposes. In this regard, opera houses' legacy rooted in tradition can be put at the service of the innovation-oriented audiences' prescriptions of artistic originality. Although these prescriptions are embodied in modern 20th century operas (Jensen and Kim, 2013), they can be even better satisfied when opera houses leverage their traditional identity to put the spotlight on their future ability to infringe its foundamental attributes. Similarly, in the realm of french haute cuisine, nouvelle cuisine activists celebrated their differences with the dominant orthodoxy of classical cuisine but also exploited its classical foundation for their attempt to challenge old rules (Rao, Monin and Durand, 2003; Rao, Monin and Durand, 2005).

Reinforcing their legacy rooted in tradition and their reputation as quintessential forms of tradition-based companies enables theatres to inject innovativeness in the production of traditional operas. In this regard tradition is not an innovation-depressing factor but a starting point for the renewal of the repertoire. For example, the increased emphasis on tradition that characterized the 2002-2003 artistic seasons of La Scala theatre was followed by a boom of innovative performances that mixed tradition and modernity over the successive two artistic seasons. Similarly, Arena di Verona is now able to deliver modern staging of traditional operas thanks to its historical reputation for being the guardianship of traditional repertoires.

In sum, we contend that when opera houses' indentities are more rooted in tradition, they contain the seeds for these organizations to instill innovation within tradition through the blending of traditional and modern repertoires.

We argue:

Hypothesis 1: the higher opera houses' commitment to traditional operas in the past, the higher their ability to contaminate traditional operas with the codes of modern operatic repertoires in the future.

Studies on classic music programming suggest that although an increased repertoire conventionality confers companies more opportunities to be recognized as high-quality producers, it also enables them to stand out which makes mistakes more egregious and exposure

to the risk of failure higher (Durand and Kremp, 2015). As repertoire conventionality implies an increased focusness on highly salient and easily assessable music pieces (Espeland and Sauder, 2007) it confers external audiences increased opportunities to judge these products which in turn reinforces the potential sanctionability of attempts to bastardize the codes of these repertoire through hybridity. In the opera field, theatres that conform to the conventional aspects of tradition can potentially accrue their reputation for quality (Boerner, 2004). However, precisely because their artistic choices can more easily be evaluated by the external audience, any attempt to contaminate the codes of tradition can be detected and punished. For example, when an opera house's programming strategies focus on the most frequently performed operas of the traditional repertoire such as *La Traviata, La Bohème or Aida*, blending traditional and modern operas becomes particularly challenging. *La Traviata, La Bohème and Aida* are the backbone of the Italian 19th century operatic tradition, widely known and familiar to both conservative and innovation-oriented segments of the audience. By focusing their programming strategies on these exemplars, opera houses emphasize their role of guardianship of a traditional repertoire which in turn exposes them to the possibility of receiving negative external evalutations for violating its codes. By contrast, by programming Il Fidelio or La Finta Giardiniera, under-performed traditional operas instead of the over-represented *La Traviata or La Bohème*, theatres raise the unconventionality of traditional repertoires which allows them to more easily achieve success when these repertoires are contaminated with modernity. For example, La Scala's choice to open its 2014 artistic season with a modern staging of *La Traviata* was negatively received by critics and the general audience (Loomis, 2013, Biennie, 2013). By contrast, its decisions to open the following seasons with modern stagings of the under-represented operas *Il Fidelio* by Beethoven and *Giovanna D'Arco* by Verdi were acclaimed even by the most risk-averse segments of the audience (Maddocks, 2015).

Highlighting the unconventional features of tradition, enables opera houses to subtract clear benchmarks of comparison that make hybrids more punishable in the eyes of different audiences.

This in turn confers theatres increased leeways to reinterpret these operas through modern aesthetic canons. In sum, de-emphasizing the emblematic features of tradition decreases constraints to hybridity. This in turn confers opera houses increased leeway to recombine divergent normative prescriptions through hybrid practices.

We argue:

Hypothesis 2a: the higher opera houses' willingness to increase the unconventionality of traditional operas, the higher their ability to contaminate traditional operas with the codes of modern operatic repertoires.

Raising the unconventionality of traditional operas protects from the external sanctions that stem from hybridity which gives theatres leeway to blend the codes of modern and traditional operas. However, unconventionality is also conducive to an excess of distinctiveness that may obstruct their search for quality gains (Espeland and Sauder, 2007; Durand and Kremp, 2015). As an increased unconventionality makes it difficult for the external audience to recognize a producer's competence and quality (Sgourev and Althuizen, 2014), raising the unconventionality of traditional operas can toughen the difficult task of establishing the quality of hybrids in the eyes of different audiences. Signaling their quality would in fact contribute to their potential success by reducing the uncertaintites that may prevent different external audiences to certify their value.

We argue that raising the unconventionality of traditional operas is more conducive to hybridity when accomplished by high status theatres. Studies on the advantages and disadvantages of occupying a high vertical status position suggest that the products of firms in high vertical positions are perceived of higher quality and less risky than those of firms in lower vertical positions (Jensen, 2006; Jensen, Kim and Kim, 2011). In this respect status further encourages theatres that raise the unconventionality of traditional operas to pursue hybridity because it reduces their quality gap, providing them with enhanced possibilities to achieve rewards from hybrids. In other words, being unconventional and high status protect the firms from the sanctions that stem from hybridity while also increasing opportunities for possible rewards, boosting incentives to undertake category spanning.

Thus, we argue that when opera houses raise the unconventionality of their traditional repertoires, occupying a high status position cements their freedom and leeway to pursue hybridity.

We argue:

Hypothesis 2b: the higher opera houses' willingness to increase the unconventionality of traditional operas and the higher their social status, the higher their ability to contaminate traditional operas with the codes of modern operatic repertoires.

METHODS

Sample

Nowadays Italian opera houses are a fragmented sector, characterized by an offer shared between different non-profit institutions (Sicca and Zan, 2005). Our sample is composed by the most important professional Italian opera houses *(i.e., Lyric and Symphonic foundations, Teatri di Tradizione)* and operatic festivals. The Lyric and Symphonic Foundations (LSF) are private foundations located in the largest Italian towns. By contrast, Teatri di Tradizione (TDTs) are usually smaller than LSFs in size, and mainly located in medium size cities. Given the relevance of festivals for the Italian operatic tradition and for the artistic development of the field, we decided to include them in our sample. Operatic festivals are realized in a limited timeframe and located in distinct geographic area. Both LSFs, TDTs and festivals receive significant funding from public bodies at both national and local levels. We excluded from our sample 'lirica ordinaria', small-scale theatres with short seasons that sporadically include operas in their repertoires. Moreover, we did not consider Accademia S. Cecilia in Rome, a lyric and symphonic foundation whose repertoire is not focused on staged operas but on concert opera and symphonic productions.

Information about opera houses' funding sources, casts and programming decisions was collected manually from specialist yearly magazines *(Annuari EDT/CIDIM dell'Opera Lirica in Italia*), widely regarded as industry references. Each issue provides artistic and economic information about the operas performed by Italian opera houses. Each opera is documented by means of various qualitative and quantitative data such as titles, composers, number of reruns and cast.

We constructed a panel data set containing information on opera institutions from the 2004-2005 artistic season to the 2010-2011 artistic season. As most of the time Italian opera houses' artistic seasons do not coincide with the solar year, we have decided to adopt the artistic season as the reference time frame. This allows us to maintain the integrity of all the seasons in the database.

Using seasonally updated data from 2004 to 2011, our final sample includes 42 professional opera companies and festivals, which, given our lagged repertoires (discussed in the next section), results in 200 observations.[1]

Variables:

Dependent variable:

Category spanning *(hybridity):* music scholars have commonly distinguished between modern twentieth-century opera and traditional pre-twentieth century operas which capture the divergence in opera tastes (Parker, 1994). Modern opera is often described as a divergent and even *oppositional* genre. Lindenberger (2007, pp. 84-86) defined modern opera as "not-quiteopera" and noted that "much operatic modernism consists of approximations of opera rather than what most audiences have customarily viewed as full-blown opera". Modern opera often violate the category expectations of traditional opera in a number of different ways, including its antitheatrical oratorio-like appearance and its aesthetics of difficulty and non-beauty and its intent to provoke and scandalize the audience (Jensen and Kim, 2013; Lindenberger 2007, Griffiths 1994).

We measured theatres' willingness to create hybrid operas that mix the codes of traditional and modern operas as the percentage of modern stagings. Following Jensen and Kim (2013) we define modern staging as traditional, pre-20th century operas whose stage design and visual attributes are borrowed from modern and contemporary repertoires (e.g., Peter Sellar's 1990 staging of Mozart's Don Giovanni as a New York City drug dealer).

Independent variables:

Past commitment to tradition. This variable is a proxy of opera houses' willingness to focus their repertoires on traditional operas brought to stage in their purest form (staged by respecting the visual attributes and stage designs typical of pre-20th century operas). We measured this variable by calculating the average percentage of purist-traditional operas programmed by theatres over the two previous artistic seasons.

Unconventionality of Traditional Repertoires. We measured this variable as the inverse of the conformity index (Di Maggio and Stenberg, 1985; Jensen and

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[1] Nine observations have been dropped due to missing financial data.

Kim, 2013; Kim and Jensen, 2011; Pierce, 2000), which is calculated as the average number of times the traditional opera titles programmed by a given theatre are also programmed by the other theatres in the sample. The unconventionality of traditional repertoires captures the extent to which an opera house programs unpopular, unfamiliar traditional operas instead of focusing their attention to over-performed traditional works. The higher the index, the higher the innovativeness of a theatre's repertoire within tradition. The lower the index, the higher the theatre's propensity to most famous traditional works (Jensen and Kim, 2013; Martorella, 1977, p.358). As operatic seasons are programmed two or three years in advance, to measure the conventionality of the traditional operas programmed by a theatre over a given artistic season we first counted the number of times 21 each opera in that season was produced by all the opera companies in our population over the last two artistic seasons (prior to the current one). We then calculated the average conventionality of these operas. The first season in our statistical analysis is 2006-2007 (conventionality based on the 2004–2005 and 2005-2007 artistic seasons) and the last one is 2010-2011 (conventionality based on the 2008-2009 and 2009–2010 artistic seasons).

Relational measure of status. Theatres' status hierarchy derives from patterns of artists exchange relationships. We identify an opera house's network from the opera house's sharing of artists (e.g., conductors and directors) with other opera houses. That is, a tie between opera house i and opera house j exists when opera house i shares artists with opera house j. To assess the status of opera house i we constructed a relational matrix R where each cell Rij denotes the number of times that the artists hired by the opera house i are also hired by the opera house j. R is a symmetric n x n matrix where n denotes the number of times that the artists employed by the opera house i perform at opera house j. Having constructed the matrix, we then calculated status scores based on Bonacich's (1987) centrality measure, a standard measure for relational data on status, to determine each organization's status relative to that of other organizations. The measure is defined as follows:

$$S_t(\alpha, B) = \sum_{k=0}^{\infty} \alpha B^k R_t^{k+1} \mathbf{1}$$

where,^{a} is an arbitrary scaling coefficient, B is a weighting parameter, 1 is a column vector where each element has the value "1," and St is also a column vector where element Si,t indicates the status of opera house i. Status scores are standardized so that the highest status opera house in a given year has a status of 1. The upper bound on B is the reciprocal of the largest eigenvalue of the R matrix. For the analyses that follow, we set B at this upper bound. Given this specification, an opera house's status is a function of the number of opera houses that hire the same artists and of the status of these opera houses (which in turn derives from the number and the status of opera houses with whom they share artists and so on).

Since an opera house's artistic season in the time period t is programmed over the previous two artistic seasons, we believed it was more appropriate to include the status of an opera house as a lagged variable t-2 . This allows us to measure the status of an opera house at the time in which the programming decisions for a given artistic season were actually made.

Control Variables:

Structural holes: we relied on the Burt's measure of structural holes (2004) to account for the effect of brokerage on opera houses' willingness to innovate through hybrids. As a matter of fact, organizations occupying the position of brokers are more open to pursue hybridity due to their ability to collaborate with previously unconnected alters and to recombine knowledge coming from different actors in the network (Burt, 2004). This measure is defined as follows:

$$H_i = 1 - \sum_{i'} \left(p_{ii'} + \sum_{q} p_{iq}\, p_{qi'} \right)^2$$

$$i \neq i' \neq q$$

where denotes the proportion of i's network that is invested in the relation with, indicates the proportion of q's network that is invested in its relation with . Hi can range from 0 to 1. As i is connected to an infinite number of others who are themselves disconnected, Hi approaches 0. Conversely, if i shares artists with few opera houses that are well connected among themselves (e.g., they constitue a clique and share the same artists), then Hi will approach 1.

Opera houses' funding sources. Opera houses' funding sources may exert a strong influence on opera houses programming decisions (Martorella, 1977; Di Maggio and Stenberg, 1985). We controlled for opera houses' funding sources by computing the share of total revenues accounted for by national government grants, private funds and box office revenues.

Time dummies. We also included dummies for each artistic season in the model.

Size. We used the *total number of programmed runs* to control for an opera house's size. We measure this as the number of performance runs an opera house set up in the artistic season t.

Coproductions. Coproducing operas with other theatres can lower the perception of risk related to hybrid strategies which in turn may affect theatres' propensity to undertake them. We measured theatres' propensity to coproduce operas with other theatres as the percentage of coproduced operas in the repertoire.

New productions. Theatres that put new productions on stage are typically less risk averse and may be more open to various repertoires of strategies. A new production includes new cast, set designs, costumes, and stage directions that had not been previously used by the opera house. For example, in 2006 Teatro alla Scala in Milan set up a production of the famous opera *Aida* (composed by Giuseppe Verdi) *ex novo* with new cast, set designs and costumes, under the stage direction of Franco Zeffirelli. By contrast, in 2006 the same theatre rented a production of *Eugenio Oneghin* that has already been staged by the Glyndebourne Festival Opera (EDT/CIDIM, 2006). We measure theatres' willingness to mount new productions as the percentage of new productions staged by a theatre seasonally.

Descriptive statistics and correlation matrix are presented in Table II.

Table II. Descriptive statistics and correlation matrix

Significance: †$p < .10$

	Variable	Mean	SD	1	2	3	4	5	6	7	8	9	10	11
1	Hybridity	0.418	0,256	1										
2	Past commitment to tradition	0.478	0.230	-0.182†	1									
3	Unconventionality of traditional operas	-27.228	14.985	0.3473†	-0.276†	1								
4	Status	0.416	0.275	0.070	-0.239†	0.054	1							
4	Structural holes	0.286	0.134	-0.183 †	0.325†	-0.218†	-0.521†	1						
5	Private funding	0.091	0.085	-0.038	0.018	0.053	0.067	0.034	1					
6	Box office	0.151	0.126	-0.105	0.139†	-0.283†	-0.025	0.128†	0.001	1				
7	State funding	0.347	0.177	0.083	-0.029	0.011	0.157†	-0.187†	-0.286†	-0.127†	1			
9	Coproduction	0.464	0.360	0.197†	-0.203†	0.114	0.272†	-0.262†	0.057	-0.042†	-0.284†	1		
10	Repertoire size	5.799	2.846	-0.020	-0.066	0.087	0.458†	-0.279†	0.055	-0.000	0.345†	-0.163†	1	
11	New Production	0.389	0.296	0.137†	-0.145†	0.272†	-0.134†	-0.037	-0.009	-0.152†	0.193†	-0.303†	0.136†	1

RESULTS

Table III presents the fixed-effects ordinary least squares (OLS) regression results (a Hausman test indicated that the fixed-effect model was more appropriate than random-effects) (Stock and Watson, 2007). Model 1 in Table III is a baseline model that contains only the control variables. In Model 2 (Table III) we added the opera houses' past commitment to tradition, the degree of unconventionality of their traditional operas and status as independent variables. In Model 3 (Table III), our *full model*, we added the two-way interaction effect between the unconventionality of opera houses' traditional operas and their status. All the variables have been standardized in order to guard against multicollinearity (Aiken, West and Raymon, 1991).

Table III. Model Estimation. The effect of Market Identity on Hybridity

	***Dependent variable*: Hybridity**		
	Model 1	**Model 2**	**Model 3**
Independent Variables			
Past commitment to tradition	-	0.492*** (4.32)	0.420*** (4.17)
Unconventionality of traditional operas	-	0.441* (4.32)	0.248* (2.48)
Status	-	0.151 (1.20)	0.189* (1.51)
Unconventionality of traditional operas*status	-	-	0.272* (2.50)
Control variables			
Repertoire Size	0.149 (0.95)	0.036 (0.24)	-0.002 (-0.02)
New Production	0.135 (1.33)	0.082 (0.85)	0.088 (0.93)
Structural Holes	0.078 (0.40)	0.242 (1.15)	0.235 (1.14)
State Funding	-0.065 (-0.32)	-0.187 (-0.97)	-0.198 (-1.05)
Private Funding	0.135 (0.86)	0.203 (1.36)	0.210 (1.43)
Box Office	-0.255 (-1.38)	-0.223 (-1.28)	-0.280 (-1.62)
Coproduction	-0.032 (-0.23)	-0.094 (-0.72)	-0.119 (-0.92)
Time dummies	*Included*	*Included*	*Included*
Constant	-0.172 (-1.10)	-0.161 (-1.09)	-0.164 (-1.12)
No. of observations	201	201	201
R-sq	0.061	0.19	0.22
F	0.88**	2.48**	2.81***

Significance:
***$p < .001$; **$p < .01$; *$p < .05$; †$p < .10$; t-statistic in parenthesis. Standardized regression coefficients

Hypothesis 1 suggests the higher opera houses' commitment to traditional operas in the past, the higher their ability to contaminate traditional operas with the codes of modern operatic repertoires in the future. Model 3 (Table III) provides strong support for this hypothesis. As shown in model 3 there is a positive and significant relationship between opera houses' commitment to tradition and hybridity (ß = 0.420, $p < 0.001$).

In hypothesis 2a we posit that the higher opera houses' willingness to increase the unconventionality of traditional operas, the higher their ability to contaminate traditional operas with the codes of modern operatic repertoires. As shown in models 3 the relationship between the degree of unconventionality of opera houses' traditional operas and hybridity is positive and significant (ß = 0.248, $p < 0.05$), thereby supporting our hypothesis 2a.

Finally, in hypothesis 2b we argue that the higher opera houses' willingness to increase the unconventional traits of traditional operas and the higher their social status, the higher their ability to contaminate traditional operas with the codes of modern operatic repertoires. As can be noted, in model 3 the interaction effect between the level of unconventionality of traditional operas and status is positive and significant (ß = 0.272, $p < 0.05$). This result confirms our hypothesis 3. We graph the interaction following procedures proposed by Aiken,West and Raymon (1991) (Figure 1).

Figure 1. Interaction effect between the degree of unconventionality of opera houses' traditional repertoires and their status

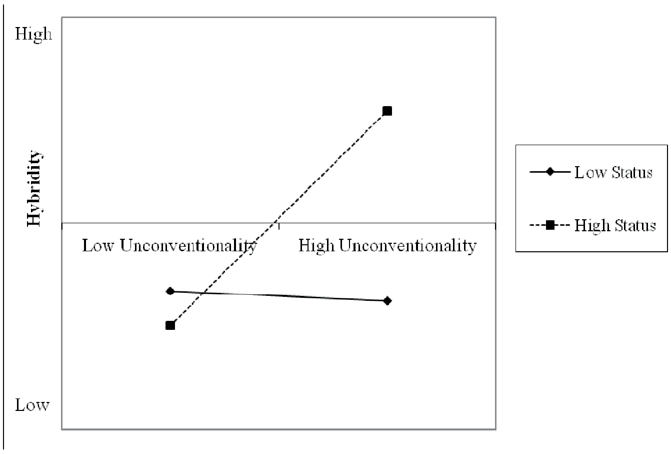

Figure 1 shows that for low levels of traditional operas' unconventionality, high and low status theatres have almost the same proportion of hybrid operas in the repertoire. However, as the unconventionality of traditional operas increases, the propensity to stage hybrid operas significantly raises for high status opera houses and slightly decreases for low status houses.

CONCLUSION:

Our objective in this article was to understand how organizations' willingness to recombine divergent categorization systems is influenced by specific traits of their past and present market identites. We explore this relationship within the context of the Italian opera scene, where the tension between conservative vs. innovation-oriented external prescriptions challenges opera houses' programming decisions. First, we argue that a steadfast adherence to the codes of a traditional category that incarnates prevailing prescriptions in the past creates incentives for opera houses to contaminate that category with the codes of modernity. The legitimacy-conferring action of establishing an unquestionable membership in tradition provides theatres with protection from the possibility for their hybrid strategies to be criticized by dominant audiences. At the same, it confers theatres the possibility to make category spanning be perceived by divergent audiences as a provoquing and transgressive attempt to put their traditional identity at the service of experimentation and innovation, boosting their attractiveness in the eyes of this audience.

Second, we argue that opera houses' efforts to de-emphasize the conventional, emblematic aspects of tradition positively affect their ability to merge it with the codes of modernity. Indeed, by removing clear benchmarks of comparisons that render the category easily assessable by different audiences, opera houses make the hybridization process less subject to external criticism and social penalties. Finally, we posit that by enhancing the external perception of quality of organizations that display unconventionality (Durand and Kremp, 2015), an increased social status confers them more opportunities to gain positive rewards and achieve success from hybridity which in turn reinforces the incentives to pursue it.

Our statistical analyses provide strong support for our theoretical arguments. Specifically, our analyses show that a reinforced commitment to respect the codes of tradition in the past, boosts theatres' willingness to merge tradition with modernity. De-emphasizing the conventional traits of tradition increases theatres' willingness to blend traditional and modern operas as well. This holds particularly true when high status theatres increase the unconventionality of traditional operas. Theatres that are simultaneously unconventional within tradition and high status may in fact benefit from being protected from the criticism that stems from hybridity while at the same time increasing their reputation for quality which enhances opportunities for their hybrid products to achieve market and artistic success.

This study contributes to advance research on market identities and category spanning (Jensen, Kim and Kim, 2011; Hsu, Hannan and Koçac, 2009; Durand and Paolella, 2012; Negro, Hannan and Rao, 2010) by shedding light on under-examinined traits of an organization's market identity that are conducive to hybridity. In this respect we challenged the argument that organizations have scarce incentives to recombine categories imbued with divergent audiences' expectations, by shifting focus from the identity-constraining to the identity-enabling factors to the enactment of hybrid strategies.

We not only go beyond the assumption of audience homogeneity that pervades much work on category spanning but we also provide evidence of the possibility for organizations to manipulate category meaning and boundaries strategically according to their interests and to where they think audiences' focus might be (Durand and Paolella, 2012). In this respect, our studies shed light on this mechanism by showing how a firm can leverage its adherence to the codes of a category infused with dominant prescriptions in the past and its level of conventionality within that category to create hybrid products that recombine divergent expectations. The ability of firms to merge heterogenous audiences' interests is contingent on how they can make the meaning of hybrids being favourably received by divergent audiences by accentuating different identitytraits.

Adhering to the codes of a category infused with dominant prescriptions in the past and ecplipsing its conventional traits contribute to form specific audiences' view of hybridity in the future which strongly affects firms' ability to recombine different audiences' expectations through hybrids.

In addition to these contributions, our research contributes to status theory as well. Status research highlights that having status may limit and constrain the opportunities and choices of action available to a firm (Sauder, Lynn and Podolny, 2012). Studies have already shown that high status organizations' positions at the top of the social system allow them greater control over how audiences perceive and make sense of their actions (Martin, 2009). We add that status functions as a transfer for quality that cements and supports firms' willingness to manipulate specific traits of their identites to make hybridity be received positively by divergent audiences.

In doing so, we shed light on the role of status as a quality-enhancing traits of an organization's identity that may be jointly exploited with other traits of an organization's identity (e.g., unconventionality) to raise the potential for success of hybrids and increase the incentives to undertake this practice.

Despite these contributions, our study also has limitations. The decision to focus on the specific industry and geographic market of Italian opera may limit the generalizability of these findings. Studies re-assessing the relationship between organizations' market identities and hybridity in different settings characterized by supplementary characteristics such as a more complex intertwine of normative prescriptions or logics will help to further test the generalizability of our findings. Future studies could also refine our model by specifying how contextual variables such as the extent to which different prescriptions are represented inside the geographic community where organizations' operate and in their peers' competitive strategies interact with organizations' identity to shape their willingness to pursue hybridity.

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Cultural Marketing in the Digital Age: The Influence of Place and Media on the Brand Image of Live-Operas

Abstract

Music theatres are challenged by digitization and the emergence of new media. New media enables people to stay outside the opera house while attending a live-opera, e. g. via live-streamed opera shows in the cinema. Moreover, opera houses are confronted with declining public funds and are increasingly forced to account for an efficient allocation of resources. Against this background, market orientation and branding are of growing relevance to opera houses. Based on Keller□s (1993) brand image approach, we use an explorative qualitative study in order to investigate similarities and differences between the brand image of live-operas experienced in an opera house versus those shown in a cinema. As a result, we found that audiences distinguish between the respective brand images in detail. Furthermore, classic live-operas of an opera house are perceived as an original, positive, holistic, and unique experience. Music theatres can use the results of this study in order to develop targeted brand management strategies.

Key words: consumer behavior, brand image, live-opera, cultural marketing, marketing strategy

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1 The Detachment of the Live-Opera from Place through Digitalization

The German music theatre respective opera landscape shows a substantial bandwidth that is contrary to the centralized systems in Paris, New York or London(Lutz, 2013, p. 49). Audiences make use of these offers substantially: Taken together, the musical genres of the opera, operetta, musical, dance and concerts have about 10 million spectators, which is nearly as much as the teams of the German Football Bundesliga have(Bollmann 2012, p. 13). Opera performances[1] reach nearly 4 million spectators per year (Deutscher Buehnenverein 2015, pp. table 3).

The ongoing digitalization and a growing network of media facilitate new patterns of media consumption that, in turn, bring about new forms of marketing and business models for the music theatre. In particular, the possibilities for live-transmission create new challenges for opera houses. Even though live-opera transmissions are not new, as shown by established TV-offerings by Arte and 3Sat in Germany, public viewing and live-streaming gain relevance and attractiveness for audiences of opera performances. Nevertheless, only large international houses, such as the Metropolitan Opera (MET) in New York currently offer regular transmissions (Reuband 2013b, pp. 223). Additionally, it can be seen that budget constraints of the public, growing costs for the operations of music theatres (with opera performances creating the highest costs) and declining numbers of audiences lead to questions of legitimacy of German public music theatres (e.g. Abfalter 2010, pp. 127; Lutz 2013, pp.65).

These changing circumstances make a targeted cultural marketing necessary, so that opera houses have a chance to survive in the market. A strategic identity-based brand management approach, which is targeted towards all internal and external stakeholders, has the potential for creating successful competitive differentiation and building customer relationships in the cultural sphere (e.g. Aaker 2014; Burmann, Schleusener and Weers 2005; Esch 2014; Guenter and Hausmann 2012, pp. 45). A necessary foundation for this is a comprehensive research of cultural audiences (Abfalter 2010, pp. 99).

It becomes evident that current approaches to cultural audience research are often ad hoc and seldom built systematically from the ground up (see also Glogner-Pilz and Foehl 2010). Additionally, integrated approaches for brand management in cultural institutions are scarce (for an overview see Buensch 2011, 2015). Moreover, existing research does not take into account the influence of different geographical locations and contexts, in which live-operas are being offered (for an exception see Reuband 2015).

This study closes this gap, because it includes the location as well as the type of an opera performance under the banner of the brand. In parallel to the example of contrasting live-streamed operas of the MET in the cinema and live-opera performances in the opera house, the current study focuses on the perception of the audience and aims to answer the following research question:

Which similarities and differences does the brand image of live-opera performances show, if the performance is given in an opera house or transmitted in a movie theatre, and which concrete management implications can be drawn from these findings?

Following this line of argumentation, the research paper addresses not only management issues, but also culturally- and socio-politically relevant questions. The aim is an interdisciplinary analysis of the context of live-operas, and on this basis, to find out how the context can be used for branding purposes of the ‘classical’ live-opera in the opera house.

2 Determinants of the Brand Image

Price Sensitivity (PS). Consumers who are sensitive Because of the special circumstances surrounding the service-character of operas, customer-related uncertainties arise. A strong and well-defined brand can create a promise of quality, which can remedy these uncertainties. A brand can be defined as a bundle of benefits that has specific characteristics in terms of identification and differentiation for the relevant target groups(Meffert 2012, p. 270).

In the last years, we have seen an evolution of our understanding of brand management towards an identity-based strategic brand management (for an overview see Meffert 2012, pp. 269). With such an understanding, we differentiate between the managerially-intended brand identity (inside view) and the specific brand image (outside view), which reflects the entirety of the impressions about a brand by its stakeholders. The brand image, then, is a subjective, multi-dimensional construct of different semantically-linked associations(Radtke 2014, p. 2).

In the following, the focus will be on the visitors of live-operas. The determinants of the brand image will be analyzed in terms of a behavioral science approach. By presumingthat brands have characteristics with different abstraction-levels within a semantic network (e.g. Keller 2005, pp. 1318), we do not concentrate on a single event or a specific location. Rather, the focus will be on the contexts of the music theatre and movietheater in order to derive abstract brand-characteristics. Therefore, the concept of Keller (1993)seems to be ideal. Under the condition of a brand awareness and compared to other approaches (e.g. Aaker 1991)it highlights the attitude towards a brand as a significant success factor. Following Keller (2005), the brand image is the major determinant for the preferences and choices of a customer and consists of unique, advantageous and strong associations (pp. 1318).Based on a rising level of abstraction, he (1993) differentiates between three levels of brand associations.

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[1] An opera performance can be defined as a dramatic work, in which the text is entirely or mostly sung and in which music is used to leverage the effect of the performance (Abfalter 2010, p. 97).

First, the focus is on attributes. It centers on “what a consumer thinks the product or service is or has and what is involved with its purchase or consumption“ (p. 4). Moreover, Keller (ibid.) differentiates those in product-related and non-product-related characteristics, such as price, conceptions of the user of the benefits, the use of the benefits, and the packaging. Since a live-opera in an opera house or movie theatre is a service, the packaging will not be included in the analysis. According to Keller (ibid.), the idea of the brand personality derives from a combination of user- and usage-impressions. The brand personality concept itself is based on the socio-psychological assumption that people attribute a personality to objects and services. In this context, a brand personality is defined as „the human characteristics of a brand“ (Aaker and Fournier 1995, p. 391). Specifically, research has shown that a strong brand personality has positive effects on buyer behavior (Biel 1993) and should be considered when analyzing emotional services such as live-operas. Therefore, it is included as a separate determinant.

Second, the focus is on the benefits that arises through the satisfaction of functional (intrinsic aspects), experiential and symbolic (rather extrinsic aspects) needs through the consumption (Keller 1993, p. 4).

Third, there is an attitudinal dimension of the brand image, because brands are meant to generate preferences of the consumers (ibid. 2005, pp. 1309). The concept of brand management in public theaters has gained rather little attention to date, and usually focuses on specific operaperformances and opera houses (for a review of existing studies see Buensch 2011, 2015). Research on the audience perception of German opera performances centers on sociodemographic and motivational aspects, which do not focus on the brand image (Abfalter 2010; Jobst and Boerner 2011; Lutz 2013; Reuband 2015). In addition, the studies that attend to the place of opera performances, e.g. in a warehouse (Roll and Hoeflich 2014), or approach live-opera transmissions in the context of open-air public viewing (for Austria, see Josch 2010) or cinemas (especially Reuband 2013a, 2013b, 2015) do not integrate any branding aspects.

3 Qualitative Methodology

This study chooses a qualitative methodology to generate the relevant aspects of the brand image, because the brand image of live-operas in different contexts has not yet been studied, and, therefore, no scientific data currently exists. Using a qualitative approach, focus group interviews are a suitable method for different reasons. In this method, a moderator leads a discussion with several people. The benefit is that the group dynamics in the interview may lead to multi-faceted and spontaneous answers (Iacobucci and Churchill 2010, pp. 64). When selecting the participants, it is important that the group includes people that have at least once experienced a live-streamed opera in a cinema and/or a live opera performance in an opera house, as well as people that have previously not had any experience with it. This heterogeneity may further create a greater bandwidth of responses (Esch 2014, p. 666). Moreover, the focus is on younger adults (18-30 years old), because this target group increasingly has lower demand for music theatres (Lutz 2013, pp. 59). The potential participants are approached by a snowball sampling (Berg, 1988).The qualitative interview guide includes open and broad questions, to give the participants a preferably large space for associations regarding live-opera transmissions in movietheaters and live-opera performances in opera houses. Furthermore, the information sharing is supported by trusted methods for revealing and structuring information such as the repertory-grid-method (Sampson 1972) and the laddering-technique (Olson and Reynolds 1983; Reynolds and Gutman 2009).

After the interview, the discussed characteristics for the brand image “opera house” and “cinema” are shared with the participants. They should select those aspects from the list, which they see as relevant and further name the opposite of the respective term. The result is a brand profile of semantic differentials, which the interviewees rate on a five-step-scale individually for both contexts. The interviews are recorded audio-visually and transcribed with customary standards. Afterwards, using a computer-aided qualitative research software (ATLAS.ti), a grounded theoretical content analysis that is oriented on the theoretical coding approach(Glaser and Strauss 2010) is conducted.

In addition to the interview, a questionnaire frames the focus-group interviews. In this case, the questionnaire focuses on sociodemographic aspects and global attitudes towards opera events in movie theaters and opera houses (see e.g. Keller 2005, p. 1321), actual visits and the likelihood of a visit in the next half a year, as well as the clarity of the image of the contexts (oriented onRuge 1988, p. 100). An overview of the research design can be found in the

4 Results of the Brand Image Contrast

The conception of research and two pretests of the focus group interviews were completed in April 2016. Afterwards, in the beginning of May 2016, two interviews with five to six people were conducted that lasted about one and a half hours.

The distribution of gender and experience with live-operas was satisfactory heterogeneous in both groups (see appendix, Table 1). The interviewees are 23 to 27 years old, predominantly well-educated (at least German Abitur), and come from the immediate surroundings of the meeting point for the focus group interview in Weimar (Germany). With one exception (P1w, employed), all participants are students and have rather little income. Three people (P6w, P9w, P7m) live in a relationship, the rest is single.

Nearly half of the 11 participants attends the opera at least several times per year. Only four people visit cinemas less frequently. Six people also visit other events, such as local opera festivals.

Appendix

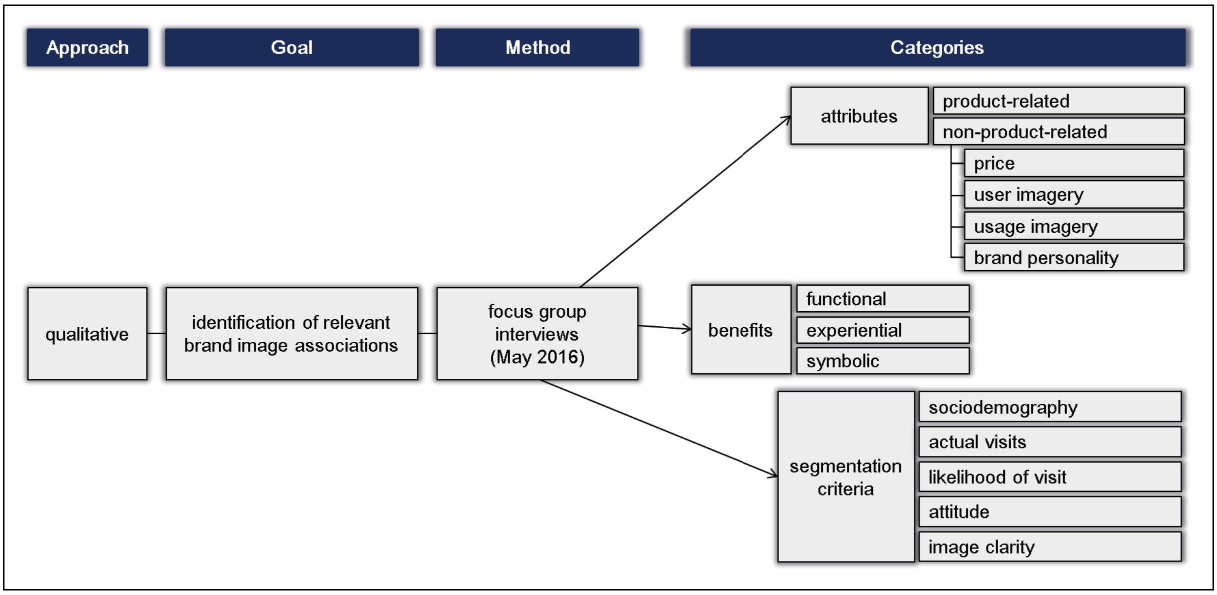
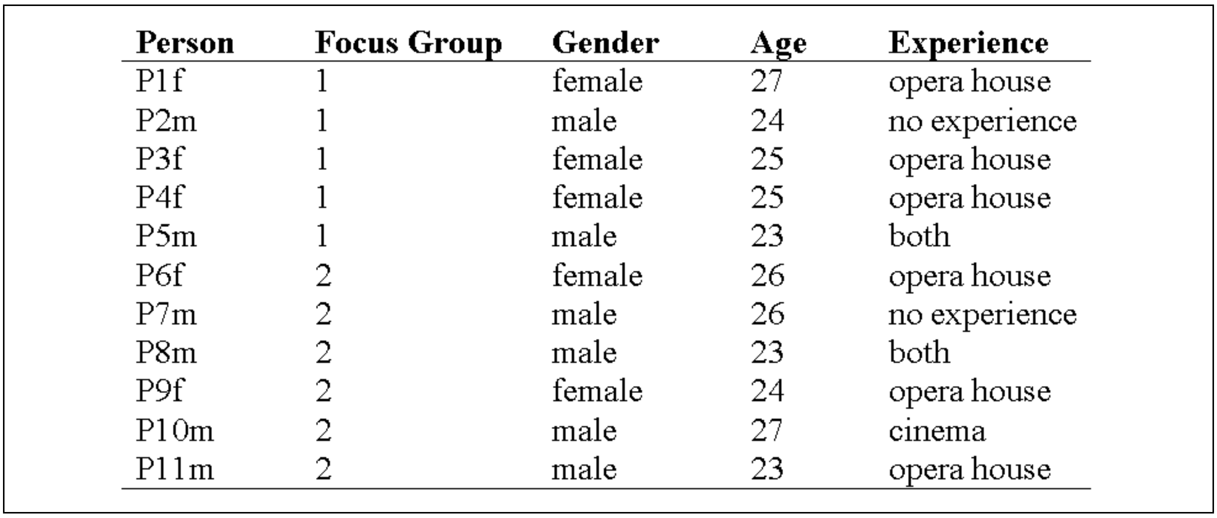

Approach
Goal
Method
Categories
qualitative
identification of relevant brand image associations
focus group interviews (May 2016)
attributes
product-related
non-product-related
price
user imagery
usage imagery
brand personality
benefits
functional
experiential
symbolic
segmentation criteria
sociodemography
actual visits
likelihood of visit
attitude
image clarity

Figure 1: Research Design (own research)



Person	Focus Group	Gender	Age	Experience
P1f	1	female	27	opera house
P2m	1	male	24	no experience
P3f	1	female	25	opera house
P4f	1	female	25	opera house
P5m	1	male	23	both
P6f	2	female	26	opera house
P7m	2	male	26	no experience
P8m	2	male	23	both
P9f	2	female	24	opera house
P10m	2	male	27	cinema
P11m	2	male	23	opera house

Table 1: Participant Overview (own research)

In regards to the general attitude, both groups rated the “opera house” (M=1.821[2]; SD=1.168; n=11) most positively, followed by “other places” (M=2.10; SD= .838; n=10) and “movie theater” (M= 3.00; SD= .775; n=11). It is significant that all participants of focus group 1 rated the “opera house” as very positive, whereas focus group 2 only had a positive attitude. This impression corresponds with the answers to rating the clarity of their understanding: Most interviewees could understand better what it means to visit an opera performance in an opera house (M=1.452[3]; SD= .688; n=11) than in a cinema (M=3.45; SD=1.036; n=11); the clarity of the image is also rated less by focus group 2. The likelihood of a visit in the next six months [4] is structured similarly, since focus group 1 has slightly higher ratings. Overall, a visit of an opera house is regarded as more likely (M=1.64; SD=1.120; n=11), the visit of other places of live-opera events is regarded as neutral, and the visit of a live-opera transmission in a movie theater is rated as rather unlikely (M=4.09; SD= .944; n=11).

While the first focus group has generated 13 associations for the characterization of the brand image overall, the second focus group named 18 aspects.

In comparison, we can see many intersections. Both groups named the aspects of camerawork, high culture, complexity, live-character, experience, cognitive effort, and exclusivity. It is remarkable that the interviewees do not explicitly distinguish between the attribute andbenefit dimension. For example, “complexity” is associated with the contrasting pair of “elaborate – simple”, while the aspect of boredom is connected with a lower complexity. Moreover, focus group 1 mentioned three additional associations (vividness, authenticity, foreseeability), whereas focus group 2 supplements four very different associations (degree of experience with operas, acoustics, distance to travel, opportunity to see celebrities).

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[2] scale: 1=very positive, 2=rather positive, 3=neutral, 4=rather negative, 5=very negative

In comparison with the systematic of Keller(1993), the focus groups name both product-related and non-product-related brand attributes and all three benefit dimensions; where, however, a clear separation cannot be made. It is notable that the price is not rated as relevant, even though the interviewees have a lower income. This could be explained by the relatively high level of education and the context of Weimar, which could instigate a high esteem for the opera in general.

A first hint towards a differentiated perception is offered by the polarity profiles of the associations to characterize both brand images of the “opera house” and the “cinema”. These have very little intersections. The five pairs, which are being rated as very similar for both brand images (red marker: long-lasting-diverting, surprising-foreseeable/uncreative, familiar setting–unpleasant setting, predefined perspective–one□s own gaze, stimulates thinking-does not stimulate thinking) indicate that these are aspects which are inherent to a live-opera performance and independent of the place and nature of transmission. Overall, the profiles of both focus groups show that the opera event in an opera house may be more formal, but also more holistic than the visit of a live-stream in the cinema (see appendix, Figure 2).

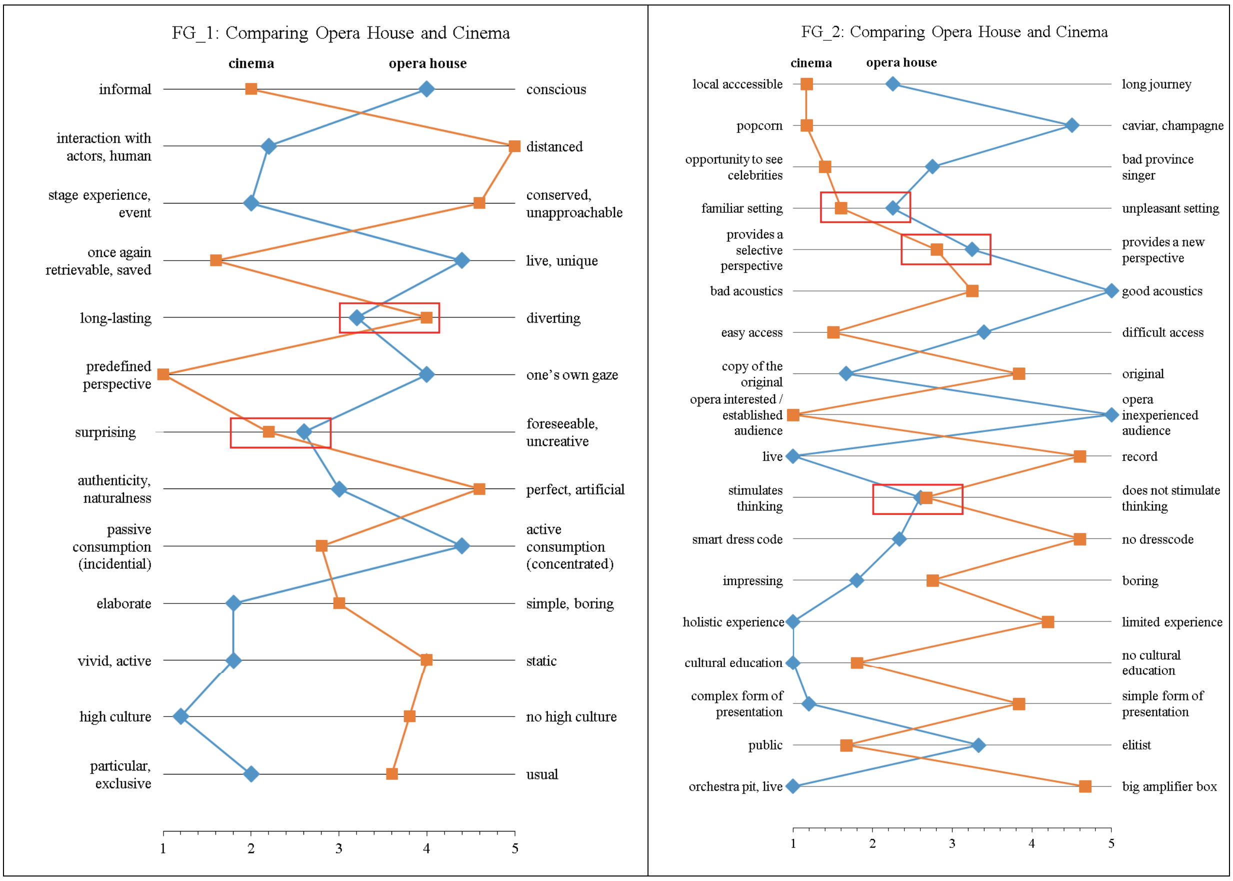

Figure 2: Polarity Profiles (FG_1: n=5; FG_2: n=6, own research)

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[3] scale: 1=very clear, 2=rather clear, 3=neither nor, 4=rather unclear, 5= very unclear

[4] scale: 1=very likely, 2=rather likely, 3=neutral, 4=rather unlikely, 5=very unlikely

Comparing the individual evaluation of both contexts for each focus group separately reveals that the “opera house” is regarded more heterogeneous than the “cinema”, even though the group dynamic of the interview may have suggested that the profiles would have been more uniform. This could be related to the fact that all participants state to have a clearer image of the “opera house” which may be more personal. It is also remarkable that focus group 1 characterizes the “opera house” as especially heterogeneous. This may mean that group 1 may have more faceted attitudes and opinions from previous opera visits. Furthermore, it can be concluded that the opera house may possibly have more segments or target groups than a cinema, due to its more differentiated characteristics.

A second hint towards differences is shown by the responses of the interviewees in regards to the brand personality. Both describe an opera personality as “formal, enduring and dignified” (P2m, p. 118), wearing “formal clothes” (P6w, p. 191). At the same time, the opera house is regarded as multi-faceted and productive, as one participant explains: “One evening, he is wearing a monocle and the next, he has pink hair and a golden sweat suit [laughing]. The third day, he is naked.” (P11m, p. 170). P1w sees this versatility as something “between genius and madness” (P1w, p. 54). On the contrary, P5m sees this as “quite frightening” (p. 50), even though he regards the character of the opera house as positive. Focus group 2 complements this picture by seeing an older, appealing man, “who sometimes may take himself a bit too seriously” (P10m, p. 166) and who is with a “high intellect […], monocle and […] a walking stick” (P8m, p. 169).

While focus group 2 sees the character of the cinema as younger, fashionable and more up-to-date, but with similar characteristics to the opera house personality, focus group 1 differentiates more strongly: The participants describe a man with “holes in the pants […] entirely informal, and quite enjoyable” (P2m, p. 113), as well as rather reserved and indifferent towards others. According to the interviewees, such an unapproachability in the means of being not understandable and too opportunistic leads to the fact that the cinema personality cannot be exactly evaluated.

5 Discussion and Conclusion

The research shows that people strongly, easily and holistically differentiate between the brand image of the opera and the cinema. This is shown in the following striking statement ofa participant: “in the movie theater it is a movie, and in the opera, it is opera” (P2m p. 63). This indicates that place and mediaof live-operas are clearly perceived and have a significant influence on the brand image. At the same time, we find associations that show similarities between the opera house and the cinema, which means that there are some aspects which can be regarded as detached from place and transmission of an opera performance.

The brand image profiles suggest two things: First, the opera in the classical opera house is regarded by both groups as an original, positive, holistic, and unique experience, for which it is necessary to make an effort to prepare (e.g. clothes, cognitive efforts for its reception). It is striking that focus group 2 expects a more opera-inexperienced audience in the real opera house, whereas the “copy” (P8m, p. 46) may attract predominantly an opera-experienced audience. Second, opera houses are advised to compare their brand identity with the generated scale to survey their brand image. On this basis, they can analyze which aspects should be how communicated. Finally, by manipulating the brand image accordingly to the desired brand identity means to manipulate the preferences of the customers (Keller 2005, p. 1318).

Even though both focus group interviews were, as preferred, heterogeneous in respect to opera experience and gender, they share an equal background of their life-world (students, and rather opera-friendly). Moreover, the results are only meaningful for this respective sample. However, it can be assumed that there are differences in the perception of the brand images based on segmentation variables. Based on our qualitative research, further studies can explore the following questions with a quantitative approach: Do these relevant brand-image associations also count for a larger group? Are there actually different clusters of opera house visitors? Which brand image structures can be identified as preferable, unique and strong (ibid., p. 1321)? Subsequent research may help us to advance the discussions around cultural marketing and create a greater understanding for how to manage the brand identity of life-operas in the digital age.

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Transmedia Experience and Narrative Transportation

Abstract
The aim of this research is to better understand the impact of transmedia storytelling on consumers' experiences in the cultural field (e.g., at a museum or heritage site). Transmedia storytelling refers to the interaction among different forms of media leading to convergence (telling a single story across multiple platforms and forms, namely, using digital technologies). This article discusses whether this multidimensionality of platforms enables a greater appropriation of the story and improves consumers' experience with the cultural object and whether the transmedia experience can lead to a positive attitude toward transmedia platforms and the cultural object.

Keywords: transmedia storytelling, consumption experience, narrative transportation, immersion, appropriation, attitude

Résumé
L'objectif de cette recherche est de mieux comprendre l'influence que peut avoir le transmédia sur l'expérience vécue par les individus dans un contexte culturel (ex. musée, patrimoine). Qui dit « transmédia » dit convergence de discours (univers narratif) à travers de multiples plateformes médiatiques. En quoi cette multi dimensionnalité des dispositifs permet-elle une meilleure appropriation de l'univers narratif et améliore-t-elle l'expérience vécue ? En conséquence, en quoi cette expérience, vécue avec un dispositif transmédia, déclenche-t-elle une attitude favorable à l'égard du dispositif lui-même et de l'objet de la narration ?

Mots clés : transmédia, expérience de consommation, transport narratif, immersion, appropriation, intention attitudinale.

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Introduction

Arts and cultural organizations need to adapt to new technologies and appropriate digital tools. From a practical point of view, most of these organizations today are considering and supporting experiments regarding videography and artistic works adapted to digital and mobile environments. Professionals are also reviewing whether these digital developments might improve public responses and increase attendance.

Among these digital tools, transmedia storytelling expands a single universe through different content and stories across multiple media platforms with the aim of delivering more interactive and immersive experiences to users. Transmedia storytelling must be differentiated, on the one hand, from cross media, which produces an adaptation of the same story across different forms of media, and, on the other hand, from multimedia, which is the diffusion of different content through a single medium.

The film and video sector has provided a fertile ground for transmedia storytelling. For example, the *Star Wars* universe can be approached through several ways: not only movies but also mini-series, books, videogames, and so on. Recently several museums, heritage sites, and performing arts companies have used digital technologies and, more particularly, implemented transmedia experiences trying to improve relationships with their current audience but also to develop new relationships with new visitors and spectators. As an example, in France, the project on *Léon Vivien, Facebook 1914* probably has been one of the most successful transmedia experiences in the cultural sector. On the initiative of the Museum of the Great War in Meaux, the Facebook page told during over the course of one year the daily life of this soldier of the Great War. After his death, more than 60,000 people had “followed” and liked the page and, among them, 60% were under 35. Among other relevant examples of transmedia experiences are *Le Défi des bâtisseurs* (Strasbourg Cathedral) and *Le Théâtre sans animaux* (Théâtre du Rond-Point in Paris).

The main objective of this article is to better understand the influence of transmedia storytelling on consumer experiences in a cultural context (e.g., museums, heritage sites, etc.). *Transmedia* thus means convergence of discourse (on a single, unique universe) through multiple media platforms. So, in which way do transmedia platforms (and their multiplicity) facilitate immersion and narrative transportation into the experience? Does transmedia storytelling enable a better appropriation of the narrative universe and improve consumers’ experiences? Therefore, which kinds of behavioral intentions toward the cultural object and transmedia platforms are activated by transmedia experiences? To answer these questions, this article first attempts to clarify the concept of transmedia and its characteristics through existing literature and expert interviews. In the second part, the results of an exploratory study are presented and discussed.

Theoretical background and experts’ interviews

Our theoretical framework relies on the experiential approach (Holbrook and Hirschman 1982), consumer culture theory (CCT) (Arnould and Thompson 2005) as well as the concept of “co-creational marketing” (Gamble and Gilmore 2013) to better understand and also to assess the potential for artistic mediation of transmedia experiences. More precisely, we support the perspective of Ilhan, Kozinets, and Otnes (2013), who adapted the idea of transmedia storytelling by grounding it in consumer culture theory and initiated the study of the transmedia consumption experience (TCE). These authors especially explore how consumers engage with interrelated narratives across a set of media platforms and how they co-create the transmedia world.

The concept of transmedia was first suggested and defined by Jenkins (2006) as *“a process where integral elements of a fiction get dispersed systematically across multiple delivery channels for the purpose of creating a unified and coordinated entertainment experience”.* According to Jenkins (2006, 2009), transmedia entails a paradigm shift – the convergence paradigm that does not see new media as replacing old media, but rather that the media will interact in more complex ways and reshape audience expectations about the entertainment experience. Thanks to convergence culture and new narratives, consumption moves from an individual and passive practice to a collective and active process through social interactions. Today cultural organizations reach toward the objective of participation and active commitment by their audience. Transmedia storytelling creates value for consumers by facilitating this participation and multiplying potential touchpoints where commitment can occur.

Building on Jenkins’s pioneer work (2006) as well as on interviews with experts[1] – who work either as transmedia designers or advertisers – this article first tries to delineate the concept of transmedia storytelling and to identify its main components. The search for an accurate and consensual definition of transmedia storytelling has proved an enduring endeavor for professionals and researchers in this sector. Indeed transmedia storytelling is sometimes considered to be a *process,* other times a *strategy* or a *user experience.* More specifically there are different views with regard to transmedia's overall purpose: whereas transmedia designers assume that transmedia is part of the core product (e.g., transmedia narratives complete and improve the core product), marketers see transmedia more as part of the promotion strategy. However, everyone emphasizes the content and density of narratives scattered on multiple media platforms consistently and in a coordinated manner. Hoguet (2015) prefers the term *interactive narrative* and thus highlights the interactivity dimension of transmedia. Transmedia experts have brought to the forefront four major components of transmedia:

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[1] Arnaud Hacquin (founder of Cluster Aquitain du Transmedia Storytelling), Candice Chenu (responsible for new technologies and mediation, Musée du Quai Branly), Méline Engerbeau (Once Upon, studio of transmedia architecture), Benjamin Hoguet (transmedia designer and writer), and Chloé Jarry (Camera Lucida, transmedia production company).

- Narrative universe, stories, and characters
- Platforms, interfaces, and *rabbit holes* (touchpoints that are chosen by the consumer to enter the universe)
- Temporality
- Audience participation and commitment

These components are explained in the following sections through experts' relevant quotes.

Narrative universe, stories, and characters

The key feature of transmedia is the narrative universe as well as the different stories created around this universe. *"Media platforms form a coherent transmedia storytelling when they allow a spectator or consumer or listener to stroll in the same universe, which could be a real story or a fictional story... There is no better way to tell a story today than transmedia storytelling, to make people use their imagination…"* (Méline Engerbeau). This narrative universe can be developed through different content or stories and can take a number of forms: movies, books, comics, exhibitions, theatre plays, and so on. The resulting transmedia experience does not *"tell a single story but several stories from the same universe"* (Benjamin Hoguet), each story, each content being distinct from other stories and content. Moreover, characters are essential story engines and are the driving forces of any story. According to Hoguet (2015), *"a character is not only about physical appearance or career; it is a collection of motivations, aspirations, and unique skills".* Empathy with characters would come from understanding their goals and motivations.

Platforms, interfaces, and rabbit holes

The narrative universe is disseminated through different media such as Internet, television, smartphones, digital tablets, and so on. Arnaud Hacquin shares that different content *"will be spread through several media platforms; it can be a website, it can be a mobile phone, it can be real, live, street marketing, for example; it can be audiovisual media with a movie that will be broadcasted on TV ...".* To develop their universe and related stories, cultural institutions have to imagine several touchpoints in order to reach and attract the largest number of users. These touchpoints are called *rabbit holes.* Each bit of content can thus be approached independently and constitute a point of entry into the transmedia universe. The multiplicity of content as well as platforms will *"create an experience for the user who is richer as he consumes one, two, three, four of these platforms"* (Benjamin Hoguet).

Temporality

The temporality of a story is a notion that refers to the duration of the narrative as well as the moment of its consumption. Time in a story can stretch, slow down, stop; it can be eluded, reassembled, and then destructured: *"Some transmedia experiences create moments, others last in time; some transmedia experiences only propose very ephemeral things, others propose more durable ones ..."* (Benjamin Hoguet). Experts also point out the difficulty of sustaining a transmedia project over time.

Audience participation and commitment

Transmedia storytelling aims to involve consumers who are immersed in the heart of the narrative universe. The experience then becomes participative and immersive. Participation and immersion may enhance the content of the story through commitment and interactions among consumers. Benjamin Hoguet even defines transmedia through this perspective: *"Transmedia storytelling is a strategy involving content dissemination by users and users' commitment".* He also highlights the *"emotional power"* that transmedia storytelling might have over its audience. Méline Engerbeau talks about transmedia as *"a potential for involvement of the spectator".* According to Arnaud Hacquin, *"transmedia better applies to a universe in which people are strongly involved and active … if I caricatured, I would say loyal fans…".* According to experts, it seems that transmedia particularly adapts to an audience already acquired but can also be seen as a way to enhance participation and involve potential consumers in the cultural experience.

Because at the core of transmedia storytelling is a universe and stories or narratives, it seems relevant to focus on the concept of narrative transportation in order better understand the consumers' experience. Narrative transportation occurs whenever the consumer experiences a feeling of entering a world evoked by the narrative because of empathy for the story's characters and results in the consumer's immersion into the imagination of the story plot (Batat and Wohlfeil 2009; Gerrig 1993; Green 2008; Green and Brock 2000; Van Laer et al. 2014). Deighton, Romer, and McQueen (1989, p. 335) were the first to investigate the construct of narrative transportation by arguing that a story invites receivers into the action it portrays and, as a result, makes them lose themselves in the story. Van Laer et al. (2014) identified in the literature three relevant features or stages in the narrative transportation process: (1) narrative transportation requires that consumers process stories – the acts of receiving and interpreting; (2) story receivers become transported through two main components: empathy – which implies that story receivers try to understand the experience of a story character, that is, to know and feel the world in the same way – and mental imagery – story receivers generate vivid images of the story plot so that they feel as though they are experiencing the events themselves; and (3) when transported, story receivers lose track of reality in a physiological sense. Narrative transportation thus occurs and is facilitated in the context of transmedia storytelling.

An exploratory study was conducted to better understand this phenomenon and to meet the research objectives (influence of transmedia on consumer experiences, on the appropriation of the narrative universe, as well as on commitment and intentions of the spectators or users).

Methodology

Thirty-six introspective reviews of students who experienced the transmedia project *“Le Défi des Bâtisseurs”* (Table 1) were collected. These students are at the master level in the areas of arts and culture, aged between 21 and 42 years, and thus familiar with the cultural field (Appendix A).

Appendix A: Informants' profiles

Initials	Gender	Study level	Age
A.C.	Woman	Master 1	20
A.C.	Woman	Master 1	21
A.D.	Man	Master 1	24
A.G.	Woman	Master 1	21
A.M.	Woman	Master 2	23
A.T.	Woman	Master 1	23
A.W.	Woman	Master 1	21
B.C.	Man	Master 2	26
D.L.	Woman	Master 1	22
E.N.	Woman	Master 1	21
E.P.	Woman	Master 1	21
F.D.	Man	Master 1	42
F.L.	Woman	Master 1	23
G.C.	Woman	Master 1	27
H.A.	Man	Master 1	22
H.R.	Woman	Master 1	23
J.B.	Woman	Master 1	25
J.C.	Woman	Master 1	27
J.S.	Man	Master 1	21
K.-S. C.	Woman	Master 1	26
L. G.-P.	Woman	Master 1	24
L.A.	Man	Master 1	24

Informants were free to experience the transmedia project in the computer room of the university or at home. A semi-directive interview guide was provided to informants (Appendix B).

L.M.	Woman	Master 1	23
M.A.	Man	Master 1	23
M.A.	Woman	Master 1	24
M.C.	Woman	Master 1	21
M.F.	Woman	Master 1	23
M.G.	Woman	Master 1	21
M.G.	Woman	Master 2	23
M.H.	Woman	Master 1	22
M.V.	Woman	Master 1	21
P.C.	Woman	Master 1	23
P.H.	Woman	Master 1	23
S.B.	Woman	Master 1	32
T.M.	Man	Master 1	23
V.B.	Woman	Master 2	25

We carried out two lexical analyses of the data: a vertical analysis and then a horizontal analysis. Our epistemological posture is based on hypothetic-deductive reasoning. A thematic analysis grid was developed based on the literature review and built on the following themes: experience and narrative transportation experienced with a transmedia project, losing track of reality and time, and intentions toward the cultural object, transmedia projects or platforms experienced in particular, and transmedia storytelling in general. In this phase of analysis, a horizontal approach to the corpus is favored to identify terms that are common from one interview to another. These recurring terms are grouped into sub-categories built on theoretical bases ensuring that saturation criteria are met (Vernette and Giannelloni 2015).

Table 1: Description of the transmedia project

	Le Défi des Bâtisseurs
Cultural category	Heritage site
Narrative universe	Strasbourg Cathedral
Context of the transmedia project	Obtaining funds
Themes and experiences	1. To monitor the individual steps during the building of a cathedral through five architects' point of views 2. To become a tower builder of this construction
Platforms and interfaces	- 3D movie - A web documentary with an interactive game - A mobile application

Findings

The first themes that emerged from introspective reviews were the dimensions of narrative transportation – mental imagery and empathy with story characters as well as losing track of reality and time. Some user characteristics and technical features of transmedia platforms that facilitate or hinder narrative transportation are also highlighted in this first part of the findings. Second, the influence of transmedia on behavior intentions – toward the cultural object or cultural category, a particular transmedia experience, and transmedia storytelling in general – is explored at various levels. Informants' quotes were used to provide vivid pictures of their experience while experimenting with the transmedia project *"Le Défi des Bâtisseurs"*.

Narrative transportation and its dimensions

Experts' interviews clarified the concept of transmedia storytelling and its characteristics as did a literature review on narrative transportation (Green 2008; Green and Brock 2000; Van Laer et al. 2014), which emphasized that transmedia storytelling facilitated consumer narrative transportation, defined as an experiential response to stimuli (universe, stories, characters, etc.). The lexical analysis of introspective reviews makes it possible to find the salient components of narrative transportation. Narrative transportation, at the core of the experience lived with transmedia platforms, requires a stimulation of the imagination of the individual who can then feel empathy for the characters. This process may enable the appropriation of the universe by the individual and his or her immersion or even lead him or her to lose the notion of reality.

Mental imagery and empathy

Beyond processing and interpreting information about the Strasbourg Cathedral, people who experience transmedia generate vivid and precise images of the story told: *"I imagined the builders of that time, difficulties they have encountered, the joy of seeing the cathedral emerge from the earth, anxiety when the construction was stopped"* (S.B., female, Master 1 student). The ability of transmedia storytelling to stimulate imagination can also lead to an identification of the individual with the character he or she is embodying, even to project into the narrative universe: *"I feel directly concerned and involved in this project… I see my office, my journey"* (M.G., female, Master 1 student). As a result, a feeling of belonging to the builders' team and community can develop, thus promoting the appropriation of the universe: "*We sit around a table with the boss ... me ... and two assistants…*

It is up to us to take up the torch" (G.C., female, Master 1 student), *"with really the desire to succeed this mission entrusted to us. Unintentionally, we would almost put pressure on ourselves to win the contract!* (A.C., female, Master 1 student).

However, some individuals report, with some regret, not having been transported by the story told, namely, because of some difficulty identifying with the character. *"Actually I did not get into the story… that's what I would have liked: to identify with this character and to go with him to discover new things"* (A.C., female, Master 1 student). The individual's lack of identification with the character seems to be an obstacle to developing the receiver's imagination and empathy, a necessary condition that leads to the loss of the notion of reality, another characteristic of narrative transportation.

Losing track of reality and time

According to Green (2008) and Van Laer et al. (2014), once transported into stories, the individual loses the notion of reality, temporally and physiologically. He or she participates actively and can be part of the story with the different protagonists. The narrative transportation that takes place then goes beyond the mere loss of the notion of time and can be manifested in physiological reactions: *"At times I shook my head during the meeting and I realized that, when at the beginning, I was with the boss, the modeler, and my assistant, I tried to behave properly as if I were really participating"* (J.C., female, Master 1 student).

Some consumers' introspective reviews also stress that the use of transmedia platforms may be a source of unpleasant sensations for a while, perhaps because of a temporary anxiety related to the loss of the notion of reality: *"This shift involving several levels of reality was not pleasant to me initially. Then the tendency to be 'sucked up through the screen as a reality of its own' then suppressed my anxiety, and I was surprised for a while by the immersion that took place"* (L.A., male, Master 1 student).

However, some individuals were only partially transported by the story and were aware of the fictional character of the narrative universe: *"Through the false mission presented at the end of the introduction, the boss gave us the task of doing some research on the cathedral in order to build a second tower"* (M.V., female, Master 1 student).

Perception of time passing and being active on platforms is prevalent in informants' discourses: *"The pedagogical content itself is quite well done, not too long, not too short, and goes to the point"* (V.B., female, Master 2 student). People may also feel cut off by the time that elapses: *"I spent a little less than two hours on the site to discover the different tabs, listen, click on the questions. Time did not seem too long"* (A.T., female, Master 1 student).

The immersion in the narrative universe generated a loss of the notion of time related to the recreational elements of transmedia platforms: *"You can quickly be disoriented as time passes"* (V.B., female, Master 2 student), *"I stayed 1h30 to navigate through platforms without realizing it … I think it is because of the construction of the tower"* (M.A, male, Master 1 student).

Some individuals also expressed a desire to control time through transmedia platforms: *"Most videos cannot be stopped during play; you cannot watch a part of it if you want. This element disturbed me during the use of the site"* (A.W., female, Master 2 student).

In addition, lexical analysis shows that other individuals sought to optimize the time spent on the experience lived through transmedia: *"I spent 45 minutes on the website. I did not watch all the videos. I did not want to waste my time"* (A.M., female, Master 2 student).

Facilitators and barriers to transmedia experience: users' characteristics and transmedia technical features

Individual characteristics of users and the technical features of transmedia platforms influence the perception of the transmedia experience. First, lexical analyses emphasize the importance of the propensity to adopt a technology on the part of the user in the appropriation of platforms. This stable individual characteristic results from facilitating factors (enthusiasm, control) or inhibitors (feelings of dependence and vulnerability) of the use of a technology. These contrasting feelings are expressed by users of the *"Défi des Bâtisseurs",* and they influence the mental and technical (through platforms) appropriation of the universe: *"Giving people the opportunity to experiment [with] such a project is essential in the world we live in today, where we are becoming more and more dependent on technology. It is through this kind of collaborative work that we can see the possibility for everyone to become master of these technological tools again, to think in turn and not to let all projects, whatever their nature, [remain] only in the hands of experts"* (J.S., male, Master 1 student).

Technical features (multi-language character of transmedia, high-definition images, ergonomic navigation) also influence the experience and narrative transportation felt by the individuals. The first two criteria are favorably perceived by the majority of users: "*The website can be used in several languages (French, English, German). The world can access it!"* (H.R., female, Master

1 student). Individual perceptions of the site's ergonomics seem varied according to the user's ease of adopting a new technology: *"The site has some ergonomic problems; it is not easy to pick up; it takes a few minutes before being able to navigate easily"* (T.M., male, Master 1 student); "*I discovered that to unblock all the contents of the cathedral's construction it was necessary to familiarize myself with the entire web documentary. An ingenious way. I found the mainframe and transitions very well constructed. The content is rich and the finishes were of a particular high quality"* (H.A., male, Master 1 student).

Videos, shot in a subjective view and aimed at generating identification with and empathy toward characters, did not always seem to have the desired effect: *"When you start the web documentary, you do not really know what to expect. The first scenes attempt to involve the user, filming in the first person. It did not really happen for me" (*M.A., male, Master 1 student). However, this feeling of confusion tended to fade as the user navigated through the platforms: *"Some elements became understandable during navigation through platforms. We understand that we are placed in the role of an architect who must first gather information about the cathedral of Strasbourg in order to realize the second tower" (*M.A., male, Master 1 student).

Finally, coherence between platforms and contents then contributed to the narrative transportation felt by the individual: *"A certain realism is created in the situation that has been presented to us: the quality of the image is good, the situation is credible through the initial situation in the architects' office, and this makes us discover a professional field that one does not know necessarily"* (M.H., female, Master 1 student) – or, if not coherent, can hinder consumers' transportation: *"The exchanges with colleagues did not always seem realistic, including messages that were totally unexpected. Apart from the gothic and neo-gothic styles, elements of construction proposed were incongruous"* (L.A., male, Master 1 student).

As a result, narrative transportation may occur when certain conditions (propensity to adopt new technologies, involvement, participation, transmedia platform ergonomics, high-quality images, coherence, etc.) are met. Weak transportation or absence of transportation – a negative experience – may be correlated with a lack of involvement by the individual in the narrative object, technical problems ("*I was somewhat intimidated by the multiplicity of possibilities of interactions"* (L.A., male, Master 1 student)), lack of propensity to adopt a technology ("*I know very little technology; I prefer the real"* (L.M., female, Master 1 student)), or lack of realism (*The game is not developed enough; it is still too fake"* (M.C., female, Master 1 student). However, even if the respondent has been only weakly transported into the narrative universe, he or she may express favorable intentions with regard to the cultural object or transmedia platform.

Impact of narrative transportation on the receiver's intentions

Informants reported few attitudinal intentions (their representations of the cultural object have barely changed), but some of them declare behavioral intentions (toward the cultural object). Their intentions either relate to the cultural object that was put in the spotlight (the Strasbourg Cathedral) or, at a more abstract level, to the culture category (cathedrals in general, monuments, architecture) and culture overall. Finally, the informants referred to immediate elements of their experience, namely, the transmedia project (*"Le Défi des Bâtisseurs"*) or to their intentions to look for other transmedia storytelling projects.

With regard of the subject of the narration (Strasbourg Cathedral), informants expressed two kinds of intentions: to get more information about it and to discover it. Concerning their intention to learn more, their experience of transmedia may have triggered a particular interest in Strasbourg Cathedral's past: *"We want to learn more about this cathedral, its architecture and its history"* (C.M., female, Master 1 student) but also in its future: *"The only thing this website has triggered is my curiosity. What will become of this cathedral?" (*M.A., female, Master 1 student). Some respondent stated their intention to visit the heritage site, which came from a desire to discover the reality of the site through a sensory experience. This transmedia experience did not actually result in a visit of the heritage site, but informants now would consider this option if the opportunity arises. This desire to visit the heritage site is motivated by the curiosity that this first experience has triggered: *"I now sincerely want to go and see this cathedral with my own eyes now that I know its history and the exceptional look of its arrow"* (H.A., male, Master 1 student). This desire to visit is also explained by the fact that respondents would like to see life size what they saw, discovered, and understood virtually: *"It will help me make a real [no longer virtual] opinion of the cathedral, its size, its forms ..."* (M.V., female, Master 1 student). The virtual experience, although realistic, is not considered as an experience of reality: *"The story told makes me want to see the Strasbourg Cathedral, to see what it looks like"* (M.G., female, Master 2 student). Overall, this suggests that the transmedia experience makes the storytelling subject (or the narrative universe) interesting: *"With all of the information collected on the website, it is now more interesting to go to the cathedral"* (M.V., female, M1 student). For the most interested informants, this experience triggered a desire to devote time to visit the heritage site.

With regard to the cultural category (monuments and architecture), some informants expressed their desire to learn about the same kind of monuments (cathedrals) but also about other types of monuments: *"It made me want to learn more about cathedrals in general, but also about other impressive buildings constructed over the centuries, including the construction techniques. For example, how were the pyramids of Egypt built? How are they still standing up?"* (S.B., female, Master 1 student). This experience (the construction of the Strasbourg Cathedral arrow through transmedia platforms) sparked interest for the entire cultural category (monuments and heritage sites), of which the cathedral is a representative, and for the topic discussed and highlighted (construction or architecture). In resonance with their own concerns, some informants wondered about the potential of transmedia to support actions in favor of the cultural category, for example, mobilizing people for a renovation project: *"I think that it can inspire some people to invest in the refurbishment of a monument"* (M.A., female, Master 1 student).

With respect to the transmedia project *"Le Défi des Bâtisseurs",* when respondents declare intentions, they express behavioral intentions: to talk about this kind of project (word of mouth) and to recommend its test to other individuals (prescription). The prescription intention concerns people that informants judge potentially interested by transmedia platforms, its topic, or educational qualities. Thus, they declare having talked to or considered talking to people working in the education and childcare field: ***"****I'll talk about it to my mother because she is primary school teacher ... She teaches her pupils about the different styles of cathedrals, so she could be even more interested in this experience"* (P.H., female, Master 1 student) or to architecture fans. Informants may think it consistent to inform those persons because of their field of interests: *"In my family we all love history in all its dimensions"* (M.V., female, Master 1 student), because the project is designed for the well-informed public: *"This kind of transmedia project aims mainly at a limited or specialized audience"* (M.V., female, Master 1 student), or because those persons live or have lived in Strasbourg or nearby: *"I've talked to people around me: my family and a friend who lives in Colmar"* (C.J., female, Master 1 student). As far as they are concerned, few informants want to continue their exploration of the transmedia "*Le Défi des Bâtisseurs*" because they think "they have seen it all": *"I don't want to extend the experience because I think that I know enough about the story told since the experience is complete"* (M.G., female, Master 1 student).

Finally, when informants have enjoyed their experience, they say they intend to look for other transmedia projects of this kind. This intention is correlated either to a curiosity toward this kind of presentation – *"This experience has made me curious to test new transmedia projects and platforms"* (M.V., female, Master 1 student); *"I'd like to experiment with other transmedia projects of that kind"* (M.G., female, Master 1 student) – or to a desire to use transmedia advantages and strengths that they have appreciated to discover other cultural objects – *"When you have information on monuments, the visit is much more enjoyable"* (M.V., female, Master 1 student).

Although not expressed explicitly, many comments refer implicitly to the suitability of this type of transmedia project to enhance the experience and make it more fun. Indeed, this presentation format can modify our representations of culture: *"This type of transmedia project can change the prejudices people might have, for example, about documentaries being boring"* (M.V., woman, Master 1 student). Conversely, when the experience of transmedia is unsatisfying, participants logically, clearly, and critically express their unwillingness to reuse such kinds of transmedia platforms: *"I was already skeptical about transmedia before; this experience reinforces my opinion. To me, this kind of tool only works well for very few projects, often for detective projects that require investigation and to solve a case, or for more abstract and non-linear projects"* (A.D., female, Master 1 student).

Discussion

This research was aimed at exploring the influence of an individual's use of transmedia on his or her cultural consumption experience, appropriation of the narrative universe, and development of favorable intentions (toward transmedia and the subject of the narration).

This research presents various theoretical contributions. First, it refines the definition of transmedia. The literature presents this concept as a process facilitating speech convergence through multiple media platforms. The results of the expert interviews enrich this definition and highlight four salient components of transmedia: narrative universe, story, and characters; platforms, interfaces, and points of entry; temporality; and audience participation and commitment.

In addition, the analysis of the informants' introspective reviews shows that to be positive, the transmedia experience requires the individual to appropriate transmedia platforms. The transmedia experience is then characterized by the stimulation of the individual's imagination, his or her empathy (or even identification with the characters of the narrative), degree of control (or enthusiasm) over the technological features of transmedia, and perception that time passes quickly (or even a loss of the sense of time and reality from a physiological point of view).

Experts mentioned the "emotional power" of transmedia, which operates well when these elements are combined. Conversely, a negative transmedia experience may happen when the user does not become comfortable with the online platform. A negative transmedia experience may be caused by a sensory and cognitive over-stimulation, accompanied by feelings of frustration, annoyance, or boredom; loss of attention; a lower willingness to interact with the environment; and finally a desire to control the duration of the experience or even interrupt it. As a result, a negative experience (unpleasant sensations) and a low degree of narrative transportation of the individual (difficulty identifying with the character) can be correlated to individual characteristics (computer anxiety, low propensity to adopt a technology) or technical features (bad ergonomics, lack of realism).

Finally, favorable intentions can be triggered when the experience is positive and when the individual is transported into the narrative universe. Most often, these intentions are behavioral, with respect to transmedia (word-of-mouth, prescription) and to the cultural object (willingness to learn more about and to discover a life-size Strasbourg Cathedral or more broadly to consider heritage and culture in general, a desire to deepen knowledge of monuments).

On a managerial level, this research encourages professionals in the artistic and cultural sector (heritage sites, museums, live art, and so on) to use transmedia, which could then facilitate the co-creation of the experience through

– A better understanding of the cultural object
– Easy access to the cultural object through hedonic, playful, or aesthetic feelings triggered by narrative transportation (entry in the narrative universe, stimulation of the imagination)
– Greater appropriation of platforms by users (via empathy or even identification with the characters of the narrative)
– A commitment by the receiver with respect to the subject of the narration

These elements could spark interest for cultural consumption and, as a result, enable better access to the cultural object (theatres, museums, and so on).

This research work has certain limits because of its exploratory nature. Indeed, we have exploited only a few expert interviews, and introspective reviews have been collected from a convenience sample. These limits highlight future avenues of research. It seems necessary to continue the exploration of the influence of transmedia, taking into account the temporality of the experience desired by the transmedia designer and the platform used as the point of entry in the experience for the individual.

In addition, relationships among individual characteristics (age, familiarity with respect to the cultural object, propensity to adopt a technology), platform features (ergonomics), and the degree of narrative transportation felt by the transmedia users need to be studied further. Finally, a deeper analysis of the introspective reviews could help generate items to propose a French narrative transportation measurement scale in the future.

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Appendix B: Interview guide

After exploring, freely and without constraint of time, the website and the mobile application dedicated to the *"Le Défi des Bâtisseurs",* we invite you to transcribe your experience and to express yourselves about the two following themes:
Mention everything that you thought about, everything that you felt, everything that comes to your mind when recalling this experience. Thank you for your kind participation.

I. EXPERIENCE OF THE TRANSMEDIA PROJECT *« LE DEFI DE BATISSEURS »*
1. Share your experience of the *"Le Défi des Bâtisseurs".*
2. How did it go? (How did you feel? What was your relation to your physical environment and to time?)
3. Describe your thoughts? What did the story tell you about?
4. During your experience, what were your positive or negative feelings?
5. Did you feel disturbed or distracted by some elements? If so, which elements bothered you? Why?
6. Overall, what stays in your mind after this experience? What did you most and least enjoy?

II. WILLINGNESS TO EXTEND THE EXPERIENCE AND TO REVISIT TRANSMEDIA PLATFORMS
1. Did the test of these transmedia platforms and the story raise specific intentions?
2. Did you want to go deeper into the experience to learn more about the story being told? If so, how?
3. Will you talk to your friends about this experience?
4. Do you feel the desire to experiment with other transmedia platforms of this type?

Positioning of the museum supply for children at world level

Abstract

Museums occupy a special place in the educative system all around the world. But, the institutions concerns about children are recent. For thirty years, a lot of studies showed a great deal of interest in the relations between schools and museums or in the implementation of a kind of specific device, but few of them studied the total supply of institutions towards children, especially at the international level. This exploratory study contributes to enrich the theoretical corpus of the children museum visit and presents an international typology of museums supply toward children.

Key words: Children, Museum, Learning, Typology, International Marketing

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More and more public and private institutions and organizations offer educational services. Museums are no exception. The Council of Museums, ICOM, recommends that education should become one of the priority missions of museums and UNESCO aims to make museums accessible to all. On the strength of these dispositions, cultural institutions have begun to take an interest in young audiences. Previously, the presence of children in the museums was deemed necessary but, paradoxically, was problematic, harming other visitors and endangering works due to their uncontrollable behavior and not conforms to the imposed museum discipline. This ambivalence of prescription has, for many years, contributed to keeping the young public away. But, for the past forty years, things have been reversed to make them an inescapable public.For what reasons? One is deontological: children constitute the society of tomorrow and in particular the future public of museums, hence there is an interest in conditioning their future behavior from the younger age. The other is economic: children represent an important market.However, despite this sudden interest in the visitor child, the remaining problem is how to treat them. Besides an imperative of instruction, museums are also places of identity building where the individual in general, and the child in particular, can develop cultural values. Questions about visiting children create new obligations, including the re-examination of collections discourse, the search for new forms of appropriate mediation, and adjustments to ergonomics.As a result, international supply has changed considerably since the end of the 1970s, bringing many museums to specialties and multiple forms to meet the specific needs of this specific target. In this context, it seems interesting to analyze more precisely how museums around the world have attempted to meet the expectations of this category of visitors.

After defining the theoretical corpus of this study, based on the current literature on Learning, we will present the methodology of an exploratory research concerning the different offerings of museums towards children. Finally, the light thrown on our results will allow us to establish an international typology of these different programs and to identify ways of thinking about how the museum approaches the child in the world.

THEORETICAL FRAME

ICOM considers the museum as a support for the educational system whose mission is to convey, create or acquire knowledge. Thus, the theories of Learning are, quite naturally, the theoretical corpus of our research:

- Behaviorism (Watson, 1913; Skinner, 1968) is the first major theory of Learningwhich has strongly influenced the fields of education during the first half of the 20th century. It develops a model in which learning consists in transmitting knowledge by exposing it (stimulus), in training individuals to produce behavioral responses according to the problems encountered, which causes a persistent, measurable, and specific change in behavior.
- Constructivism, developed among other things by Piaget in 1923, in reaction to behaviorism, which, according to him, limits learning to stimulus-response association, emphasizes the activity and inherent capacity of each the reality that surrounds it. Constructivism assumes that the knowledge of each subject is not a mere “copy” of reality, but a “re-construction” of it. The constructivistprinciple is based on the assumption that there is no transmission; knowledge is constructed by those who learn (Legros et al., 2002). According to Piaget, the individual is the active protagonist of the process of knowledge, and the mental constructions that result from it are the product of his activity; He organizes his world as he learns, adapting himself.
- Socio-constructivism, developed by Vygotski (1997) and Bruner (1983), introduces an additional dimension to constructivist theory: The construction of knowledge, although personal, is carried out in a social context. Learning is then considered more as a product of socio-cognitive activities, linked to didactic exchanges (Vygotski, 1997).
- Cognitivism advocates the active participation and involvement of the learner: learning is an interactive process in which individuals learn from each other. The cognitivist perspective is understood in the sense of process and product.
- With humanism, the primary objective is the development of the child through his experiences. Each child is unique and learns by himself through various authentic situations (Rogers, 1963).
- Connectivism is the theory of learning in the digital era developed by G. Siemens and S. Downes. They rely on the limits of behaviorism, cognitivism and constructivism, and by drawing closer to the neo-constructivism of Vygotski, they make full use of the resources of science and information and communication technologies.

After summarizing the main theoretical foundations of learning, it is now appropriate to focus on the central object of our study, the visitor child and its peculiarities. First of all, the child represents a paradoxical public, rather present in museums but little disposed to go there freely: he goes there with the school or with his family. While the term “education” is mostly used by children who come to the museum during a school visit, the idea of “recreation” applies in case the child comes with his family.Since gambling is one of the first ways in which children communicate with their environment, museums wishto give a playful aspect to the activities in order to make the museum experience more entertaining (Merleau-Ponty, 2000). Moreover, according to Piaget, children are active and motivated learners. Action and manipulation are therefore indispensable to the construction of his thought. Building on constructivist theory, most museums admitted the principle that children’s learning was a matter of action. In order to be effective, manipulation inserted in an exhibition must allow the young participant to think while he is acting. Thus, the learning process is built on emotional and cognitive elements (Bloom, 1980). The mode of discovery and apprehension of the world for children is more sensory and affective than for adults; it needs to physically come into contact with objects and their exhibition space. The child assesses objects more sensually and affectively than rationally (Derbaix, 1982; Brée, 1993). Moreover, the role of the image is of fundamental importance in children. Indeed, the human being in general, and the child in particular, makes images to have the pleasure of entering and evolving as if they were hallucinations(Tisseron, 2006). The museum object is eminently conducive to these virtual journeys and it becomes crucial for the visitor child to be able to dream that it is integrated in the space of this object.The museum sphere has thus profoundly transformed and diversified over the past forty years. The attention of museums, once concentrated on objects, is now being conveyed to the public, with special attention to children. To this must be added the digital revolution that has changed the cultural field of the museum in its contents, uses and modes of consumption (Lagier, De Barnier and Ayadi, 2015) and accentuated the porosity between the cultural sphere and the sphere of leisure activities (Pulhand Mencarelli, 2012). Nowadays the aim of the museums offer is to promote the formation of the child’s sensitivity to art and to form the adult that he will become through a system of knowledge, perceptions and attitudes (Ansart, 1991).

After summarizing the various theories of learning and specifying the peculiarities of the visitor-child, it is now necessary to present the methodology and the results of the exploratory study that we carried out.

CONTEXT AND METHODOLOGY

Frame 1: Data collection

The object of study

Our field of application is limited to science and technology museums for several reasons: They are present in most countries of the world and are the most likely to offer heterogeneous activities to children because of the plurality of themes that can be covered by terms «science» and «technology».

Netnographic study

An exploratory netnographic procedure was mobilized with the aim of immersing in the forums and the Facebook pages of the museums. Netnography is a qualitative method of collecting recent data (Kozinets, 2002) which is defined by Bernard (2004) as «a qualitative survey method that uses the Internet as a data source based on virtual consumer communities». This qualitative method is of great interest to the researcher since it is a non-intrusive method for the consumer, making it possible, on the one hand, that the sample is not contaminated by the researcher (if non-participating observation), and, on the other hand, «access to original and natural data» on the Internet (Bernard, 2004).

This technique allowed us to analyze proposals for children on museum sites and to study the online notices of visitors who visited the museum with children but also to observe and / or participate to consumer discussions on online forums open to the public (Kozinets, 2010). In a final step, the various testimonials were first translated into French for the purposes of the analysis, and then we interpreted the data through a content analysis. All the information has been indexed and was the subject of a thematic analysis.

Thus, to summarize in figures, the forums and Facebook pages and their contents of 122 museums, located in 28 countries spread over 4 continents, were analyzed and 142 254 posts and comments were analyzed, which represents a corpus of 258 pages.

Frame 2: Data analysis

Experimental protocol

The analysis made it possible to update the main themes which were then codified, summarized and classified according to their similarity. The offer of museum institutions to children has been studied in two ways:

- The cognitive - affective angle: Does the museum institution insist more on the «knowledge» aspect or on the «emotion» aspect?
- The passive - active angle: Does the museum institution offer exhibitions where the child is rather

a spectator or an actor? The degree of interactivity could be assessed according to three factors: the degree of difficulty of the action required of the young visitors, the number of actions necessary to achieve the result and the complexity of the cognitive objective, a simple transmission of information or the transmission of a content requesting the reasoning of the visitors.

In order to determine precisely the identification of museums on these two aspects, we have listed several criteria for the exhibition itself, related visit proposals, workshops and activities offered outside the exhibition and resources provided by the museum. We have taken into account more than 85 criteria from which we have assessed each of the museums chosen on each of the two dimensions presented above. On the basis of these evaluations, we were able to establish a global typology of the museum offer proposed to children according to the different countries.

RESULTS

The methodology described above allowed us to classify museums according to two axes: Active / Passive and Cognitive / Affective to distinguish five orientations:

- Didactic Learning (Cognitive - Passive orientation): it is an educational learning where the child listens and observes to learn. The child remains a spectator, examines what is presented to him and stores knowledge. This is the case of the museums of Romania, Brazil, Argentina, Russia and Malaysia, and to a lesser extent Peruvian and Chilean museums, as well as those of India, Germany and Portugal. These museums offer, for example, guided and commented tours, educational booklets, scientific presentations, thematic debates, dioramas, meetings with scientists, homework workshops, mediators to answer questions from children, scientific classes, scientific film screenings, libraries, publishing popular science magazines for children...

For Brazil, Argentina and Romania, museums devoted to science constitute less than 15% of the totality of museums in these countries and are concentrated in the biggest cities of the richest regions. They are attached to universities, research institutes or municipal institutions and continue to define themselves as complementary institutions of education. None of these museums are open in the evening and several ferments during the weekend. Despite impressive collections, they offer only guided tours, static exhibitions, focused on the transmission of knowledge. They are, for the most part, reflections of the European or American museums of a few years ago.

We can note the peculiarity of India, which since the 1970s has focused on the development of interactive museums and traveling exhibitions that promote participation through experimentation (interactive and participative programs for educational purposes) and which gradually slips towards the Cognitive - Active orientation.

- Experimental discovery (Cognitive - Active orientation): the learning envisaged by the museum is an experimental learning in which the child carries out experiments allowing him to understand the scientific process. This is the case for museums in China, France, Belgium, and to a lesser extent, Poland and Japan. These museums offer experimental workshops, junior laboratories, science clubs, scientific courses during school holidays, visits to exhibitions in the form of discovery trails, interactive exhibitions, quizzes on collections through exhibitions, scientific competitions...

China deserves special mention, since in recent years the development of scientific and technical museums has been unprecedented. What is striking in Chinese museography is the decidedly didactic orientation given to all the institutions which have been working closely with the National Education services since the 2002 law enacting scientific development as a national priority.

- Experiential discovery (Emotional - Active orientation): the learning envisaged by the museum is, in this context, focused on the consideration of the senses. The child triggers processes that allow him to apprehend a feeling and to understand the process through the sensory reaction. This is the case for museums in Australia, Italy, Sweden, Norway, Spain and, to a lesser extent, museums in Thailand, Mexico and Colombia. These museums offer sensory spaces dedicated to children, scientific creative leisure activities (making a perpetual calendar, a sundial ...), criminal laboratories (lying detector, taking fingerprints in the framework of the search for a murderer ...), sensation-oriented training courses (astronaut training course where children are accommodated in rooms imitating bunks in space shuttles...), exhibition visits where the child can activate his senses with the help of experience (the generator Van de Graaff or how to feel his hair stand on his head ...), role-playing games where the child can take turns to be a paleontologist, an explorer...

In the case of Mexico and Colombia, the activities and exhibitions proposed by these museums are more oriented towards the learning activities of applied scientific techniques (such as weaving, dyeing, etc.) allowing the conservation and transmission of traditions.

- Emotional learning (Emotional - Passive orientation): the learning envisaged by the museum is based on the sensation or the feeling of strong emotions. The child learns by undergoing experience. These museums are found in the Netherlands and to a lesser extent in the United Kingdom. This type of museum is closer to the amusement parks than to the traditional design that one can have from a museum. These museums offer "sensation" visits (live an earthquake in a supermarket, flight simulator, gyroscope), screening of scientific films adapted to children in 4D, shows of scientific demonstrations with the presence of real actors, singers, actors, shows of live animals, puppet shows for the little ones, meetings with factitious scientists in the museum, exhibitions on supernatural phenomena or the visit of the haunted mine...
- Learning "à la carte" (neutral orientation): these are museums in which the child is considered as actor and spectator according to spaces and where learning is considered, both experimentally, but also experiential. This is the case for museums in Canada, the United States and South Korea. Learning is considered in all ways, allowing the child to choose what suits him best in the same place. Some spaces are more experimental in order to store knowledge by carrying out scientific experiments, while others are more playful and allow the child to be, in turn, an actor and then a spectator. These museums are generally modern museums that use the latest technologies to meet the needs of each child, considered a singular individual with special expectations.

However, in the United States and in Canada, we note a rather heterogeneous nature of the institutions and find very disparate orientations of museum offerings to children. The average that appears is only a somewhat misleading picture of a much more ambiguous reality.

The offer of museums around the world allows us to establish a global typology of museums with regard to their offer with regard to children.

Table 1: Proposal of an international typology of the museum offer towards the children

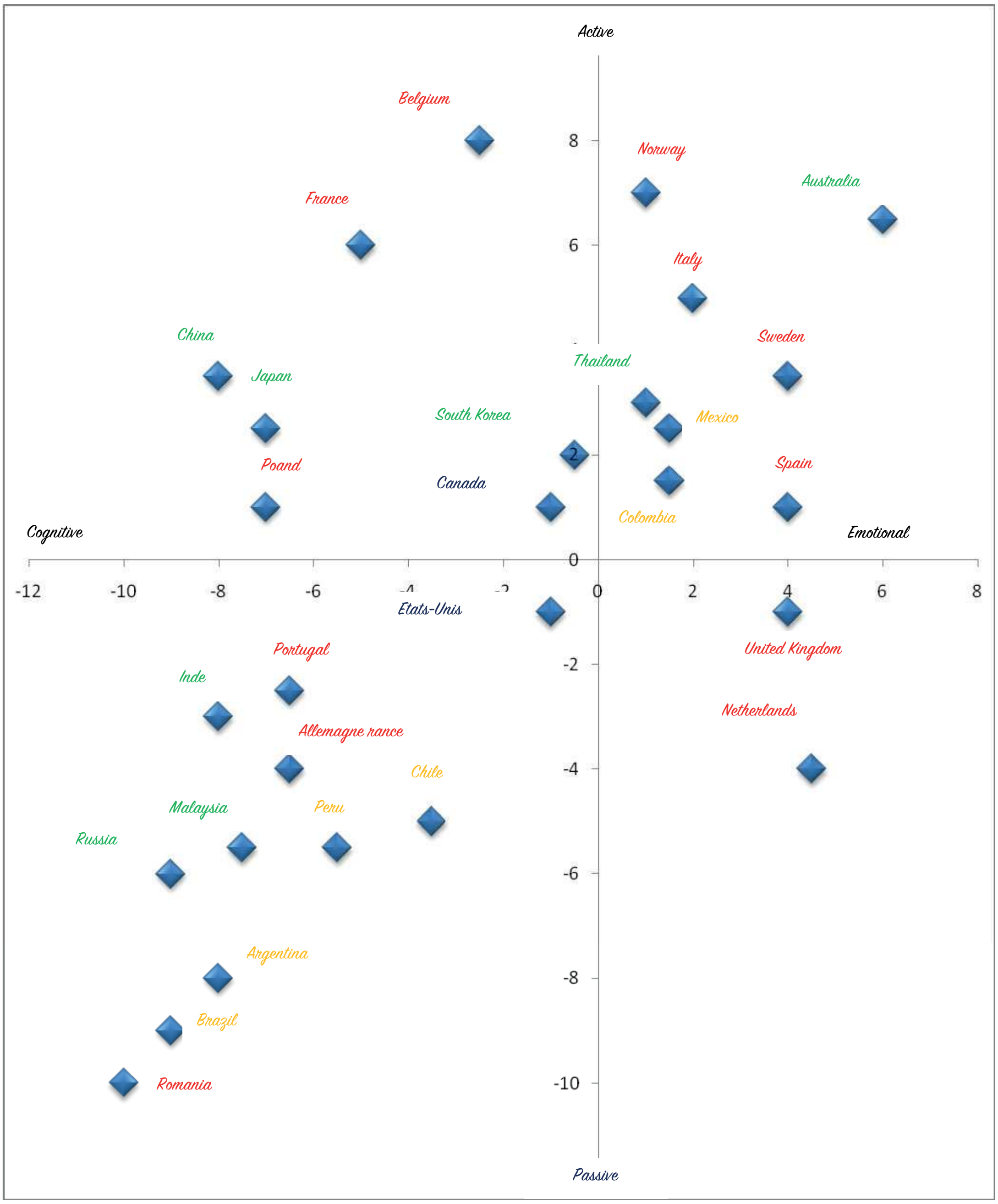
	Cognitive	**Emotional**
Active	Belgium France China Japan Poland	Norway Australia Italy Sweden Thailand Mexico Spain Colombia
Passive	Portugal India Germany Malaysia Chile Peru Russia Argentina Brazil Romania	United Kingdom Netherlands

United States

Canada

According to the analysis of the museum devices and the posts / comments we have collected, it seems interesting to us to establish a slightly more detailed typology by trying to evaluate in an interpretive way the dimensions Cognitive - Affective and Active - Passive of Each country chosen, although we are fully aware that this proposal will have to be validated and clarified more scientifically by an adequate quantitative analysis.

Chart 1: Proposal of an international typology of museum supply to children



CONCLUSION, LIMITS, RESEARCH PERSPECTIVES & MANAGERIAL IMPLICATIONS

The aim of today's museum with regard to children is to facilitate learning and to create emotions. It is a question of making him discover imaginary universes, in the active mode, in the mode of discovery, via a personal approach (E. Hooper-Greenhill, 1994). Passive contemplation of exposure units is considered to be unsuitable for children and to be offered exposure devices that involve participation, hence the interest for museums to use manipulative devices. The interactivity of exposures can be defined as "a form of communication between the child and the computer or mechanical machine" (Gasc, 2007). User actions and responses are the basis of interactivity (Weissberg, 2000). Learning through experimentation is at the heart of the so-called active teaching method in exhibitions offering manipulations. Manipulation involves the motor skills of the visitors, mobilizes one or more senses, often the sight and the touch, require various cognitive constructions and stimulate reflection and finally develop the imagination of the children by simulation games allowing to put oneself in place of someone else to discover his life or work. A manipulation will tend to generate forms of child - child or child - parent sociability, adding interest to the experience

In this context, museum strategies have taken into consideration the autonomy of the child, his disposition to interactivity and his demand for manipulation allowing him to carry out independent activities and assert his identity. Thus, based on psychological and sociological theories, children's museums have emerged, considering that children are not small adults but require pedagogical methods based on their needs and adopt an approach based on tactile experience. In addition, adult museums have opted for the creation of one or more child-friendly spaces, providing greater freedom of presentation and animation, installing as many manipulations, text and games as they need to the most attractive aspect without the risk of hampering the aesthetic appearance of the exhibition. In this case, specific works reserved for children and other inaccessible for them can be regretted because social interaction is of paramount importance in learning (Vygotski, 1997). Finally, other museums have taken up the challenge of harmonious cohabitation of the different publics in the exhibition space and offered the child the opportunity to compare his interpretations with the explanations of an adult during the visit (Tisseron, 2006). The museum thus plays its full role of social interaction, the importance of which has been demonstrated by the socio-constructivist theory.

On the other hand, through a work of art, the child comes into contact with all who can see ittoday, but also with all who saw it yesterday and all who will see it tomorrow. The child thus reaches the idea of universal consciousness, hence the interest of capturing the attention of the child. However, the interactivity / multimedia confusion is not without risk, it seems necessary to take precautions concerning the analogy of interactivity and multimedia. Indeed, it is very likely that there are profound differences between the interactivity of manipulations and the interactivity generated by multimedia and computing. Therefore, the playful and interactive universes proposed to children within exhibitions probably have very different impacts depending on whether one uses only manipulations, or only multimedia, or both together. A more preoccupying one, a possible drift prompts us as a result of this study and echoes the questions posed by many researchers (Viatte, 2006; Michaud, 2003) on the tendentious rapprochement of new forms of museology with the amusement parks and even shopping centers, where the logic of entertainment now seems to prevail over all other motives. Some museums aim at "transforming culture into a playground" (Chaumier, 2007, 2010) and thus run counter to the goals of education and identity building that they had made their priority.

Finally, like any research, this work presents different limits. One of them is the sample we used to analyze museum offers restricted to science and technology museums, excluding art museums that are more difficult to access for children, belonging to an extremely heterogeneous category, within which are found not only museums, but also aquariums, planetariums, zoological museums ... which belong to different universes and offerings. The second limitation that we can evoke concerns the role of manipulations. Indeed, according to several previous studies, it has been demonstrated that the role of the manipulations belongs to the scenography in which they are integrated and are to be analyzed among the other exposure units. They punctuate the young visitor's journey according to the duration of use and the attention they mobilize. However, the analysis of museum offers via the website or documents issued by the institutions does not give us the opportunity to study this aspect.

This research is an exploratory research which is part of a wider field and which could, through future research, link the influence of the cultural dimension on the museum supply to children. From a managerial point of view, it would seem interesting to examine the impact of the cultural strategy adopted by the museum towards the young public with other social dimensions, such as the place of the child in the family in the place of education and the development of the child in society, or to link the dimensions of the relationship to time and space in the country with the themes and the scenography of museum exhibitions for children.

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Fine Arts Museums at a Crossroads: Between Core Mission and Adaptation to New Tourist Clients

Arts museums have in recent years experienced a sharp increase in the number of visitors in part due to their willingness to increase their revenues and attractiveness to sponsors. Thisstudy of 50 museums at 20 destinations in 10 countriesand literature review indicates thatart museums have invested heavily in technologies, websites, mobile applications andthe use of social media not only in response to that trend and to manage the crowds from around the globe, but also to enhance the visitor experience, in particular for younger visitors. To satisfy clients who are essentially more interested in tourism than culture, art museums also innovate in different ways to offer a lively and memorable experience that incorporates a social aspect, as well as wine bars, restaurants and boutiques.

Moreover, the most successful museums have created a strong brand, which they “franchise” in different cities. More recently, truly private arts museums have been created by industrial or financial moguls to enhance the value of their art collection, share it and thus benefit from an international reputation and goodwill.

Key words: Museums, Innovation, Tourism, Millennials, Brand

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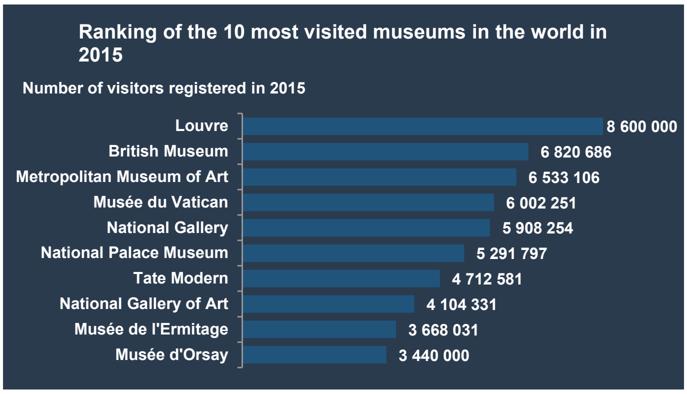
Fine Arts Museums at a Crossroads:

Between Core Mission and Adaptation to New Tourist Clients

In recent years, fine arts museums have transitioned from cultural institutions to tourist attractions that are a driving force behind most urban destinations.This research, which involved analyzing 50 museums at 30 urban destinations in 10 countries, proposes a framework for thought that will be used as a conceptual framework to carry out a more in-depth international research project.It establishes the main trends and the major issues of these trends. It specifically explains the sharp increase in the number of visitors to museums, their ongoing search for new client groups, the use of digital technologies and the development of a strong brand.

The sharp increase in the number of visitors to fine arts museums

Thanks to sustained growth, cultural tourism is now one of the largest tourism segments in the world. According to the WTO, cultural travel accounts for over 50% of all international tourism. Fine arts museums have taken the lead over all other cultural attractions visited.
The table below summarizes a survey by The Art Newspaper that ranked fine arts museums around the world by their attendance:



The Louvre, which has been the most visited museum in the world for years, topped the list again in 2015 with over 8.6 million visitors.Foreign tourists account for over 70% of the museum's visitors and the most represented nationalities are American, Chinese, Italian, English and Brazilian. Over 50% of its visitors in 2014 were under 30 years old, and a hefty portion of those visitors were between 18 and 25 years old.The museum has been able to draw young clients.The Louvre is also one of the most connected museums in the world.In fact, it has over 14 million visitors on its website, and 1.6 million Facebook followers, which ranks it the 2nd most followed museum in the world on Facebook.It is also the most popular museum on Instagram and the most geolocated place in the world.The Louvre expects over 12 million visitors per year by2025 and plans to stay open 7 days a week, following the examples of the Metropolitan Museum of Art in New York City and other museums in London and Madrid.

The British Museum in London comes in 2nd place with 7 million visitors in 2015, up 100,000 visitors from 2014. The Metropolitan Museum of Art eclipsed the National Gallery of Art in Washington D.C. to take in 3rd place.
In addition, The Art Newspaper surveyed art exhibition attendance numbers. In Paris, the Jeff Koons exhibition at the Centre Pompidou in April 2015 drew the largest number of visitors with an attendance of 650,000.Next was the Bonnard exhibition at the Musée d'Orsay with 510,000 visitors, followed by the Velàsquez exhibition at the Grand Palais with 478,000 visitors.

Adaptation is necessary

To deal with the constantly growing crowds, many institutions have renovated to open up their spaces and make them easier for visitors to access, such as the Louvre or the Musée d'Orsay.They have also had to manage visits and information more effectively by using digital technologies as support tools.
A survey conducted by The Art Newspaper shows that these renovations resulted in significant changes in the attendances of many museums, which saw anaverage increase of 14.1% compared to the institutions that had not carried out renovations, where attendances increased 10.2%.

Reaching young people and tourist clients

The 18 to 35 year-old market, i.e. "young clients," is not easily won over.In fact, this market comprises 3 different generations (X, Y and C) that do not have the same profile, particularly in terms of the way they spend their time, which is divided up differently between studies, careers, and social and family activities.As a result, these young adults have to choose where they will spend their free or visit time and how they will budget for the outings.And when this client group considers visiting a museum, the theme of the exhibit plays a key role in itsdegree of interest.Yet, this group also takes other factors into consideration when making this decision since itprimarilyseeks a quality overall experience.

As digital technologies develop, the presence of high-tech tools, such as audio guides, smartphone applications, touch screens or tablets serving as information mediums, which allow visitors more independence in their museum visits, may influence the decision of potential visitors among young clienteleto visit a museum.One key factor for the young client group is thatthe museum is actively presentin social networksto promote its activities and encourage interaction with its clientele. Other noteworthy and increasingly important factorsareon-site restaurants and cafes serving a wide range of healthy food at decent prices, as well as opportunities to interact with guides or even other visitors.

In this connection, a study entitled "Marketing Museums and Exhibitions:What Drives the Interest of Young People" surveyed 224 young American adults, who were randomly chosen from a panel of consumers aged 18 to 35 years old, with the goal of studying their degree of interest in visiting an exhibition or a museum.In total, 41% of the respondents expressed interest in visiting an exhibition in general.When adding information such as the museum offers restaurant services with awide selection of food, general interest increased by 7%,whereas when it involved seeing an exhibition as part of a group outing, interest declined significantly.

This panel of consumers was segmented into 3 groups with clear motivations:
- Regular clients (40%)
- Clients who seek leisure and social activities (31%)
- Clients who like to interact with others (29%)

The table below shows each of these segments' predispositions to visiting an exhibition depending on various features:

Table 1: Propension of respondents (18 to 35 years) to assist to an exhibition or to visit a museum depending of the message
Source: Alex Gofman and Howard R. Moskowitz

	Regular clients	People looking for pleasure and social activities	People who like interacting with others
Propension to visit and exhibition	63%	8%	47%
Complementary characteristics or messages	Proportion which is subtracted or added to the propension depending on message		
Special attention consisting to visit an exhibition not yet open to public	9%	-1%	-9%
Varied and quality food offer	-17%	24%	22%
Layout that favors open conversations rather than whispers	-17%	13%	18%
Looking for pleasure above all	-15%	27%	-15%
Desire to see something new	-7%	20%	-3%
Possibility to take part in an interactive adventure	-7%	-5%	20%

Source: Alex Gofman and Howard R. Moskowitz

The researchers came to the conclusion that regular visitors, who have already been won over, will be positively influenced by features related to longer visit times, or special treatment.However, this segment reacts negatively to messages related to additions, such as a restaurant.Aggressive marketing activities could actuallyhave the reverse effect on them and dissuade them from considering a visit.
The second segment, which is made up of people who seek leisure and social activities, does not visit museums very frequently.However, messages greatly influence their intention to visit.Finally, the group of people who enjoy interacting with others is influenced by several features including food service, exhibitions that encourage people to talk freely rather than whisper during their visit, and interactive adventure concepts.According to the study's authors, this segment has a lot of potential for museums.

Technology use
Characterized by the development and diversification of ICTs that are transforming the entire scope of human activity, the 21st centuryhas undoubtedly ushered in the digital era in museums, which have very quickly adapted and equipped themselves with a multitude of digital tools. These tools are varied in their number and form.Many studies cited in the bibliography have addressed this subject, but not necessarily drawn all of the tangible strategic and marketing implications.

The website is undoubtedly the most important digital tool, and it allows visitors to prepare for their visit ahead of time by obtaining information about schedules, the location of the museum or even the themes of the various exhibitions.For instance, in just a few clicks, today's Internet users can go from the MOMA in New York City to the Prado Museum in Madrid or the Louvre in Paris, while comfortably seated in front of their screen.And the list of museums that provide online access to their collections continues to grow, even though it already includes a large number of museums, such as the Metropolitan Museum in New York City or the National Gallery in Washington D.C., which launched a new website in 2013 and provided free access to 25,000 high-resolution images.

Likewise, the Rijkmuseum in Amsterdam offers the possibility of downloading works in high-resolution images for free through Rijkstudio, an interactive section of its website.According to the director of collections at the Rijkmuseum, a museum is a public institution, which means that all of the art and objects in it are "everyone's" property and that everyone should have access to them. Other reasons for the decision to provide online access to original images in very high resolution include the rise in poor quality reproductions on the Internet and the difficulty in controlling copyrights or the use of the images.

Through its Google Art Project, Internet giant Google has also been working on digitizing the world's cultural treasures in the last few years with the goal of making them accessible to everyone for free.To that end, the firm has partnered with hundreds of cultural institutions in over 40 countries around the world, including numerous museums.Today, the site has masterpieces from over 430 institutions.

In the space of just a few years, the Google Art Project has become the largest virtual museum in the world with over 40,000 illustrations of works in high definition, including Van Gogh's Bedroom in Arles, the Birth of Venus by Sandro Botticelli or Woman with a Flower by Paul Gauguin. This means that visitors can carry out virtual visits just by browsing on the site.The principle is simple and accessible thanks to Street View technology and 3D modeling. An icon is next to the name of each institution. By clicking on it, site visitors can start their visit with 380-degree panoramic photos, making them feel like they are actually on site.In just one click, they can move to different sections of the museum.

Institutions' websites are not the only noticeable example of their desire to modernize and adapt to technological developments and today's audiences. In fact, many museum institutions are aware of the very high number of smartphones around the world, i.e. well over 1 billion users, and have developed digital applications (apps) as a result.Thanks to their various functions, these apps will transform smartphones and tablets into truly interactive pocket guides thatcan geolocate works of art, provide access to audio comments on site or in front of a piece, give virtual tours, and provide practical information (schedules, rates, events).

One of these institutions, the Guggenheim, recently launched a new version of its mobile application with an even broader range of content,in addition to multimedia guides for current and past exhibitions, interviews with various prominent figuresof the art world, such as artists, curators and scenic artists, access to over 1,200 works in the permanent collection and the possibility of exploring current and past temporary exhibitions.The app is accessible for free in 4 languages, i.e. English, French, German and Italian, for iPhones and Androids on the Guggenheim's site or on the App Store and Google Play.Visitors can use their own headphones or obtain some in the reception area of the museum for $1.Users can also create their own virtual collection by selecting works in the permanent or temporary collections.They can even share content and make comments on the app about their visit or the artwork.

The Art Institute of Chicago has coproduced an app called "art in the moment," which is available on the App store,to encourage the discussion and involvement of senior citizens with a cognitive deficiency, especially Alzheimer's.A few years ago, the MOMA launched a similar public initiative with its "Meet me at MoMa" education program for adults with dementia.

Furthermore, in 2013, the museology world witnessed the launch of MoMa's Audio +, an informative and interactive application that lets visitors listen to audio comments on a selection of works in the permanent collection as well as access, share and record additional content.
As a result, since 2013, almost all traditional audio guides have been replaced by this application, which is available in 9 languages:English, German, French, Spanish, Italian, Korean, Japanese, Mandarin and Portuguese.Traditional audio guides now account for just 5% of all audio guides.

In 2013, the Prado Museum in Madrid launched its first app, which offers high-quality reproductions of 400 works accompanied by texts written in more than 5 languages.Because it wanted to highlight 50 masterpieces, Prado's digital team not only made it possible to explore them in high resolution, but also to zoom in for a closer look at the details.Five thematic tours are offered through the app: the50 masterpieces, Velázquez, Venetian paintings, princesses and animals.These tours were set up to make it easier to locate works in the museum, prepare for the visit, develop knowledge about the collections and provide children with a fun way to discover the Prado.Unlike other cultural apps, this one is sold on the App Store for □9.99.To promote the app and encourage visitors to download it, a microsite was createdwith all app-related information anda YouTube video filmed inside the museumthat shows what it is like to visit the Prado.

The Thyssen Museum in Madrid opted for simplicity in its mobile digital platform.Its interface looks like a bookcase with various categories, such as education initiatives, exhibitions and restorations, which can be accessed through the books in the bookcase, and provides access to works, descriptive cards, virtual tours and other activities.The app is available for free on Android and IOS in English and Spanish.

The Tate in London has also launched a mobile platform that is accessible on iPhone and iPad.It is designed much like a modern art guide for both on-site visitors and general art lovers and tries to put a fun twist on the movements, techniques and emblematic figures of modern art.Users must pay a fee for the app, which has not yet been translated from English.

Finally, mobilecultureapps have also been created, including Cultureclic, which lets users discover 1,350 French museums as wells 850 works of art and provides their addresses, schedules and rates, etc. This app also allows users to geolocate paintings in the museums and view their descriptive cards in more detail.

Brand power

Just like companies, museum institutions are embracing globalization and trying to conquer the world, driven by the desire to export their brand and their know-how.The Guggenheim led the way for these institutions by opening a satellite museum in 1997. The way it works is simple:The Guggenheim provides its name, expertise and collection, whereas the partner (the Basque Country in this case) is in charge of the building (construction and operating costs), exhibitions and staff.The museum's name alone draws a large flow of tourists, who are often as interested in the building as they are in the collections; the Guggenheim satellite in Spain may receive over one million visitors per year. This institution already present in New York City, Venice and Bilbao, is now contemplating the idea of exporting its brand to Helsinki in a few years.

As for the Louvre, it has sold its image to Abu Dhabi for a term of 30 years at the cost of □400 million. This project meets one of the institution's development strategies, which is to keep looking for new resources.This strategy of creating branches or "franchising" also serves the French State by helping itto demonstrate its prestige, disseminate knowledge and highlight expertise in a hub that brings together the new global elites.However, this type of approach has caused polemics because its detractors feel thatitreduces art to a "commodity," which is no longer everyone's public property, but rather a simple "product," to which the market assigns a value.8

Likewise, the Louvre isopening satellites across the nation, specifically in Lens, where the institution opened its doors in 2012. All the works come from the Louvre museum in Paris and 20% of the works displayed there are replaced every year. In the 10 years before Delacroix' famous painting "Liberty Leading the People" was replaced, visitors were invited to say their goodbyes by taking a photo in front of the painting with a smartphone or a tablet and send it to a mini site created for the occasion and specifically dedicated to this painting.

The Louvre is not the only museum that has taken this approach.In France, the precursor for "cultural delocalization" is the Centre Pompidou.Inaugurated in 2010, the Centre Pompidou-Metz seems to have made a very successful case for delocalization after just 6 years, as it receives nearly one and a half million visitors per year.Furthermore, in 2013, itsigned an agreement with a giant Saudi oil company to open a temporary exhibition of works from the museum's collections.During that period, Saudi Arabia received 44,000 visitors in less than 6 weeks.In March 2015, the Centre Pompidou Malaga, also known as "El Cubo," opened its doors for a 5-year period and expects 250,000 visitors every year.

The rise of private museums

In this dynamic trend, more and more private art centres are popping up all over the world.They do not receive any assistance from the State and rely solely on private funding, patrons, sponsors and revenues from visitors.A subsidiary of GDF-Suez manages around fifteen sites that host a total of 2 million visitors per year.3

Many prominent business figures are also investing a part of their fortune in art collections.Valued atUS$2.3 billion, the largest private art collection in the world belongs to David Geffen, producer and creator of Asylum Records, Geffen Records and DreamWorks SKG.2

In 2010, Bernard Arnault, the world's top luxury goodsmogul, launched the Fondation Louis Vuitton, which is dedicated to art. It holds a treasure trove of permanent works but also temporary exhibitions. François Pinault, his eternal rival, failed in his attempt to set up an art gallery in the Paris region. However, he already owned Palazzo Grassi and won a contest for the creation of a contemporary art centre in Venice.In June 2009, after 14 months of renovations, Punta della Dogana reopened its doors to the public with the exhibition "Mapping the Studio."25 As a result, Pinault may use the building for a 33-year period to show the works in the Pinault collection.

In the interest of promoting Chinese art, Adrian Cheng, the young heir to one of the largest fortunes in Hong Kong, launched the K11 Art Foundation in 2010 and created the first Art Mall in the world, a concept that mixes retail and culture.26

In 2014, he signed a 3-year partnership with the Palais de Tokyo, in Paris, for a series of exhibitions and exchanges focused on emerging art in China and France.

The following year, the K11 Art Foundation announced a three-year partnership with the Centre Pompidou.

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When painting is part of the tourism imaginary: the example of Normandy and 19th century
State of play

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1.1. The origins of our questioning

We were struck upon seeing the CRT's (Comité Régional de Tourisme) Normandy brochure a few years ago. Indeed, the cover was a reproduction of a famous painting by Claude Monet: the Aval Arch in Étretat. To this day when looking up Étretat, Normandy, Trouville…on the Internet one finds reproductions of paintings and contemporary photographs side by side, taken from the same angle as where the artist stood. (see pictures 4 & 5). The Seine Maritime publishes a brochure called « Impressions of Seine Maritime, five essential impressionist itineraries ». On the cover, 7 pictures, two of which are paintings: one by Pissaro, the other by Turner. The first page shows « impression of a rising sun » with Monet's signature very visible. Page 9, « impressionist Dieppe », one finds two pictures that illustrate the product: « the beach at Pourville, sunset », Monet 1882 (oil on canvas)and just next to it a photograph, « the beach at Pourville-sur-mer today ». The two images look very much alike. This choice proceeds from « a staging of the touristic space » (Amirou, 1995) as shown by some of Monet's paintings (see picture 6).

Our query deals with the use made of paintings for destinations and more specifically for Normandy and the impressionist Claude Monet.

1.2. Impressionnism.

The point here is not to linger on this pictorial trend but just to say a few words. This movement was born in England but blossomed in France, and precisely in Normandy. It is a rupture in 19th century art. When we say impressionism, the name that comes to mind is that of Claude Monet. It is his « impression of a rising sun » that gave its name to this new pictorial movement.

Monet does not paint in a studio but outdoors. This is very new. He once answered a reporter who wanted to visit his studio: « But I've never had a studio myself, and I don't understand being locked up in a room. To draw, yes; to paint, no. Here's my studio! he exclaimed, making a large gesture embracing the landscape before him ». (Klein, 2016). They paint the scenery, the changing sea, the Seine and especially Normandy….Klein says that 54% of Monet's work was done there. (Klein, 2016). They paint bourgeois women at the beach with crinolines and parasols, fishermen…Monet also paints bathers in swimming costumes. These « bared » people bathing in the sea are new. It is a budding fashion.

1. Links between tourism[1] and painting.

2.1 The Grand tour, the origin of tourism and the evidence

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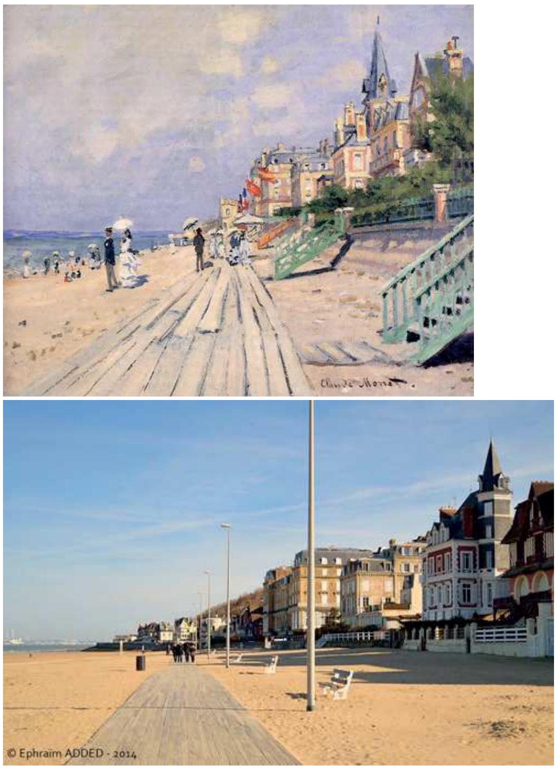
Nothing really new here; the first representations of elsewhere are due to drawing or painting, not to mention the writings. These paintings' goal through the ages was certainly not touristic, they are testimonies. 17th century Dutch painting shows the banks of the Escaut, winter landscapes, Delft by Vermeer….which others will later see in turn. Klein attributes to the painter Charles Mozin the transformation of the modest fishing village that is Trouville in the middle of the 19th century into a very chic seaside resort where aristocracy and the 2nd Empire high bourgeoisie mingle. There again painting testifies, contemporary photographs also, taken from the same angle.



Picture 1 : La plage à Trouville, Monet 1870, Picture 2 : Trouville, photo Ephraïm Added, 2014

From the very start the places sketched by the 17th century tourists build the imaginaries of touristic destinations (in the primary meaning of the word). Corbin reminds us that the traveller's eye in those days is structured by its knowledge of painting (Corbin 1988). Some of the travellers met artists who gave them images to take home, views of Venice by Canaletto for example. According to

[1] We will use the words tourist and traveler as well as travel and tourism which we will consider synonymous.

Bertrand (2010) « Italy was surely the place of a codification that announced the era of tourism ». The sea fascinates the 17th century tourist who draws the beach or fishermen (Corbin, 1988).
The traveller tries to find these views which have been amply designated by travel narratives and illustrations: watercolours, oil paintings, engravings…. They are « mental translations » of a perceived reality that belongs to the imaginary (Amirou, 1995) and that the tourist wishes to « remember » or discover. The use of impressionist painting for touristic promotion seems to attest this; it is not so much the work that is shown but precisely its subject.

« Nature « must » imitate art, for art « invented » nature, such is the tacit rule in the universe of change of scenery and exoticism. In the previous centuries, painting showed the traveller objets worthy of admiration, guidebooks classified them and gave them stars based on their degree of « authenticity », that is according to their resemblance with the pictural or literary models.(Amirou, 1995).
The etymology of the word picturesque refers back to painting. The « picturesque describes what belongs to painting, what it concerns ». A picturesque site « provides useful indications to painters » (Larousse, 1907). Didn't the romantics use the adjective to describe what is colourful, what resembles a painting? Stendhal, in The Memoirs of a tourist (1838), suggests that « the picturesque comes to us from England ». If we accept to undertake a reductive but enlightening simplification, we can say that, as romanticism corresponds to German literature around 1800, the picturesque coincides with the landscape art (gardens and painting) in England between 1730 and 1790 (Mosser, 2016).

Scenery knew periods of disdain to such a point that at the very end of the 18th century « it is a genre that we should not deal with » (Michel, Volume 8, 1928). Everything changes with the Romantics for whom « nature is self-sustaining, like a face of which one must, so to speak, draw the portrait » (Michel, Volume 8, 1928). They will restore landscapes' honour. What did they not do for tourism between words and images….But the landscape that the traveller appreciates so much changes according to who is looking at it and depending on the light. If the painter understands that well, so does the touristic brochures designer. (see pictures 4 & 5).

Touristic scenery is picturesque in essence, since it is reproduced by painters and these productions (reproductions) give a « picturesque » image of elsewhere, of the landscape that will become a destination. Indeed, the tourist comes to admire it 'in situ' as recommended by the guidebooks and brochures, as he has seen it in a picture or a museum. He comes to admire a work of art.

2.2. What the artist paints

John Ruskin insisted on the fact that drawing (with or without talent) helped to see, to notice, to « paint in words » (in Botton, 2002).
Doesn't the painter give us to see what he has noticed? When Monet paints Etretat, he lingers before the Aval door, its arch, at various times of day, in different lights, with or without boats at sea, by calm or restless sea…We find a few fishermen near their boats but most of the time there are no tourists ! The painter represents what is remarkable in the area: the cliffs, the Arch, the sea…and the local fishermen, up to then unknown, captured in their occupations and their « exoticism ». The sea fascinates with its changing colours, scintillation, the waves' movements, the shades of white: that of the surf, the boats' sails…This is what the modern tourist comes to see. Herbert (1994) notes that the painter usually places himself so as to exclude almost every indication of the village, the hotels, and everything that shows the place's transformation into a fashionable resort. In a way we can say that Monet 'reproduces' the photographic views of the contemporary catalogs, the framings that eliminate the town. Sainte Fare Garnot and Curie (2016) point out « that Claude Monet knows how to settle himself in a central position when he handles his cliffs and views of Etretat ». That is what the traveller comes to admire. Klein (2007) says that these painters « invented a more natural, more luminous painting, less concerned with 'effects' and more focused on values ».

However, when Monet lingers in Trouville, it is the ladies of the time on the beach, on the promenade, that he captures. These beauties are none other than tourists from Paris or England! One cannot be mistaken looking at their elegant outfits, the parasols that protect them from the sun. Monet thus adapts himself to tourism's increasing trend, as to the demands of his clients. This is also true of his 1870 paintings representing the Hôtel des Roches Noires in Trouville, a second empire fashionable resort. Seaside holiday resorts spread over Basse-Normandy and more particularly the Calvados coastline towards the middle of the 19th century. Note that Monet painted fashionable resorts and not unknown beaches, those whose fame preceded their « display » in Parisian galleries. Let's refer to Klein (2007) who points out that these Normandy painters «contribute despite themselves to promoting tourism ». The opening of the Rouen/Le Havre, Rouen/Dieppe, Rouen/Fécamp railroad between 1847 and 1856 marks the Alabaster coast's consecration. He adds « the pays d'Auge's more temperate climate, softer sand, less brutal waves will attract the vacationers more, then one day the tourists. Trouville slowly overtakes Dieppe, before being rivalled by Deauville… ». By showing elegant tourists, Monet grants qualities to tourism, luxury, fashion, and denies the place's reality, its inhabitants, and its activities. The place becomes a touristic destination, already sanitized, far from authenticity.

Although the daguerréotype[2] exists, the artist gives to see something strongly resembling a photograph with a setting, a choice of idealized characters that doesn't represent reality. It is intended for his rich clients, proud to hang on their wall a view of a fashionable beach, whether they've been there or not. As if they associated art and tourism. The less wealthy shall be content with a postcard. (Herbert, 1994). Today we would take a « selfy » on the boardwalk, at the beach, with our backs to the cliffs…

2.3 What the travelers seek

2.3.1. They seek to make their « tour » in the aristocratic sense of the word.

They go where the others go, they go where they too can have pretty outfits or at least be assimilated to those who wear them.
Pierre Larousse (1876), writes in the article dedicated to the tourist: « They are the painters in search of landscapes and sun effects, but they do not form the true species of tourists (…) that only set out for the pleasure of the journey or even to say that they have travelled ».

2.3.2. They seek for an elsewhere

They look for a horizon, a desire that stems from romanticism, a time where the scenery, the sea in particular, becomes something else than a workplace and proves able to be a place of pleasure. But, like today, the tourist has a gregarious instinct. Etretat's prestige was increased by the coming of « stars » as we would say today, widely commented about in the day's gazettes, such as Maupassant[3], Massenet or Offenbach. The tourism industry already becomes the village's main source of income (Herbert, 1996). The painters go to Etretat for the place's beauty but also because others go there. They leave Paris in the summer and meet there. Herbert insists on the fact that if the cliff's beauty acts as a magnet, the impressionist painters went there because the village was unknown of except to an elite. This makes us think particularly of diffusion through imitation, of Boyer's distinction tourism (Boyer, 1999).

We understand the 19th century tourist's fascination before the sea, its foamy waves, its changing colours, its scintillating glints… These are the games of light that the artist represents. Today is added the anticipated - then real - pleasure of a sea bath more frequent than then. This new fashion will bring the Etretat fishermen to become lifeguards, their wives and daughters will serve the tourists as laundresses or nannies. Everything for the tourist, already.

3. The touristic image

3. 1. The contemporary tourist is the same as that of yesteryear

The railroad connects Deauville and Trouville to Paris in 1863 facilitating the summer vacationer's coming. Klein (2016) relates that Alphonse Karr will say about Etretat that it has become a real branch of d'Asnières[4] » ! Today Deauville is the 21st arrondissement of Paris…the town has long since understood that despite a peak of attendance in August, Deauville's proximity with Paris erases too much seasonality thanks to secondary residences.

Formerly or today, « the tourist population searches for the 19th century privileged people's exoticism » (Boyer, 1999). But in fact nothing has changed. When one person complains about the hostelry's lack of comfort, another welcomes it in the name of authenticity. This is Chapus' case who, in 1855, praised this lack of renovations that keeps the places more real. He amply comments on the cohabitation between tourists and natives and the changes that it generates, such as the invasion on certain nights of the Etretat casino by the locals, the tourists wishing to mingle with the natives during the traditional festivals of Saint Sauveur. One might have thought that the tourist had become more mature, that 150 years of tourism had taught him to observe the scenery, to know that there is another, a local, a native, inseparable from the landscape, and that he is curious about his customs. To witness this « Dysneylandisation » Sylvie Brunel (2012) had to go as far as New Zealand.

Today's tourist is faithful to his predecessors, like them he travels to find picturesque, exoticism, as much in the scenery as beside the natives most often captured in their «traditional » attire. He observes landscapes as he does customs. That is what today's amateurs of ecotourism, solidary tourism seek….who will mingle with the local populations (Babou and Callot, 2007). Brochures and other promotional documents are not miserly with photographs featuring the natives in their traditional outfits.

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[2] Daguerréotype : dispositif enregistrant une image sur une plaque métallique enduite d'une substance impressionnable à la lumière, image photographique ainsi obtenue. (Larousse, 1907)

[3] See « Baignade à Etretat », 1865 by Eugène le Poittevin : the diver is the young Guy de Maupassant, behind him the painter Charles Landelle and the elegant crinoline is Eugénie Doche who was the first actress who interpreted "la dame aux camélias"(Klein, 2016: 97).

[4] Asnières was then known for canoeing and boating on the Seine.

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3.2. When the painting serves as an emblem to a region (La porte d'aval, Etretat, Claude Monet)

As pointed out by Jean-Marie Miossec (1977), « the touristic space is foremost an image. An image that the tourists make out or that is given to them by the vacation organisers(…) A complex image, dreamed of, reflected by posters, guidebooks, leaflets, paintings, books, movies. In April 2015 the town of Etretat publishes a « notebook of walks, natural cliffs, cultural cliffs ». For its cover it has chosen two paintings that are in the Musée d'Orsay and which represent Etretat's cliff and its Aval gate. One is by Courbet, the other by Monet. (see picture 3).

3.2.1 What do we see ?

−The painting in the background shows the porte d'Aval. One can barely see the Aiguille hidden in the Arch. The beach seems deserted. A few red and white spots in the sand suggest the presence of boats. The picture is ambiguous. Its sharpness places it half-way between a photograph and a painting hard to date it seems so contemporary.

The Monet in the foreground however is clearer. The brush strokes are sharper (sky, sea). A few red sails approach the shore. They are fishing boats, the racing boats' sails are white (cf. Régates à Sainte Adresse et Plage à Sainte Adresse, 1867). These fishermen's boats underline the local life, distinguishing it from the vacationing bourgeois' life. In fact we see no human beings. Their presence here is suggested by the sailboats on which a helmsman is needed. Here the Aiguille is clearly represented.

ETRETAT
Carnet de Balades
falaises naturelles, falaises culturelles

Picture 3 : source : Office de tourisme d'Etretat, Cyriaque Lethuillier. Photos : Philippe Deneufve.

The site is certainly remarkable, but the similarity between Monet's paintings and the recent photographs of the Arche d'Aval in Etretat, of the Hôtel des Roches, of the beach in Trouville is stupefying. Most of the views painted by Monet are still easily recognisable. From there to deducing that the 21st century photographer « copied » the 19th century painter, there is but a step.

3.2.2. Painting or photo ?

Not only Monet or Courbet were fascinated by the Aval arch. For example this painting by Monet and two photos found on the Internet. Both represent the Aval gate in the flamboyant light of a sunset. (see picture 4)

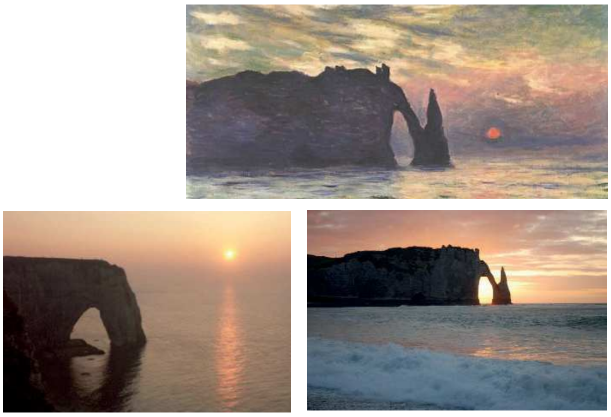
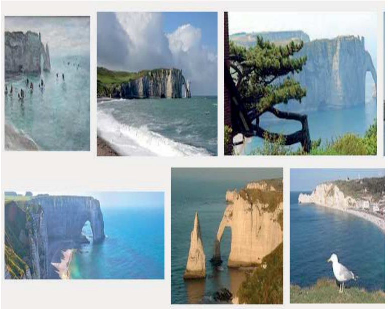


Image 4 : Source : Google search, screenshot

There is no question that this geological prowess is remarkable. Visitors rush there, immortalize it in painting or photograph. The light spellbinds the painter who tries to represent it, it also dazzles the present-day photographers. Let us not deny ourselves this pleasure, let us smile at the wink of the photographers who tried to reproduce Monet's famous work of art with modern means… The similarity is striking. The easel and the lens are in the same place, the time of day is similar. Like the painter, the photographer delivers a personal impression of reality. Photography and painting, because they are visible to all thanks to the Internet, strike the visitor's eye.

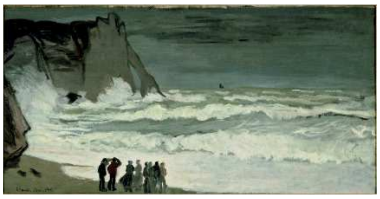
Let us now look at the Internet page devoted to Etretat.



Picture 5: Source: Google search, screenshot

Three pictures of the Arch. The top left-hand one is known to us, it dates back to the 19th century. The top right-hand one creates a problem. Strangely resembling the painting assigned to Courbet in the document dedicated to Etretat (see picture 5). The sky, the sea foam, might make us doubt, not to mention the angle chosen by the photographer that does not show the beach where we expected to see collapsed sails….Blue-grey is pervasive in these images. The web page's developer's idea is very ambiguous. First he places these pictures side by side as if they were part of the same series: the spectator is lost. What is real, what isn't ? Then the photographs and the paintings have the same subject, clearly intended to underline the cliffs' exceptional side « that is worth it ». The site's vocation is to attract the tourist ! How does the page proceed ? It puts a 19th century painting and current day photographs on the same level.

Always the Arch, but beneath a tormented sky with a rough sea and fishermen on the beach. The women' dresses are lifted up by the wind, the men hold their hats. To retain them or to watch the storm on the horizon ? This image is not as touristic as the previous ones due to the weather. However it presents the interest of showing natives. Isn't this what our contemporary amateurs of alternative-solidary-sustainable tourism look for ? To mingle with the locals ?
We have here the two tendencies patterned by the painters, the reality of a place with the «real people » and the idealised vision of the place.



Picture 6: Grosse mer à Etretat, Claude Monet

Conclusion

Imagery contributes to the making of a destination. Some paint it, draw it or photograph it with its natives, others favour the landscape, when others will finally place a few tourists. Painting builds the destination's imaginary and the destination becomes inseparable from the painting. Painting is thereby used today as an illustration of the destination and to give the desire to go there. The use of old paintings always gives authenticity and sustainability to the place. A scenic sustainability but also one in terms of touristic destinations, « a touristic resort since 1850… » like on storefronts. This choice of images therefore fits in perfectly in the tourist's eternal quest: authenticity.

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The anthropomorphic features of a virtual agent: social presence and confidence generators to a website

Résumé

L'objectif de la recherche est d'étudier l'impact de la présence (vs. absence) et du type (humain vs. non humain) d'un agent virtuel sur la présence sociale, la confiance vis-à-vis du site, sur l'intention d'achat, le bouche à oreille et l'e-fidélité. Puis, de connaitre l'effet de cette présence sur la confiance vis-à-vis du site et d'en connaitre l'influence sur les intentions comportementales en ligne. La conduite d'une expérimentation montre d'une part, que la présence d'un agent virtuel humain améliore significativement la présence sociale, la confiance en ligne et les intentions comportementales. La recherche montre que les caractéristiques anthropomorphiques de l'agent améliorent la perception de présence sociale. Les résultats permettent de proposer des contributions théoriques et managériales originales.

Mots-clés : *Agent virtuel, anthropomorphisme, présence sociale, confiance, e-fidélité*

Abstract

The aim of the research is to study the impact of the presence and the type (human vs. non-human.) of a virtual agent on social presence, online trust, on purchase intention, word of mouth and e-loyalty. Then, to show the effects of their presence on online trust and to know the influence on behavioral online intentions. Conducting an online experimentation, the results show that the presence of a virtual human agent significantly improves social presence, online trust and behavioral intentions. On the other hand, research shows that the anthropomorphic characteristics of the agent increase social presence perception. The results offer original theoretical and managerial contributions.

Keywords: *Virtual Agent, anthropomorphism, social presence, trust, e-loyalty*

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Les caractéristiques anthropomorphiques d'un agent virtuel : Des générateurs de présence sociale et de confiance en ligne

Introduction

Les sites marchands se sont installés comme une réalité quotidienne, à la fois pour le consommateur et pour les entreprises. Ils sont devenus le principal point de contact avec un grand nombre d'utilisateurs, constituant l'un des facteurs clés de succès pour le développement d'une entreprise. Toutefois, la recherche suggère que la cause inhibitrice la plus importante dans le processus d'achat en ligne, est le est le manque d'accompagnement pendant la visite (Holzwarth, Janiszewski et Neumann 2006). En effet, les consommateurs considèrent les sites Webcomme impersonnels et ils se sentent impuissants lorsqu'ils ils parcourent des catégories de produits et services inconnus et complexes. Les internautes cherchent à être guidés dans des environnements virtuels, similairement aux magasins traditionnels. En d'autres termes, grâce à l'intégration de technologies telles que les agents virtuels, comment les sites marchands peuvent-ils procurer de la confiance aux internautes et les encourager à acheter leurs produits et services, à en parler positivement et à les fidéliser ?

La littérature montre que la confiance est considérée comme l'un des éléments clés pour amorcer et maintenir les relations avec la clientèle en ligne (Lemoine et Notebaert 2011), elle serait plus importante dans un contexte virtuel que physique (Harris et Goode 2004). En effet, le manque de contact physique, la réduction de l'environnement de vente à la taille de l'écran (McKinney 2004) et l'absence de contact humain, influencent le sentiment de confiancevis-à-vis d'un site (Chouk et Perrien 2005). Comprendre la nature de la confiance, ses antécédents et ses conséquences semble primordial (Gurviez et Korchia 2002). De nombreuses interrogations persistent quant aux facteurs susceptibles d'apporter aux internautes davantage de confiance. Parmi ces facteurs, la présence sociale sur un site semble constituer une condition nécessaire pour le développement de la confiance vis-à-vis d'un environnement marchand (Gefen et Straub 2004). Il s'agit de donner l'impression d'être socialement présent dans le point de vente en ligne(Van der Heijden 2004), afin de réduire la distance physique et sociale séparant les internautes et les marques sur Internet. Pour ce faire, les responsables de sites marchands conçoivent des atmosphères qui stimulent le système sensoriel des internautes, à travers des agents virtuels.

Les agents virtuels intelligents constituent une technologie alternative intéressante, puisqu'ils favorisent la proximité entre l'internaute et le site par la création d'un lien social et interactif (Cassell et al. 2000). Toutefois, si l'importance de la présence (vs. absence) d'un agent virtuel sur un site marchand a été prouvée (Lemoine etNotebaert 2011), peu de recherches ont étudié l'effet d'un agent humain (vs. non humain). Par conséquent, cette recherche se propose de répondre à plusieurs objectifs. D'abord, identifier l'effet de la présence (vs. absence) d'un agent virtuel comme facteur social de l'atmosphère en ligne. Puis, de contrôler ses caractéristiques anthropomorphiques afin d'en connaitre l'impact sur la perception de la présence sociale en ligne, sur la confiance vis-à-vis d'un site marchand et sur les intentions comportementales des internautes. Enfin, de d'étudier l'effet de la présence sociale sur la confiance et celui de la confiance sur les intentions comportementales, en termes d'intention d'achat, de bouche-à-oreille et la fidélité en ligne

1. Le cadre conceptuel de l'étude

1.1. Les agents virtuels intelligents

Dans les magasins physiques, les clients sont en contact direct avec les représentants de l'entreprise. Sur Internet, certains environnements marchands introduisent des agents virtuels comme substituts pour leurs homologues humains (Morisson, Cegielski et Rainer 2012). Les agents virtuels se réfèrent à la reproduction d'une entité, c'est « une représentation graphique d'un être humain dans un environnement de discussion » (Holzwarth, Janiszewski et Neumann 2006) et désignés comme des personnifications graphiques de processus qui s'exécutent sur des ordinateurs (Halfhill 1996). Dans le cadre de cette recherche, les agents virtuels constituent des représentations personnifiées et médiatisées par ordinateur (M. Holzwarth, Janiszewskiet Neumann 2006), ce sont les conseillers du site et incarnent l'une des dimensions sociales les plus importantes de l'interface marchande (Wang et al. 2007). L'interaction socialeavec l'agent est similaire à l'échange entre les internautes et les humains (Qiu et Benbasat 2009). Ils expriment la présence humaine et représentent les interlocuteursde l'homme (Benteetal.2008). Les agents virtuels cherchent à connaitre les préférences du consommateur afin d'améliorer l'expérience et de se rapprocher au mieux de la cible.

L'intégration d'éléments sociaux en ligne a pour but d'améliorer la perception des aspects hédoniques et informationnels (Pentina et Taylor 2010). Ces dispositifs constituent une alternative très pertinente à la nature impersonnelle des sites marchands, puisqu'ils instaurent une nouvelle forme de dialogue avec la marque. Ils participent à la présentation de l'offre et à l'interaction entre le site et l'internaute. Lorsque les visiteurs interagissent avec un avatar, ils sont capables à la fois d'influencer et d'être influencés parles stimuli de l'environnement du site (Chung2005). Les agents virtuel sont des effets significatifs sur les réponses des internautes, notamment en terme de confiance, d'intention d'achat, de satisfaction, de valeur perçue, d'implication, etc. (Holzwarth, Janiszewski et Neumann2006 ; Alves et Soares 2014). La présence d'agents est également liée à une augmentation de la sociabilité du site, du plaisir, de l'excitation des visiteurs et plus globalement de leurs émotions(Wang et al. 2007). La théorie de la réponse sociale suppose que les consommateurs peuvent répondre positivement à des signaux sociaux, tels que le représentant de l'entreprise, un employé de service ou le guide de shopping sur le site.

Afin d'optimiser les effets positifs des agents virtuels sur leurs sites, les marchands sont de plus en plus soucieux des détails fonctionnels et anthropomorphiques des agents. Si auparavant ces représentations étaient matérialisées par des images figées, aujourd'hui, elles tendent à se rapprocher au mieux de l'humain (Lemoine et Cherif 2012 ; Alves et Soares 2014). Ces personnages sont de plus en plus interactifs, conversationnels et émotionnels, leur conception repose principalement sur l'intuition du gestionnaire du site (Qiu et Benbasat 2005 ; 2009). Les caractéristiques physiques des agents virtuels semblent considérablement influencer les perceptions et les comportements des internautes (Qiu et Benbasat 2009), à ce titre peu d'études ont exploré l'effet d'un personnage a apparence humaine, comparé à un agent humain.

Cette recherche se propose précisément d'étudier l'effet de la présence (vs. absence) d'un agent virtuel (non humain vs. humain) sur la perception de présence sociale, sur la confiance vis-à-vis d'un site marchand et par conséquent sur les intentions d'achat, le bouche à oreille et l'e-fidélité.

1.2. La présence sociale

D'après la théorie de la réponse sociale, les humains ont tendance à considérer la technologie comme une entité sociale (Moon 2000). Ce phénomène se produit face à un écran, au contact d'une voix, ou d'un agent virtuel. L'interaction développe une relation affective et contribue à attribuer des caractéristiques humaines à l'ordinateur (Lemoine et Cherif 2012). La recherche sur les interactions Homme-machine montre que la technologie peut être personnifiée (Shin et Shin 2011) et la perception de présence sociale joue le rôle de catalyseur dans cette interaction. En effet, la présencesociale représente le degré avec lequel un média permet à un utilisateur d'établir une connexion personnelle avec d'autres individus (Komiak et Benbasat 2006). Elle s'exprime par la présence psychologique (Lombard et Ditton 1997) ou la «capacité du média à véhiculer l'expressivité et l'émotion» (Burke et Chindambaram 1999, p. 566) en réduisant la distance sociale qui sépare les internautes (Ardelet et Brial 2011). Il s'agit de la mesure dans laquelle un site Web permette aux utilisateurs de vivre une expérience avec d'autres individus sans qu'ils ne soient physiquement présents (Van der Heijden 2004).

En se basant sur le paradigme S-O-R, Wang et al. (2007) expliquent que certains facteurs atmosphériques d'un site constituent les déterminants de la présence sociale. En effet, dans le commerce traditionnel, les consommateurs sont habitués à interagir avec des humains, tandis que sur Internet, un site marchand ne réagit pas comme l'internaute l'attend (Gefen, Karahanna et Straub 2003). L'objectif est que le client soit aussi à l'aise devant son écran qu'en magasin. Un niveau élevé deprésence sociale qualifie un site de sociable, chaleureux et personnel (Shin et Shin 2011). L'introduction de repères sociaux sur un sitemarchandpeut rendrel'interaction Homme-machine plus naturelle (Wang et al. 2007). Dans cette perspective,les consommateurs doivent pouvoir interagir avec les produits et les environnements que les marques proposent, développer du lien social avec les vendeurs ou avec les autres clients en ligne et connaître de nouvelles émotions et sensations (Benteet al. 2008). L'agent virtuel peut donc créer ce sentiment de rapprochement psychologique qui génère des réactions affectives et émotionnelles intenses. L'utilisation des agents virtuels permet d'améliorer la perception de la présence sociale, contrairement à un site qui utilise uniquement le format texte et une interactivité limitée (Shin et Shin 2011). Nous proposons alors :

H1 : L'absence d'un agent virtuel influence positivement la présence sociale.

H2 : La présence d'un agent (non humain) influence positivement la présence sociale.

Si certaines recherches ont étudié diverses caractéristiques sociales du siteweb qui pourraient améliorer la perception de la présence sociale, comme les contenus textuels et l'accueil personnalisé (Gefen, Karahanna et Straub 2003), les images (Lemoine et Notebaert 2011), ou encore le chat en direct et les commentaires en ligne (Cyr etal. 2007 ; Ardelet et Brial 2011), peu d'études ont explorél'effet du typed'agents virtuels sur la présence sociale perçue. Lorsqu'on se penche sur les caractéristiques mêmes des agents virtuels, il semble que plusieurs d'entre elles peuvent influencer les perceptions des internautes (Lee etal. 2006 ; Lemoine et Cherif 2012). La théorie de la réponse sociale postule que les consommateurs peuvent réagir à un site qui présente des caractéristiques sociales semblables aux humains, de manière similaire aux interactions Homme-Homme (Wang et al. 2007). Par conséquent, les réponses sociales sont plus fortes au contact d'agents plus « humains » (Nass, Kim et Lee 1998). Les caractéristiques anthropomorphiques de l'agent ont un effet considérable pendant l'expérience, car elles agissent sur l'identification des utilisateurs à ce dernier[1] (Lemoine et Cherif 2012). Plus précisément, un agent virtuel humain engage l'utilisateur dans des interactions semblables au face-à-face (Qiu et Benbasat 2009) la présence de ces caractéristiques anthropomorphiques amène les utilisateurs à appliquer les règles sociales pratiquées au quotidien. Les internautes sont alors susceptibles de percevoir une plus forte présence sociale au contact d'un agent virtuel humain. Par conséquent :

H3 : La présence d'un agent virtuel humain influence positivement la présence sociale.

1.3. La présence sociale et la confiance vis-à-vis du site

Chaque site marchand est source d'information pour les internautes grâce à la quantité et la qualité de l'information qu'il transmet. Cependant, indépendamment des dispositifs mis en place, ces informations restent indirectes et soumises à l'acceptation du consommateur. La confiance vis-à-vis du site pourrait jouer un rôle pendant la visite en ligne. Il s'agit d'un état psychologique en amont de l'intention de comportement (présomption, attente, croyance) (Chouk etPerrien 2005).Elle « reflète un ensemble de présomptions cumulées quant à la crédibilité, à l'intégrité et à la bienveillance que le consommateur attribue à la marque » (Gurviez et Korchia 2002, p. 7). Il s'agit d'un comportement de prise de risque, permettant d'avoir un ascendant sur le déroulement d'évènements futurs, qui reflète un ensemble d'états mentaux non directement observables qui se fondent principalement sur des indices que sur des preuves (Gurviez et Korchia 2002). La confiance se traduit par la mesure par laquelle elle réduit l'incertitude qui est créé par la dépendance aux autres acteurs du processus (Fang et al. 2014). Cet état mental est essentiel dans la mesure où les consommateurs ont besoin de contrôler leur environnement, ou avoir l'impression de le faire.

La confiance en ligne découle de la pertinence des renseignements collectés et de la richesse des interactions (Fang et al. 2014). Cependant, la nature impersonnelle du web et l'incertitude liée aux transactions en ligne, amène les entreprises en ligne à renforcer la confiance des clients envers les sites (Shin et Shin 2011). Les agents virtuels semblent être une solution pertinente pour réduire le manque de confiance ressenti pendant la navigation, puisqu'ils renforcent le sentiment de confiance à l'égard d'un site. Lemoine etNotebaert (2011) montrent que la présence d'un agent virtuel humanoïde, représenté sous la forme d'une image statique, améliore la confiance des internautes. D'autre part, Qiu et Benbasat (2005) expliquent que la voix d'un agent virtuel augmente considérablement la confiance, puisqu'elle a la faculté d'entrainer une meilleure évaluation du produit. Toutefois, ces études ne sont pas en mesure de confirmer qu'un site avec agent ait plus d'effet sur la confiance qu'un site sans agent (Alves et Soares 2014). La présence d'agents virtuels comme substituts de leurs homologues humains, pourrait favoriser le développement d'une relation de confiance. D'où les hypothèses :

H4 : L'absence d'un agent virtuel influence positivement la confiance.

H5 : La présence d'un agent virtuel (non

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[1] Il s'agit notamment de la mise en œuvre de visages humains (Cowell etStanney 2005), de «visages parlants» (Lee, Liu et Lu 2002), et plus globalement de la gestuelle, des expressions faciales, de l'apparence physique (Lee et al. 2006), l'âge et le genre (Cowell etStanney 2005) de la voix (Alves et Soares 2014).

humain) influence positivement la confiance.

Si la littérature sur l'utilisation de l'agent virtuel dans les environnements marchands est relativement riche, il existe peu de recherches traitant de l'effet l'apparence même de l'avatar sur la confiance. Une grande partie de ces recherches implique des avatars statiques ou animés qui ont une forme humanoïde ou pas (Holzwarth,Janiszewski et Neumann 2006). Cependant, si les internautes interagissent socialement avec les agents virtuels et par conséquent ont un sentiment de confiance plus fort vis-à-vis du site, c'est parceque certains de ces dispositifs sociaux sont conçus d'une façon plus ou moins anthropomorphe (Lemoine et Cherif 2012), leur conférant des caractéristiques humaines. Le niveau de confiance devrait alors varier d'un type d'agent à l'autre (Shin et Shin 2011). Plus l'agent virtuel est anthropomorphe, plus le niveau confiance serait important. Par conséquent :

H6 : La présence d'un agent virtuel humain influence positivement la confiance.

La confiance en ligne s'exprime par la croyance des consommateurs que leurs faiblesses ne seront pas exploitées et elle ne peut avoir lieu que dans un contexte social (Gefen etStraub2004). Certaines études suggèrent quela présence sociale est un facteur qui influence l'intérêt et la confiance des utilisateurs. Gefen, Karahanna et Straub(2003) expliquent qu'une forte présence sociale augmente la confiance des utilisateurs. Il s'agit de donner un sentiment d'attachement à l'environnement virtuel aux personnes sensibles au contact humain. Sans contact réel, la perception de présence sociale peut être générée par les interactions avec le site (Gefen et Straub 2004 ; Alves et Soares 2014). Les composantes de l'atmosphère de vente sont en mesure d'influer positivement le développement de la confiance à travers la présence sociale :

H7 : la présence sociale influence positivement la confiance vis-à-vis du site.

1.4. Intentions comportementales des internautes

Les consommateurs sont à la recherche de lien social avec d'autres individus. Si la relation entre l'entreprise et les clients est médiatisée par les vendeurs, ces derniers augmentent la fidélité, le bouche-à-oreille positif et les intentions achats. Sur Internet, les agents sont amenés à jouer un rôle essentiel en matière de création d'une relation privilégiée entre les internautes et les sites qu'ils consultent (Lemoine et Notebaert 2011). En effet, Holzwarth, Janiszewski et Neumann (2006) montrent qu'en plus de la présence d'agent virtuel, le type même d'agent (attractif vs.non attractif et expert vs. non expert) a une influence sur les intentions d'achat des internautes. L'interaction avec un agent virtuel pourrait affecter positivement la création d'un lien social avec le consommateur, la fidélité envers le site (Harris et Goode 2004) et un bouche à oreille positif (Lemoine et Notebaert 2011). La présence et le type de l'agent virtuel présent sur un site pourraient ainsi influencer les intentions des internautes.

H8 : L'absence d'un agent virtuel influence positivement l'intention d'achat (a), le bouche-à-oreille (b) et l'e-fidélité (c).

H9 : La présence d'un agent virtuel (non humain) influence positivement l'intention d'achat (a), le bouche-à-oreille (b) et l'e-fidélité (c).

H10 : La présence d'un agent virtuel humain influence positivement l'intention d'achat (a), le bouche-à-oreille (b) et l'e-fidélité (c).

Si la confiance à l'égard d'un site est l'une des conséquences de la présence sociale (Cyr etal. 2007), celle-ci influence les réponses comportementales des internautes (Chouk et Perrien2005 ; Alves et Soares 2014), notamment l'intention d'achat et le bouche-à-oreille. D'où les hypothèses :

H11 : la confiance vis-à-vis d'un site influence positivement l'intention d'achat(a), le bouche-à-oreille (b) et l'e-fidélité (c).

Notre objectif est double. Étudier d'abord l'impact de la présence d'un agent virtuels (vs. absence) et ses caractéristiques anthropomorphiques (humain vs. non humain) sur la présence sociale, la confiance et sur l'intention d'achat, le bouche à oreille et l'e-fidélité. Puis, de connaitre l'effet de la présence sociale sur la confiance et sur les intentions en ligne.

2. La méthodologie de l'étude

Afin de tester nos hypothèses, une étude quantitative a été réalisée sur trois versions d'un site marchand et sur un échantillon de 685 individus[2] (Annexe A).

2.1. Le site sélectionné et le recueil des données

Trois versions d'un même site ont été réalisées (Annexe B). Les différentes déclinaisons du dispositif expérimental traitent de la même offre et ont le même contenu. La première version ne comporte pas d'agent virtuel, elle nous a permis de collecter 253 questionnaires. La deuxième version met en évidence un agent,représenté par une maison, qui guide les internautes, réponds à leurs questions et les assiste tout au long de la visite. Cet agent, répond aux internautes sous la forme d'un *chat* et a été distingué par l'ensemble des 296 individus qui ont navigué sur ce site. La troisième déclinaison du site mobilise un personnage humain qui pose des questions aux utilisateurs afin de mieux connaître leurs attentes, et les internautes doivent y répondre pour avancer dans leur démarche. Le nombre de répondant est de 136. Afin de constituer un échantillon de répondants homogène, chacun des répondants était invité à naviguer sur l'une des versions du site sans consignes particulières.

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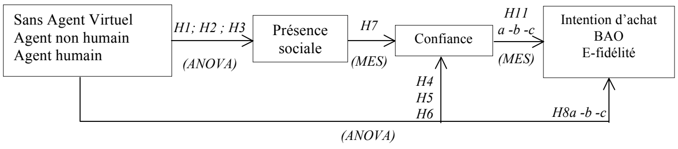
[2] Des contrôles sur l'âge, le genre, le niveau d'étude et la catégorie socioprofessionnelle ont été effectués. L'analyse multi variée de variance (MANOVA) montre que la répartition au hasard des sujets sur les trois plans expérimentaux est satisfaisante.

2.2. Les échelles de mesure utilisées et la méthode d'analyse des résultats

Les mesures des différents construits ont été dérivées d'échelles préexistantes dans la littérature et adaptées au contexte de cette étude. L'ensemble des dimensions de l'étude ont été mesurées sur une échelle de Likert d'accord à sept points (Annexe C). Pour l'interprétation des données collectées, une analyse de variance (ANOVA) a été effectuée pour le test des hypothèses H1, H2, H3, H4, H5, H6, H8, H9, H10 et celle des modélisations par équations structurelles via l'approche PLS (Partial Least Square), pour les hypothèses H7 et H11. PLS est une technique de modélisation de causalité multivariée puissante pour les relations entre plusieurs construits latents dépendants et indépendants (Inkpen et Birkenshaw 1994). Cette approche est plus rigoureuse que l'approche LISREL, elle minimise les préjugés associés à des mesures dichotomiques et ordinales (Mintu-Wimsatt et Graham 2004).

L'ensemble des hypothèses est présenté ci-dessous, dans la figure 1.

Figure 1 : Le modèle de recherche



2.3. La fiabilité et la validité des construits et l'ajustement du modèle structurel

Des analyses factorielles exploratoires ont été réalisées. Elles ont démontré une fiabilité et une validité satisfaisantes pour les différentes mesures utilisées (Annexe D). L'AlphadeCronbach et la variance moyenne extraite (VME) de l'ensemble des construits sont satisfaisants. La variance partagée par des construits différents est inférieure à l'indicateur de VME par chaque construit. Ils sont donc suffisamment discriminés entre eux (Annexe D). Ensuite, une analyse factorielle confirmatoire a été effectuée via *WarpPLS*.

3. Les résultats de l'étude

3.1. L'effet de l'agent virtuel

Afin d'étudier l'effet de la présence d'un agent virtuel sur la présence sociale (H1, H2, H3), la confiance (H4, H5, H6) et les intentions comportementales (H8a, H8b, H8c), nous avons effectué des analyses de variance (tableau 3).

	Présence sociale	Confiance	Bouche à oreille	Int. d'achat	E-fidélité
Absence agent	14,04	31,40	10,95	7,99	13,78
Agent non humain	21,15	41,45	13,51	8,71	24,58
Agent humain	22,75	46,78	13,52	8,90	27,68
F/Probabilité d'erreur	109,35/,000	192,83/,000	22,07/,000	4,70/,000	315,21/,000

Tableau 1 : Résultat des analyses de variance

L'ANOVA montre que la présence de l'agent virtuel sur le site améliore la perception de présence sociale pendant la visite. Les résultats montrent que pour un site sans agent le score de la présence sociale est inférieur à celui d'un site avec agent. Ce test permet de **rejeter H1** et de **valider H2**. D'autre part, il semble que l'agent humain génère plus de présence sociale qu'un agent non humain (Moyenne = 22,75). **L'hypothèse H3 est validée**. Ce test montre que la présence sociale est affectée par la présence d'un agent virtuel. Plus l'agent est anthropomorphe, plus la connexion établie entre le site et l'internaute est forte. Le test des hypothèses H4, H5, H6 montre qu'un site avec agent procure plus de confiance qu'un site sans agent ($\text{Moy}_{\text{sans agent}}$ = 31,40 ; $\text{Moy}_{\text{agent}}$ = 41, 45), et plus particulièrement lorsqu'il est humain ($\text{Moy}_{\text{agent humain}}$ = 46,78 ; p = ,000). Conformément aux travaux de J.-F. Lemoine, E. Cherif (2012), la présence d'un agent humain sur le site s'accompagne d'une forte amélioration de la confiance des internautes. **H4 est rejetée** etles hypothèses**H5 et H6 sont vérifiées**. Ce résultat traduit le fort sentiment de confiance engendré par l'existence d'un agent humain.

Enfin, l'analyse de variance fait apparaitre que la présence d'un agent améliore le bouche à oreille, l'intention d'achat, en support aux travaux de Lemoine, Notebaert (2011) et de Holzwarth, Janiszewski et Neumann (2006). D'autre part, l'étude montre que l'agent virtuel a un effet positif sur l'e-fidélité. Ce premier résultat **rejette** les hypothèses **H8a ; H8b et H8c** et **valide** les hypothèses **H9a ; H9b et H9c**. Par ailleurs, il semble qu'un site avec un agent humain a plus d'effets sur le bouche à oreille (Moyenne = 13,52) et l'e-fidélité (Moyenne = 27,68) que sur l'intention d'achat (Moyenne = 7,90). Ces résultats nous permettent de **valider H10a ; H10b et H10c**.

3.2. Le modèle structurel

Pour tester leshypothèses H7, H11a, H11b et H11c, nous avons procédé à une modélisation selon les méthodes d'équation structurelles (tableau 4).

	□ standardisé	*p*-value	R^2	Hypothèses
Présence sociale □ Confiance	,60	,000	,36	*H7 validée*
Confiance □ Bouche à oreille	,62	,000	,38	*H11(a) validée*
Confiance □ Intention d'achat	,49	,000	,24	*H11(b) validée*
Confiance □ E-fidélité	,37	,000	,14	*H11(c) validée*

Tableau 2 : Test de l'influence du modèle global (MES)

Les résultats montrent que la présence sociale influence positivement la confiance vis-à-vis du site (β = ,60 ; p < ,001), **validantH7**. Quant à l'effet de la confiance, le test montre qu'il est significatif sur le bouche à oreille (β = ,62 ; p < ,001), l'intention d'achat (β = ,49 ; p < ,001) et l'e-fidélité (β = ,37 ; p < ,001). **H11a, H11b et H11c sont validées.** Les intentions comportementales sont d'autant plus importantes lorsque les internautes sont en confiance.

4. Discussion des résultats et implications

Les résultats de l'étude suggèrent que certaines caractéristiques sociales de l'atmosphère marchande influencent les émotions et les sensations des internautes, qui à leur tour, influencent leurs intentions comportementales. Nous avons constaté que l'agent virtuel a un impact positif et significatif surla présence sociale. Ce facteur permet de faciliter le développement de liens sociaux forts avec le site, augmentant le sentiment de sociabilité et la sensibilité aux interactions sociales en ligne.

D'autre part, la présence sociale a bel et bien un effet sur la confiance vis-à-vis du site. Ce résultat corrobore la majorité des travaux sur le sujet (Cyr et al. 2007 ; Wang et al. 2007).

Afin de compenser le manque d'interaction directe et la distance entre les internautes et les marques sur Internet, les sites renforcent leur présence sociale à travers une humanisation du site. Elle facilitel'acceptation de l'information proposée et renforce la confiance envers le site. Les résultats confirment l'importance de la confiance comme l'une des variables les plus importantes affectant les intentions en ligne (Davis etal. 2009 ; Lemoine et Notebaert 2011). Les coefficients de régression standardisés obtenus montrent que plus les internautes éprouvent de la confiance envers le site, plus leurs intentions comportementales envers le produit ou service, le site et la marque sont favorables.

D'un point de vue théorique, la recherche apporte un soutien empirique des effets des signaux sociaux sur Internet. Si certains chercheurs ont exprimé des doutes quant à l'existence de tels effets (Cassellet al. 2000 ; Davis et al. 2009), nos résultats affirment que les facteurs sociaux peuvent améliorer la performance d'un site, notamment en termes d'intention d'achat et de fidélité. L'étude montre que plus l'agent virtuel est anthropomorphe, plus l'aspect social de la plateforme en ligne augmente, générant des sensations et des perceptions positives chez les internautes. Certaines réponses déclenchées grâce aux interactions client-employé, identifiées dans le contexte physique, peuvent être provoquées par l'utilisation des agents virtuels sur les sites Web. Nos résultats confirment certaines études antérieures sur le rôle important joué par l'agent virtuel et fourni un soutien supplémentaire aux recherches antérieures autour de la présence sociale en ligne (Gefen et Straub 2004 ; Shin et Shin 2011). Les réactions des internautes montrent que le site marchand a le pouvoir d'influencer les perceptions développées par d'autres acteurs sociaux d'une manière similaire (Davis etal. 2009 ; Menneckeetal. 2011) et cette recherche démontre que la présence d'un vendeur en ligne est suffisante pour donner l'impression d'une interaction entrele site etla tâche à accomplir.

D'autre part, notre étude dépasse les recherches sur l'étude simple de l'influence de la présence (vs. absence) des agents virtuels. Elle confirme la théorie de laréponse sociale, qui affirme que les individustraitent les ordinateurs en tant qu'acteurs sociaux, même s'ils savent que ces machines ne possèdent pas de traits humains (Moon, 2000). En prolongement, l'étude montre que les conventions sociales de la vie réelle sont reconstruites grâce aux interactions avec les agents virtuels et elles sont renforcées moyennant les caractéristiques anthropomorphiques de ces agents. L'adoption d'attributs sociaux justifie la volonté de l'entreprise àmettre en place une gestion de la relation client pertinente, permettant d'accroitre les intentions comportementales grâce au renforcement de la confiance. Le rôle de la présence sociale comme antécédent de la confiance exprime le mécanisme qui influence la manière par laquelle les consommateurs font confiance à la marque derrière le site (Gefen, Karahanna et Straub 2003). La présence sociale est au cœur de l'efficacité du message et les consommateurs forment leur confiance en fonction de l'expérience vécue. Les sites sont devenus capables de créer de riches relations sociales imaginées avec les internautes, pouvant augmenter la demande d'informations dans les points de vente physiques et améliorer les intentions d'achat (Alves et Soares 2014).

Cette étude apporte également des implications pratiques pour les managers. En effet, les agents virtuels joueraient un rôle similaire aux conseillers en magasin et représenteraient une réduction de coûts de taille. Ces réductions de coûts sont particulièrement importantes puisqu'on estime qu'une visite physique faite à un client coûte en moyenne 15 fois plus cher qu'un contact par le biais d'un centre d'appels, qui quant à lui est 10 fois plus élevé qu'un contact par le biais d'Internet (Darmon 2001). De plus, les agents virtuels ont un effet réel sur les intentions d'achat et sur la fidélisation des clients. Cette recherche montre que des intentions comportementales favorables vis-à-vis du site sont liées aux caractéristiques anthropomorphiques de l'agent. D'autre part, puisque la présence sociale est liée à l'intention des utilisateurs à l'égard du site, la présence d'agents humains peut augmenter l'imperméabilité des sites Web et verrouiller le passage des internautes à d'autres sites.

Les recherches antérieures ont montré que la relation client/site repose sur une relation rapidement établie et par conséquent déterminer les facteurs déclencheurs de la confiance est essentiel. Nos résultats suggèrent que les praticiens peuvent améliorer la performance de leurs sites en utilisant des médias riches. Ils doivent gérer avec soin le contenu du site et les facteurs qui permettent de communiquer le message, notamment en humanisant les dispositifs sociaux en contact direct avec l'internaute. Il s'agit de développer les moyens et les outils nécessaires pour manipuler les facteurs sociaux humanisés, afin de générer un niveau élevé de présence sociale. Il s'agit de considérer l'utilisation d'agents anthropomorphes comme une manière innovante de gérer la relation client en créant une relation personnalisée à travers le site.
Cependant, il est possible que les agents virtuels aient un effet de nouveauté sur certains internautes, il est donc important d'éduquer les consommateurs quant à la manipulation de ces dispositifs. L'apprentissage est important car il accentue l'habilité de l'internaute et sa familiarité à l'outil. Les enseignes pourront personnaliser leurs agents virtuels selon la préférence des clients, et proposer des modes de présentation de manière à en maximiser l'impact. Le site pourrait proposer aux visiteurs de choisir parmi plusieurs agents virtuels, celui qui conviendra le mieux aux internautes et transmettra le message de l'entreprise de la manière la plus pertinente.

La recherche stipule que la présence sociale produit des réponses favorables (Wang et al. 2007), notamment la confiance des internautes qui réduit les risques perçus et affecte positivement les intentions comportementales sur le site. Afin d'améliorer la confiance, le message communiqué par l'agent virtuel doit être accessible et adapté à la population ciblée, notamment les néophytes et les plus expérimentés de l'outil Internet. En effet, les recherches indiquent que la confiance envers le site est déterminée par les caractéristiques anthropomorphiques de l'agent (Fang etal. 2014) mais également par la congruence et les premières impressions pendant la visite (Naylor 2007). Les gestionnaires doivent être en mesure de prendre en compte ces conditions, puisque les agents virtuels sont soumis aux jugements des consommateurs et affectent l'évaluation du site et par conséquent les intentions comportementales.
Enfin, les e-commerçants doivent faciliter les possibilités d'interaction sur les sites en humanisant la relation entre les consommateurs et l'entreprise grâce à l'agent virtuel, puisque que cet outil est susceptible d'augmenter à la fois la confiance, l'e-fidélité, le bouche à oreille et les intentions d'achat. Les résultats impliquent que les sites doivent permettre aux internautes d'effectuer des achats en ligne de la manière la plus pratique que possible, offrant des économies de temps et d'efforts.

5. Limites et voies de recherche

Si l'étude propose des résultats et des implications originales, ils comportent cependant certaines limites qui invitent, à l'avenir, à compléter cette recherche. Tout d'abord les résultats ont révélé que l'étude des facteurs sociaux tels que les agents virtuels, peut-être trop simpliste dans la description de l'atmosphère marchande. Une recherche future sur les effets des stimuli de l'environnement de vente en ligne devrait inclure plus facteurs déterminants de la présence sociale perçue, notamment les commentaires en ligne et les récits d'expérience. D'autre part, pendant la visite les internautes peuvent utiliser les mécanismes de l'attention sélective de l'information ou chercher un défaut dans le message et générer des contre-arguments ce qui affecte l'évitement de l'information, les ressentis et génère des réponses défavorables. Enfin, l'effet de l'attention envers le site est également une voie de recherche potentielle, dans la mesure où l'attractivité d'un site marchand ne dépend pas uniquement de la manière dont il est conçu, mais également de l'offre qu'il propose. Des recherches futures pourraient explorer cette piste, qui traduirait les facteurs relatifs à l'attractivité qui pourraient avoir des effets positifs sur l'attention et le temps passé sur le site.

D'un point de vue méthodologique, l'échantillon est composé majoritairement de jeunes adultes (personnes de moins de 40 ans) éduqués (Bac+3 et plus), nous pouvons nous demander si le type d'agent virtuel jouerait un rôle tout aussi important pour d'autres catégories de la population.

Dans cette recherche les variables socio-démographiques n'ont pas d'effets significatifs sur les variables du modèle étudié. L'étude des variables psychologiques et autres variables attitudinales pourraient suggérer des résultats pertinents. Une étude incluant ces variables pourrait être menée pour enrichir cette recherche. D'un autre côté, le site web sélectionné pour l'étude correspond à un site fonctionnel, en effet Cogedim est une entreprise spécialisée dans le financement de biens immobiliers. Une voie de recherche intéressante serait de connaitre les changements à envisager dans d'autres contextes (par exemple un site hédonique). Enfin, la recherche étudie l'effet des agents virtuels sur un site web via ordinateur. Étudier leurs effets via d'autres écrans (tablette, smartphone, etc.) pourrait faire l'objet d'une recherche future.

Les agents virtuels ne sont pas encore totalement adoptés par les sites marchands, probablement en raison de nombreuses contraintes techniques et financières. Cependant, à un moment où de nombreux services en ligne déclarent ouvertement vouloir réduire la distance physique entre consommateur et les produits proposés en ligne, les sites marchands intégrant des agents virtuels anthropomorphes peuvent certainement réduire cette distance et répondre aux attentes des internautes.

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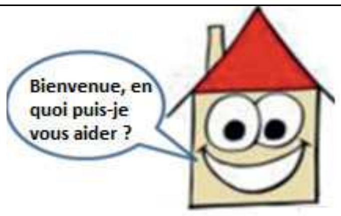
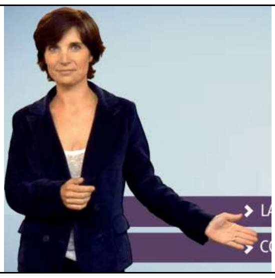
ANNEXES

Annexe – A : L’échantillon de l’étude

		Effectif
Genre	Masculin	321
	Féminin	364
Age	22 et -	289
	22-30	248
	31-40	45
	41-50	31
	51-60	41
	61 et +	31
Niveau d'étude	Bac ou -	89
	Bac + 3 ou -	181
	Bac + 4	221
	Bac + 5 et +	194
Profession	Demandeurs d’emploi	37
	Cadre et Professions intellectuelles supérieures	232
	Commerçant	28
	Employé	188
	Étudiant	178
	Ouvrier	2
	Retraité	20
Total		685

Annexe – B : Le plan factoriel

Texte + image	**Version 1**
 Bienvenue, en quoi puis-je vous aider ?	**Version 2**
	**Version 3**

Annexe – C : Les mesures utilisées

La présence sociale	Gefen et Straub (2004)	Il y a des contacts humains On s'adresse à moi personnellement Il y a de la convivialité Il y a de la chaleur humaine Il se dégage une certaine sensibilité humaine
La confiance vis-à-vis du site	Gurviez etKorchia(2002)	**Crédibilité du site** J'ai confiance dans la qualité du site Les produits ou services du site sont sûrs Je ne cours aucun risque en achetant des produits de ce site **Bienveillance du site** Ce site fait attention à ce qui me convient le mieux Ce site tient compte de mes intérêts Ce site me propose ce qui correspond le mieux à mes attentes **Intégrité du site** Je crois en la sincérité de ce site Ce site est honnête avec moi
Le bouche à oreille	Zeithaml, Berry et Parasuraman(1996)	Je parlerai en bien de ce site à mon entourage / Je recommanderai ce site à ceux qui me demanderont conseil / J'encouragerai mes proches et amis à visiter ce site
L'intention d'achat	Putrevu etLord (1994)	J'achèterai ce produit / J'achèterai des produits sur ce site Web
L'E-fidélité	Anderson et Srinivasan(2003)	Je suis prêt àrevisiterce sitedans un avenir proche / J'aimepasserbeaucoup de tempssurce siteWeb / Je suis prêt àretourner sur ce sitedans un avenir proche / Quand je vais surce site, je veux y passer le plus de temps / Lorsque je visitece site, je ne veux plus en visiterd'autrependant un certain temps.

Annexe – D : Fiabilité et validité des échelles de mesure

	Présence sociale	Crédibilité du site	Bienveillance du site	Intégrité du site	Bouche à oreille	Intention d'achat	E-fidélité
PS 1	,861**	,457**	,502**	,442**	,491**	,339**	,295**
PS 2	,834**	,421**	,520**	,411**	,477**	,335**	,290**
PS 3	,877**	,433**	,478**	,413**	,559**	,432**	,242**
PS 4	,889**	,435**	,504**	,438**	,509**	,372**	,271**
PS 5	,868**	,446**	,549**	,483**	,550**	,401**	,292**
CR1	,538**	,883**	,659**	,716**	,559**	,461**	,327**
CR2	,425**	,918**	,583**	,673**	,501**	,460**	,267**
CR3	,396**	,898**	,555**	,660**	,455**	,429**	,244**
BS1	,569**	,646**	,934**	,660**	,473**	,304**	,368**
BS2	,549**	,605**	,931**	,680**	,489**	,326**	,323**
BS3	,528**	,611**	,922**	,682**	,487**	,334**	,306**
IS1	,503**	,745**	,707**	,967**	,550**	,407**	,292**
IS2	,472**	,723**	,693**	,965**	,557**	,410**	,282**
BAO1	,550**	,510**	,446**	,516**	,936**	,684**	,082*
BAO2	,562**	,571**	,499**	,553**	,940**	,703**	,151**
BAO3	,571**	,508**	,520**	,548**	,944**	,692**	,128**
IA1	,432**	,475**	,336**	,407**	,689**	,944**	,326**
IA2	,388**	,470**	,317**	,393**	,705**	,947**	,412**
EFID1	,258**	,286**	,329**	,266**	,118**	,202**	,838**
EFID2	,284**	,324**	,349**	,296**	,144**	,211**	,886**
EFID3	,289**	,310**	,351**	,289**	,121**	,192**	,906**
EFID4	,279**	,236**	,284**	,237**	,092*	,237**	,877**
EFID5	,273**	,182**	,223**	,185**	,086*	,166**	,782**

		VME	PS	C	BAO	IA	EFID
Présence sociale (PS)	,915	,751	**1**				
Confiance (C)	,937	,706	,598**	**1**			
Bouche à oreille (BAO)	,934	,883	,597**	,610**	**1**		
Intention d'achat (IA)	-	,893	,433**	,468**	,737**	**1**	
E-fidélité (EFID)	,911	,730	,322**	,362**	,127**	,233**	**1**

** : La corrélation est significative au niveau de 0.01

CRM's contribution to the outcome of an appropriate assessment to CUSTOMERS and tailored to their expectations: value added CRM within the company

Abstract:
Customer needs come first and is what matters most. That's why leaders must focus and build on the process CRM (Customer Relationship Management).
In order to make this process, it should contain headlines of listening and evaluation tools. However, the ambitions and the expected results of all activities should be the light goal for managers and deviate from the assessment and the specific objectives of a particular function. The advantage of CRM is a way for the company to personalize the customer relationship, a better understanding of customers, the history (average basket, ventilation) deadlines (contract renewal...). And especially a better way to take advantage of Internet technologies in managing customer relations and enhancing the maximum of client capital. The major challenge is to increase value and customer loyalty which is a primary objective of ROI (Return on Investment) in the CRM, to do this we must succeed in coupling marketing, sales and customer point of contact forces.

Key words: *CRM; e-CRM; Customer relation; customer loyalty; TIC*

Résumé :
La contribution du CRM à l'aboutissement d'une évaluation appropriée au client et adaptée à ses attentes : valeur ajouté du CRM au sein de l'entreprise. Les besoins des clients conditionnent l'offre, c'est la raison pour laquelle les dirigeants doivent tabler sur le processus CRM (Customer Relationship management) ou GRC (gestion de la relation client). Pour ce faire ce processus doit contenir comme lignes directrice des outils d'écoute et d'évaluation. Toutefois Les ambitions et les résultats attendus de l'ensemble des activités doivent faire l'objet phare des orientations des dirigeants.L'avantage du CRM c'est qu'il permet à l'entreprise de personnaliser la relation client, la meilleure connaissance des clients, de l'historique (panier moyen, ventilation) des échéances (renouvellement de contrat,…). Et surtout un meilleur moyen de tirer profit des technologies.L'enjeu majeur du CR M est l'augmentation de la valeur et la fidélisation du client qui sont deux éléments primordiaux de retour sur investissement, pour ce faire il faut parvenir à coupler marketing, forces de vente et point de contact client.

Mots clés : *CRM – e-CRM - GRC- CRM- Relation client – Fidélisation des clients – TIC*

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Introduction

Increased competition led large retailers to seek ways to gain a competitive advantage allowing them to ensure growth and sustainability. Thus businesses in the retail industry focus on the quality of the customer relationship. This can include improved customer information, interaction with the sales force and quality of the provided service. This position refers to the notion of relational marketing that gathers, According to DJ Kim, DL Ferrin, HR Rao, 2008[1], "All activities aimed at the establishment, development and maintenance of Success.

In this regard, technological progress represents an opportunity for achieving these objectives. We are now witnessing an abundant supply of solutions called "Customer Relationship Management" which concern all companies operating in the field, hence the interest of focusing their activity on their clients.

Today the concept of CRM gains a stronger foothold in companies. Indeed, it has profoundly changed the practices and theories of marketing because the concept of CRM demonstrates a willingness of companies to no longer be limited to short-term one-off transactions (buy / sell) and to focus more on building customer relationships over the long term (business or consumer).

Today, global companies are increasingly moving towards a customer-centric organization, depending on the current structure of product lines or geographic divisions.

Peelen and Al. (2006)[2] argue that ICT indeed support the Customer Relationship Management strategies defined by organizations as they facilitate contact between customers and agents from different departments in the company via Internet, telephone or even face-to-face. Also, CRM must be integrated into the existing information system in the organization, giving a prominent place to the Information Systems Department that must support all of the CRM-related processes.

For Benavent and Villarmois (2006)[3], CRM would be a specific information system for solution providers. Whereas for practitioners, it would be more a response to the following problem: how to establish a lasting relationship with customers?

I. Customer relationship

1. Customer-oriented company

At the level of a brand organized in a traditional way, the direct involvement of the customer relationship is divided into several functions: from marketing to billing, through sales and quality control. The customer thus approaches the brand through multiple points of contact. The latter do not always give information through the same channels, the management of the customer relationship is subdivided, giving rise to confusion, missed opportunities and a lack of responsiveness to changing needs. Conversely, the transversal approach allows to manage all functions relating to the client in an integrated way, which is, as a process. By managing all customer processes in a coordinated way, companies improve the corporate client interface, making it transparent and enabling them to stay in touch with the customer through a single point of contact. This approach favors the development of true partnerships, in contrast to the fragmentation by departments, which does not allow the necessary flexibility.

1.1. Evolution and importance of customer relationship

The history of customer relationship began in the sixties and can be summarized in five major eras corresponding to different types of relationships between different actors:

The era of the "King Supplier"

During the 1950s and 1960s, supply declined and competition became weaker. The customer was the only one to take advantage of this shortage situation as long as he had the power to buy from a supplier who delivered to him when he could and whenever he wanted. For example, a customer wishing to buy an automobile may defer the receipt on an X date.

However, it was always considered that the customer was not demanding. The reality is different; He could not afford it.

The era of the "commercial conquistador"

By 1965, most companies, mastered their industrial manufacturing and sought to develop by aiming to conquer many customers and gain market share. Their goal was to find numerous outlets for their offer: sell everywhere as long as the customer is open to innovation, curious and eager to try. He took from the supplier number 1 who came to see him with new products.

The era of the "hero product"

From 1975, the competition has been more intense and customers have become more demanding. Companies learned to differentiate products, segment their offerings and make them more attractive to customers looking for variety. The segmentation of supply went hand in hand with innovation. The consumer is delighted with this plethora of choices. He overconsumed with appetite and let himself be seduced by advertising mirages. Image creation became the primary goal of any brand.

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[1] DJ Kim, DL Ferrin, HR Rao « A trust-based consumer decision-making model in electronic commerce: The role of trust, perceived risk, and their antecedents,2008

[2] Idem Peelen et a., (2006)

[3] Benavent, C., DE LA Villarmois, O., (2006) « CRM, apprentissage et contrôle organisationnel », Journal of Information Systems and Technology Management, Vol.3, N2, p.193-210

In the mid-1980s, competitors communicated more, which led to an evolution of communication. Despite increasing sharpening of segmentation, adjusted positioning, customers are less sensitive and less durable.

The era of the “King Client”

Beginning in the 1990s, the tension of global competition and international outsourcing caused certain costs to collapse and, by the same token, price. At the same time, the evolution of communication and the slowdown of growth in the industrialized countries, led to the evolution of the purchasing habits of the customer. In addition, he plows from one supplier to another with the sole purpose: obtaining better advantages.

The era of “Partnership and Loyalty”

The 2000s were marked by the emergence of new customer behaviors. The strengthening of links with certain suppliers, the expectation of proactivity and creativity and the purchase of mimetics were developing. These expectations were crowned by the ultimate goal: customer loyalty in order to build lasting and balanced relationships.

By managing customer relationship as a process, companies are able to:

- Define specific responsibilities related to customer relationship.
- Focus on the results that customers expect and not on the internal objectives of the departments.
- Measure customer satisfaction in order to continuously improve to strengthen the relationship with them.

The CRM is structured around four major axes:

- Better understand the client’s needs.
- Segment the client portfolio in order to identify the ones that are likely to yield a permanently profitable relationship.
- Understand the advantages and challenges of information and communication technologies (ICTs) and organize business processes specifically to meet customer needs.
- Learn to know more about the client: listen to the customer. Although this recommendation has been recurring for some 20 years, little progress has been made in this area. Companies did not benefit from this because of the lack of interest or motivation, as they were too focused on their internal organization (functions, hierarchy ...) to take full account of the customer relationship and be able to define precisely his expectations.

To perfectly pinpoint the requirements of their customers, retailers will have to shape their organization and open up to the outside world, creating integrated processes and bridges between departments and departments that will allow them to determine the precise profile of their customers.

This profile is essential for managing customer relationship effectively. With the help of it, the company can understand the exact nature of its relationship with the customer and define what he expects from the company today and what he will expect tomorrow. The profile also allows executives to develop the relationship by aligning and coordinating all processes related to customer management, instead of advancing discontinuously, department by department.

1.2. Principles of customer relationship

There are many ways of giving a definition of a client from the point of view of the author or from the point of view of the customer. It is very difficult to give a precise definition of what a customer is for a company. Each company carries out its own client typology. On the other hand, customer relationship management seems to be a transversal concept for companies. That said, a valid definition of customer relationship management would be to capture and retain customers through the use of real-time technologies. But we could just as well define it by saying that it is a strategy used to capitalize as much information as possible on the needs and attitudes of the customers in order to develop with them a lasting relationship.

However, there are concepts to which all types of customer relationship management systems respond:

 Client strategy: seeks to optimize relationships between the client and four players throughout the company: suppliers, partners, prospect, and employee.

The optimization of these relationships led to the emergence of the notion of Customer Interaction Management (CIM). It’s about a:

- Customer- company-supplier optimization: the company becomes a relational bridge between the supplier and its customer in particular in the context of failing products.
- Customer-company-partner optimization: this is the management of the customer through the monitoring of the partner (s) of the company entering into relation with his client. This aspect of management covers a much wider area than the exchange of information between the company and the partners.
- Customer-company-prospect optimization: indeed, the best advertising used for the company is its own customers. Then, why not seek to prospect through

their intermediary.

- Customer-company-employee optimization. The main task of the employees is to meet the needs of the customers rather than maintaining regular and direct relationships with them and to build a true relationship of trust.

- Customer knowledge

Indeed, if the customer is considered as a simple actor who buys, the objective of the company will be to retain this buyer by providing him with as many complementary services as possible to satisfy him on the one hand, and on the other hand, to differentiate itself from competition.

- Quality of service to customers and communication with customers

Customer relationship management projects differ according to their size, the chosen integrator or even the company's culture. However, the notions around which the strategy is articulated are often identical. These concepts are: the traceability of client elements; Responsiveness to customer expectations; Proactivity in the relations with the client and the management of the customer relationship.

Christian Michon, Jean-Claude Andreani, Olivier Badot, GanaëlBascoul[4](2010) Managing the relationship is based on the following principles:

- The mutuality of the benefits of the relationship corresponding to one of the four pillars of relational marketing.
- Planning implementation: -CRM helps companies know the cycles of their customers and meet at the time their needs.
- The full role: setting up a CRM is an opportunity to develop communication activities.
- Means merits: -If the implementation of a CRM approach is accompanied almost always by the operationalization of dedicated information systems. However, it is essential to remind that CRM is primarily a business strategy
- Flexibility: - The company can implement a custom process to the relationship based on the identification and anticipation of the customer's specificities in order to offer personalized service and greater value.
- **Implementation of a customer orientation strategy**

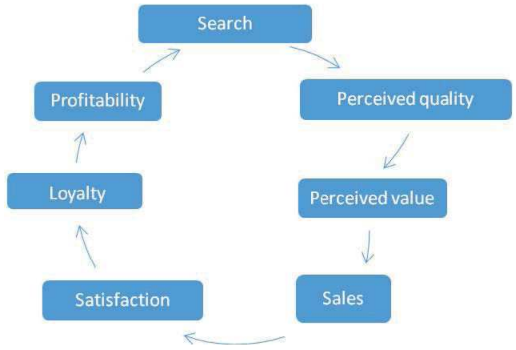
A company is called "customer-oriented" when it is strongly engaged in the following three areas: in the generation of "market intelligence", that is, the discovery of the current and future needs of consumers and the exogenous factors affecting them (regulation, competition, technology, ect.); In the dissemination of this market intelligence within the organization; In the response of the organization to this market intelligence allowing it to adapt to new environmental conditions (Saras D. Sarasvathy[5]). Such a strategic approach generates superior performance for the company, both in terms of profitability and sales growth. Beyond the performance of the company, this strategy has important consequences for customer satisfaction and loyalty (retention, recommendation), and on commitment and mobilization of staff.

Daniel Coté (2009)[6] presented a model for the implementation of a client-oriented strategy that is integrated in the global approach beyond functional approaches (mainly focused on marketing and human resources management). Daniel believes that loyalty is a leadership philosophy that promotes mutually beneficial management of the stakeholder relationship. Loyalty must be integrated into the company's core strategy. It consists in giving primacy to principles and relationships, by putting in place practices that require fundamental changes by the company. The author adds that it is impossible to gain the loyalty of its customers without obtaining that of its employees, which requires a long-term vision where one must know how to deserve their trust. The construction of a loyal customer base cannot therefore be done at the margin. The entire business system should be built around the loyalty of the customer.

2. Loyalty, a crucial aspect of customer relationship

2.1. Ensuring Customer Satisfaction

Loyal customers generate more sales than unplanned customers. Not only do they buy more and more often, but the brand has no interest in investing in marketing to seduce them. In spite of these brilliant advantages, several brands always favor the assimilation of new customers over loyalty.



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[4] Christian Michon, Jean-Claude Andréani, Olivier Badot, GanaëlBascoul :Le Marketeur: Fondements et nouveautés du marketing 2010

[5] Saras D. Sarasvathy,Effectuation: Elements of Entrepreneurial Expertise 2009

[6] Daniel Coté. (2009), « Comment implanter une orientation client ? », Revue Gestion, vol 33, p :71-79.

[7] DV Caetano - 2014 - estudogeral.sib.uc.pt O contributo das técnicas de marketing digital para a performance das organizações

o Loyalty:

It is essential for a brand to gain new customers and keep them, hence the importance of sustaining an existing relationship

o Profitability:

For a customer we can say that he is profitable at the time that his purchases bring to the brand more than it costs to keep him.

Loyalty is an attachment, a constant of the relationship in time. A faithful customer renews his purchase periodically. Attitudes of loyalty are expressed in several ways and coincide with a variable intensity:

- The regular customer is of a lukewarm loyalty; he buys from time to time, he has no reason to change, as he has no reason to remain loyal;
- The regular customer buys regularly from his supplier; he assigns a significant portion of his budget for a type of purchase.
- The faithful customer makes periodic purchases and has a lasting relationship. He devotes a very large share of its overall budget.

2.2. The forms of loyalty

According to Moati and Corcos (2005), three forms of loyalty can be identified:

- The chosen loyalty, it results from the coherence between the desire and the act. It is then the consequence of the client's choice to maintain the relationship. This promise can be based on satisfaction with the offer, the psychological attachment of the supplier, and the trust that has developed between the parties.
- Inertia, it refers to repeated purchases that are the result of habits. In this case, the persistence of the link may be the product of a routine behavior or a high risk aversion.
- Locking.

To get a precise profile of their clientele, companies strive to no longer consider it as a whole. They mobilize their resources to reach ever narrower customer segments, to the individual, to the market of one (a customer, a market).

Today, thanks to ICT and new processes, they can address these sharp segments in a profitable way. That is why managers expect an increase in demand for "tailor-made" products and services. Most also believe that this individualized approach is an essential element in the client's seduction process. On the other hand, only a minority of firms have the resources, the culture or the capacity to put this strategy into practice. As a result, standardization of supply is still relevant. A number of companies are currently turning to strategies that combine mass marketing methods with targeted practices to establish a privileged relationship with each client.

All these new ideas are not yet applied by different vectors, such as the sales force, which usually collects information about the customer for companies. Currently, the process relies on the sales force. However, IT investments aiming to develop customer relationship are expected to grow significantly, particularly with regard to identification and customization. Indeed, companies surveyed, believe that the role of the Internet and all of ICT, in the process of collecting customer information is becoming preponderant. This breakthrough of ICT does not mean that companies abandon traditional methods.

II. CRM projects

1. Rise of CRM

Customer Relationship Management (CRM) is often assimilated to relational marketing or as an application of relational marketing. McGraw (2013)[8] argues that the concepts of one-to-one marketing and CRM are similar and are used interchangeably in literature, even if the procedures of implementation are different. The latter gives the following definition of CRM: CRM represents the values and strategies of relationship marketing, in particular the relationship with customers, transformed into practical applications. "

The acceptance and the popularity of relational marketing rely heavily on the speed of diffusion and development of ICTs (B Nguyen, DS Mutum, 2012)[9]. Among these technologies are CRM and its applications. The term CRM appeared at the end of the 1990s and would be the work of Tom Siebel, Chairman of Siebel Group, a CRM solution provider today bought by Oracle.

2. Forms of CRM

Several authors have identified three categories of CRM:

- Operational CRM;
- Analytical CRM
- Collaborative CRM

2.1. Operational CRM

We then mention that Operational CRM is based on the daily management of the relationship with the customer. It then combines the different channels of interaction between the company and its customers by providing information for marketing, sales and all departments.

Operational CRM is a combination of processes and technologies that help improve the effectiveness of day-to-day relationships with the client. It brings together all the channels through which the players in the customer relationship interact. Operational

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[8] McGraw-Hill Higher Education, Service management: Operations, strategy, information technology J Fitzsimmons, M Fitzsimmons - 2013

[9] B Nguyen, DS MutumA review of customer relationship management: successes, advances, pitfalls and futures, 2012

CRM technologies represent the company's direct interface with its clientele, providing easy access to information and the ability to discuss issues with human beings rather than with an electronic response system.

2.2. Analytical CRM

The analytical CRM includes: understanding customer and segmentation analysis, évolution of dashboards to analyze profitability, calculation of customer value and Life Time Value, predictive scores, marketing applications with marketing databases, Campaign management and relationship optimization.

2.3. Collaborative CRM

Collaborative CRM, meanwhile, manages all interactions between the company and its customers e-mails, face to face discussions, etc.), according to V Liljander, P Polsa, K Forsberg (2007), collaborative CRM aims to improve communication and Internal coordination using technologies that ensure the coordination of the activities and thus allow to have an integrated vision of the customer but also external thanks to technologies that facilitate and develop direct interactions with the customer.

Collaborative CRM offers the advantage of setting up a real one-to-one marketing strategy (HS Kim, YG Kim, 2009), but also to clarify customer needs and respond to them more quickly and fairly.

2.4. Datamining:

The development of quality and the reduction of time available for analysis lead to the use of inductive methods to help find useful relationships between variables, but without resorting to prior hypotheses about the relationships that may exist. More precisely, these relationships influence the strategy and operations of the company and are ultimately able to contribute to the achievement of objectives.

2.5. The data warehouse:

There are several definitions of a data warehouse. According to Jallat et al (2007), a data warehouse is an environment:

- Intended to support management information systems, without affecting operational systems;
- Housing data with which it is possible to draw up a clear and logical history of the organization;
- Providing users with fast, convenient access to information to help them make decisions.

2.6. Customer relationship and segmentation

Segmentation is a process of analysis that contributes to the formulation of a marketing strategy. It aims to move closer to customer groups in a differentiated way in order to increase their satisfaction, retain them and encourage them to buy more from the supplier. From the perspective of the CRM, it consists in developing offers for each segment.

2.7. Analysis of loyalty actions

A distinction should be made between retention and development actions:

- Analysis of retention actions: loyalty primarily aims at keeping clients, a goal that professionals call "retention".
- Analysis of development actions: A cross-selling involves selling products to customers who already buy at least one other. During the development phase of the customer relationship, this process clearly contributes to prolonging and deepening the relationship.

3. The CRM Project: a need for Decisive Factors

A consensus emerges in the literature: project managers focus too much on the technical aspect of the CRM project and are not aware of its strategic implications (BLIGH, Turk 2004), Light (2003). Strategic alignment is a line of research in information systems that emerged when it became apparent that some organizations were implementing information systems that did not fully support the strategy.

Several researches have therefore set themselves the goal of arriving at methodologies designed to deploy information technologies as well as possible in order to fulfill the aims of the organization.

Major CRM projects occur in most of cases in the event of a change in corporate strategy. In our opinion, the analytical approach provides a framework for reflection which leads the managers to ask questions that go beyond the purely technical framework of the project. The social approach, on the other hand, allows the study of the human problems of the CRM project.

Alignment therefore makes it possible to consider the failure of CRM projects at the strategic level, which led us to think about the key success factors of CRM project integration.

To our knowledge, there is no model dealing with the key factors of success of CRM, as well as the main models that approach this point of view.

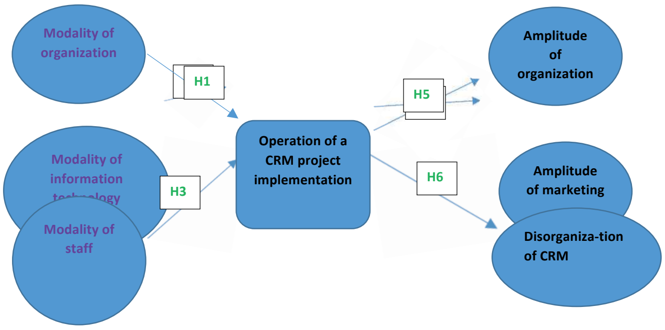
It should be noted that the causes of failure to introduce a CRM project are multiple. Indeed: The first obstacle encountered is resistance to change, accompanied by the incapability to count a return on investment, the inadequate allocation of key players internally, the size of the CRM budget, and the difficulty to evaluate the benefits of such a solution.

Today, brands have the means to place their customers at the heart of their organization. This explains for most of them a thought about its activity, its movements, personal, its technological means, information systems, networks, telecommunications ... on the other hand, an authentic methodology must be respected in order to prevent the important causes of failure, that is to say that a CRM strategy must not stifle the capitalization of customer perception that seeks to better know the customer by handling the datamining. Then, there is the management of access to the customer that leads the divergent channels of interaction with the client and the integration of the client processes with the existing information systems and finally the follow-up as well as the customer loyalty.

The risk-based approach is used to provide an appropriate analysis framework because it allows to consider contingency factors specific to each brand. Each brand has its own strategic, cultural, organizational and technical characteristics which the project team must take into account both to ensure appropriate management and to create a system that makes a of competitive advantage.

After reading these different articles, they allowed us to conclude that it is necessary to have a set of technological, managerial and human conditions as shown in the figure below:

Brand's environment


Modality of organization
H1
Modality of information technology
H3
Modality of staff
Operation of a CRM project implementation
H5
H6
Amplitude of organization
Amplitude of marketing
Disorganiza-tion of CRM

III. Qualitative methodology and results analysis

The first step of our work is to design and administer an interview guide to collect opinions of professionals in the field and compare the initial research model to their views. This confrontation will bring a different perspective to the base model.

A relevant methodology allows accessing, recording and analyzing of situations based on representations and observations. It is built to answer a specific theoretical object and adapts to the specificities of the contexts studied. The methodology is translated into a research strategy or, in other words, "a structured approach whose outcome is a representation and explanation of a complex phenomenon".

The methodology is defined as the study of the proper use of different methods. It consists of questioning their adaptation to the object of research and to the objectives pursued.

1. Hypotheses :

H1: Some groups of CRM means and organization modalities establish the benefits that explain the success of the integration of the CRM project.

H2: Some groups of CRM resources and technological capacity establish advantages that explain the success of the integration of the CRM project.

H3: Some groups of CRM means and modality of human resources establish advantages that explain the success of the integration of the CRM project

H4: Technological, organizational and human resources modalities combined with an operating CRM implementation have a positive impact on the effectiveness of the marketing modality.

H5: Technological, organizational and human resources combined with an operating CRM implementation have a positive impact on the brand

H6: Technological, organizational and human resources modalities combined with an operating CRM implantation may be the source of the project failure

2. Objectives of the interview guide

The aim of this guide is to see if companies, through their managers, perceive the importance of meeting certain preconditions for setting up CRM, also if the respect of a number of steps is necessary for the success of implementation and what are their expectations in relation to this project which reflects a strong commitment of the company.

Otherwise, this guide aims to describe the representations of the phenomenon of Customer Relationship Management from a professional point of view of the field. The main goals of this interview guide are:

☐ Describe their representations of the phenomenon

☐ Compare these representations

☐ Recording and analyzing the situations from representations and observations

It is therefore a transversal interview guide with an exploratory aim. It forms part of the confirmation or information of the fundamental axes of the research construct. It is therefore necessary to clarify the approach.

3. Methodology of the interview guide

Our guide therefore aims to test the construct.

So we had to find common questions for company managers in order to be able to confront the points of view. Moreover, not wanting to take the risk of influencing the answers of the professionals by submitting too many precise questions on the research model, we have designed an interview guide containing a total of thirteen questions relating to the three main axes of the Research, but indirectly.

4. Population and administration of the interview guide

The choice of the population was made according to several criteria. First, we needed companies in the retail sector, then we selected three brands that have already established a CRM approach or who have an interest in this subject and they reflect on it. In fact, the first retailor “Marjane” has fully integrated the CRM project, the second “AswakAssalam” and the third “Label’vie” has not yet integrated the project but are in the reflection phase to integrate CRMs.
We have opted for directional interview guide whose advantages are:
- A very safe interview for the researcher;
- He arrives with a ready-made interview guide;
- Each question is asked in a pre-established order, and the researcher has only to read his questions and check the boxes.

5. Construction of the maintenance guide

The interview guide has four parts:

Part 1: Company Overview

It is about knowing the main activity of the company, the product marketed, also the size of the company and its geographical extent.

Part 2: Adoption of IT by the company.

In this section, we try to evaluate the degree of integration of IT in the companies questioned and the description of their experience in this field.

Part 3: Customer Relationship Management

The objective of this section is to clarify whether the company is aware of the importance of the orientation of its marketing from a transactional perspective to a relational perspective. Also, if the company is in the process of implementing a CRM project and if so to what context.

6. Results analysis of the exploratory study

The analysis of the results of the exploratory study will focus on validating or rejecting the key ideas of our initial research model. Thus, we identify nine key variables:

Usage level of IT

	Currently exploited	**Planned to be exploited**	**TOTAL**
E-mailing	3	0	3
EDI	2	1	3
Internet	3	0	3
Intranet	2	1	3
Extranet	2	1	3
CRM	2	1	3
ERP	2	1	3
BI	2	1	3
AGGREGATE	**18**	**6**	**24**

Among the three cases studied, two companies which are AswakAssalam and Marjane, are fairly advanced in the use of IT, from simple emails to Business Intelligence. However, this is not the case for Label’vie that simply uses the Internet and e-mailing, but considering the use of other applications in the future.

Usage level and technological infrastructure

	Strongly disagree	Disagree	Neutral	Agree	Strongly agree	TOTAL
Technological infrastructure	0	1	0	0	2	3
Level of technological usage	0	1	0	0	2	3
Competency	0	0	2	1	0	3
Aggregate	**0**	**2**	**2**	**1**	**4**	**9**

AswakAssalam and Marjane have considerable infrastructure and the level of technology usage is fairly advanced, while Label’Vie is considering an implementation too

Interest in IT usage

Interests in IT exploitation	Nb. of Cit.	Freq.
Yes	3	100%
No	0	0.0%
TOTAL	3	100%

All the interviewees confirmed that the exploitation of IT brings enormous interest to their companies.

Benefits of IT and CR

Values	Yes
client	3
Retention	3
gain	3
Expectations	2
Winner	2
Best	2
Better	2
Anticipate	1
Money	1
Confidence	1
Comfort	1
Know	1
Listening	1
Opportunity	1
Accuracy	1
Speed	1
Relationship	1
Answer	1
Satisfy	1
Time	1
Traceability	1
TOTAL	31

By crossing two questions, one related to the interest in IT Operations and another related to the meaning of the term “Customer Relationship”, the surveyed companies’ responses have allowed to identify some key terms including the common ones between those displayed in the chart above while having mainly these three words repeated in all responses : “Customer”, “loyalty” and “Gain”

Customer focus

	Strongly disagree	Disagree	Neutral	Agree	Strongly agree	TOTAL
Importance of clients’ needs	0	0	0	0	3	**3**
Tradi. Versus electr. transactions	0	2	1	0	0	**3**
Use of internet by clients	0	0	2	1	0	**3**
Clients’ demands	0	0	0	2	1	**3**
Aggregate	**0**	**2**	**3**	**3**	**4**	**12**

All respondents stated that electronic transactions are well perceived except in some cases for the answer of AswakAssalam, but they argue that not necessarily all customers use the Internet for commercial transactions. As for the last “Clients’ demands” variable, it enabled us to verify and validate the answer linked to the importance of client needs for business.

CRM adoption phase

Software importance Ideal CRM model	Strongly disagree	Disagree	Neutral	Agree	Strongly agree	TOTAL
Strongly disagree	1	0	0	0	0	**1**
Disagree	0	2	0	0	0	**2**
Neutral	0	0	0	0	0	**0**
Agree	0	0	0	0	0	**0**
Strongly agree	0	0	0	0	0	**0**
TOTAL	**1**	**2**	**0**	**0**	**0**	3

Among the companies surveyed, Aswak Assalam and Marjane say their CRM project has already been adopted which is not the case for Label’Vie, which is confirming intentions to implement it

Ideal model for CRM implementation and importance of software

Importance Logiciels Modèleidéal CRM	Strongly disagree	Disagree	Neutral	Agree	Strongly agree	TOTAL
Strongly disagree	1	0	0	0	0	**1**
Disagree	0	2	0	0	0	**2**
Neutral	0	0	0	0	0	**0**
Agree	0	0	0	0	0	**0**
Strongly agree	0	0	0	0	0	**0**
TOTAL	**1**	**2**	**0**	**0**	**0**	3

By crossing this time the question related to the importance of software during the implementation of CRM and that related to the existence of an ideal model of the introduction of CRM, all respondents agreed that the choice of software is not an automatic guarantee of a successful implementation of CRM. However, the use of a predefined Label’Vie CRM model, given their lack of experience in the field, is for operating an ideal model; For the other two companies, they hesitate in their affirmation by contenting themselves with choosing the answer “neutra” while signifying that a ready-to-wear model does not exist but they can use it as a roadmap to illuminate their path toward a CRM implementation.

Role of top management

Managers’ role	Nb. Of Cit.	Freq.
Strongly disagree	0	0.0%
Disagree	0	0.0%
Neutral	0	0.0%
Agree	0	0.0%
Strongly agree	3	100%
TOTAL	**3**	**100%**

Average = 5.00 Standard deviation = 0.00

All respondents confirm that the role of leaders in the technological engagement process of enterprises such as CRM projects is extremely crucial.

Purposes of CRM use

	Strongly disagree	Disagree	Neutral	Agree	Strongly agree	TOTAL
CRM-performance	0	0	0	0	3	3
CRM- sales	0	1	0	1	1	3
CRM-information exchange	0	0	0	2	1	3
CRM-Communication	0	0	0	2	1	3
Aggregate	**0**	**1**	**0**	**5**	**6**	**12**

Respondents answered unanimously that CRM is used for the purpose of information exchange, communication and seeking performance. There was a small difference of opinion regarding the use of CRMs for sales’ purposes. Two respondents say that they are definitely looking for sales’ goals through this company’s commitment, except for one respondent seeing the gains in sales of CRM implementation not as an aim in itself but rather an improvement of customer relationship, confidence and loyalty that is sought and the gains in sales are only a consequence to these outcomes.

CONCLUSION

CRM is a mix of functions taking into consideration the customer's expectations by integrating people skills, processes and technologies to improve or even optimize relationships with customers of the brand by succeeding in retaining the customer, and above all to reduce the costs and increase its profitability. To do so, it is necessary to take into consideration the following points:

- Evaluation and analysis of all data collected relating to the client.
- Customer loyalty to a brand or company.
- Profitable customer retention on a particular segment.
- Measurement of customer satisfaction.
- Actions towards customer service based on measured satisfaction.

CRM is differently adopted from a sector of activity to another. Given the relatively high number of customers, banks, airlines companies, insurance companies and telemarketers were the first to focus on the first CRM solutions, to proceed after that to the automotive industry and retail. The realization of this study was made by implementing a CRM solution while trying not to be limited to the specific needs of a company in a particular sector.

However, the CRM does not include a general representation of the concept as it is a compilation of tools and solutions that are not directly related to the company's strategy. So, a call into question for its strategy is important to embark on a process based on complex systems. We should also keep in mind that CRM is considered for some as a simple technological application of relationship marketing while others consider it as a true customer-oriented business strategy aligned with the overall strategy of the organization.

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The value generation process in art restoration companies

Abstract

The aim of the paper is twofold: 1) to propose a conceptual framework toanalyze the value generation process of culture-drivenenterprisesby making use of the Ferrero (2013) value creation model and of the Grönroos and Gummerus (2014) service logic (SL) approach to the value generation model and suitably adapting them to culture-driven enterprises and 2) to test such a model on the art restoration companies of the province of Pesaro and Urbino, Italy.

The study adopted a qualitative methodology, an exploratory-descriptive approach, and the case study method because of the complex phenomenon under examination. The specific case study was carried out by means of direct interviews with the 31 art entrepreneur-restorers who work in the province of Pesaro and Urbino, Italy.

The paper provides empirical insights about how the companies either create or co-create value for clients in six phases of the value generation process: value design, production, assessment, communication, delivery, and the last phase in which the client creates value alone or with stakeholders. The inability to fully exploit the potential for value generation by these companies is mainly linked to the structural limitations of micro enterprises, to the restorers' lack of managerial skills and to the reduction of orders.

Althougha single case was investigated the present work offers a preliminary theoretical contribution which is useful for perfecting the conceptual framework and applying it to a larger sample of restorers and preliminary implications to increase value for clients, enterprises and stakeholders.

The study contributes to expand the understanding of a strategic sector for the conservation and valorization of cultural heritage which was neglected by the Cultural and Heritage Management literature.

Key words: art restoration enterprises; value; cultural heritage management; value creation andvalue co-creation; service logic; culture-driven enterprises.

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1. Introduction: the role of art restoration companies in the cultural heritage management

Heritage conservation can be defined as the discipline “devoted to the preservation of cultural property for the future” (Muños-Viñas, 2005, p.13) whereas valorization of cultural heritage consists in creating value from the very usage of said heritage by and for the enjoyment of cultural consumers, cultural organizations, and stakeholders, with full respect for the integrity of that cultural property (Kotler, Kotler, 1998; Colbert, 2000; Chong, 2002).

Enterprises that engage in the conservation and restoration of works of art represent a special category of *for profit* service companies (Norman, 1985; Lovelock, Wirtz, 2007) that have a cultural and social purpose (Colbert, 2000; Chong, 2002) because their objective is to preserve the quality of cultural heritage to ensure its fruition. Therefore, in some ways they are similar to service enterprises and to cultural organizations, and they could be defined as *culture-driven* enterprises. In particular, art restoration enterprises preserve the quality of cultural assets and create value for customers, themselves, and stakeholders (residents, tourists, schools, businesses, etc.).

According to the marketing literature, value is a subjective and multidimensional concept, and it emerges from an overall assessment of the utility of a consumer product or service based on the perception of what one receives (*get*) and what one gives (*give*) (Zeithaml, 1988) in the medium-to-long term (Grönroos, 1990; Gummesson, 1999). In particular, the benefits (*get*) can be functional, symbolic, hedonistic, aesthetic, and emotional while the sacrifices (*give*) can be financial or measured in terms of time spent collecting information or in physically obtaining the service, etc.

There are three approaches that can be followed in heritage conservation: material-based, values-based, and living heritage (Poulios, 2014). A material-based approach is focused on the preservation of the material/fabric, is an expert-driven approach, and it limits use to protection. A values-based approach focuses on the values that society, consisting of various stakeholder groups, ascribes to heritage, is an expert-driven approach even though community is involved, and adjusts use to protection (Mason, 2002; Mason, Avrami, 2002; de la Torre, 2005). According to the living heritage approach the core community is seen as an inseparable part of heritage so an appropriate equilibrium is sought between use and protection, with an emphasis on use, and this approach is community-driven (Wijesuriya, 2005; Poulios, 2011; 2014). Although these approaches appeared in different time periods, they are all applicable today and the choice of the “appropriate” approach depends on the specific conditions of the heritage place (Polious, 2014).

Recent literature on managing cultural goods is mostly in line with the values-based approach.That is to say, that it attempts to “resolve” the trade-off between use and preservation by shifting the focus onto use, but without compromising the conservation of the cultural property (Montella, 2009).

Barile and Saviano (2014) propose a model which integrates the service-based systems perspective and the Viable-Systems-Approach (VSA) to build a network organization for the effective and sustainable conservation and valorization of cultural heritage (Mitchell, Rössler, Tricaud 2009; Montella, 2009; Barile *et al*., 2012). In particular, the Authors argue that “to implement an effective co-creation, actors should be linked as resource integrators within a network relationship and share a governance approach inspired by cooperating principles as postulated by the VSA consonance model” (p. 58).

Conservation and valorization are essential activities because culture and cultural heritage are fundamental inputs for the creation of the identities and habits of individuals and communities (European Commission, 2007) are the object of cultural tourism(Boyd, 2002; Bonn *et al*., 2007; Poria *et al*., 2003; Timothy, Boyd, 2003; Richards, 2011; Richards, Wilson, 2006) and the key resources underlying competitivenessof countries (Florida, 2002; Throsby, 2008; Sacco; 2012).

There is a vast amount of literature onCultural Heritage Management (CHM) that has, until now, neglected the role played by strategic actors such as enterprisesfor the conservation and restoration of cultural goods.

There are only a few studies on art restoration enterprises located in Tuscany that have stressed the peculiarities of the sector (Lazzaretti, Cinti, 2001; Calamandrei, 2009), such as the very small size of the companies made up mainly by restorers alone, the strong specialization and the prevalence of manual work, the trust relationship forged with clients who are mainly public and local, and finally, the background of the restorers who, for the most part, have an undergraduate degree (artistic-humanistic background) and who have taken professional courses in art restoration.

The present paper aims to offer a contribution that might begin to fill this gap, by analyzing the value generation processof art restoration companies in the province of Pesaro and Urbino.

2. Objectives and Methodology

This research intends to answer the following questions:
(1) How is the value generation process of culture-driven enterprises characterized?
(2) What does the model suggest when applied to art restoration enterprises?

In order to answer the first research question, a model for the value generation process in culture-driven enterprises (Fig. 1; para. 3) has been developed and to answer the second research question the art restoration companies of the province of Pesaro and Urbino (Italy) were chosen a case study example because they represent strategic enterprises for the conservation and valorization of cultural heritage, but have so far been ignored by the CHM literature.

The research was conducted following a qualitative methodology, a descriptive-exploratory approach, and the case study method (Yin, 2009; Eisenhardt, Grebner, 2007; Tsang, 2013). The aim was to understand and describe a complex phenomenon which has, to date, been neglected by the extant managerial and marketing literature pertaining to the field of cultural heritage.

More specifically, a qualitative methodology seems suitable for this study because of its ability to provide a holistic view of the complex phenomenon in question. In fact, it makes it possible to obtain quality and in-depth information on the complex process of value generation under consideration, which is characterized by many components (phases, actors, etc.) and relationships between and among the components that constitute it. In addition, the study adopts a descriptive-exploratory approach which is particularly suitable for illustrating, for the first time, how a process such as this can be articulated within the managerial and marketing perspective.

The case study method (Yin, 2009; Eisenhardt, Grebner, 2007; Tsang, 2013) is considered appropriate for describing the process of value creation by art restoration enterprises and to this end, it makes use of direct and semi-structured interviews. These were conducted in the period from May to December of 2014, with the entrepreneur-restorers in art restoration enterprises (thirty-one, in all) registered with the Chamber of Commerce of the Province of Pesaro and Urbino, under the heading “activities for the conservation and restoration of works of art” In the interviews, which lasted an average of one and a half hours, we used as survey questions an outline of the issues to be addressed, that is, the six stages of the value creation process (see Fig. 1). In particular, we asked each restorer to describe the single phase of the proposed framework and to indicate all the actors involved. Where necessary, the interviewer asked for clarification or more information from the interviewee.

Before starting the survey, two pilot interviews were conducted in order to refine the interview outline. The interviews were recorded and transcribed and the data was analyzed in accordance with qualitative research methodology (Miles, Huberman, 1994).

The write-up was performed on the day following each interview and again once all of the data collection and data reduction (Miles, Huberman, 1994) had been carried out. In particular, a system of codes[1] was created and portions of text were assigned to the codes created. Later, the codes were placed in relation to each other, creating patterns that allowed data interpretation.

In order to enhance the reliability of the data and ensure greater authenticity, the text was coded by the researchers involved, going to the extent of conducting the so-called cross-reliability test (Miles, Huberman, 1994).

3. The value generation process of culture-driven enterprises

To understand the value generation process of art restoration enterprises, which are special service companies with profit and cultural purposes, the value generation process[2] of culture-driven enterprises (Fig. 1) has been developed. The proposed framework is based on the value creation model of Ferrero (2013) and that of Grönroos and Gummerus (2014) who take the service logic (SL) approach, and on concepts presented in the literature on value creation and value co-creation (Prahalad, Ramaswamy, 2004; Vargo, Lush, 2004; Vargo *et al*., 2008; Voima *et al*., 2010 among others) and on themanaging and marketing cultural goods

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[1] The main codes that were identified through data analysis, referred to the various phases of the proposed model, are as follows: restoration “core” service, consultancy, teaching, Superintendence, client, budget, Italian law for cultural heritage, partners such as construction companies, architects, engineer, co-design (phase 1); Inspector, Superintendence, collaboration, diagnostic tools, preventive conservation, skills, training courses, competitors in a negative light (phase 2); Superintendence certifies the quality of the restored goods, big restoration projects, not adequateprices, risks of damaging cultural goods (phase 3); reputation and professionalism of restorers, website and the importance of Internet, weak communication and sales & marketing skills, brand, absence of prestigious partners, weak value signals (phase 4); ability to listen and to manage relationships, visits by Inspectors, rare meetings in workshop with clients, bargaining position (phase 5); enjoyment of restored works by people, restorers are not involved in promotion with clients and other stakeholder, weak post restoration promotion in Italy (phase 6).

[2] The value generation process is defined as follows: “a process that includes actions by several actors – service provider, customer and others – that ultimately leads to value for the customer (Grönroos, Gummerus, 2014, p. 208).

(Kotler, Kotler, 1998; Colbert, 2000; Chong, 2000 among others).

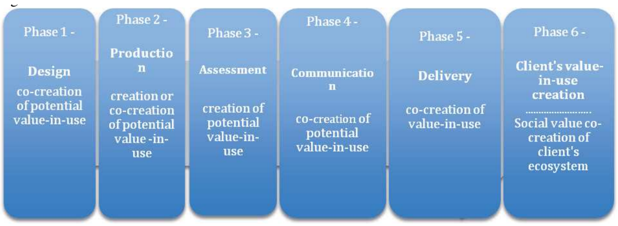
According to Ferrero's value creation model (2013), value is created or co-created for and with the customer, through the following phases: design, production, communication, delivery, assessment. According to Grönroos and Gummerus (2014), value is created or co-created in the design, development, production and delivery phases and in three spheres: the service provider sphere (alone, they offer potential value-in-use), the client sphere (alone, they create independent value-in-use or social value within their ecosystems), and the joint provider-client sphere (jointly, they co-create value-in-use).

Value emerges when the offer is consumed and experienced by the consumer (Prahalad, Ramaswamy, 2004; Heinonen et al., 2010; Voima *et al*., 2010; Jafari *et al*., 2013; among others) that is client is always the co-creator of value (Vargo, Lush, 2008; Grönroos, Gummerus, 2014) and is generated, in part, by the interactions of providers and clients (joint sphere), in the medium-long term (Grönroos, 1990; Prahalad, Ramaswamy, 2004; Greer *et al*.; 2016). Suppliers are called upon to facilitate the process of creation and enjoyment of the value (Vargo, Lush, 2004; Lush *et al*., 2007; Grönroos, Gummerus, 2014), by managing the platform of interactions and integrating the applied resources (service) with the competences and resources of the beneficiary before value is realized (Vargo *et al*., 2008; Lush, Vargo, 2014).

Moreover, within the perspective of a service ecosystem in which the providers, the service enterprises (including the employees), the clients, and the stakeholders are viewed as service partners, exchange relationships become more critical and the role of bonding and community become more important (Greer *et al*., 2016).

Drawing on these models and concepts, a conceptual framework for a value generation process in six phases of cultural-driven enterprises was suggested: in four of the phases (1, 2, 4, and 5) provider and client co-create value (joint spheres) and in the other two (3 and 6) a third party and the client each create value alone (Fig. 1). Therefore, value evolves over time during value creation and co-creation phases (as a cumulative process) and value spheres do not necessarily follow in a linear manner (Grönroos, Gummerus, 2014).

Figure 1 – Phases and actors in the value generation process of culture-driven enterprises according to the service logic


Phase 1 -
Design
co-creation of potential value-in-use
Phase 2 -
Production
creation or co-creation of potential value -in-use
Phase 3 -
Assessment
creation of potential value-in-use
Phase 4 -
Communication
co-creation of potential value-in-use
Phase 5 -
Delivery
co-creation of value-in-use
Phase 6 -
Client's value-in-use creation
Social value co-creation of client's ecosystem

Joint sphere: culture-driven enterprise, external agency like Superintendence in Italy and client	**Culture-driven enterprise sphere or joint sphere:** culture-driven enterprise alone or with other partner (e.g. other restorers, construction company, architect, etc.)	**Third party sphere:** external agency (e.g. Superintendence in Italy)	**Joint sphere:** culture-driven enterprise and client	**Joint sphere**: culture-driven enterprise and client	**Client sphere:** client alone and possibly client, cultural users, schools, local government, etc.

Source: our adaptation from Ferrero (2013) and Grönroos and Gummerus (2014).

The six phases of the model are described as follows:

*Phase 1 - Value design*means defining the value proposition of the culture-driven enterprise, that create greater differential value for the customer (Normann, Ramirez, 1995) while achieving profit and cultural objectives (Kotler, Kotler, 1998; Chong, 2000). This implies selecting the segments of clients (targetgroups) to serve (Ferrero, 2013), defining the offer (service design) must in order to provide the "core" service (e.g. restoration service), the "necessary" services (e.g. the restorer's skills, the diagnostic tools) without which it is not possible to provide the core service, and any "differentiation" services (e.g. teaching or consultancy activities of the restorer) that would expand and differentiate the main offer (Grönroos, 1990; 2008). Third, it is necessary to design how such services become available to the target, through: 1) the physical, informational, and economic accessibility of the offer, 2) the interactions between provider and client, and the interactions among clients,3) the active role of the client.

In this phase the external resources, skills, and networks need to be activated (Grönroos, 1990; Prahalad, Ramaswamy, 2004; Edvardsson *et al*., 2005). In culture-driven enterprises like art restoration companies,numerous actors generally co-create potential value-in-use (joint sphere) in the design phase; at the very least,they consist of the company, the client, and an "external agency" like the Superintendence in Italy.

Phase 2 - Value production means putting into practice what has beendesigned, and to this end, it is essential to exploit internal and external resources and skills by carrying out the required processes both inside and outside the company (Kotler *et al*. 2002; Anderson, Narus, 1999; Normann, Ramirez, 1995). For this purpose, culture-driven enterprises are required to develop internal expertise (through appropriate activities for the selection, training, incentivizing, etc. of personnel) and foster relationships with partners (e.g. other culture-driven enterprises) to deliver services in an effective and efficient way (Colbert, 2000; Kotler, Kotler, 2000), respecting both profit and cultural goals.

In this phase, there is co-creation of potential value-in-use (joint sphere) and the more expert the client is, the more he/she influences the co-creation of value.

Phase 3 -Value assessment involves evaluating the offered service and meeting the quality expectations of the customers, thus achieving full customer satisfaction (Ziethaml *et al*., 1991; Ferrero, 2013). Expectations with respect to a service are linked to the customer's expectations of quality, based on the promises made by the company, on word-of-mouth advertising from other customers, on industry standards, on needs, and on the experience of using the service. However, in culture-driven enterprises, service value assessment is made by a third party sphere. For example in Italy, the Superintendence of Cultural Goods which, by law, is called to express an opinion on such a sensitive matter as cultural heritage, thus contributing to creating potential value-in-use.

Phase 4 - Value communication means being able to communicate and allow clients and stakeholders (Superintendences, audiences watching the restored works in museums, etc.)to perceive the culture-driven enterprise's ability to create value and to develop an appropriate image of the company and its brand (Kotler, Kotler, 1998; Colbert, 2000). To this end, culture-driven companies may use various tools in the communication mix (advertising, promotions, public relations, website, etc.) and make use of "value signals" that affect customer perceptions (Ferrero, 2013). In the context of services, three types of value signals can help the client make assessments (Berry, Parasurman, 1992; Grönroos, 1990): 1) the conditions of the physical environment (e.g. temperature, cleanliness, etc.), work environment (aesthetic and functional features), and social aspects (appearance and behavior of the service staff, features of other clients); 2) communications that emphasize the tangible elements of the service, encourage word of mouth to advertise the positive experiences, give substance to the promises, and offer guarantees on the service outcome; and 3) price.In this phase, culture-driven enterprises mainly create potential value-in-use alone but, because of the advent of web 2.0, social media, and communication processes, they become co-creators of value with clients (joint sphere).

*Phase 5 - Value delivery*stands for*how* the value is effectively delivered to the client.

This means that accessibility must be guaranteed at the physical (e.g. easy to reach, parking, physical context), informational (e.g. available information on website) and economic (good pricing policy) levels(Grönroos, 1990). In addition, interactions with clients and interactions among clients themselves must be managed efficiently and effectively, as they are strategic for value co-creation. Finally, the clients should also be participants (e.g. art restoration enterprises allow clients and users to see the restoration work in progress).

To this end the role of front-office personnel becomes crucial (Kotler, Kotler, 1998; Colbert, 2000). Today interactions with clients are enabled by technological platforms through the Internet (Sawhney *et al*., 2005; Nambisan, Nambisan, 2008; Nambisan, Baron, 2009). In this phase there is value co-creation (joint sphere) as client interactions influence the value generation process, and especially, decisions about price.From these interactions, value can be co-created and knowledge and innovation generated (Tanev *et al*., 2010; Greer *et al*., 2016).

Phase 6 – Client's value-in-use creation and (eventual) social value co-creation means that

the client creates value-in-use alone, i.e., independently from the intervention of the culture-driven enterprise, and may co-create social value with other stakeholders (e.g. users, schools, public administration, tourism businesses, etc.) (Grönroos, Gummerus, 2014). The value that emerges for clients and final users when a service is consumed is strongly linked to the level of education (Bourgeon-Renault, 2000; McCarthy *et al*., 2004), sensitivity, and interest of the client/user. However, in this phase the value-in-use could be increased with initiatives that are not counterproductive to cultural heritage preservation, such as events to showcase the restored paintings/works of art. These initiatives may generate a greater number of opportunities for the cultural enrichment of clients, users (both residents and tourists), and/or school children, and they may increase in social and economic value for the local community by spurring additional tourism, restoration, employment, etc.

4. Findings: the value creation process in art restoration companies of Pesaro and Urbino (Italy)

The restorers interviewed owned very small business with an average of two employees with a background in the Arts; they are not yet well protected by Italian law (D. Lgs. N. 42/2004, the Code of Cultural heritage and Landscape) and are generally and commonly considered 'artisans' by most people. They have no mission or strategic purpose and mostly serve expert and local clients such as public administration entities (Municipalities), the Superintendence, or private clients, that contact the restorers directly. The restorers interviewed offer the basic "core" service (the restoration service) and only a few of them offer "differentiation" services such as teaching, consultancy, or decoration services. In order to implement any restoration service of cultural goods assigned directly or through a tender requires the preparation of a written project signed by an authorized restorer and approved by the Superintendent. In the case of architectural restoration, the project must be co-signed by an architect.

Generally, the restorer co-designs the service with the Superintendence, and the private or public client can only decide the available budget.

The restoration that requires more restorers (aggregated informally) are co-designed by them while the restoration included in larger projects, such as architectural ones for instance, are co-designed by a team of architects, engineers, construction companies, and Superintendence commissions (Superintendence for historical, artistic and ethno-anthropological heritage, and Superintendence for architectural heritage and landscape). Usually, the restoration project is submitted once the construction company has won the tender.

Producing the restoration service (phase 2)

Restorers provide the "core" service mainly alone, following the instructions of the Superintendence staff,and also in collaboration with other partners (other restores, construction companies, architects, etc.). An Inspector meets frequently with the restorer to see the work in progress, and together they decide how to proceed. The intensity of the collaboration with the Superintendence staff is closely tied to the latter's skills and interest in the cultural property to be restored.

Art restorers in Pesaro and Urbino work primarily by hand, endeavoring to follow a preventive conservation approach, so as to intervene as little as possible on cultural property. They use classic and inexpensive diagnostic tools (e.g. photography) and occasionally collaborate with specialized laboratories to perform scientific investigations (such as chemical analysis, UV testing, etc.) due to reduced volumes of work and relative budgets.

Generally the entrepreneur-restorer is proud of his/her skills perceived as the main strength of the business, however restorers' skills are not continually updated and expanded, as only about half of the respondents take training/refresher courses. This is mainly due to a lack of technical training courses being offered (e.g., courses for AutoCAD, laser technologies, etc.), and because it is believed that practice constitutes the best form of professional development.

It is quite common to perceive competitors in a negative light and they are seen as engaging in "unfair" competition, which constitutes an obstacle to collaboration in the sector. Nevertheless, restorers sometimes have to work together as a team and only few of them consider collaboration strategic for the business.

5.3. Assessing the restoration service (phase 3)

The Superintendence certifies the appropriateness of the intervention carried out in a written report on the proper execution of the work (on time, without litigation, etc.). This document guarantees the quality of work for the client and reduces any gap between expected quality and perceived quality of service on the clients. From the interviews there emerged the perception that nowadays, art restoration projects – particularly large ones overseen by construction companies - are not commissioned following precise and transparent criteria, are undertaken by restorers who are not always qualified, and are not given an adequate budget for the workload involved.If, for various reasons, the restoration is not performed correctly or is carried out by incompetent restorers, the cultural heritage can be damaged, even seriously.

Communication of the restoration service (phase 4)

As the reputation and professionalism of restorers are central to their being successful in the sector, the main communication tools used by them in the province of Pesaro and Urbino are word-of-mouth and business cards. Investment in the Web is still minimal (only five out of thirty-two restorers have created a website), even though the majority of respondents are aware of the importance of the role the Internet can play in this sector. Generally, the questionnaire respondents indicated that their principal weakness lies in the area of communication, but also in sales and marketing, particularly now that there is less available work.

Moreover, there is scarce awareness of the importance of investing in “value signals” like making the restoration workshop more comfortable and attractive, for example, or investing in a personal brand, or by collaborating with prestigious partners (e.g., participating in seminars at Universities, taking on leadership roles in local trade associations, etc.).

Delivery of the restoration service (phase 5)

As regards the delivery of the restoration service, although restorers believe they are able to listen to their clients and manage the relationships they have with them (perceived as their second greatest strength), none of them have created client databases, or used collected information collected to improve the service. While meetings with Superintendence inspectors are mandatory, the meetings held in the workshop are often decided by the client in proportion to his/her own interest in the works of art. The restorers that were interviewed did not appear to be committed to improving all of the points of contact and relationships with clients, despite the fact that most of the respondents’ second main strength, as they perceive it, is the ability to listen and to manage relationships with the customer.

Furthermore, they do nothing to search actively new clients, to involve the client more actively in the whole restoration process, to guarantee access to information (e.g. via the art restoration company’s website) and to their workshop.

The lack of orders has weakened the bargaining position of entrepreneur-restorers so that they now accept very unfavorable price conditions in order to work and to avoid having to close the business.

The phase of value creation by the client (phase 6)

It is only assumed that the restored works have been enjoyed by many people (residents, students, tourists, etc.) and will continue to be by future generations, as well. As a matter of fact, restorers know that many artworks are on permanent public display and that some have been shown in special temporary exhibits. Nevertheless, several respondents pointed out that in Italy post-restoration enhancement of cultural property is weak and more work should be done to highlight all the potential value of restored works, with the help of public and private actors who can contribute to promoting communication and enhancing the enjoyment of them. Finally, according to the respondents, the clients and various stakeholders do not do as much as they could, or perhaps should, to valorize restored works of art.

5. Discussion

The analysis of art restoration companies’ value generation processes is crucial to understanding how these restorers create value for themselves, clients, cultural consumers, and stakeholders, and to preserve and valorize cultural heritage. The findings of this study show that art restoration companies in the province of Pesaro and Urbino create and mainly co-create value but do not adequately take advantage of the potential to both create and co-create value, thus underscoring a series of weaknesses in the value generation processes in each of the phases illustrated in the in the proposed model (Table 1).

Table 1

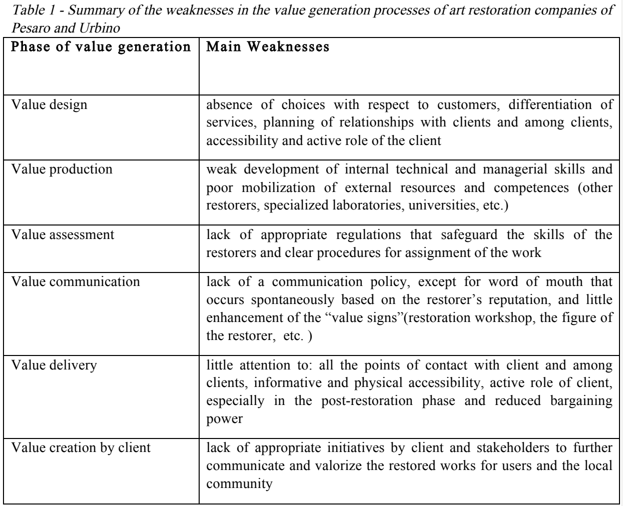


Table 1 - Summary of the weaknesses in the value generation processes of art restoration companies of Pesaro and Urbino

Phase of value generation	**Main Weaknesses**
Value design	absence of choices with respect to customers, differentiation of services, planning of relationships with clients and among clients, accessibility and active role of the client
Value production	weak development of internal technical and managerial skills and poor mobilization of external resources and competences (other restorers, specialized laboratories, universities, etc.)
Value assessment	lack of appropriate regulations that safeguard the skills of the restorers and clear procedures for assignment of the work
Value communication	lack of a communication policy, except for word of mouth that occurs spontaneously based on the restorer’s reputation, and little enhancement of the “value signs”(restoration workshop, the figure of the restorer, etc.)
Value delivery	little attention to: all the points of contact with client and among clients, informative and physical accessibility, active role of client, especially in the post-restoration phase and reduced bargaining power
Value creation by client	lack of appropriate initiatives by client and stakeholders to further communicate and valorize the restored works for users and the local community

The inability to fully exploit the potential for value generation by art restoration companies is linked to the structural limitations of micro enterprises, to the restorers’ lack of managerial and marketing skills, and to the reduction of orders. While the respondents perceive the restorer’s historical-artistic background, technical and organizational skills, and his/her ability to listen and to manage customer relationships as strengths in their favor, today, such features are no longer sufficient to meet the new challenges of the market. These include participating more often in tenders, finding new customers and managing all the customer-firm contact points, entering new geographic markets, developing partnerships, etc.

While restorers recognize that their main weakness is scarce expertise in the area of communication, sales and marketing, they, like small businessmen in general, lack full strategic awareness and continue to make business decisions based mainly on intuition and on experience (among others, Kenny, Dyson, 1989; Carson et al., 1995).By better managing all of the phases of value creation, art restorers could also improve their negotiating power which is still rather weak.

The proposed conceptual framework (Fig. 1) has proven to be a useful key for "reading" the enterprises that were the object of this study, in terms of phases and spheres of value generation.

In line with Grönroos and Gummerus, 2014, three spheres were identified: the joint client-enterprise sphere, the third parties sphere, and the client-specific sphere.It appears that the logic of value co-creation prevails (Lush *et al*., 2007; Grönroos, Gummerus, 2014) in the interviewed enterprises, and specifically, in the phases of value design, value production, and value delivery (joint spheres) in which the art restoration company "directs" the creation of potential value-in-use in collaboration with clients and other actors (Superintendence, construction companies, other restorers, etc.). In the communication phase, instead, while the advent of the Internet has led us to configure this phase as a *joint* sphere in which the culture-driven enterprise can co-create value with its clients, what our research has brought to light is the fact that it is, rather, a *culture-driven* sphere, due to low investment in web 2.0 and social mediaas well as the non-participation of the client in co-creating value.

In phase 1 of value design, until recently it was not necessary to look for customers, but today, they have to actively seek them,to differentiate the "core" service, and to manage the relationship with them and with other partners more effectively. The poor aptitude for market analysis and more generally, the lack of a mission and of strategic purpose are connected to the structural limitations of such enterprises and the formation and competences of the restorer.

It is interesting to note that the art restorer prefers to work alone and co-design and co-creation of value process is imposed, not consciously sought, and value creation remains strongly linked to the skills of the restorer.

The inability to improve their own skills through training courses and to collaborate with stakeholders(phase 2 of value production) applies not only to colleagues and construction companies but also to specialized laboratories, the University (e.g., interns), trade associations, and so on, from the perspective of adding value by improving expertise and building up the reputation of the restorer and his/her company.The art restoration companies studied do not valorize resources and external competencies adequately (Norman, Ramirez, 1995; Anderson, Narus, 1999), thus limiting their opportunities, as suggested in the literature (Prahalad, Ramaswamy, 2004), to co-create, increase knowledge, and innovate (Tanev et al. 2010; Greer *et al*., 2016).

As can be seen in Table 1, critical issues also emerge in phase 4 of value communication and phase 5 of value delivery. Because of the special nature of the cultural property for which the service is provided, the assessment step in phase 3 is assigned to an external agency, the Superintendence, which issues a special document testifying to and guaranteeing the quality of work; it also serves to reduce the gap between expected quality and perceived quality of service on the clients' part (Ziethaml *et al.*, 1991).

The respondents are aware of their weakness in the area of communicating value (phase 4), particularly when associated with their lack of online visibility and with the fact that there is essentially no active client involvement via the Internet. They rely on a spontaneous word-of-mouth method of spreading their professional and personal reputation, thus limiting their opportunities to break into new markets and to augment the value of their business. Their Internet use is all but nonexistent not only to communicate with potential clients, but in general, to valorize the enterprise and the restored cultural heritage of the territory.This confirms the overall scarcity of communication in Italy In sum, art restoration companies have not adopted any branding policies, whether to create a strong and distinctive image of the enterprise or to take advantage of potential co-branding opportunities that could serve as a liaison between the restoration business and the city or regional brand.In the art restoration companies analyzed in the case study, for example, there could develop interesting forms of co-branding by bringing together the brand of the restored cultural property, that of the city of Urbino, the UNESCO World Heritage seal, and the icon of the Italian Renaissance.

The shortcomings in value delivery (phase 5) are tied to the diminished ability to create online and physical access for clients, to the mismanagement of all the points of contact with clients both during and after the restoration service, and to the absence of active client involvement (Grönroos, 1990; Ferrero, 2013).

With the exception of a single case observed, the art restoration enterprises interviewed do not encourage their clients to visit the workshop to see the restoration in progress.Furthermore, they do nothing to maintain a relationship with their clients once the work has been completed and there is absolutely no attempt to manage the relationships among clients for example by offering them an opportunity to interact and share content on social platforms like Facebook, Twitter, etc., or to visit the workshop while restoration work is underway.

Lastly, in phase 6, we argue that clients can create value on their own, independently of the culture-driven enterprise. Nonetheless, the study has revealed that, currently, clients in Pesaro and Urbino do not take full advantage of this important phase in which value-in-use is created/co-created for themselves or for the end users (residents and/or tourists). Although the *value* attributed by the client and by the users is highly subjective and depends on the level of education, (Bourgeon-Renault, 2000; McCarthy et al., 2004) the sensitivity or interest of the client, user, and any other stakeholder could increase with promotional initiatives and events to showcase the value-in-use for cultural users. For example, objects in exhibitions may generate cultural and socio-economic value for schools, tourists, restaurants and hotels, stores, etc. thus helping to create value for the territory that hosts them.

Therefore, the restoration of cultural goods first contributes to create cultural, social and economic value by strengthening the intangible dimension linked to the historical, cultural, and symbolic meaning of the artworks, creating social value because it allows an interested public at large to experience it and third, it constitutes a potential source of competitive advantage for the territory as it creates the conditions for local development and tourism growth (Sacco, 2012; Richards, 2011; among others).

6. Conclusions

Although the main limitation of this study is that we restricted the investigation to the art restoration companies of the province of Pesaro and Urbino (Italy) alone, so the results are not generalizable, the present contribution offers a starting knowledge base in value generation process ofculture-driven companies as special service companies with cultural and profit purposesthat can be enriched by further analysis in order to obtain confirmation and a more in-depth look at what has been outlined thus far.

The study allowed theoretical and managerial implications.

The value generation process of cultural driven-enterprises presents the following peculiarities with respect to the generation process of for profit service companies (Ferrero, 2013; Grönroos and Gummerus, 2014):

- there are multiple dimensions of value, value-in-use for the customer and any current and future users, in the classic dimensions of value at the individual level (functional, symbolic, hedonistic, aesthetic, and emotional) (Zeithaml, 1988), economic value for the cultural driven-enterprises and social and economic value that these companies can create with the help of stakeholders for the territory (e.g. art restoration companies may create value in terms of growth of tourism, employment, etc.);
- there is a high contribution of the client and cultural consumers in the creation of value, as value is strongly related to education, awareness, interest and/or the art culture of the user;
- there is a high degree of co-creation of value with clients and many stakeholders in all the stages of the value generation process;
- value assessment plays a special role although it is not the final step but an intermediate one and it is not undertakenonly by the client. This is because enterprises with profit and cultural purposes such as art restoration companies deal with cultural heritage which needs to be adequately monitored, in terms of the quality of the restoration service provided by an external body, which, in Italy, is the Superintendence;
- the client's ecosystem made up of stakeholders (firms, schools, local administration, etc.) may play a central role, independently from the provider, in the cultural and socio-economic value creation and co-creation process. This contributes to the dissemination of culture and to the better preservation and valorization of the cultural heritage for future generations.

The study confirms the need for a more in-depth analysis of enterprise-client interactions (Grönroos and Gummerus, 2014) even through the use of the Internet and the sphere of value creation by the client alone (Jafari et. al., 2013), which is the least researched phase. This is particularly important in the field of cultural goods that are intrinsically experiential in nature and where value creation is tied to personal formation and reinforced by the way it is consumed in loco. Finally, in the cultural property sector it is important to study the interactions among end users and stakeholders in order to gain a deeper understanding of the experience/context of cultural heritage fruition and enjoyment bythe final users.

With regard to the practical implications for art restoration companies, in order to adequately generate value,they should:

- develop more in-house expertise;this serves, on the one hand, to increase the knowledge, skills, techniques of the restorer's craft (new techniques, etc.) and on the other, to integrate complementary skills in sales, marketing, and management in general, through the inclusion in the company of people dedicated to these areas;
- strengthen their ability to co-create value through the better management of relationships with clients in terms of planning and in the better handling of the different "points of contact"; moreover, client loyalty must be built up by creating a database and periodically sending out a newsletter, for example;
- improve the informational (e.g. through a website) and physical accessibility;taking better care of the *servicescape* is an important but underestimated "signal of value");
- manage the relationships between clients and visitors, both off-line (in the workshop, in restoration work sites) and on-line (Internet andsocial networks);
- more thoroughly study the experiential context of clients, of cultural consumers (residents and tourists), and of stakeholders in order to improve their enjoyment while the work is in progress;
- build stronger relationships with other stakeholders (external specialized laboratories, universities, associations, etc.), in keeping with the total relationship marketing perspective to improve expertise and value co-creation.

Furthermore, clients and stakeholders should cooperate in the post-restoration phase
to organize events and a systemic perspective is required, with the contribution of public and private actors first for the recognition of the professional qualifications of the restorer and to sustain demand.

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