

LINDA LOTINA

Conceptualizing Engagement Modes:
Understanding Museum–Audience
Relationships in Latvian Museums



DISSERTATIONES DE MEDIIS ET COMMUNICATIONIBUS
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AUTHOR`S CONTRIBUTION

The defender`s contribution to the respective articles is as follows:

Study I: The study was fully initiated and designed by the author. The study was conducted and analysed by the author and the author is fully responsible for the manuscript.

Study II: The study was fully initiated and designed by the author. The study was conducted and analysed by the author and the author is fully responsible for the manuscript.

Study III: I contributed to the theory section of the article, interviewed museum visitors at the Riga Open Air Ethnographic Museum; I contributed to the analysis section. I am the third author.

Study IV: I wrote the theoretical section of the paper; contributed the design of the analysis, analysed the Latvian museums data and was the main writer of the results and analysis sections. I wrote the article with support and contributions from Krista Lepik who had analysed Estonian museums data, developed the research design and contributed to the data analysis section.

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In addition, taking part in various conferences, summer schools and doctoral schools has supported my studies. Writing boot camps of Doctoral School of Behavioral, Social and Health Sciences, “*Creativity and Control: Rephrasing Closed Societies*” (2011) “Transformative museums” (2012), *NODEM* 2013, Gesis Summer School in Survey Methodology (2014) and the ECREA European Media and Communication Summer School are events which have provided me with opportunities to meet colleagues worldwide and to establish contacts. I thank my colleagues at the Vidzeme University of Applied Sciences for supporting me during these years, especially Ilze Grinfelde.

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INTRODUCTION

‘Engagement’ is a term widely applied in different fields, such as computer sciences, education sciences, social sciences and humanities. The increasing significance of engagement related studies in the context of democratization of society and the challenge of the term’s vague conceptualization have both contributed to the selection of the research topic and placed the concept of audience engagement in Latvian public museums at the focus of this PhD introductory article.

The topicality of museum engagement is related to the democratization processes in the broader societal context which redefine the roles, and also transform the position of people. The debate of the engagement and increased significance of audience opens up a broad field of study, inter alia, for communication scholars. Increasing museum audience engagement is a demanding process in terms of communication: the initiation of new audiences for the institution – through inclusion, collaboration and bringing in new external consultants – changes former communication practices. Museum studies have also explored different aspects challenging wide engagement opportunities, such as museums’ sensitivity towards global market forces and the unchallengeable authority of museums as places of knowledge and expertise (Wilson 2010: 165; Fouseki & Vacharopoulou 2013). Contemporary museums are challenged to reconsider and develop participatory ways of communicating and working with their audiences (Pruulmann-Vengerfeldt & Runnel 2014; Andermann & Arnold-de Simine 2012).

Practical aspects related to the challenges of increasing audience engagement are only part of the research problem; there are also theoretical issues. The term ‘engagement’ is currently widespread across disciplines and used for describing a wide range of physical, emotional, social and intellectual activities, but in the context of museums, there is a need to find a systematic approach how to conceptualize audience engagement and by doing so I move away from the normativity of the idea of participation to make sure that noel concept respond to the diverse museums and their purposes.

Therefore, two aims are defined in this PhD dissertation. The empirical aim is **to explore how museum professionals understand audience engagement and interact with active audiences** and it looks at audience engagement modes and practices in museums in Latvian post-Soviet transitional society. This is a first PhD dissertation on audience engagement in Latvian museums and with this research I would like to support the development of the Latvian museum sector. The broader theoretical aim is **to introduce a novel conception of museum audience engagement**. It focuses on the relationship between engagement and similar conceptions, develops a set of related definitions and identifies factors impacting engagement.

In this PhD introductory article a ‘museum’ is understood as a “non-profit, permanent institution in the service of society and its development, open to the public, which acquires, conserves, researches, communicates and exhibits the

tangible and intangible heritage of humanity and its environment for the purposes of education, study and enjoyment” (ICOM 2010–2015). The focus is on engagement in public history museums, art museums and local history museums which form the majority of the sample. Museums functioning as scientific or interpretive centres, private collections, commercial art galleries or historical houses are excluded.

This PhD introductory article explores the audience engagement process in public knowledge institutions and, as such, is part of the research implemented by media and communication researchers at the University of Tartu. Related studies include the collection of articles in the book *Democratizing the museum. Reflections on participatory technologies* (2014) (eds. P. Runnel & P. Pruulmann-Vengerfeldt), the PhD introductory article *Transformations of museum-embedded cultural expertise* (2013) by T. Tatsi and *Governmentality and cultural participation in Estonian public knowledge institutions* (2013) by K. Lepik. This PhD introductory article *Conceptualizing engagement modes: Understanding museum – audience relationships in Latvian museums* provides both an analysis of the specific situation of public museums in Latvia and conceptualizes engagement, which might be helpful in describing and understanding the transformations of museums in further engagement and participation related studies.

The specifics of the audience engagement topic in the context of democracy locate this PhD introductory article in media and communication sciences and from this a list of interconnected concepts emerges – the museum as a democratizing institution, engagement, participation, power, empowerment, active audience.

The museum as a democratizing institution is central in all of the Studies, **I**, **II**, **III** & **IV**. A democratizing institution is the type of organization that respects, promotes and strengthens competences crucial for democracy, for instance, those mentioned by Saxer (2009: 90): “confidence-building, capacity-building, the clarification of perceptions, awareness-raising concerning present or future challenges, the creation of forums and channels for dialogue, the explorations of co-operation potentials, and building bridges between sectors and groupings in society.” Other authors (Crooke 2007; Marstine 2006; Prior 2003) debate the concept of a reshaped museum and discuss how the institution can contribute to the democratization of society through engagement practice – through developing more open-ended spaces, encouraging diverse groups to become active participants, sharing power with communities and increasing the role of the institution in community development.

The central concept of this PhD introductory article is ‘engagement’ and this prevails in Studies **III** & **IV**. The term ‘engagement’ has previously been used without being defined clearly and some examples from other disciplines show the different meanings given to the term. For instance, in the context of education sciences Van Uden discusses students’ engagement in learning behaviourally, emotionally and cognitively (van Uden 2014: 50). Citizen engagement focuses on the benefits to the whole society and refers to “individual and

collective actions designed to identify and address issues of public concern” (Adler & Goggin 2005, as cited in Cegarra-Navarro et al. 2014) and the active role of citizen engagement in the service of the wider community (Whitehead & Stroope 2015; Warren et al. 2015). Cegarra-Navarro et al. (2014: 660) argue that “citizen engagement refers to the ways in which citizens participate in the life of a community”, thus identifying the link between the concepts of engagement and participation. I have summarised previous efforts of researchers from different disciplines and developed my own definition of museum audience engagement – it is **a two-way process combining the performance of both the museum and active audience by responding to stimuli of engaged parties and initiating activities with the aim to improve museum work, enhance the experience or make a difference to society on a larger scale.** (See extended explanation of engagement definitions in 2.2.)

In this PhD introductory article the notion of ‘participation’ is the subsection of the concept of audience engagement, which has been derived from political participation studies and is rooted in theories of democracy (e.g. Arnstein 1968; Pateman 1970). The starting points for this research were the concept of participation in the context of museums (see Study I) and the debate on the distribution of power between the museum and participants, the inclusion of participants in the decision making processes, as well as varying levels of participation and other criteria of participation derived from political studies. These criteria were challenged by actual research data collected from museums during expert interviews (Study I & II) and afterwards the research data were re-analysed in a reflexive manner (Alvesson 2003). Instead of participation, I defined engagement as the central concept, and it is an umbrella term that includes participation.

Museums are public knowledge institutions, and according to Foucault, power and knowledge have an intrinsic link (Foucault 1995). Therefore, transformations in museums’ relationship with audiences are related with power issues. In addition, participation is linked with theories of democracy, and the issues of power distribution among the engaged parts are significant (Carpentier 2011). The museum researchers Bennett (1995; 2000; 2005) and Hooper-Greenhill (1989; 1992) have both focused on the ways in which modern museums produce a self-improving, disciplined population. Bennett (1995) has relied on Foucault’s concept of disciplinary or governmental power to understand the knowledge-power relationship in public museum institutions. Governmental power is characterised by a multiplicity of objectives and has its own authorisation and rationality. It is exercised through calculations and strategies, which, embodied in the programmes and technologies, aim to manipulate behaviour in desired directions (Foucault 2009). In a museum, having power allows control of knowledge, e.g. through appreciating some objects and rejecting others (Hooper-Greenhill 1992) and so on. Also, in museums’ subject positions, defined by the situation, lies a significant part of the power-knowledge relationship (Foucault 1969 & Giddens 1994 cited in Lepik 2013). Nowadays expert positions include all kinds of museum professions (e.g. curators) and marketing

related positions. Other types of subject positions are those of students and visitors that fulfil the roles of learning and consuming (Hooper-Greenhill 1992; Lepik 2013). Further on in my PhD introductory article I rely on the concept of governmental power and take into account the presence of varied subject positions, which play a significant role in the relationship between museums and audiences.

The democratizing museum actively seeks to share power with the communities it serves (Marstine 2006), and that process demands the empowerment of the audience. The understanding of empowerment varies among authors (Dasuki et al 2014; Kabeer 1999; Lord & Hutchinson 1993) but a widespread notion refers to empowerment as a process of change (Dasuki et al. 2014). I rely on Kabeer's understanding of empowerment as "a process of change by which those who have been denied the ability to make choices acquire such an ability" (Kabeer 1999: 435). Empowerment only refers to previously disempowered audiences. In this PhD introductory article the concept of empowerment helps to explain the changing relationships between museums and audiences in terms of power balance.

Engagement is defined by the mutual relationship between museum experts and other subject positions – that is, different audiences. I have chosen to rely on the concept of audiences instead of museum 'visitors' for several reasons. First, this PhD dissertation is located in media and communication studies and the concepts of audience and active audience are widely used in communication sciences (e.g. Livingstone 2000; Livingstone 2005; Livingstone 2014; Morley 1992). Second, the concept of audience is not unfamiliar to previous interdisciplinary studies connecting museums and communication (e.g. Stylianou-Lambert 2010; Longhurst et al. 2004). Third, along with museum studies, the term 'visitor' is traditionally used in visitor studies in different fields, such as tourism and marketing (e.g. Packer & Ballantyne 2002; Falk 2009; Rappola 2012). In several museum studies (e.g. Goulding 2000), the term 'visitor' is strongly linked to marketing and only occasionally discusses consumer behaviour, which restricts the meaning of the term. Some authors use the concepts of 'audience' and 'visitors' as synonymous (e.g. Crooke 2007). However, in this PhD introductory article the terminology in accordance with the media and communication field prevails, and further, I refer to 'audiences' as an inclusive term incorporating different subject positions, such as museum visitors, stakeholders, participants, etc. Active audiences are seen as "active interpreters who selectively construct meaning based on their personal experiences, associations, biases, and sense of identity whereas the museum is envisioned as an open work that is only completed by the visitor". (Stylianou-Lambert 2010: 130)

The PhD dissertation consists of the following four interconnected articles (called 'Studies' here): *Analysis of participatory activities in the museums in Latvia* (Study I); *Reviewing museum participation in online channels in Latvia* (Study II) both authored by me; *Constructing national identity: A national museum visitor's perspective* (Study III) co-authored by P. Runnel, K. Lepik

and me; and *Exploring engagement repertoires in social media: Museum perspective* (Study **IV**) co-authored by me and K. Lepik.

The main research questions are defined to tackle the issues covered in this PhD dissertation:

1. What kind of engagement modes do different museum activities support? (Studies **I**, **II**, **III** & **IV**)
2. How are museum functions communicated through different engagement modes? (Studies **I**, **II** & **IV**)
3. What kind of power sharing do different engagement modes involve? (Studies **I** & **II**)
4. How are engagement modes connected to different audiences? (Studies **I**, **II**, **III** & **IV**)

Research was based on both qualitative and quantitative data collection methods. Interviews in Latvian museums (Studies **I**, **II** & **III**) and the Estonian National Museum (Study **III**) as well as posts created by Latvian and Estonian museums on Facebook during a one-year period (Studies **II** & **IV**) were the main sources of the data. For Studies **I** & **II**, marketing and communication specialists as well as curators and managers of museums were selected as experts for in-depth interviews. The list of represented museums includes state, autonomous and municipal museums that cover diverse topics, are situated in different places, and have different status. Study **III** represents the opinion of museum visitors with data from domestic and foreign visitors to the Riga Open-Air Ethnographic Museum and the Estonian National Museum. The data analysis methods involved content analysis (Studies **I**, **II** & **III**) and grounded theory (Study **IV**). Content analysis involved data coding, labelling, grouping, generalizing and in Study **I** also mapping data in a theoretical matrix.

Study **I** explored on-site participatory activities in Latvian museums and the attitude of museum professionals towards participants. Study **II** investigated online participatory activities in Latvian museums. Studies **I** & **II** structured the first stage of the research process, and the overall role of them was to provide an in-depth exploration of participation practice within museums. An understanding and critical analysis of the practical application of participatory activities in Latvian museums provoked a reconsideration of the concept of participation and introduced the notion of audience engagement. Study **III** analysed how museum visitors construct their national identity in Latvian and Estonian national museums, and further in the PhD introductory article the visitors' construction of national identity was reinterpreted as a single example of engagement activity. The role of the study was to illustrate the diverse manifestations of engagement, including less visible modes. Study **IV** explored how museums engage and communicate with their audience in social media. By applying the principles of grounded theory the study defined online audience engagement modes in Latvian and Estonian museums. These results allow further elaboration of the concept of engagement in the PhD introductory article.

The PhD introductory article shows both the conceptualization of engagement modes and the perspective of museum staff on audience engagement in Latvian museums. Latvia regained independence in 1990 and has its own political, economic and cultural context, impacted by 50 years of Soviet rule (see section 3.2. for detailed information on the Latvian context). Therefore, the discussion about audience engagement in Latvian museums took place in the context of a post-Socialist transition state.

In the first chapter of the PhD introductory article I highlight the challenges of museums in the context of democracy. The ongoing democratization of society frames this PhD dissertation, and the development of information and communication technologies (ICT) has a significant role in understanding this process as the general shift of democratic transformations has happened with the help of ICT. The sub-chapters also present the challenges faced by museums in the context of a global market and challenges for museums as authoritative expert institutions. An analysis of previous studies suggests that these factors play a significant role in defining audience engagement in public museums. The overall role of the first chapter is to illustrate the development, topicalities and challenges of the museum sector in the context of a democracy. This chapter helps us to understand how museum work in the past impacts on contemporary museum development and it also gives insights into the broader context that museums work within.

The second chapter of the PhD introductory article is devoted to a discussion of audience engagement. First, the concept of an active audience is articulated, and the sub-chapter explores the concept of engagement and its links with participation and interactivity. The chapter includes both a review of previous studies and the conceptualization of engagement. The second chapter places audience engagement among the related terms of participation and interactivity and develops a list of definitions, such as ‘engagement’, ‘engagement repertoire’, ‘engagement modes’ which are further used to analyse empirical research data. The third chapter of the PhD introductory article briefly introduces the Latvian context and reviews Latvian museums to provide an understanding of how the specific environment impacts Latvian museum work. In the fourth chapter, the methods and materials used are described. The fifth chapter recaps the main results of the individual studies and provides answers to the research questions. The sixth chapter discusses the research results and explains the complex nature of the audience engagement process and presents both the external and internal influences of the environment on audience engagement in museums. The final chapter is the conclusion where the most significant ideas of the PhD introductory article are emphasised.

1. THE CONTEXT OF THE MUSEUM AS A DEMOCRATIZING INSTITUTION

Democracy is a complicated concept and includes a range of potential meanings (Dalton 2007). The interpretations of the term ‘democracy’ depend on political, cultural and economic contexts, forms of bureaucratization and so on. Despite the multiplicity of definitions, in overall authors agree on the crucial elements of democracy, such as the right to participate in free and democratic elections, voting equality, the impact of elections on government, multiparty competition, and majority rule (Dalton 2007; OECD 2003). Despite the global hegemony of democracy, the establishment of democracy is problematic and democracy does not necessarily lead to good governance (Cerny 2009; Saxer 2009). The challenges democracy faces include poverty, poor health services, inadequate education, limited political knowledge and internal conflicts (Saxer 2009; Dalton 2007). Moreover, there are discussions about whether democracy as a system of governance is suitable for every state (Van de Vliert & Postmes 2014). In other words, there are many issues worth discussing in relation to the concept of democracy. However, in the framework of PhD introductory article I am interested in democracy as a background concept for the public museum institution. Therefore in this chapter I do not focus on democracy itself but on the museum as a democratizing institution, going through a process of transformation, which is contextualized by society democratization, a global market and technological development.

For several reasons ICT occupy a prominent position in this chapter – the general shift of democratization in society has happened with the help of ICT – technologies have the potential to place individuals in a situation where they can determine from a distance what happens in the centre (Van Dijk 2012). Understanding the impacts of ICT helps to understand the transformation of the museum institution and participatory culture. ICT have redefined a museum visit, object, collection, expository space, and the curatorial authority of the museum (Parry 2007). Museums as a communicative medium are part of media landscape since through participation they include wider audiences as communicators (Hooper-Greenhill 1995; Pruulmann-Vengerfeldt & Runnel 2011). The challenges of technological development in the specific context of museums are discussed in the second sub-chapter, next to the analysis of global market forces and the democratization of museum expertise. On the basis of a literature review I argue that those factors play a significant role in defining audience engagement in public museums.

1.1. The role of ICT in the development of democracy

Media technologies have pervaded almost all human activities and have caused many social, cultural, political and economic changes (Van Loon 2008; Russo & Peacock 2009; Deuze 2011) and the impact of those transformations on

people's lives has concerned researchers. Studies cover a wide spectrum – from technological influences to individuals' habits and life to macro level research concerning different sectors of the economy, culture or societal changes in general, such as Manuel Castells (2004) ideas of a new network society. As the Internet embodies major technological development, Internet growth has been the subject of major explorations (Hermes 2006; Lister et al. 2009). Technologies have not only speeded up the process of information dissemination and enabled a convergence between different types of media, but also changed the roles of users – ordinary people become producers and actors, professionals and experts (Hermes 2006; Van Loon 2008, Jenkins 2006). Many of the early Internet studies regarded the new technologies as revolutionary, both in terms of technical innovation and broad social and political implications (Van Dijk 2012; Wilson & Peterson 2002). There were authors optimistically hoping that the Internet would empower ordinary users and subvert existing power structures, e.g. Rheingold (1993). Web 2.0 related technological development allows online communities to be built and thus introduces a new topic for researchers, including from the perspective of participation. The replacement of physical contact by virtual contact, with an emphasis on the Internet as the main space of social contact, is part of the debate. Online communities have also been the focus of researchers because they allow fundamentally new constructions of identity (Wilson & Peterson 2002).

I am mostly concerned with the participatory potential provided by Web 2.0 and, therefore, in this sub-chapter I focus on the online participation concept and communities from the perspective of democracy. (See also Study II for theorising participation in online channels)

A number of authors are in agreement about the potential of ICT in terms of democracy (O'Reilly 2005; Pruulmann-Vengerfeldt & Runnel 2014; Carpentier 2011) and ICT are also considered to be powerful tools to enhance citizen engagement (OECD 2003). To sum up, technologies, in the context of democracy, are capable of supporting: (1) the establishment of direct democratic principles by removing space barriers; (2) a contribution to form virtual communities that could replace the 'lost communities' of modern society; (3) the increasing contribution of citizens to policy making in all kinds of ways as the Web 2.0 platform supports the participatory usage of Internet by allowing people to produce user-generated content (Van Dijk 2012: 50).

It is a challenging to use the opportunities provided by ICT in a way that maximizes participation, both in terms of quantity and quality. In fact, technological development has increased access to media but it does not guarantee participatory usage of those media, and the expected benefits for community development do not necessarily produce new citizens (Hermes 2006; Jenkins 2006). There are several barriers that hold back individuals from using new technologies for participatory purposes. These constraints are related to the lack of free time, psychological barriers, and a lack of information literacy or education (Tonn et al. 2001: 202; Lepik 2013). Jenkins (2006) specifically stresses that focus should be shifted from technological access to the development of the

cultural competences and social skills necessary for users' engagement. Building these competences is related to a change of learning and teaching styles and refers to museums as informal educators.

This PhD dissertation mostly concerns Web 2.0 related technologies in the context of participation and does not focus on on-site technological equipment. Also the sub-chapter goes deeper into the participatory potential of social networking sites (SNS). Social networking sites are a type of social media, developed on the Web 2.0 platform, and have attracted the interest of many authors in communication sciences (e.g. O'Reilly 2005; boyd 2011). Despite the fact that the usefulness of social media as a marketing tool occasionally neglects its participatory potential (Hermes 2006), SNS have features such as transparency, independency, persistence and emergency (Bradley 2010). They allow users to be pro-active instead of reactive, to develop both personal and professional networks of people and to participate in the definition and contestation of users' interests, thus empowering them. Social networking sites construct publics on a local or broader level (Boyd 2011), in other words Web 2.0. brings together people who have shared interests and identities¹. For Jenkins et al. (2006) there are enough arguments to come up with the notion of participatory culture – culture where the focus of literacy shifts from one of individual expression to community involvement. The knowledge of the community is greater than individual knowledge and therefore groups are great sources of collective expertise (Bishop 2007). However, Bishop (2007) stresses that participation is also dependent on the types of people that form groups and previous studies present a critical attitude towards citizen activity, e.g. Cook (2004), who points to civic passivity. Here the significance of Jenkins (2006) arguments concerning the development of the cultural competences and social skills necessary for users' engagement should be emphasized again.

In summary, ICT has increased the participatory potential of a community to contribute to democracy, but it does not guarantee citizens' engagement. Lack of access, proper competences or understanding of the value of civic engagement might prevent people from participating. In addition, Pruilmann-Vengerfeldt and Runnel (2014) indicate a gap in the understanding of the transformation of museums by arguing that there is a need to reinvent the notion of democracy and bring it out of the strictly institutional level of politics. To reshape the democracy there is the need for increased understanding about the values of democracy and vitalizing civic society on both sides – the people and the museums.

¹ Here, I follow Livingstone's (2005: 9) definition of "public" as a group of people having "a common understanding of the world, a shared identity, a claim to inclusiveness, a consensus regarding the collective interest".

1.2. Museums as democratizing institutions and their challenges

Museums are public cultural institutions in the service of society (ICOM 2010–2015) and culture² is important for democracy (Council of Europe, Directorate of Culture and Cultural and Natural Heritage; Irina 2012; Golding 2007). Irina (2012) emphasizes the role of culture in democracy by arguing that public knowledge institutions introduce ideas, rouse people and can be vehicles of power or protest, to name but a few. The development of public cultural institutions in the 20th and 21st centuries contrasts with the 19th century notion of museums as “machineries that are implicated in the shaping of civic capacities” (Bennett 2005: 522). The wider role of the contemporary museum has turned it into a key site for “civic rituals” (Duncan 1995 cited in Bennett 2006) and therefore I take closer look at an area where museums work – that is, contemporary civic cultures. Civic cultures “are the cultural patterns in which identities of citizenship, and the foundations for civic action are embedded” (Dahlgren 2009: 103), and civic cultures provide preconditions for citizen identity and engagement in public spheres (Dahlgren 2000; Dahlgren 2004; Dahlgren 2005; Dahlgren 2009). For instance, Dahlgren uses interrelated parameters of contemporary civic culture to create preconditions for society to engage in civic actions: (1) knowledge and skills; (2) values; (3) affinity and trust; (4) democratic practices; and (5) civic identities (Dahlgren 2005: 158; Dahlgren 2004). In accordance with the notion of the democratizing museum, these cultural institutions are in a process of transformation from governmental institutions to institutions of civil society (American Alliance of Museums 2015) and the challenges related with the adoption of new roles and meeting expectations should not be underestimated³.

In this sub-chapter I will explore the challenges that have a major impact on the capability of museums to transform into democratizing institutions and to

² Culture is a complex concept, and many authors have made attempts to define it from different perspectives (e.g. Bennett 2000; Hall 1980; Hoft 1996; Irina 2012; Hofstede & Hofstede 2005; Jennanote & Straw 2005). Culture has two layers – objective and subjective. Objective culture is visible and tangible; it includes institutions and artefacts such as economic systems, social practices, political structures, arts, crafts, literature, music, and so on. Subjective culture operates beyond conscious awareness, is difficult to examine and refers to ‘*the psychological features of culture, including assumptions, values, and patterns of thinking*’ (Hoft 1996: 43). Museums represent both layers of culture – through objective culture subjective culture is present as well.

³ The European Commission has pointed to the need to undertake massive changes: Europe's cultural and memory institutions are facing very rapid and dramatic transformations. These transformations are not only due to the use of increasingly sophisticated technologies, which become obsolete more and more rapidly, but also due to a re-examination of the role of modern public institutions in today's society and the related fast changing user demands. These trends affect all the functions of the modern cultural institution, from collection management and scholarly study through restoration and preservation to providing new forms of universal and dynamic access to their holdings (European Commission 2002: 9).

involve the audience more. First, ICT, which allow the expansion of participatory and engaging practices in museums. However, increased access does not necessarily lead to a participatory way of using ICT to support the reinvention of museums. Second, global market forces and shortage of funding for many museums put pressure on public institutions to commercialize their operations and thus museums become less democratizing institutions. Third, a museum's ability to transform into a democratizing institution might be challenged by governmentality principles embedded in the museum institution, which conflicts with such democratic values as appreciation of collective expertise and does not support the development of a participatory culture. These challenges have been identified from consideration of previous studies, which suggest that all three are complex issues as different authors have conflicting opinions evaluating the significance of the challenges and the capacity of the museums to overcome them.

1.2.1. The challenges of technological development

ICT have redefined a museum visit, object, collection, expository space and curatorial authority. Information and communication technologies have been an integral part of museums for over four decades, however, only in the 21st century would the “cultural turn in museum computing would begin to manifest itself fully”. (Parry 2007: 9) In previous studies authors have explored the relationships of museums with technologies from different aspects, such as learning in museums (Lewis 2000; Hawkey 2006), content digitalization, virtual museum exhibition design and the enhancement of visitors' experience provided by ICT (Witcomb 2006; Vom Lehn et al. 2013; Heath & Vom Lehn 2008; Russo et al. 2007; McTavish 2006), and transformations of museums, including examples of democratization and the development of participation (Allen 2012; Duff et al. 2009; Knell 2003; Stuedahl 2011; Pruulmann-Vengerfeldt & Runnel 2014; Simon 2010) etc.

This sub-chapter provides a general overview of how ICT have transformed museums and the main technology related challenges for museums in the context of democracy (but with no intention of discussing specific software or hardware).

Technologies potentially extend audience engagement with a museum beyond a single museum visit (Patel et al. 2011), and make museum collections available online, which enables links with wider cultural and political contexts through global flows of information (Cameron 2008). Technological tools allow museums to display content with a growing commitment to interactivity or hands-on exhibitions and enhanced learning practices which are based on visitors' involvement and active participation (Lepouras & Vassilakis 2005; Lopez et al. 2010). They also enable the display of content that cannot be presented otherwise, due to space or fragility, and provide a platform for personal expression and a customized museum experience. New technologies in museums are

not just about enhanced on-line or on-site experiences but also about increased accessibility for previously excluded groups.

Technologies are not a new thing for museums – museums are themselves a technology of a kind: a medium, a physical form of communication (Parry 2007). Technologies are adjusted in museums, continuously developed and replaced with new ones, and researchers have already started to discuss generations of interactive exhibits in museums. The first generation involved interactive devices such as touch screens and mobile guides, which enhanced visitor experience in a rather constrained manner. Recently, a second generation of interactive devices has begun to offer visitors the possibility of contributing their own content (Patel et al. 2011). The development of ICT is so rapid that it is anticipated that in short period of time several types of novel technologies will find their way to museums. The New Media Consortium (NMC) in their Horizon Report identify six main types of technologies entering museums for the purposes of education and digital interpretation: (1) mobile applications; (2) social media (which were regarded in 2012 as technologies that would change museums' interaction with patrons and communities in the short term, within 12 months); (3) augmented reality; (4) open content (identified as a mid-term technological development expected to become popular in the next 2–3 years). Finally, the long-term technologies, which were expected to be four or five years away, consisted of (5) the Internet of things; and (6) natural user interfaces. (New Media Consortium 2012: 3–6)

Introducing technological novelties might be challenging even though technologies have been present in museums for almost half a century. First, there may be a lack of expertise and, thus, a need for appropriate training for museum workers. Professionals at museum institutions are willing to learn themselves, but the resources are not always available for necessary training and technological support (New Media Consortium 2012) and rapidly changing technologies are demanding in terms of the need for staff training. Second, Vom Lehn et al. (2013) claim that museum technologies must withstand extensive usage over long periods of time and should be accessed, visually and physically, by more than one person at the same time, thus there is need for specific technological demands. On top of this, they should be 'intuitive' to operate since a wide range of visitors use them: people of different ages, levels of familiarity with technology, and expertise in the appropriate subject area (Vom Lehn et al. 2013: 73; Heath & Vom Lehn 2008). Third, designing, implementing and maintaining new technologies requires funding (Duff et al. 2009), but funding for technology projects falls outside museum core operational budgets (New Media Consortium 2012). Fourth, content production often fails to keep up with technological developments (New Media Consortium 2012) and thus sophisticated users may not be satisfied with the museum performance. Fifth, audiences may need training as well: experiencing the objects through digital means may require different forms of familiarity both with technology and the appropriate subject area. (Vom Lehn et al. 2013) Sixth, the digitization of museum content and the development of virtual museums challenge the 'authenticity business'

of museums (Burton & Scott 2007). After all, it is the authenticity of artefacts that sets museums apart from other entertainment venues and distinguishes museums from consumerism (Barnett 2012). By adopting new technologies museums might risk losing this value. Finally, the experience and responses of visitors in traditional exhibitions may be different from exhibitions with digital elements, but currently there is little research that examines how people use and respond to digital content in museums (Heath & Vom Lehn 2008). With so many potential barriers to technology-related innovations it is not surprising that personnel in some museums display an ambivalent attitude towards technologies.

Museums massively increased publicly available content by digitizing their collections, artworks and documents (Lopez et al. 2010). However, there are studies that argue that digitizing content is positive but it does not really take advantage of the interactivity of ICT (Loran 2005). Also, Knell criticizes the Internet: that widespread museum digitization programmes seem to push museums closer to becoming libraries (Knell 2003: 134). Referring to museum activities on social media, authors detect limitations why participatory potential is not used fully. Museums are open to social media communication, but with rather restricted social media activities – some forms of digital engagement are preferred to others (Simon 2010).

The intensive flow of easily accessible information from varied sources outside museums leads to new learning practices of users and the need to reconsider the roles and functions of museums. The public might demand that museums fulfil the function of interpretation rather than the collection and conservation of objects (Burton & Scott 2007). However, there are no empirical studies to confirm if such a demand exists. Commenting on users behaviour in an online environment people interact more spontaneously without the help of traditional institutions (Wallace Foundation 2009; Burton & Scott 2007). They gain many experiences independently, which adds extra pressure to organizations regarding the design of on-site offers. The advantages of the on-site experience are the authenticity of artefacts and the quality of human interaction. Therefore, technologies are more about enhancing the quality of performance and engagement than replacing the live experience. (MTM London 2010)

There are restrictions to engaging from the users point of view, such as a lack of awareness (e.g. lack of information), technological constraints, the perception of online engagement as an anti-social activity, and rating the online experience as inferior to the live one (Synovate 2009; MTM London 2010). Consequently, users do not exploit all the opportunities provided by digital technologies but rather simply watch the content and evaluate it (Institute for the Future 2008).

To summarize, full usage of the participatory potential of ICT is challenging, but at the same time museum gains from technologies are massive. Likewise, the vast majority of contemporary audiences have completely integrated technologies into their daily lives, and museums are aware they cannot stay outside these changes like isolated islands of tradition and authenticity.

1.2.2. Challenges from market forces

In modern societies, cultural production is strong (Jeannotte & Straw 2005: 275) and cultural organizations perform in a competitive environment. Along with other cultural organizations, museums have to cope with the increasing power of market forces, and the market empowers audiences. Both the positive and negative aspects of museum marketing are widely debated: how appropriate is it for museums to use the principles of marketing (Rentschler 2007a); marketing and audience development online and on-site (Bartak 2007); the need to research audiences (Falk 2009; Komatsuka 2007); museum marketing strategies and visitor oriented approaches (Mottner 2007; Kotler & Kotler 2007; Reussner 2007) and branding (Hede 2007; Burton & Scott 2007); and also not-for-profit museums.

Why should museums be interested in strengthening the marketing of their organizations? First, museums compete with other leisure time offers for the attention of audiences (Falk 2009). Second, since the 1970s competition has increased among museums; the number of museums has grown but not the number of visitors (Burton & Scott 2007; Rentschler 2007b); however these data might be different across countries. Third, despite museums being “fun, exciting, and good places to take the family and offer great value for money” (Burton & Scott 2007: 62) they fail to demonstrate the valid synergy between what audiences want and what museums have to offer. More information about visitors is needed and we need to learn how to use the knowledge about visitors effectively. Fourth, there may be exceptions but, in general, authors are in agreement that contemporary museums receive limited financial support because of a decline in public funding (Janes & Sandell 2007; Falk 2009; Rentschler 2007b; Greenhalgh 2006). Many public museums operate with limited resources and are forced to attract as many visitors as possible and to consider multiple ways of increasing their income. In practice, financial pressures are pushing museums towards increased marketing.

So, on the one hand, museums are public institutions in the service of society striving to reach their missionary goals. On the other hand, they are increasingly subjected to global market forces and have to take into account the needs of the audience to attract larger numbers of visitors. The question is: to what extent do audiences know their needs? If they know their needs, then to what extent should museums, as public institutions, fulfil those audience needs?

How do museums cope with this challenge? As contemporary societies change, they experience transformations and step by step become closer to audiences and get more involved in community life by inviting new groups, increasing the number of stakeholders and experimenting with the balance of power among involved parties. Nowadays most museums represent the view that they are, above all, for the people (Lang 2006: 30), and that the museum has changed from an object-based institution into a people-based institution (Rentschler 2007b). However, the museum sector is characterized by great diversity and a level of democracy that depends on each institution. For example,

state-funded institutions are more likely to be utilitarian instruments of democratic education than private organizations working under the absolute influence of market forces. There is no consensus about how to negotiate global market forces, with people's purchasing power on the one hand and the goals of public museums on other.

Nowadays marketing occupies a significant place in the management strategies of museums, but for some it is still considered to be a 'dirty' word (Rentschler 2007a). Marketing concepts have experienced transformations over the years: the shift from a product-centred to a consumer-centred approach (Rentschler 2007b) made marketing more available to museums. Previously a restricted, narrow comprehension of marketing as a sales technique used by private enterprises provoked the denial of it in public museums (Tobelem 2007). There is no agreement among authors about the extent to which marketing has found its way into Western museums, and different authors express contradictory opinions about the role of marketing. For instance, Tobelem (2007) argues that marketing is minor at many museums, while Falk (2009) and Janes and Sandell (2007) argue the opposite – the result of market pressure is the increased use of business solutions in museum work, starting from the architecture, exhibitions and human resource policy, specifically the recruitment of museum directors. The truth might be somewhere between these opinions and different attitudes towards marketing might mostly be rooted in the specific context of each museum – the amount of public financing, the need to reach new target groups (e.g. tourists), audiences and so on.

An enlightened understanding of marketing in museums states that the marketing staff should be involved in all museum tasks (Kotler & Kotler 2007) and it defines marketing as 'a tool for analysis and a mean for action which allow an organization, commercial or non-commercial, to achieve its objectives fully' (Tobelem 2007: 296). There is a need to know museum visitors better (Tobelem 2007; Rentschler 2007; Falk 2009) and knowledge on visitors allows museums to design more appropriate educational content, fitting participatory projects, and a higher quality of engagement. Enlightened marketing has the potential to improve the performance of museums as democratizing institutions.

1.2.3. Challenges of museum expertise

Contemporary museums have evolved from cabinets of curiosity (Bennett 2006) and in this sub-chapter I will provide insight into the transformation process by focusing on power and knowledge issues as challenges for the democratizing museum. Academic debate on museum transformations and their relationship with governance has been topical for several authors but a major issue for Tony Bennett (1995; 2000; 2004; 2005; 2006), and also Hooper-Greenhill (1989).

To explore the relationship of museums with power and knowledge, I will start with a historical retrospective. For a long time museums have been significant public knowledge institutions but their role is not restricted to producing

and providing knowledge. In the 19th century it was believed that culture had a reforming capacity for humans and that culture offered alternatives for the masses on how to spend their leisure time in a more civilized way (Bennett 1995; Bennett; 2004; Bennett 2005; Hill 2005). Museums together with other public culture institutions established “correct values and norms within society”. (Wilson 2010: 169) In museums knowledge was organized in places hidden from the eyes of the public and afterwards offered for passive consumption (Hooper-Greenhill 1989).

Commenting on subject positions, the specialists at museums did not consider their organizations as public cultural organizations but as expert institutions in a specific discipline (O’Neill 2008). The identity of the museum institution was closely related to the museum’s expertise (Tatsi 2013: 20). O’Neill (2008) argues that in the late nineteenth century, many museum professionals established their identity and territory by distancing themselves and their institutions from the objectives to develop democracy. Thus museums changed from institutions dedicated to public education to institutions primarily serving the already educated audience. Hooper-Greenhill points to the conflicting functions of the 19th century public museum: at the very beginning a public museum functioned as “an elite temple of the arts” and at the same time as “a utilitarian instrument for democratic education”. Later a third function was added as the museum was shaped into an instrument of the disciplinary society (Hooper-Greenhill 1989). Through culture government aims to work at distance and cultural resources are turned into a means of governing (Bennett 2004). Bennett highlights the educational, disciplinary and social roles by stating that in museums citizens “have met, conversed, been instructed, or otherwise engaged in rituals through which their rights and duties as citizens have been enacted” (Bennett 2006: 263).

For Michel Foucault power and knowledge have an intrinsic link (Detel 2005). Bennett refers to Foucault and stresses that high cultural practices have formed part of the apparatus of governmental or disciplinary power (Bennett 1995). The institutional power of knowledge vested in museums enabled the integration of the concept of governmentality in museums (Fouseki & Vacharopoulou 2013; Wilson 2010; Bennet 1995). Fouseki and Vacharopoulou (2013) argue that Foucault’s concept of governmentality is still useful in understanding the role of museums, specifically some type of museums (e.g. national museums). Bennett explains how the knowledge held by museums is related to power: different forms of knowledge and expertise play important roles in organizing specific strategies, techniques and mechanisms for shaping and regulating human conduct (Bennett 2004: 27).

As result of society democratization and technological developments museums find themselves in a situation where the knowledge created by museums’ collections inside the institution contrasts with externally produced knowledge, which might cause anxiety to the museum experts if they have to relinquish part of their power to a wider audience (Fouseki & Vacharopoulou 2013). Trant (2008) agrees that having authority might involve arrogance and denial of the

contributions of others to the development of knowledge (Trant 2008). The structure of institutions and the ingrained value of 'expert' over 'lay' block alternatives (Willson 2010: 176). Some authors disagree and express more optimistic opinions about the capability of museums to transform. Hooper-Greenhill (1992) claims that museums have always worked in accordance with the wider context serving many audiences and stakeholders and are used to modifying their work facing major reorganizations (Hooper-Greenhill 1992). Also Willson (2010) stresses the democratic values in museums by arguing that despite the fact that giving orders and instructions for society, the idea to improve and reform is enshrined within the modern public museum (Willson 2010).

Overall, contemporary museums search for ways to sustain authority without being authoritarian (Cross & Wilkinson 2007). They want to sustain the position of prominent public institution and at the same time to become democratic. This seems to be a challenging task as museums keep receiving admonishments for not prizing participation as their fundamental objective.

2. AUDIENCE ENGAGEMENT IN MUSEUMS

2.1. The concept of the active audience

Engagement is related to people, in this introductory article in relation to the publics that museums work with. In Studies I–IV such terms as visitors, audience and users are applied to refer to museum publics; however, the term ‘user’ is related to digitalization.⁴ Thus in this sub-chapter I introduce the concept of the ‘audience’ which is traditionally used in media and communication studies. According to the Visitor Studies Association, ‘visitor’ is a widely used term not only in museums but also in galleries, science centres, zoos, parks, historical sites and so on.

Visitor studies is the umbrella term for different research focusing on the experiences, attitudes, and opinions of people in and about museums of all sorts. When referring to visitor studies, different authors use diverse terms, such as, visitor research, visitor behaviour, audience development and audience studies (Hooper-Greenhill 2006). The main themes in museum visitor studies include observational research of visitors based on behavioural psychology, quantitative studies of visitors’ participation in arts, in-depth studies to produce management or policy-related information or to improve practice, non-visitor studies and also visitors’ attitudes and value research for market purposes (Hooper-Greenhill 2006: 364-365).

In several museum studies (e.g. Goulding 2000), the term ‘visitor’ is strongly linked to marketing and occasionally it is used to discuss consumer behaviour and thus the perception of the term is sometimes rather narrow. The concept of visitor does not contradict active publics, however researching the visitor from the perspective of marketing hints at the passivity of the visitor but the activity of people is especially significant in conceptualizing engagement. The active visitor is especially emphasized in a constructivist museum-learners construct their own meanings on the basis of their prior knowledge, beliefs and values (Hooper-Greenhill 1999b; Cooperstein & Kocevar-Weidinger 2004). Hooper-Greenhill (1999b: 67) argues that “the old ‘passive audience’ has become the new ‘active audience’”. A constructivist museum acknowledges that knowledge is created in the minds of the learners who use personal learning methods (Hein 1999). Visitors are encouraged to grasp the items with their hands, to question the objects and to engage in other active learning activities (Hooper-Greenhill 1999a; Hooper-Greenhill 1999b). In general museum related literature reflects the increasing awareness of visitors in constructing their own meanings (Stylianou-Lambert 2010).

Associated with the discussion on participation and engagement in the context of the audience are the ideas of Longhurst et al. (2004). On the basis of

⁴ There are also exceptions. For example, in reference to the citizens’ use of museums, museum visitors are referred to as users, non-users and web-users in surveys of the Danish Agency for Culture (see for example, National User Survey 2011 by Danish Agency for Culture (2012).

visitors' activity, the authors differentiate between a number of audience paradigms. One of the three main audience research paradigms is the spectacle/performance paradigm (SPP) and it conceptualizes an active audience as a 'diffused audience'. The concept presumes that the borders between a diffuse audience and performers are increasingly eroded (Longhurst et al. 2004: 105). A diffused audience is used to make imaginative choices about what to accept, reject, distort, alter, or modify in a way that would fit their sense of identity (Abercrombie & Longhurst 1998 cited in Stylianou-Lambert 2010). This paradigm has previously been applied to museum visitors by Stylianou-Lambert (2010). In the framework of SPP museum visitors are seen as "active interpreters who selectively construct meaning based on their personal experiences, associations, biases, and sense of identity whereas the museum is envisioned as an open work that is only completed by the visitor". (Stylianou-Lambert 2010: 130) The idea of an active museum visitor incorporates more than studying the visiting process *per se* and it conforms with the role of the public in a democratizing museum. The activity and shared interests of members of the audience form the basis for a community developing around the museum.

The debate on the activity of people within the audience is lively in field of communication studies, where concept of audience is often used. The activity issue has been a battlefield among authors: there are both supporters (Livingstone 2000; Morley 1992) and deniers (Seaman 1992) of audiences' activity. Biocca (1988: 51) describes the perception of audience as opposites by portraying an active audience as "individualistic", "impervious to influence," "rational, and selective" and a passive audience as "conformist, gullible, anomic, vulnerable, victims". Similarly, Livingstone has identified contrasting perceptions regarding the activity of an audience. She claims that, on the one hand, many media researchers have regarded the audience as homogenous, vulnerable and easily manipulated in the face of powerful and all-pervasive mass media (Livingstone 2005). On the other hand, there have always been certain traditions of mass communication contradicting this view and arguing for active and motivated audiences (Livingstone 2000). Livingstone justifies audience activity in mass media studies as follows: (1) audiences must interpret what they see; (2) audiences' interpretations diverge, generating different understandings from the same text; (3) the experience of viewing stands at the interface between the media and the rest of the viewers' lives (Livingstone 2000: 178). Thus, there are authors stressing the activity of people in relation to both the concepts of 'visitors' and 'audience'.

Occasionally the concepts 'audience' and 'visitors' are used synonymously, but I have opted to use the concept of active audience in this introductory article. I agree with the arguments of Stylianou-Lambert (2010), Longhurst et al. (2004) and Livingstone (2000) on the activity of an audience. The audience concept does not restrict the researcher's position – an active audience is able to perform both in a museum and outside and it is not restricted to on-site activities and it includes groups which are not considered as visitors – e.g. stakeholders. In addition, the location of this PhD introductory article in media and

communication studies defines the selections of concepts and usage of terminology in accordance with a field – the concepts of audience and active audience are widely used in communication and media studies.

2.2. The concept of engagement

'Engagement' is a widely accepted term in different fields such as computer sciences, education sciences, social sciences and humanities. However, there are so many suggested meanings across different fields that no one meaning prevails. No continuation of ideas is present in previous research – every author begins with new ideas and does not build their concepts on previous thoughts. Also, occasionally the meaning of 'engagement' is taken for granted and the authors do not explain what is understood by this term.

The previous works of two authors have provided especially significant input for this PHD introductory article with their engagement ideas: Peter Dahlgren (2006) explored the engagement concept in the political sciences while Bitgood (2010; 2013) focused on visitors' engagement in museums from a psychological perspective. The thoughts of Peter Dahlgren help to understand the link between engagement and participation. Bitgood's studies are useful because of the specific focus on museums. The psychological perspective that Bitgood's work introduces extends the understanding of museum audience engagement analysed from the perspective of communication.

In this sub-chapter, I will review previous efforts to conceptualize audience engagement in different disciplines, both from academically and professionally oriented sources. Thus, part of the sub-chapter is an analysis of previous efforts to conceptualize engagement and part of it is devoted to elaborating the novel concept of audience engagement in museums. The conceptualization of audience engagement in public museums begins with gaining from previous studies. The review includes definitions of engagement and various approaches about how to perceive the engagement process. Ultimately, various sources portray different aspects of engagement, and its similarities and differences with other concepts, such as participation and interactivity, have been consulted and combined to define engagement.

Previous ideas on engagement have been different and even conflicting and I began my review on engagement by reflecting on these differences and conflicts. Referring to political engagement, Peter Dahlgren notes that concepts of engagement and participation are occasionally used as synonyms although there is a small difference between them (Dahlgren 2006). A review of engagement-related sources indicates that a similar situation can be observed elsewhere, too: for instance, commenting on cultural activities Buraimo et al. (2011) do not differentiate between participation and engagement. Some authors have introduced the idea of levels of engagement (e.g. MTM London 2010: 26), just as, several decades ago Arnstein (1969) developed the idea of diverse levels of participation. Others distinguish between passive and pro-active engagement

(Russo et al. 2007; MTM London 2010), drawing parallels with democracy theorists such as Carol Pateman (1970), who considered political participation as ‘real’ and ‘partial’. These diverse aspects of engagement from a variety of sources illustrate the range of interpretations of engagement and the dependency of the use of the term on the field and authors’ individual understanding. The portrayal of engagement in relation to kindred concepts, such as ‘participation’ and ‘interaction’ has been a challenge (see Table 2) and it has been difficult to explore the connections between the concepts and systematize them.

Peter Dahlgren (2006) describes the concept of engagement as one that “generally refers to subjective states. That is, engagement indicates a mobilized, focused attention on some object. It is in a sense a prerequisite for participation (...)” (Dahlgren 2006: 24). The mental activity of people and their focused attention can be observed as critical elements in a number of engagement descriptions. Thus, referring to audience engagement specifically in museums, Bitgood (2010) highlights the interaction between personal factors, psychological processes and the environmental context. In Bitgood’s Attention-value model engagement is the highest of three levels of attention: when a visitor’s attention is first *captured* and then *focused* on the exhibits, we can say they are *engaged* (Bitgood 2013: 194). However, these three components of attention are not distinct phenomena; rather, they form an interconnected continuum (Bitgood 2013). Thus, both authors are in agreement that engagement demands intellectual investments on behalf of the individual. However, for Dahlgren, engagement is a precondition but for Bitgood (2010) engagement is not a way of keeping the door open for future participation; engagement with museum collections is associated with learning and requires deeper processing. For Bitgood to engage a visitor in a collection means achieving the goal.

The definition of engagement by Rosetta Consulting (2014) does not represent thoughts of academics or museum professionals but I have included this example of engagement from a marketing perspective to present multiple meanings of this concept – one of my tasks is to conceptualize engagement and a multiplicity of examples underpins background knowledge. Rosetta Consulting (2014) defines ‘customer engagement’ as a personal connection between a consumer and a brand that is strengthened over time, resulting in mutual value. It is “an enduring, two-way active relationship that simultaneously delivers on your customers’ needs and generates greater profitability for your brand”. (Rosetta Consulting 2014: 5) Following this definition, engagement is not the goal itself, it is a process, an ideal way to sustain and organize the company-customer relationship. The marketing perspective stresses the activity of both the company and the customers but this notion does not say anything about the mental inputs expected from the customers. Thus, potentially, engagement can be a disproportionate relationship where customers’ needs are negotiated and satisfied in a way that brings profit for the company. However, a few components in the definition are worth considering as significant criteria for engagement, such as the lasting power of the relationship, which is particularly important in the context of museums increasing their role in building commu-

nity and networks. Despite my critical attitude towards the marketing oriented engagement approach I can see some similarities with Bitgood’s notion of engagement – he also argues that visitors calculate the perceived value of the exhibits – in other words, how much time they are ready to spend with the objects on display (Bitgood 2013).

The strength of Morris Hargreaves McIntyre’s (2006) approach is the representation of a rather holistic perspective – it links institutional objectives, museums’ policies and the needs of visitors with engagement. Engagement turns out to be a tool to reach institutional goals. Morris Hargreaves McIntyre describes varying human needs as the source of engagement, and specifically for engagement with museum collections. The source identifies four types of engagement: *intellectual*, *emotional*, *spiritual* and *social*, which are all provoked by different motives or needs (see Table 1). This approach can also be used to explore and explain audience engagement from the perspective of museum visitors. In Table 1, I have adapted the *Policies, objectives and needs* matrix by Morris Hargreaves McIntyre (2006: 28) for the purpose of this PhD introductory article. The matrix links museum objectives and visitors’ needs to engagement with the museum collection and presents engagement as a way to reach the goals of the museum.

Table 1. An adapted version of Morris Hargreaves McIntyre’s policies, objectives and needs matrix (2006).

Museum objectives / activity objectives	Needs / motives	Engagement with collection
Immersion in collection Public inspiration	Escapism, contemplation, stimulating activity, aesthetic pleasure	Spiritual
Intimacy with collection / items	Awe and wonder, moving, personal relevance, experiencing the past, nostalgia	Emotional
Collect / Conserve	Nostalgia, sense of cultural identity	Emotional
Research	Academic interest	Intellectual
Public education	Hobby, self-improvement	Intellectual
Children`s education	Stimulating children	Intellectual
Public enjoyment	Social interaction, entertainment	Intellectual
Public attraction	Entertainment, seeing and doing	Social
Public responsibility	Inclusion, welcoming	Social
Public space	Access, welcome, warmth, comfort	Social

In the policies, objectives and needs matrix engagement is related to the spectrum of human needs but visible manifestations are occasionally absent and this can make the recognition and exploration of audience engagement practice in museums difficult. For instance, emotional engagement with art works is challenging to measure and not easy to define, but the definition of the phenomena impacts on the choice of technology for measuring engagement (Latulipe et al. 2011).

An approach elaborated by Edmonds et al. (2006) focuses on the ways of facilitating audience engagement and notes three different strategies: (1) engagement by using *attractors* – in busy places like museums there are many distractions and points of interest, and attractors invite passing audiences to pay attention to the exhibits; (2) engagement by using *sustainers* – these are attributes that keep the audience engaged during an initial encounter and turn museums into hot spots; and (3) engagement by using *relaters* – these help to grow the relationship between the museum and audience so that the audience returns on future occasions (Edmonds et al. 2006: 307). This approach indicates several stages of engagement and when designing engagement activities attractors, sustainers and relaters should be balanced.

Stephen Bitgood investigates how to engage audiences and how to sustain audience engagement – especially in an era of multiple distractions, such as other people, noises, other items, repetition of objects, light, mental exhaustion, and so on. The author introduces the concept of ‘prompted engagement’ – “an activity that occurs to a prompt and that facilitates deep mental processing of sensory, perceptual, and/or cognitive information”. (Bitgood 2013: 123) Museums should not leave mental processing only to visitors; instead, they should consider how to encourage people to process exhibit content more deeply and make it more likely for people to produce desirable outcomes, such as learning. Bitgood suggests that prompting activities might include a variety of techniques, such as imagery exercises, description, comparisons, associations, storytelling, and so forth. (Bitgood 2013: 123)

There are also authors and organizations exploring engagement practices as an array of different kind of activities. The National Coordinating Centre for Public Engagement (NCCPE) in the United Kingdom defines public engagement as “the myriad of ways in which the activity and benefits of higher education and research can be shared with the public. Engagement is by definition a two-way process, involving interaction and listening, with the goal of generating mutual benefit”. (NCCPE 2014) Such an approach is often present in reports on the cultural industry or in the practices of public organizations working with the public. The NCCPE classifies public engagement on the basis of the task of the organization and from its perspective as (1) informing; (2) consulting, and (3) collaborating engagement activities. Further, each mode of engagement involves several subdivisions: for instance, informing also involves inspiring audiences, education, improving access, and so on (NCCPE 2014)⁵. In the case

⁵ The full description of engagement modes by the NCCPE (2014) is as follows:
1) **Informing**: Inspiring, informing and educating the public, and making the work of higher

of the NCCPE, public engagement is contextualized in a wide variety of sectors from arts and heritage to science policy and local government, which suggests that these engagement modes are considered to be universally applicable.

The diverse understandings of the term ‘engagement’ presented above understandably overlap with related concepts such as ‘participation’ and ‘interactivity’, plus each of them have multiple meanings. For instance, instead of using the very mechanic perception of interactivity as “hands on,” some scholars occasionally attempt to define the term in accordance with the progressive concept of interactivity as a democratizing force in the museum (Witcomb 2006). Table 2 is created to present differences and similarities among related concepts and thus identify connections. Another aim of the table is to reflect the results of the literature review manifesting engagement as an array of activities to understand the potential of engagement as the umbrella term. The first column of the table contains a list of engagement modes presented in previous studies. The second column narrows down the perspective and presents digital engagement modes in the field of culture (MTM London 2010). The source for the third and fourth columns is Study I, which characterizes interactive and participatory activities. The last column on the right characterizes engagement modes as they are perceived in the PhD introductory article.

Table 2. Perception of different modes of interactivity, participation and engagement.

Engagement modes	Digital cultural engagement modes (Source: MTM London 2010: 18; 26)	Interactivity (Source: Study I)	Participation (Source: Study I)	Engagement (perception in PhD introductory article)
To share / facilitate (content, experience)	X	X	X	X
To find information	X	X		X
To watch / listen online	X	X		X
To experience	X	X	X	X
To access	X			
To create	X	X	X	X
To produce and publish			X	X
To learn	X	X	X	X
To have power (to control, to make decisions, etc.)			X	X

education more accessible; 2) **Consulting**: Actively listening to the public's views, concerns and insights; 3) **Collaborating**: Working in partnership with the public to solve problems together, drawing on each other's expertise. Source: NCCPE 2014

Table 2 illustrates that varied sources in fact interchangeably ascribe overlapping activities when referring to the different concepts – interactivity, participation and engagement. The systematization of the related concepts is continued in Figure 1. The figure below presents my perception of how the relationships between the above-mentioned concepts are organized and highlights engagement as an umbrella term including multiple activities. The mandatory precondition for any kind of activity is access, and restricted access can be related to any kind of barrier – physical, psychological, financial, intellectual, social and so on. Access to engagement means that individuals can make free choices and estimate if it is beneficial for them to use the engagement opportunities at the next level. Engagement as a phenomenon includes participation and interactivity. I consider these terms to be components of engagement: they are narrower in definition as they are used to display specific features of engagement – for instance, interactivity is restricted to the visitor-exhibition relationship while participation demands a power balance between the parts. It might be argued that participation and interactivity are not ‘at the same level’, but in this figure the focus is not to the hierarchy of activities. At the same time I follow Dahlgren’s idea (2006) of engagement as the precondition for participation – in the figure below engagement is the prerequisite for both participation and interactivity.

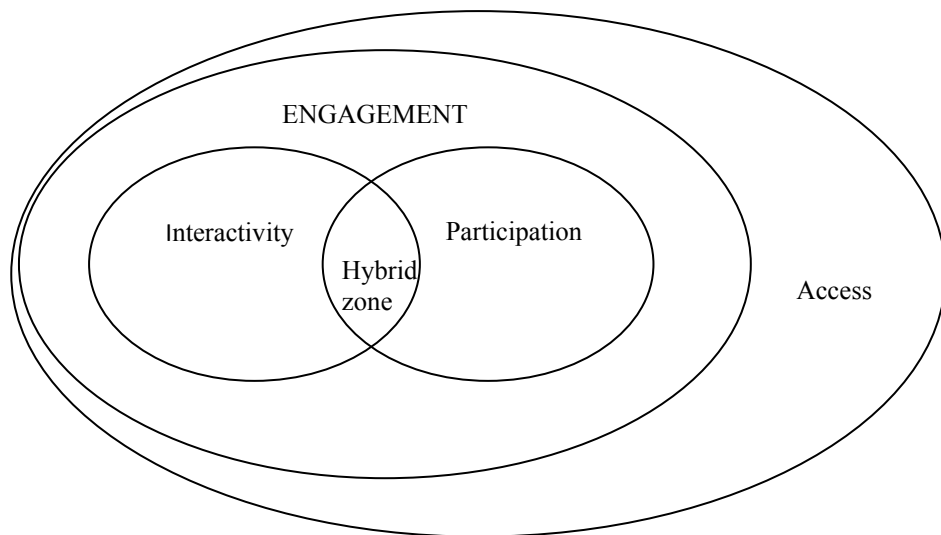


Figure 1. The audience engagement as all-inclusive umbrella concept.

Overall previous studies portray engagement as a process, a relationship, an array of activities, and also a precondition to participation. Systematization of

these ideas create the base for the novel concept of the engagement: (1) *How* to engage the audience / How the audience is involved (Edmonds et al. 2006); (2) *Why* does the audience engage and what is the relationship between the museum operations and the engagement with collections (Morris Hargreaves McIntyre 2006); and (3) *What* are the different engagement modes (MTM London 2010; NCCPE 2014). The How and Why perspectives are concerned with engagement as a process while the What perspective focuses on different engagement modes and considers engagement as an array of activities. Figure 2 below illustrates the integration of the different approaches into one system reflecting both the perspective of the museum and the audience. However, the empirical data of this PhD introductory article mainly focus on the engagement modes and array of activities from the perspective of museums.

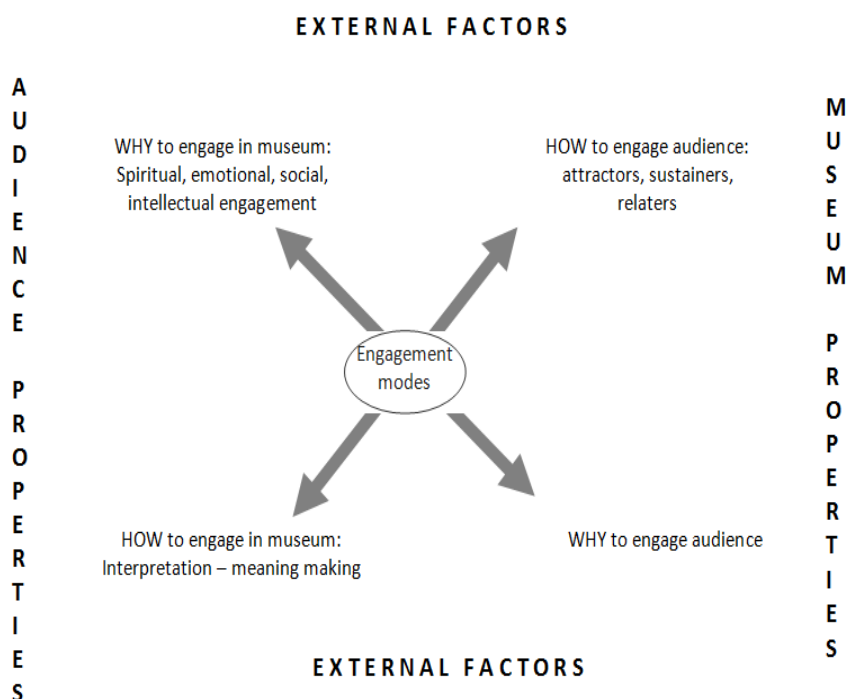


Figure 2.⁶ The engagement process in museums

Figure 2 above explains how museums and audiences mutually interact in the audience engagement process. At the very centre of the scheme is the myriad of audience engagement modes. Both the museums and the audiences are required

⁶ Figure 2 is inspired by the studies of Edmonds et al. (2006) and Morris Hargreaves McIntyre (2006)

to be active and to participate in designing and establishing meaningful engagement modes but the motivation to engage or to initiate engagement is different for each actor. The museum gains more from meaningful engagement – it is not only about the ways of engaging audiences but also about the museum needing audience engagement and understanding its value. Museums need to understand why members of audience are or are not interested in engaging and this matters in the process of recruitment and the design of engagement.

Finally, after reviewing engagement from different angles, I develop several novel definitions to conceptualize audience engagement. Several previous studies have presented definitions of engagement as processes but none of them is suitable for the needs of this PhD introductory article because they do not consider engagement as an enduring and communicative process. Engagement is **a two-way process combining the performance of both the museum and the active audience by responding to the stimulus of the engaged parties and initiating new actions with the aim to improve museum work, enhance the experience or make a difference on a larger scale in society.** This definition of engagement as a process reflects both museum and audience perspectives and its key ideas are illustrated in Figure 1.

Further, few of the previous engagement related sources attempt to categorise varied engagement modes; engagement modes also are at the very centre of Study IV and are frequently mentioned in this PhD introductory article. Engagement modes from the perspective of museum are defined as **the groups of related museum activities designed to attract and sustain interest or provoke some kind of activity from the audience by arousing a spiritual, intellectual, social or emotional connection with the performance.** My understanding of the term ‘performance’ is broad – it refers equally well to single museum objects provoking personal emotions as it does to intentionally designed large-scale engagement projects or to some issues a museum want to raise. However, not all engagement modes are planned and designed, for instance, engagement in the exhibit can be provoked by the activity of the visitors themselves and can take place unintentionally, without being planned by the museum staff.

The analysis of previous studies suggests that engagement should be considered as an inclusive concept related to the achievement of museums goals. Thus, I support the approach elaborated by Morris Hargreaves McIntyre (2006), which gives a rather holistic perspective to engagement as it links institutional objectives, museums’ policies, and the needs of visitors with engagement.

The engagement repertoire, then, is defined as the myriad of both online and on-site engagement modes in the museum that are dependent on the context in which the museum works. Figure 3 below presents the example how audience engagement repertoire is composed by separate engagement modes each consisting of unlimited number of activities from highly participatory to exclusively personal engagement.

MUSEUM ENGAGEMENT REPERTOIRE
Engagement mode: colloboration Engagement activities: museum invites retired people to work as volunteers; museum invites visitors to share their stories; ...
Engagement mode ... Engagement activities ...

Figure 3. Formation of audience engagement repertoire in museums.

One of the tasks of this PhD introductory article is conceptualizing museum audience engagement modes and the scheme of abstract engagement modes will be adapted on the basis of empirical experience from Latvian museums in further chapters. However, respecting diversity of museums, diverse contexts and believing there can be different ways how museums contribute democratization of society, I move away from the normativity of participation and argue that all engagement modes should be present in museums but do not prioritize any of them. In other words, the engagement repertoire is a mix of engagement modes, but none of them is superior to others as long as the engagement repertoire is balanced according to the specifics of the museum.

In the first and second chapter a list of key concepts, related with audience engagement, has been discussed. Figure 4 brings together these isolated elements into a single concept. The illustration below focuses to the museum example; however, similar occurrences can be observed in other institutions.

Figure 4 presents how museum audiences are engaged in and influenced by the overall processes of society democratization. In addition, this illustration wraps up the intellectual work done in this sub-chapter in relation to audience engagement concept development and places the engagement among similar activities of interactivity and participation. It claims there are wide variety of practices about how to find a new balance in the relationship between museums and their publics in the democratizing museum and therefore contributes the concept of audience engagement repertoire.

To sum up, the literature review on engagement found different perspectives of audience engagement concept and engagement is manifested as a process, a relationship, a precondition and as a myriad of activities. Previous thoughts allowed conceptualizing audience engagement in museums and in the following chapters a novel concept is applied to analyse empirical data from Latvian museums.

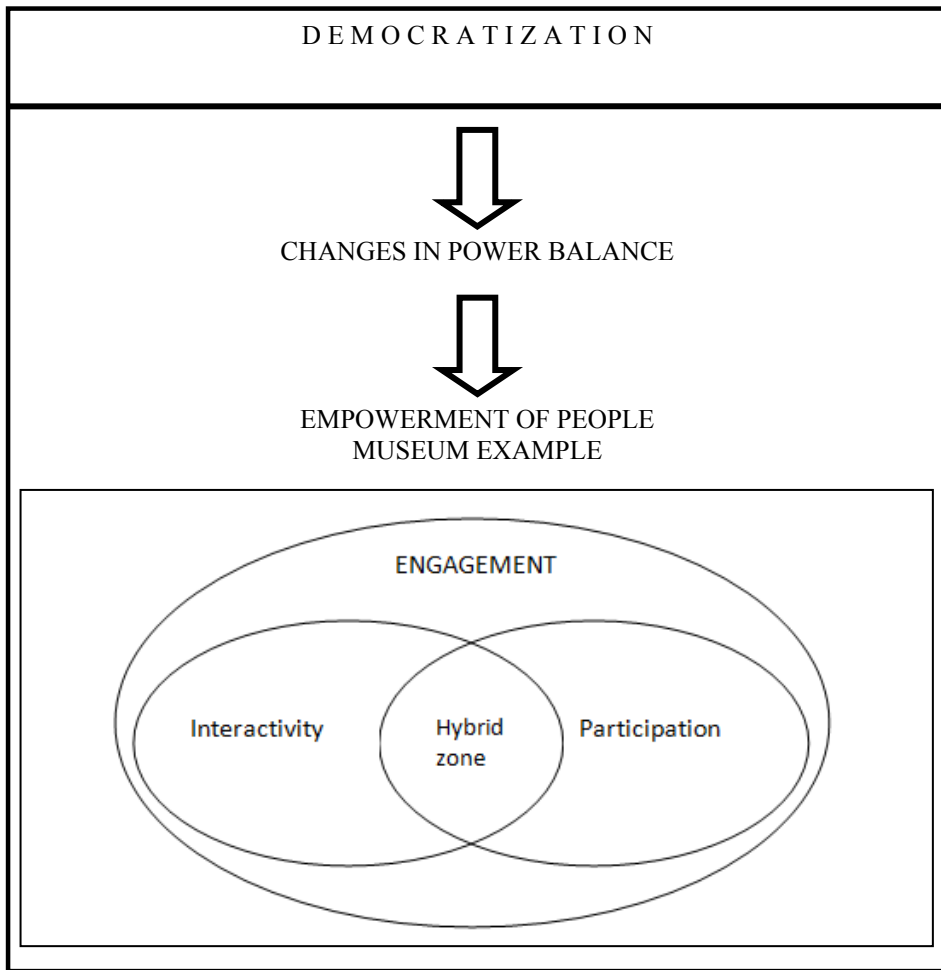


Figure 4. Conceptualizing audience engagement in museums in the context of democracy.

2.3. The challenges of audience engagement in museums

In the sub-chapter 2.3 I introduced the general challenges such as ICT, marketing and museum expertise, which influence the work of museums with their audiences. Audience engagement is not an abstract concept and must be contextualized in a specific environment. In this sub chapter of the introductory article I focus on the practical implications of audience engagement (see definitions of audience engagement in 2.2.) in a specific type of museums – history and art museums – because they make up the majority of the research sample.

Commenting on earlier studies on engagement in history museums, researchers have explored people’s trust in different history related organizations

(Rosenzweig & Thelen 1998); issues related to researching, interpreting and presenting history in museums (Gable 2006; Starn 2005; Crew 1996); history museums' and historians' relationships with their publics (Gardner 2004; Grele 1981; Woods 1995). "The Love of Art and Their Publics" (Pierre Bourdieu et al. (1969), English translation in 1991) should be mentioned with reference to art museums as it also includes some aspects of audience engagement and reflected the results of visitor surveys in different European countries in terms of cultural diffusion. Different issues that the public have and professional curators and educators have are explored by a group of researchers (e.g. Andrew McClellan, Nick Prior) in the book "Art and its Publics. Museum Studies at the Millennium" (2011). Meaning making and educational aspects in art museums have been explored by Hooper-Greenhill et al. (2001) and Hooper-Greenhill (1999a; 1999b). Ang 2005; Cerquetti 2011; Johanson & Glow 2012 and Deeth 2012 have studied diverse audiences and audience development in art museums. In general, participation and audience engagement studies are topical in museums; however, studies exploring the factors impacting on audience engagement in specific types of museums are underrepresented and rather fragmented. In the first part of this sub-chapter I focus on audience engagement specifics in history and local history museums and follow this by a review of art museums.

History is of interest to many people at a personal level: individuals are used to listening to stories about their elders, looking at old family pictures, or making a family tree. People's interest in history means that there could be high numbers of audience members motivated to engage in history museums. However, an obstacle could be that in history museums the general public's intimate and personal views on history often differ from historians' or curators' ideas (Gardner 2004; Rosenzweig & Thelen 1998). Even though online resources, such as online history journals and archive materials, have the potential to decrease the gap between academic historians and the general public by making history available, it has been noted that academics and the public do not understand each other and each others' roles. Historians trained as authorities by the contemporary education system and what Woods (1995) refers to as the fragmented field of history have been mentioned as some of the reasons behind this gap. (Gardner 2004: 15; Willinsky 2005) Although there is criticism of the way in which historians are trained within the education system, there are no convincing arguments about whether this is related to the engagement performance of history museums.

To some extent, this statement might also hold true for history museums and thus impact on the development of the audience engagement repertoire; however, it must be noted that not only historians but also communication and marketing staff work with museum audiences in contemporary museums. A specific case is audience engagement in national history museums because the messages of these museums are considered to be official statements, nationally validated (Gardner 2004: 15; Gable 2006; Simon 2010). The enormous responsibility of the authority of the message might constrain the experts in national history mu-

seums from sharing power and engaging non-historians in museum work (See Study I for practices in Latvian national museums).

What could history museums do to be more open to audience engagement? Recommendations refer to engaging visitors by presenting the past on a human, personal level, to make sure that history is not only about famous or anonymous individuals (Gardner 2004). This might help improve the audience's personal connection with the objects exhibited. The idea is not new, as personal narratives are already used in history presentations in both local and national museums. However, it is easier for local museums to connect with audiences on a personal level because audience members share a local identity and are thus more closely related to the space presented in the museum. To some extent, the local community serve a dual purpose – as a source and inspiration of exhibitions for local museums (through donations of items and photographs, storytelling and so on) and as audiences.

Art museums are the second type of museum explored in this sub-chapter. Audiences for art are characterized by their diverse interests and levels of knowledge and confidence, as well as by class, race, ethnicity and gender (McClellan 2003: 1). Thus, one of the problematic aspects of audience engagement in art museums can be the difficulty of defining the audience. For instance, Hooper-Greenhill (1999a) argues that art museums do not know their audiences well enough and they do not have enough understanding of the interpretation strategies that visitors might use. Difficulties in identifying audiences might be followed by a failure to develop a balanced engagement repertoire, because there is no such thing as universal engagement. Audience engagement has to be specifically designed for specific audiences to provide meaningful outcomes for both parties. Insufficient knowledge about their audiences might be a problem not only for art museums, but for any type of public museum.

The specifics of art museums do not allow the impact of consumerism to be neglected – art items are not only museum objects but also goods in a market. Art museums depend on private donors when developing a collection and thus are tied to private interests. Consequently, art museums have striven to engage elitist audiences that are capable of paying, and rewarded their financial support by fixing wall plaques and by organizing special events (McClellan 2003; Ang 2005). Contemporary art museums face pressures to become less elitist and more responsive to the increasing cultural diversity in society, but at the same time these institutions are sources of cultural power. It is often at this point that democratization ends in art museums – as the inclusion of new groups and their aesthetics challenge the accepted judgment of aesthetic value (Ang 2005).

Art museums work for both present and future publics, but the preservation function will always win (MacLellan 2003). This argument can also be used in the case of history museums and other museums dealing with authentic items. The emphasis on the conservation function may impact the audience engagement repertoire in several ways – for example, in the form of restrictions of public access to art items. However, such issues can sometimes be solved with the support of digital technology or copies.

Insights into history and art museums reveal that both deal with different challenges – the distinctive relationship between the publics and the subjects (history, art) affects the museums' relationships with stakeholders and visitors. The audience engagement modes are context sensitive and argue against universal audience engagement repertoires.

3. CONTEXTUALIZATION OF LATVIAN MUSEUMS

3.1. A brief introduction to Latvia

Museums are significant cultural institutions that operate in a particular political, socioeconomic and cultural context. The aim of this sub-chapter is to review the recent political, cultural, and economic environments surrounding Latvian museums. The role of the context in relation to participatory activities in Latvian museums was articulated in Study I and the impact of a context on a museum-audience relationship was stressed (See sub-chapter 2.3.). Study I specifically emphasized the past experience of the Soviet period as a possible barrier for participatory museums. Knowledge of the context is significant to understand both institutions and their audiences.

After World War I, the independent Republic of Latvia was proclaimed in 1918, but independence was lost prior to World War II, when the Soviet Union occupied the state. During World War II, Latvia was first occupied by Nazi Germany and then re-occupied by the Soviets. After the war, the Latvian Soviet Socialist Republic was one of the fifteen Soviet republics until independence was restored in 1990. After a long interruption in democracy, both politicians and citizens had to relearn how a democratic state functions and the role of civil society in a parliamentary democracy. A notable landmark in this development happened in 2004, when Latvia joined the European Union.

Generally speaking, the state has succeeded in restoring democracy (Walker & Habdank-Kołodczkowska 2012); however, some authors (Duvold 2014; Pettai et al. 2011; Tisenkopfs 2009; Ijabs 2014; Dreifelds & Kalniņš 2014) still identify a long list of weaknesses in the system, such as the public's low trust in the performance of democracy, distrust in state institutions, and corruption. Another set of problems in the country is related to civil society: part of the population is alienated from the state, civil society in general is passive, citizens have poor cooperation skills, and individuals lack faith in their ability to make a difference as involvement in citizens' initiatives and other civil society activities is low. However, occasionally, there might be a higher level of political activity, but it is usually triggered by rising ethno-political and social inequality issues (Tisenkopfs 2009).

There are a large number of non-governmental organizations (NGOs) in Latvia (Šimanska 2013), but the number of inhabitants actively working in NGOs is small, 5–6% of the population (Tisenkopfs 2009). The inability of Latvians to establish a link between universal societal interests and their own benefit to some extent explains the low NGO participation rates. Participation is particularly low in organizations advocating universal interests significant for society as a whole – human rights, corruption, environmental sustainability, and so on – rather than the interests of particular groups (Ijabs 2009). Civil society is more active in the fields of religion, culture and sports than in politics. Thus, one of the main challenges for Latvian democracy is to find ways to increase

public interest in participation and to encourage new citizens' initiatives (Tisenkopfs 2009).

In 2014, the population of Latvia fell below two million for the first time since the 19th century. The decrease can be explained by birth rates being lower than death rates, and significant work-related emigration. Historically, Latvia developed as a multi-ethnic country and currently people from about 150 ethnic groups live in the country. The biggest ethnic group is Latvians who make up slightly over 61% of the population (Latvijas Republikas Centrālā statistikas pārvalde 2014; Rozenvalds 2014a). Russians form the biggest ethnic minority in the state, and many residents – about 13% of all inhabitants, mostly Russians – are yet to gain citizenship (Šūpule 2014). Results of a recent study (2014) confirm that more than 84% of Russian speakers mainly watch Russian Federation TV channels (Rozenvalds 2014b). These data show the existence of two separate information spheres and indicate that many residents are not integrated into society politically or culturally. In a similar vein, cultural consumption is impacted by ethnical divisions: on average, ethnic minorities partake in fewer cultural activities than Latvians (Tjarve 2010), but no statistical data or study is available about the percentage of museum visits for different ethnic groups in Latvia.

The decreasing population is one of the problems for the Latvian economy. Small and medium-size enterprises and service industries dominate the economy. The value of imports is higher than exports, and the majority of exported goods do not have high added value, which is crucial for national economic development (CIA World Factbook 2012; European Commission 2014). The Latvian economy has experienced both a period of rapid growth and a deep recession (Skribane & Jakobsons 2013) and the global economic crisis resulted in the strict consolidation of the state budget for several years. In 2009, the budget was consolidated twice and the state reduced costs in almost all areas and raised taxes (Eiropas Ekonomikas un sociālo lietu komiteja 2012). In 2015, drastic budgetary consolidation is no longer needed, but the state still has to solve many urgent problems, such as high unemployment rates, high income inequality, poverty and the high tax burden on labour (Eiropas Ekonomikas un sociālo lietu komiteja 2012). Several sectors, including culture, have not regained the pre-crisis level of financial support from the state budget.

ICTs open new opportunities for democratization and for museums; therefore, a short review of ICT-related issues in Latvia is presented here. In 2014, 81% of Latvians were Internet users, and amongst 16–34-year-olds the proportion of users was over 95% (ITU 2015; Latvian Internet Association 2015). Multi-function portals, news sites, social networking sites, collective shopping pages, information databases and catalogues attract the biggest audiences (Driķis 2013). A recent study on online commentary culture highlights a low Internet culture: about fourth quarter of the comments on online news sites are very aggressive, and coarse words are used in approximately half of the comments (Domnīca Providus 2015; Barisa-Sermule & Ambote 2015; Rožukalne 2012). The findings show that a low Internet culture is typical, not just for few

individual users, but for a significant number. It raises doubts about the ability of Latvian Internet users to employ Web 2.0 opportunities for strengthening democracy, building online communities, having constructive discussions, and so on.

However, in the context of ICT usage for democratization, positive changes have taken place. The legislator in 2012 approved the Law on National Referendums, Initiation of Laws and European Citizens' Initiative (*Latvijas Vēstnesis* 2012a). The law states that citizens can collect signatures electronically for legislation initiatives. An ICT related project started in 2011 – an online platform for social initiatives called *ManaBalss.lv* (My voice). Any Latvian citizen can use the platform to post an initiative, and initiatives that gain over 10,000 signatures are delivered to the Parliament, Cabinet, Chancery of the President, and other institutions if needed (*ManaBalss.lv* 2011–2015). The developers of the project have evaluated the quality of submitted ideas positively (Ugaine 2012), and in 2012, the first initiative submitted on this platform received parliamentary support (*Latvijas Vēstnesis* 2012b). An increasing number of debates gathering like-minded users, and a variety of protest forms, have taken place in the online environment, but the use of online social media for strengthening democracy is not yet fully exploited.

The context of Latvia would not be complete without a short description of the sector museums operate within – the cultural sector. Cultural policy in Latvia is determined by the long-term document *National Culture Policy Guidelines 2006–2015: the National State* and the mid-term document *Cultural Policy Guidelines 2014–2020: Creative Latvia*. Both documents are integrated into the national long-term planning document *Sustainable Development Strategy of Latvia until 2030*. The aim of *Creative Latvia* is “to strengthen the cultural values of the community, and to create a favourable environment for personal development, social activities and Latvian growth” (Ministry of Culture of the Republic of Latvia 2014: 12). At the level of political statements, there is support for the promotion of everyone's personal development, education and creative potential as well as for broad audience participation in culture (Ministry of Culture of the Republic of Latvia 2014). However, in practice financing is only occasionally given to support the implementation of these policies.

In terms of cultural consumption, the Special Eurobarometer *Cultural Access and Participation* ranks Latvian inhabitants above the average European level: 4% of inhabitants report very high cultural consumption, 17% high consumption, and 62% medium consumption. The report identifies the main barriers to cultural consumption in every European state, and in the Latvian case, lack of time is one of the most significant constraints. For example, regarding the attendance of museums and galleries lack of time is mentioned as the main barrier for 39% of Latvian respondents; lack of interest for 22%; limited choice or poor quality for 14%; too high prices for 9%; and lack of information for 5% (European Commission 2013: 26). The results of the Eurobarometer survey indicate that Latvian inhabitants are generally interested in cultural consumption, which is a positive sign for museums. To sum up, the statistics show the high interest

of people in Latvia in culture, while, at the same time, there is space for the development of a participatory culture in Latvia and relatively intense cultural consumption does not guarantee audience engagement with public knowledge institutions.

3.2. Museums in Latvia

The museum sector is contextualized within the environment examined in the sub chapter 3.1. In this sub-chapter the main focus is on the different processes that have shaped Latvian public museums. A relatively large amount of attention is devoted to the position of museums in Soviet time because contemporary museums still deal with information from the relatively recent past, as pointed out in Study I. The analysis of the literature review allows us to conclude that economic aspects in public cultural institutions also have a major impact on contemporary museums. At the end of this sub-chapter an explanation of the financial conditions in Latvian museums are illustrated to explain audience engagement potential in museums.

Museums have been a part of the cultural landscape in Latvia for a long time. Museums developed early: the first museum in the territory of Latvia was founded in 1773, and today the Museum of the History of Riga and Navigation is the oldest public museum in the Baltic States, and one of the oldest ones in Europe (*Rīgas vēstures un kuģniecības muzejs* 2007). The Latvian Ethnographic Open Air Museum, founded in 1924, is one of the oldest and largest of its type in Europe (*Latvijas Etnogrāfiskais brīvdabas muzejs* 2010). The foundation of the first national museum is related to the Riga Latvian Society (RLS): one of the Society's cultural committees started to gather materials in 1869 to enable the establishment of a Latvian museum during the national awakening process. The RLS collections were given to the state in 1918, and the museum became the National History Museum of Latvia (*National History Museum of Latvia* 2015). During the interwar period, institutional and legal bases were created for public cultural institutions and museums. After the occupation by the Soviet Union and later by Germany, the sphere of culture was rearranged according to the ruling ideological regime (*Ķencis & Kuutma* 2011).

During the post-war Soviet occupation period power belonged to the Communist Party of the Soviet Union. The staff in museums were replaced and collections rearranged (*Ķencis & Kuutma* 2011). Latvian museums lost many valuable items during the Soviet era, mainly those that did not satisfy the demands of the Communist ideology. Some of them were destroyed, some brought to Russia, and some placed in special collections with restricted access (*Pumpuriņš* 2015). The dominant themes and narratives related to class struggle, revolution and war, and the positive influences of Russian and Soviet culture (*Ķencis & Kuutma* 2011). Restrictions on displays were a common feature of Latvian museum work during the Soviet regime; examples of such practices include bans on opinions not approved by the Communist Party and restrictions on cultural

cooperation (including cooperation with exiled Latvians). Despite these constraints, Latvian museums were able to achieve valuable outcomes – some exhibitions developed in Soviet times have been exhibited many years after independence (e.g. the exhibition in 1984 to commemorate the 120th anniversary of the Dikli Song Festival). Communist censorship loosened during the *perestroika* and *glasnost* policies, but the most significant turning point was the Plenum of Creative Unions in 1988 – afterwards, Latvian museums were able to open their closed collections and to present previously censored topics in their displays (Pumpuriņš 2015). This gave museums a significant role during the Latvian national awakening: they challenged the Soviet version of Latvian history and represented new national values and narratives (Pumpuriņš 2015; Ķencis & Kuutma 2011). For example, in 1988, the History Museum of the Latvian Soviet Socialist Republic (the present-day National History Museum of Latvia) organized an exhibition “*Latvija starp diviem pasaules kariem*” (Latvia between two World Wars). The exhibition attracted an extraordinarily high number of visitors – around 300,000 (Ministry of Culture of the Republic of Latvia 2015) – people queued in long lines outside the museum to enter.

In 1990 Latvian independence was restored and the system of museum management and legal basis changed. The narratives and display policies were reconsidered significantly, in line with the ideology of the independent state (Ķencis & Kuutma 2011). However, it is important to recognize that the narratives had already begun to change gradually in the late 1980s (Pumpuriņš 2015). In the 1990s, many museum items representing the ideas of the Communist Party were destroyed, and material that would be captivating from a present-day perspective was lost. The period after independence was active for Latvian museums as cultural contacts with foreign colleagues were restored and the exchange of experiences was especially intense with museums in Denmark, Sweden, Germany, the Netherlands, the United Kingdom and France. The contacts established during the Soviet period with Russian, Estonian and Lithuanian museums were sustained. Since independence, museum professionals have received training and attended seminars to help them cope with the recently introduced aspects of museum work, such as marketing, project management, partnership and copyrights. The names and concepts may have been new, but the idea behind them was often familiar, for example, the notion of partnership had similarities with museums’ cooperation with collective farms in the Soviet period. Some of those cooperative projects were great examples of sustainable partnership. The book series started in the 1990s, “*Muzeoloģijas bibliotēka*” (The Library of Museology), played a significant role in the process of further education and exchange of ideas (Pumpuriņš 2015).

In the 1990s, the processes of denationalization and privatization had a negative impact on many museums. In the Communist era, museums were often located in churches or other buildings, which were given back to their previous owners after Latvia regained independence. As a result, many museums lost their properties, which led to the closure of some smaller museums and hindered new museum development projects generally (Pumpuriņš 2015). The

same trend also affected collections: for instance, items that were illegally confiscated or nationalized during the Soviet period had to be returned to their previous owners. The 1990s also saw a reorganization of the management and legal basis of the Latvian museum sector and Latvia joined international museum associations (for instance, the International Council of Museums, ICOM). After the turbulent 1990s relatively serene times followed, but in 2008 an administrative territorial reorganization took place, forcing many museums to redistribute their collections in line with the new territorial borders (Pumpuriņš 2015).

Currently the Law on Museums, in force since 2006, regulates the Latvian museum sector (Law on Museums, 2005). Apart from private museums, there are three types of public museums: state, municipal and autonomous. Ministries, most commonly the Ministry of Culture, fund the state-owned museums, whose funding is dependent on ministries' budget. To ensure high-quality performance, accreditation is mandatory for public museums and optional for private museums (Law on Museums 2005). As different ministries and municipalities fund public museums their budgets are very different. However, all accredited museums are eligible to receive funding from the Ministry of Culture State Culture Capital Foundation (SCCF) and from EU funding programmes (Vilcāne 2013; Law on Museums 2005).

The Ministry of Culture of the Republic of Latvia is responsible for the implementation of cultural policy and the allocation of funds to the cultural sector. It monitors national public museums and has established the Council of Museums – a consultative body promoting decision-making and cooperation among institutions in the museum field. The Ministry also bears the responsibility for the national museums (Law on Museums 2005) and the maintenance of a museum registry. The database includes public museums and accredited private museums as well as non-accredited private museums where there is an agreement with the owners (Ministry of Culture of the Republic of Latvia: Information Systems for Culture 2006–2010). At the end of 2013, there were 111 museums in Latvia providing jobs for 1,813 people (Latvijas Republikas Centrālā statistikas pārvalde 2015; Latvijas muzeju biedrība 2014). In comparison with 2007, the number of accredited museums decreased by 13%; however, the number of museum visitors increased. In 2007, there were 1,093 museum visits per 1,000 inhabitants, while in 2013, the number rose to 1,321 (+21%) (Klāsons et al. 2014). The network of public museums covers the whole of Latvia: about 30% of museums provide their services in Riga and the Riga region, and the other 70% elsewhere. There are regional differences regarding the number of museums in different regions of Latvia (Latvijas Muzeju biedrība 2014). In the Latgale region there are fewer museums, and consequently, opportunities for the community to participate in the work of museums are limited.

The future development of museums in Latvia is based on integration, for in the cultural policy document *Creative Latvia* the strategy of each separate

cultural sector is integrated⁷. The aim of integration is to ensure that museums work as dynamic, contemporary and widely inclusive institutions, needed by the community, and that the identity of museums is based both on a unique tangible and intangible heritage. To reach the strategic aims it is essential to strengthen the capacity and competitiveness of museums and their professional staff, to have accessible and engaging museums with modern expositions, and to use cultural heritage actively in terms of research, maintenance and creativity⁸. Proper infrastructure is a mandatory precondition for reaching the aims in the museum field. Achieving the financially demanding goals in the museum sector might be challenging, however: in the previous policy planning period some cultural policy objectives were set up but not implemented – for instance, the building of the Museum of Contemporary Art (Vilcāne 2013; Ministry of Culture of the Republic of Latvia 2014).

The *Creative Latvia* guidelines emphasize the importance of memory institutions, including museums, and recommend their higher involvement in public life-long learning to facilitate people's social and communication skills, community cohesion, inter-generational communication, and social inclusion. Support is also given to the idea of educating museum sector workers to modernize museum expositions – to increase interactivity and open new opportunities for audience engagement (Ministry of Culture of the Republic of Latvia 2014).

From a financial perspective, the future plans regarding museums should be viewed with some caution. After all, culture has been the economic sector that has suffered the most under the conditions of limited resources. The sector has been affected by decreased ticket sales and cuts in state funding⁹. During the global economic crisis Latvian museums and archives experienced the largest cuts compared to other cultural institutions (Matisāne 2009) and still have not regained the previous amount of state financing. Many museums earn their own money through entrance fees, rental services, donations, guided tours and other services depending on the museum's infrastructure and operational specifics (Vilcāne 2013). The shortage of funding has caused several problems in Latvian museums: noncompetitive salaries¹⁰, underdeveloped infrastructure which does not meet the demands of contemporary society and technological development, and limited access to cultural services in the regions. Other reasons why the museums' offer does not meet the demands of society are related to insufficient

⁷ At the time of writing the introductory article, the Ministry of Culture of the Republic of Latvia was in the process of finalizing the Strategy for the museum sector.

⁸ Society engagement was stressed as one of the priorities of the Strategy for the museum sector. However, as the strategy was not confirmed at the time of writing the introductory article, it is not discussed here.

⁹ There are also exceptions: for example, DNB Latvijas barometrs (2012) presents the increasing number of visitors during the economic crisis in the Latvian National Museum of Art.

¹⁰ Noncompetitive salaries make the recruitment of museum staff difficult, in many museums a high proportion of staff are relatively old. According to the annual reports of museums, in some cases up to a third of all museum workers have attained retirement age. This may partially explain why museums are not always open to technological innovations.

attention to culture and creativity in formal education, poorly developed public-private partnerships, low research capacity in museums, and the reluctance of museum staff to use ICT (Vilcāne 2013; Matisāne 2009).

The ongoing poor financial conditions in many public museums have raised questions about the political will to allocate finances for the development of the museum sector. The long term level of national funding, low and insufficient compared to western and Nordic European countries might result in lack of progress for Latvian museums. The next few years will show if there is going to be a general shift in cultural policy in the museum sector or if the proposed strategic priority to increase society engagement in cultural institutions will remain just words on paper.

4. RESEARCH DATA AND METHODS

The PhD introductory article is based on several interrelated articles and on multiple data deriving from distinct sources and collected by different methods. The introductory article uses both quantitative (Study **IV**) and qualitative (Study **I**, **II** & **III**) data. Studies **I** and **II** are based exclusively on data from Latvian museums; for studies **III** and **IV** the data come from both Latvian and Estonian museums. The aim of this chapter is to bring together and describe in detail the range of data sources and methods.

This chapter consists of two sub-chapters: the first describes the data collection process and the second focuses on methods of data analysis. The second sub-chapter also includes an explanation of how the data was re-analysed to prepare the cover article of the PhD introductory article *Conceptualizing Engagement Modes: Understanding Museum – Audience Relationships in Latvian Museums*.

4.1. Methods of data collection

This PhD dissertation is based on both qualitative and quantitative data collected mainly in Latvian museums. To gain richer data, Estonian museums were also used as sources in Studies **III** and **IV**; and the Estonian sample and data are present in the methods section. However, the aim is not to provide a comparison between museums in different states and the main focus is on Latvian museums. Table 3 below summarizes the main data collection methods and museums used as sources of data in Studies **I–IV**. The table is developed in accordance with the same anonymity settings as in each separate study: anonymity is preserved for those museums which were presented anonymously in studies, and vice versa. For Study **III** secondary data was used – that is, visitor interviews in Latvian and Estonian national museums originally collected for the EuNaMus research project¹¹. EuNaMus researchers also designed the data collection method. For the three other studies primary research data was used.

I developed the research designs for Studies **I** & **II**, and contributed to the research design for Study **IV**. Co-researchers created the research design for Study **III**. The research design of the PhD introductory article has been updated as the results of each completed research stage redefined the methodology for the next stage.

¹¹ EuNaMus was a three-year research project funded under the Seventh Framework Programme of the European Commission and conducted through a multi-disciplinary collaboration (EuNaMus 2010).

Table 3. Summary of the main data collection methods and sources for Studies I–IV

Museum	Staff interviews	Visitor interviews	Staff phone interviews	SNS content	Study
Municipality museum in region				X	I & II
Private museum				X	I & II
Affiliate of National Museum				X	I & II
Affiliate of specific theme museum	X			X	I & II
Affiliate of autonomous museum, state agency (well attended by tourists)	X			X	I & II
Autonomous museum, state agency	X			X	I & II
Department of National Museum, Open Air museum	X			X	I & II
National museum	X			X	I & II
Museum in region, structural unit in municipality agency	X			X	I & II
Three small, local museums situated in rural territories	X		X	X	II
Ethnographic Open-Air Museum of Latvia		X			III
				X	IV
Art Museum Riga Bourse, affiliate of Latvian National Museum of Art				X	IV
The Art Museum of Estonia KUMU				X	IV
Estonian National Museum		X			III
				X	IV

Studies I & II rely on semi-structured expert interviews as the main data collection method, to reflect the plurality of the museum professionals' opinions. Sixteen specialists were interviewed in Latvian museums during March and April, 2011. The selection of museums for expert interviews was defined by several criteria: they had to cover national, regional and local museums, private

and public museums, affiliates and main organizations, and different thematic museums including open-air museums. A mandatory criterion for selection was that the museum had to have an Internet site and an active account on at least one of the following social networking sites (SNS) – Facebook.com, Draugiem.lv or Twitter.com. Such a sampling strategy made it possible to use data for both on-site (Study I) and online participation analysis (Study II). The general sample for Studies I & II included all the Latvian museums mentioned in the official museum register cultural map (*Kultūras karte*; available at www.kulturaskarte.lv). In the next step, the social media activity of the museums was monitored to narrow down the sample. In all the museums except one small private museum several interviews or group interviews were carried out, mainly with public relations and marketing specialists, curators and specialists responsible for educational work activities. Those specialists were selected because their daily duties are related to work with audiences, they have regular contact with the audience and also have experience of participating in audience engagement-related projects. The interview questions were divided into several sections ranging from personal to institution-related questions as well as questions concerning the interviewees’ professional experience of on-site and online participatory activities in museums.

In Study II, the data collected in the first round of interviews motivated the researcher to make three additional phone interviews with the managers of museums that had terminated or avoided active usage of online channels. These were small museums in rural areas or small towns. The number of interviews was ultimately determined by saturation, as it is a central principle of qualitative sampling (Baker & Edwards 2012).

Table 4 below illustrates the step-by-step data collection stages for Studies I & II as both studies partially shared data sources. Study II focused on online participation in Latvian museums from the perspective of museum professionals, therefore, apart from the interviews with staff, constant monitoring of museum online activity took place.

Table 4. The data collection phases of Studies I & II.

	Sample selection of Latvian museums	Monitoring of museums’ online activity	Museums’ selection (SNS users) for interviews	Semi-structured interviews	Museums’ selection (SNS non-users) for interviews	Semi-structured phone interviews
Study I	X	X	X	X		
Study II	X	X	X	X	X	X
					Monitoring of museums’ online activity	

Study **III** is based on data collected during a cross-national museum research project, EuNaMus, in 2011. This multidisciplinary project explored the creation and power of European national museums. The focus was on understanding the conditions for using the past in negotiations that recreate citizenship (EuNaMus 2010). The overall qualitative visitor study of the EuNaMus project involved six very different museums, but the paper focuses on Estonian and Latvian museum visitors in the Estonian National Museum and the Riga Open-Air Ethnographic Museum. These two national museums are similar in their format, to some extent in their societal context, and in their permanent displays, which are primarily ethnographic.

In the summer of 2011, semi-structured interviews were carried out in Estonia with 25 visitors. Significantly more women (16) were involved in the interviews than men. More than 10 visitors came from outside Estonia. Random visitors who happened to be in national museums were interviewed. At the Estonian National Museum a focus group with five Russian language speakers, all women, was carried out. In Latvia, 20 visitors were interviewed, 17 of them individually, with slightly more women (12) than men taking part in the interviews. The majority of visitors (15) were Latvian, and two were born in Latvia although their nationalities were Polish and Russian.

The EuNaMus researchers designed the data collection methods for Study **II** but for the specific needs of this study, the data from Estonian and Latvian national museums were re-analysed. The interviews consisted of discussions about the visiting experience and identity conceptualisation, and of the relation of the visiting experience to the notion of identity. The final section of the interview dealt with the question of what role the national museum has in identity building.

For Study **IV** the main source of data collection is the profiles of Latvian and Estonian museums on Facebook. Facebook is the most used social network in Estonia and in its museums. Latvian museums use the local social network Draugiem.lv, Facebook.lv and Twitter.com, therefore, only data from Facebook was collected as each social networking site has its own communication specifics. The sample includes four museums, two institutions in each country – the open air museums and art museums which all have active communication on Facebook. The analysis of institutions from different countries allows richer data on engagement practice to be gathered. Differences in the contexts museum work within might produce varied examples of engagement practices and can serve as sources of experience exchange.

To collect the content created by museums for Study **IV**, the free software *Digital Footprints* was used and the museums' Facebook (FB) posts from October 2013 to September 2014 were retrieved: The Ethnographic Open-Air Museum of Latvia – 876 cases of FB; Art Museum Riga Bourse, the affiliate of the Latvian National Museum of Art – 282 cases of FB; The Art Museum of Estonia KUMU – 207 cases of FB; The Estonian National Museum – 355 cases of FB. The retrieved data included posts (text and visual material) and all related information including users' feedback.

The selection of data collection methods is defined by the research topic – semi-structured interviews were considered to be the most appropriate method of gaining rich data and the plurality of opinions museum staff. To conceptualize different engagement modes on the basis of online content created by museums, quantitative data was needed. In summary, two different data collection methods were used to provide a balance between qualitative and quantitative data sources.

4.2. Methods of data analysis

This sub-chapter describes the preparation of data for analysis and methods of data analysis for Studies **I-IV**. Content analysis and grounded theory are the main methods used. Qualitative data analysis methods prevail in Study **IV** although it is based on quantitative data. Studies **I & II** have been implemented by using similar methods of data analysis and partly overlapping coding guidelines. For different studies different analytical tools were used: for example, for Study **I** used the participation model of Nina Simon (2010), and for Study **IV** used the model of a sign's functions (Jakobson 1960; Thwaites, Davis & Mules 2002). Table 5 below shows an overview of the research methods employed in all studies and reflects several research stages starting from the initial preparation of data for analysis.

In Studies **I & II** the data from interviews were analysed by using the generally inductive approach that allows research findings to emerge from the frequent, dominant or significant themes inherent in raw data, without the restraints imposed by structured methodologies (Thomas 2003: 2). The interview texts were transcribed and read closely before the analysis of their content was started. The written texts were coded to subdivide the informants' different statements. Some coding examples of Studies **I & II** include such labels as 'professionals' attitudes towards collective expertise', 'participatory activity', 'perception of visitors'/users' activity' and so on. For the needs of Study **II** specific social media related codes were developed, such as 'advantages of concrete type of social media' and 'social media usage'. The meanings of the texts were thus researched and, finally, similar units were grouped into analytic categories to create more general and abstract notions. The units were defined by their membership in a category – by their having something in common (categorical distinctions) (Krippendorff 2004).

Table 5. Research methods for studies I–IV.

Study	Data collection	Preparation for data analysis	Data analysis: Stage I	Data analysis: Stage II
Study I	Interviews	Transcribing interviews and close reading	Inductive approach: qualitative content analysis-preliminary coding, development of coding guide, labelling, grouping of similar units on the basis of categorical distinctions	Mapping categories in theoretical matrix, generalizations
Study II	Interviews, phone interviews, SNS content monitoring	Transcribing interviews and close reading	Inductive approach: qualitative content analysis – preliminary coding, development of coding guide, labelling, grouping of similar units on the basis of categorical distinctions	Generalization
Study III	Interviews, focus group discussions	Close reading	Inductive approach: Identification of identity construction markers	Generalization
Study IV	Retrieving FB content	Development of analytical categories	Inductive approach: axial coding – grouping of similar units; use of grounded theory to generate model	Generalization of data by using Model of a sign’s functions
			Re-definition of analytic categories	
Introductory article	Inductive–deductive approach Interview data analysis method – re-analysis of interview data and <i>ad hoc</i> meaning generation			

In Study I the participation model of Nina Simon (2010) was used as an analytical tool to map the analytical categories – that is, the types of participation activities in Latvian museums. The following categories were mapped: 1) Information and collective expertise collection, 2) Resources (human, material, financial resources) raising, 3) Building loyalty, 4) Attracting and educating school audiences, 5) Attracting and educating general audiences, and 6) Engagement of stakeholders providing a range of benefits. The model elaborated by Simon was used because it is developed specifically for museums and can integrate a wide spectrum of participatory activities.

In Study **III** the interviews with visitors were analysed through close reading and content analysis. The theoretical framework of national identity construction provided guidelines for coding national identity markers (such as languages, customs, religions and rituals). The observations of how visitors construct national identity also emphasize the comparative perspective – the differences and similarities between the Estonian and Latvian cases.

To analyse the data for Study **IV** we used a set of methods in several phases. The method of close reading coupled with the principles from grounded theory (that is, initial, focused and axial coding) allowed us to collect data and to identify analytical categories presenting museum online communication conceptualized through diverse engagement modes. In our study we do not reflect audience perspectives on online engagement: in line with the aim of our study, our sample simply helps to outline the perspective of museums.

The first phase of data analysis started with close reading and a labelling of the diverse analytical categories that museums use to communicate with online communities. To develop these categories, different sources were used to gain insights into the variety of perspectives of audience engagement discussed in the theoretical review. We mixed different theoretical approaches and our own empirical experience to develop a comprehensive list of engagement modes significant for museums. The actual application of engagement categories to content was followed by several redefinitions of engagement modes. Finally, we developed our own list of online audience engagement modes and their detailed descriptions regarding the context of museums. The list includes: (1) Informing; (2) Marketing; (3) Consulting; (4) Collaboration; (5) Connecting with stakeholders; (6) Connecting with either or both participants and audiences; (7) Connecting with professionals.

The second phase of analysis in Study **IV** involved coding – a generalization of Facebook content. We had already developed a list of online engagement modes, which we applied to our adaptation of the model of a sign's functions to develop an analytical grid. The model was initially created by Roman Jakobson (1960) and later developed by Thwaites, Davis and Mules (2002). We convey the semiotic approach to a sign's functions into the social media context by analysing the different aspects of the 'message' concerning engagement modes. We included the following functions of message in the grid: 1) Content, 2) Code, 3) Form, 4) Addresser, 5) Contact, 6) Addressee, and 7) Context. Because of the online environment and the specifics of this study the element of *addresser* was neglected. The reason to leave the addresser out of our scope was justified by the fact that the imagined addresser is always the same – the museum – even if there may be several senders, or different people working in the institution and posting in the name of the museum. This approach allowed us to look beyond the content of a Facebook post and consider the aspects surrounding a textually, visually or audibly embedded notion of various engagement modes.

The last stage of PhD dissertation – preparation of the introductory article involved some minor additional data collection, such as museum updates in

social media and close reading of museums' annual reports. An interview with a historian who had worked in different Latvian museums for over 30 years was carried out to gain more information about recent developments in the Latvian museum sector.

I considerably re-analysed data already gathered in a reflexive manner (Alvesson 2003). At the initial stage of this PhD dissertation, when working on Studies I & II, a normative attitude towards participation in museums and a belief in the positive effect of participation on museum performance and work with audience prevailed. I considered participation as “a context-free truth about reality ‘out there’” (Alvesson 2003: 15). My position became much more context-sensitive as the study progressed. The different studies of the dissertation reflect the transformations of a researcher's position – Studies I & II strictly look for activities in Latvian museums matching the criteria of participation, while Studies III & IV are concerned with the more flexible and inclusive concept of audience engagement. The concept of participation is rooted in democracy theories and demands a balance of power between involved actors. For this reason, Studies I & II have limitations in terms of participatory museum activities – the readiness of professionals to share power and to reject the control of audiences were significant criteria in marking activities as participatory. At the final stage of introductory article, I re-analysed interviews with museum professionals with the aim of integrating into the research previously excluded engagement activities, in order to develop a more complete understanding of the audience engagement repertoire in Latvian museums. The re-analysis of the data included the development of new labels such as ‘emotional engagement’, ‘spiritual engagement’ etc. in line with the umbrella concept of engagement defined in sub-chapter 2.2. Later the analytical framework of different engagement modes (Study IV) was used to reflect the audience engagement repertoire in Latvian museums (see Tables 7 and 8). The second round of interview analysis was done by using *ad hoc* meaning generation (Kvale 1996: 203), which Kvale describes as the most frequent form of interview analysis that allows “a free interplay of techniques and a combination of different approaches to generate meanings”. Thus a researcher can navigate between inductive and deductive approaches.

5. EMPIRICAL FINDINGS

There are two main types of the empirical findings in this PhD introductory article: the answers to the research questions from the perspective of Latvian museums and the conceptualization of audience engagement. To structure the research results each of the findings is described in a separate sub-chapter.

5.1. Conceptualizing audience engagement modes

Before presenting the empirical findings regarding audience engagement in Latvian museums, I explored the relationship between different modes of participation (Studies **I** & **II**) and engagement (Study **IV**). The classification differences emerged as a result of the transformation of the researcher's position during the study process (see sub-chapter 5.2). In each study (**I**, **II** & **IV**) different modes of participation and engagement have been developed. The modes do not overlap, even for Studies **I** & **II**, despite both partially sharing data. I explain that the distinction is a result of both the application of non-identical codes for data analysis and the differences in participation activities displayed online and on-site. To sum up, three interrelated studies present distinct concepts about how to categorize museum work with audiences. In Table 6 each column is devoted to the results of one study, and each row contains shared content engagement modes. This explains why a few categories are mentioned repeatedly. Study **III** is not shown in the table as it did not produce new engagement modes.

The engagement modes developed during Study **IV** will be used to conceptualize engagement in Latvian museums further – the richness of the data and the step-by-step updates of the modes in Study **IV** allowed the definition of carefully considered online engagement modes. The conceptualization of audience engagement modes is based on an analysis of different online and on-site audience engagement activities in Latvian and Estonian museums and I argue these modes are universally applicable.

In Study **IV** several rounds of data analysis were undertaken to define online audience engagement modes. The essence of each category remains unchanged to adapt those modes to on-site environments, but its use is expanded, as seen in Table 7, so that they can be used for on-site practices. The process and the result of the redefinition is presented in Table 7. The content in the first and second columns – the online engagement modes and their description – are generated in Study **IV**. The third and fourth columns are used for transforming and connecting the descriptions of online engagement modes so that they refer to both online and on-site environments.

Table 6. Conceptualizing engagement modes.

Study I	Study II	Study IV
Perspective of museum professionals on participation		Modes of engagement in Facebook content
Information and collective expertise collection	To market museum	Marketing & advertising
	To gather collective expertise	Informing Consulting
Raising resources	To mobilise audiences	Collaboration
Building loyalty among participants	To be closer to audiences	Connecting with participants / audiences
Attraction and education of school audience	To educate users To market the museum	Informing Marketing & advertising
Attraction and education of general audience		
Engagement of stakeholders providing a range of benefits for an institution		Connecting with stakeholders
		Collaboration
		Connecting with professionals

Table 7. Redefinition of audience engagement modes.

	Engagement modes	Modes of engagement in Facebook content (Study IV)	Redefinition of audience engagement modes	Comments
SPIRITUAL, EMOTIONAL, SOCIAL, INTELLECTUAL ENGAGEMENT	Informing	Refers to strictly educational activities and excludes any promotional intentions of the museum, exhibitions or other products offered by the organization or its stakeholders.	Refers to strictly educational activities online and on-site and excludes any promotional intentions of the museum, exhibitions or other products offered by the organization or its stakeholders.	Education is a basic function of museums and thus this engagement takes place frequently as it is hardly possible for audiences to avoid engagement during educational activities, for instance intellectual engagement in an exhibition.
	Marketing & advertising	Refers to the promotion of any of the museum's activities and contains an invitation to visit the museum or its stakeholders, or participate in related events. Occasionally educational information may also be a part of promotion. Museum posts attract users' attention by adding playful activities and by triggering emotions.	Refers to the promotion and implementation of any of the museum's activities and contains an invitation to visit the museum or its stakeholders, or participate in related events. Occasionally educational information may also be a part of promotion. The museum attracts users' attention by adding playful activities and by triggering emotions.	No major transformation of the mode's description.

	Engagement modes	Modes of engagement in Facebook content (Study IV)	Redefinition of audience engagement modes	Comments
	Consulting	Refers to the posts that actively raise issues, including socially significant ones, and invite users to debate and to give feedback. The main intention is to label posts that invite the collective expertise of the community; marketing activities or invitations to participate are strictly excluded from this category.	Refers to engagement that actively raises issues, including socially significant ones, and invites users to debate and give feedback. The main intention of the category is to label activities that invite the collective expertise of the community. Marketing activities or invitations to participate are strictly excluded from this category.	Consulting can be embodied in different activities, for instance discussions, forums, provoking exhibitions. Intellectual engagement is mandatory for consulting.
	Collaboration	Refers to the posts inviting users to participate in social processes, to act as volunteers, fundraisers, donors, etc. These types of posts stress the significance of a temporary activity that is about to happen and refer to activities beyond temporary verbal expressions.	Refers to the museum as a platform inviting and enabling audiences to participate in social processes, to act as volunteers, fundraisers, donors, or content developers, or to take other active roles in museum related projects, etc. The category refers to activities beyond temporary verbal expressions.	Collaboration is more explicit on-site as online content only partially reflects museum collaboration activities and the description is significantly altered.
Connecting with stakeholders		Refers to the museum's role as a stakeholder in a network of related organizations. It includes reposts of others' news, influenced by FB's sharing function. This gives a helping hand to some other institutions and serves their goals.	Refers to the museum's role as a stakeholder in the network of related organizations. It is expressed through the presentation of shared projects, which gives a helping hand to other institutions and serves their goals.	This mode is explicitly on-site, but the emphasis shifts from sharing information to the real life manifestations of museums as organizations serving for others and to some extent museums fulfilling social functions.

	Engagement modes	Modes of engagement in Facebook content (Study IV)	Redefinition of audience engagement modes	Comments
	Connecting with participants/ audiences	<p>Refers to the posts that stress the duration of the museum's relationship with a community. It might contain information that provokes emotions by sharing memories and strengthens the link of the public with the organization by allowing them to look into the organization's processes (e.g. shared information or pictures reflecting the less formal life of the organization).</p>	<p>Refers to performance that stresses the duration of the museum's relationship with a community and invites the community to initiate, engage in and sustain a relationship with the museum and to establish and strengthen 'family' bonds between the museum and audience.</p>	<p>The performance regarding the museum's relationship with the community is not as explicit on-site as it is online; in fact, the borders with other engagement modes are blurred because sustaining the relationship can be seen as added value.</p>
Connecting with professionals		<p>Refers to the physical persons and legal entities who already have some kind of professional knowledge in the specific field of museums. These posts inform professionals about events and show that the museum organization is a part of a professional network that communicates with colleagues and is trusted by them.</p>	<p>Refers to activities with physical and juridical persons who already have some kind of professional knowledge in the specific field of museums. The activities show that the museum is a part of a professional network that communicates and works together with colleagues and is trusted by them.</p>	<p>Museum work with stakeholders and other professionals is combined with design and implementation of activities and projects. Connecting with professionals includes real life manifestations of professional cooperations, such as implementation of shared projects. In relation to professionals, this engagement mode also includes 'consulting' as professional cooperation would hardly be possible without mutual consulting.</p>

The descriptions of the readjusted engagement modes are developed in line with the notion of the democratic, reorganized museum, for example, they enable social policy issues to be included. Although it is possible to readjust online engagement to on-site, there are some challenges. The main limitation is that the rather short online communication messages and their concentrated content are easier to categorise. In on-site practice this can be different as one project can aim to attain multiple aims, work with several audiences and to engage audiences in multiple ways. Thus, a single activity can refer to several engagement modes.

The results of Studies **I** & **II** are not explicitly presented in the final definition of engagement modes, but knowledge and ideas from all of the studies are embodied to create the new engagement modes. The museum audience engagement modes are concepts that are built step by step and evolve on the basis of previous categorizations.

5.2. Audience engagement in Latvian museums

This second sub-chapter is devoted to empirical findings and reflects engagement modes specifically in Latvian public museums. A summary of Latvian museum audience engagement practice is presented in Table 8 and reflects the empirical findings from Studies **I–IV**. Study **I** provides the perspective of the museum professionals on on-site modes and Study **II** on online engagement modes; Study **III** serves as an extensive analysis of national identity construction as an engagement activity from the perspective of museum visitors; Study **IV** provides the perspective of museum professionals by using the Facebook content they have created. Table 8 does not include all of the engagement activities in Latvian museums detected during Studies **I–IV**. It focuses on the innovative and typical activities of audience engagement mainly from the perspective of museum professionals and on the online content they have created. Thus, it presents ‘tangible’ engagement activities and does not concentrate on the hardly visible intellectual, spiritual, emotional and social engagement activities because this requires the in-depth exploration of the audience perspective. However, Study **III** provided only limited insight into the audience perspective. Some of the activities are mentioned several times – as previously explained, they can be attributed to several goals of museums.

Table 8 provides partial answers to the research questions concerning what kind of engagement modes different museum activities support; and what is a museum’s relationship with its different audiences. Studies **I–IV** show how Latvian museums work with and engage their three main audiences: the general audience, schoolchildren and the stakeholders with a closer relationship to the museum. Stakeholders may refer to individuals, informal groups and organizations – volunteers, colleagues in other museums, participants in projects etc.

Study **III** is not so pronounced in Table 8; however, the re-analysis of empirical findings from the study stress the role of engagement activities that are not self-evident – visitors during museum visit construct their national identity by involving emotionally, intellectually and so on. The process is hardly measurable but it does not reduce the significance of such engagement.

Table 8. Research findings. Engagement modes (illustrated by examples) in Latvian museums.

Museum objectives	Engagement activities for general audience	Engagement activities for school audience	Engagement modes for general audience and school audience	Engagement activities for stakeholders	Engagement modes for stakeholders
Immersion in collection Public inspiration	Interactivity of exhibitions (I) Informative posts (IV) Short term exhibitions composed of photos made by visitors (I) Provide national identity markers for visitors (III)	Pedagogical programmes for children (I) To host exhibitions of paintings made by children (I)	Informing; Collaboration; Connecting with participants/ audiences	Help to create intimacy with collection by participation in event/exhibition planning/implementing (I) Storytelling (I) Decision making on the museum's annual exhibition plan (I)	Collaboration; Connecting with stakeholders
Intimacy with collection/ items	Informative posts (IV) Visitors' comments of objects as a part of exhibition (I) Cultural heritage as an national identity marker (III) Exhibition of donated subjects (I)	Pedagogical programmes for children (I)	Informing; Collaboration	Help to create intimacy with collection by participation in event/exhibition planning/implementing (I) Exhibition of donated subjects (I)	Collaboration; Connecting with stakeholders; Connecting with professionals
Collect Conserve	Exhibitions of donated subjects (I) Invitations to donate (I; II; IV) Information about restored pieces of art (IV) Donations to museum (I)		Informing; Collaboration	Cooperation with experts, e.g. historians (I) Donations to museum as result of previous engagement or donations as start of future engagement (I)	Collaboration; Connecting with professionals; Connecting with stakeholders

Museum objectives	Engagement activities for general audience	Engagement activities for school audience	Engagement modes for general audience and school audience	Engagement activities for stakeholders	Engagement modes for stakeholders
Research	Information online on research activities (IV)		Informing	Intense integration of professional associations in museum work (I)	Collaboration; Connecting with professionals; Connecting with stakeholders
Public education	Informative content (II; IV) Anniversaries of significant events (I) To provide a sense of the past (III) To educate audience on heritage protection (IV) Interactivity of exhibitions (I)	Pedagogical programmes for children (I) Informative posts for children (II; IV)	Informing	Support the museum to provide public education, e.g. shared projects (I) Stakeholders invited to give live demonstrations (I) Project Have Your Own Museum Item for Every Inhabitant of Cesis (I) Engagement of volunteers (I)	
Public enjoyment	Interactivity of museum exhibitions/events (I) Provide playful games, competitions online and on-site (I; II; IV)	Pedagogical programmes for children (I)	Marketing & advertising; Informing; Collaboration	Content development (events, activities, exhibitions and implementation in cooperation with stakeholders (I) Folk group participation in events (I)	Collaboration; Connecting with stakeholders; Connecting with professionals

Museum objectives	Engagement activities for general audience	Engagement activities for school audience	Engagement modes for general audience and school audience	Engagement activities for stakeholders	Engagement modes for stakeholders
Public attraction (or marketing/public relations)	Questionnaires for visitors and users (I; II; IV) To provide playful game, competitions (I; II; IV) Invitations to exhibit content created by audience (e.g. amateur photos) (I)	Pools for teachers and kids (I) Seminars for teachers (I) To host birthday parties for children (I) To host exhibitions of paintings made by children (I)	Marketing & advertising; Consulting	Support to the museum for audience attraction, e.g. artists plan opening ceremonies of their exhibitions (I) Cooperation with tourism organizations (I) Project Have Your Own Museum Item for Every Inhabitant of Cesis (I)	Collaboration; Connecting with professionals
Public responsibility	Invitations to volunteer (I)		Informing; Connecting with audiences/participants	Engagement of volunteers (I)	Collaboration; Connecting with stakeholders; Connecting with professionals

Museum objectives	Engagement activities for general audience	Engagement activities for school audience	Engagement modes for general audience and school audience	Engagement activities for stakeholders	Engagement modes for stakeholders
Public space	<p>Invitations to exhibit content created by audience (e.g. amateur photos) (I)</p> <p>Invitation to support museum (e.g. online voting)</p> <p>Creative and inviting posting (II, IV)</p>		<p>Informing; Connecting with audiences/ participants</p>	<p>Museums provide space for audience created content – for youth organizations, amateur artists (I)</p> <p>Museums allow others to use their space as reward (I)</p> <p>Museums create opportunities for retired people to be active and needed (I)</p>	<p>Collaboration; Informing; Connecting with stakeholders</p>

Engaging the audience is not an end in itself for museums. Just like participation, engagement should also be practiced in a meaningful manner – in other words, engagement practice needs to be related to the museum’s functions and role in society. The analysis of the content of different engagement modes in Latvian museums also allows us to come to some conclusions about how functions are communicated. Table 8 shows that some functions in the engagement repertoire are more pronounced than others. As indicated in Studies **I**, **II** & **IV**, the research function frequently remains hidden from the general audience. For stakeholders the situation is different because their connection with the work of the museum is deeper and occasionally they do museum-related research work themselves. The stakeholders’ expertise is a precondition of engaging in museum research. Study **I** presents a case from the National History Museum of Latvia where professional historians, working outside museum, permanently participate in museum research projects. This second finding suggests that the research function is slightly more visible in on-site engagement modes because the public online environment is not often used for communicating with professionals – there are more personal ways to contact people,

Museums are eager to communicate with their audiences for a number of reasons, such as marketing – including entertainment – purposes, educational intentions, and even ‘small talk’ to keep the audience-museum relationship active and alive. The educational function is definitely of high importance as it is explicitly manifested both in online and on-site engagement modes. Museums seriously perceive their roles in terms of heritage conservation and restoration – this topic is communicated particularly frequently. In general, Study **IV** emphasizes the creativity of museum staff in the process of delivering information to their audiences – they use enticing words and stimulate curiosity in other ways to engage the audiences.

So, in answer to the research question about how museums communicate their functions, it can be concluded that the marketing/public relationship, education, conservation, and collection functions are particularly important. Also, the creation of exhibitions – that is, curatorial work – is well represented in museum communication, as sometimes the audience is welcomed to the “kitchen” of exhibition development. The engagement modes also highlight museum performance in the collection function: this becomes visible when museums ask for items to be donated or express their gratitude for donations. Museums also frequently deliver information to audiences on new items in their collections, or on any interesting item, exhibited or not. A good example of intensive online communication concerning new items is the Art Museum Riga Bourse. Just like educational work, collection work is also one of the well-represented functions in both online and on-site engagement.

Museum research work turns out to be the most underreported function, especially in online communication with the general audience. Museums leave this function outside of their engagement repertoire museums might doubt that audiences would be interested in specific subjects or have sufficient knowledge to appreciate them. Another reason might be low research capacity of Latvian

museums due to limited finances (Pumpuriņš 2015) resulting in the poor execution of the research function.

Table 8 also shows that museums are in the process of developing engagement activities concerning such functions as bearing public responsibility and serving as public space. Institutions not only learn how to deal with audiences that have attended the museum and been part of the museum for years, but with the wider community.

Studies I & II focus on the exploration of the power sharing balance between the museums and audiences and provide an answer to the research question about what kind of power sharing different engagement modes involve. Study I especially concerns power issues in museums and the model developed by Nina Simon (2010) was adapted to categorize the different participatory activities in Latvian museums on the basis of power balance.

Although democracy theories define power sharing as one of major criteria for participation, engagement does not require the mandatory presence of a power balance between the museums and audiences – a balanced engagement repertoire consists of different engagement activities – with and without sharing power with audiences. However, this does not mean that a considered engagement repertoire is one with no power sharing at all. The empirical findings indicate a range of engagement practices in Latvian museums, including cases of participation where museums share power on a large scale. If audience members have expertise or some other useful resources for the museum, the will and motivation, this has a positive impact on the institution's decision to share power with those people. Turning anonymous visitors into participants depends on both parties and despite the efforts of museums to engage people they might stay outside. This happens even in museums located in small rural communities with several hundreds of inhabitants, where museum managers admit to the difficulty of engaging community members even when using a personal approach.

The findings also stress that Latvian museums are used to sharing power with members of specific groups. Thus, connecting with professionals or stakeholders turn out to be the engagement modes with the highest level of power sharing between museums and active audiences. Practice shows that in some cases museums trust their stakeholders so much that they are prepared to relinquish their rights to make significant decisions – for instance, drawing up their annual exhibition plan. Study II notes that Latvian museums have well established participation practices with formal and informal groups and individuals whose expertise, resources, or professional activities overlap with the specifics of museum work. Another specific audience group is schoolteachers, especially teachers who organize regular visits to museums for their pupils. Museums are interested in the expertise of teachers, as they want to enhance schoolchildren's museum visits.

Some engagement modes definitely demand less power sharing or no power sharing at all. Marketing and informing engagement are the best examples of

engagement without sharing power. These activities make up a considerable part of the whole engagement repertoire.

There is room for development in participatory activities for the general audience. Study II stresses that museum professionals express positive attitudes towards the *collective expertise by users*. They read and take into account comments made by users. However, the majority of museum professionals consider users as passive, to some extent, and they are yet to develop a system to harness the general audience's complete potential. Museums design engagement for the general audience and occasionally include training activities – for instance, workshops for preparing art works and exhibitions with items created by audiences. However, museums still maintain control over exhibitions: whether to display art works or not, and if so, for how long and so forth.

Occasionally, properly designed engagement activities allow anonymous audience members to be transformed into participants. Commenting on engagement modes in relation to different audiences, Table 8 shows the main audiences and their roles in museums. Latvian museums' engagement practices indicate the presence of three main audiences: the general audience, schoolchildren, and specific groups or stakeholders. The identification of these groups is based mainly on the results of Study I and reflects the opinion of museum professionals. The term 'general audience' refers to groups with no specific relationship with museums, apart from visits to museums or museum-related events, or the exploration of museum-related resources online without participatory intentions. Apart from engagement with museum collections, the general audience occasionally engage in short-term activities, e.g. donations to museums or museum marketing activities – games or competitions. Their engagement with museums is usually a reaction to the communication and marketing activities of museums. The relationship this group has with museums can be described as a 'traditional museum-visitor relationship' – in other words, hierarchical and one-off: the museum takes the role of the 'teacher', and the audience is in the position of the 'pupil' (See Study IV for relationship types).

The second well-represented group in this study is school pupils. They are important to museums because they make up a significant proportion of museum visitors annually and many museums provide free entrance for school children. Pedagogical programmes at museums are often designed specifically for children and keep in mind active learning and interactivity. However, in-depth interviews (Study I) do not explore the content of the programmes themselves thus the programmes appear as type of engagement activity without profound analysis. The identification of schoolchildren as a separate audience might be criticised for several reasons. First, children visit the museum and enjoy the same exhibitions as the general audience. The only exception, the special offer for schoolchildren, is the pedagogical programmes. Second, communication between museums and schoolchildren is mediated through the teachers, many of whom have developed closer ties with museums. Thus, teachers play a major role in making decisions about whether the group of schoolchildren should attend museums, and if yes, then which museums and when.

Consequently, museums eagerly explore teachers' expertise to improve their knowledge of the needs of schoolchildren and their behaviours. Teachers are inseparable from the schoolchildren audience, and there are counterarguments as to why schoolchildren should not be treated as a separate audience. However, during the interviews museum professionals stressed the importance of the group, and, for informants, audience engagement is mainly related to schoolchildren. When asked about audience engagement in museums, professionals often refer to activities for schoolchildren as their first feedback and this gives the impression that, from the perspective of museum staff, schoolchildren are the most significant audience.

The third group 'stakeholders' I understand as the range of individuals and groups whose relationship with museums goes beyond mere museum visits, is more continuous in nature and occurs at varying levels of intensity. Stakeholders include such participants as volunteers, members of youth organizations, field experts, and students in the field and other professionals. Table 8 shows the richness of the museum engagement repertoire that is available for stakeholders. This audience is integral part of the museum and they work with museum professionals to develop content for general audiences.

Study **IV** identifies different relationship models between museums and their audiences in terms of engagement. The relationship can be analysed from the perspectives of time and roles – for instance, short-term versus rather permanent, teacher versus pupil, and professional versus professional. A greater diversity of relationship types can be identified in engagement activities for stakeholders, because the roles of an active audience are not permanent and depend on context.

6. DISCUSSION

In previous chapters of this PhD introductory article I have discussed the transformations of a museum towards democracy and reviewed factors challenging the transformation of institutions, conceptualized engagement modes, and presented the novel concept of engagement work in practice by analysing engagement modes in Latvian museums. This chapter is devoted to linking the analysis of the factors challenging the audience engagement in Latvian museums and it focuses on the identification and analysis of factors impacting on the engagement repertoire in Latvian museums.

However, before linking theory and empirical data, I summarise how the concept of engagement was developed and discuss its practical applicability. Studies **I** & **II** focus on participatory activities in Latvian museums and take a rather normative position, analysing how the principles of participation are put into practice. This stance is largely because the theoretical framework of participation derived from democracy theories before becoming an aspect of communication science. Studies **III** & **IV** go beyond the concept of participation and develop the concept of engagement in museums. From a holistic perspective, engagement is defined as a two-way process that combines the performance of both the museum and active audience by responding to the stimuli of engaged parties and by initiating new actions with the aim of improving museum work, enhancing the experience or making a difference on a larger scale in society.

For this study ‘engagement’ as an all-inclusive concept allows us to explore the work of museums with their audiences both online and on-site: (1) the museum-audience relationship is perceived from a holistic perspective, as an entirety and introduces the notion of the engagement repertoire, is open to many-sided engagement activities involving various levels of audience activity and power sharing; (2) systematizes and integrates related notions such as participation and interactivity; (3) is in line with the principles of the transformed museum, such as being receptive to diverse groups from the community by offering varied ways of engaging; (4) supports the flexibility of roles for active audience members – one individual can assume various roles in different contexts and at the same time it allows personalized engagement experiences to be tailored; (4) takes into account that engagement does not always result in immediate and observable audience activity and includes activities that might not be visible at first glance, such as personal emotional engagement with art works; (6) is a familiar term for museum professionals. The term ‘interactivity’ easily found its way to museums, but ‘participation’ is better known amongst academic researchers than museum professionals (Study **I** & **II**). The audience engagement concept is a friendly alternative to be used by both museum professionals and academic researchers.

To understand the whole process of engagement in museums, this study established and defined sub-concepts such as ‘audience engagement modes’ and ‘museum engagement repertoire’ and used these sub-concepts to reflect Latvian

museum practices. Engagement in practice in Latvian museums is reflected as a range of engagement modes, which, when put together, make up the museum engagement repertoire.

Each museum has a different engagement repertoire, and its balance depends on the specific context that the museum finds itself within. The impacting factors refer to both internal and external effects. By external influences, I mean broader economic, cultural, political and social factors creating a specific context for the museum's work. External influences also refer to the level of democracy and support for democratization trends in society and culture. For museum institutions, the idea of a cultural timeline is also significant in terms of engagement – it includes traditions, national festivities, and anniversaries of personalities, events and so on (Study IV). The cultural timeline provides one reason to educate audiences and inspires exhibitions and events about concrete topics. Other noteworthy external influences include international and national cultural policy, the legal basis of the museum field, funding for public museums allocated by the state and municipalities, and the supportive legal basis for donations and sponsorship. Education-related policies and the education system also qualify as significant external factors – for example, the higher education system by training professionals for museums, and the primary education system by motivating teachers to organize visits to museums. It is also important to note the number of leisure time offers museums have to compete with. To sum up, the above-mentioned external factors refer to macro influences, except those controlled by audiences.

Audience properties are related to lifestyle in general: to people's habits of consumption, specifically of culture and entertainment, and to people's perceptions of quality leisure time. The socio-demographic setup of audiences, including their education and competencies, affects their participatory potential, as well as the interest of museums in the expertise offered by audiences. The civic culture of a community, in turn, defines how much individuals intend to engage in museums' work, their attitude towards museums and how – if at all – the community exerts pressure on museums to act like democratizing institutions. In short, civic culture indicates how knowledgeable individuals are about democratic practices (Dahlgren 2004). Morris Hargreaves McIntyre (2013) discusses audience cultural engagement and regarding the audience properties points to two groups of factors: (1) self related factors, such as learning styles, attitudes and interests, self awareness and needs, ambitions and so on; (2) social factors, such as background, family, friends, colleagues and peers. In the framework of this PhD introductory article both audience related factor groups are viewed as the entirety and make up the audience properties.

Some tips suggest how to increase the interest of audiences in the work of museums, such as giving clear instructions to audiences on how to engage and give feedback (Ridge 2013; Simon 2010), using a step-by-step approach, not complicating engagement at the very first stage, and avoiding asking people for information that is too specific (Ridge 2013). A positive aspect is that audience

properties are not fixed and museums can work to transform passive audiences into active ones; however the opposite effect is also possible.

The second group of factors refers to the internal influences on museum institutions. The data suggests that one of the most significant factors in this respect is human resources. If museums do not have enough human resources in terms of amount and quality, audience engagement decreases as designing and communicating activities is very time-consuming and demands motivation, specific skills and knowledge, for instance, on diverse audiences. The interviewees stated that strategic and financial management and organization culture – how decisions have been made, how ideas are developed, and what the powers of the formal and informal authorities are – also rank among the important internal factors (Study I). The formal and informal authorities in the museum should recognize the value of audience engagement; otherwise, the efforts of the rank-and-file staff might not be enough to initiate and develop a balanced engagement repertoire. The perceptions of museums of the roles of institutions, in the broader context of democracy, may increase or decrease the amount of engagement activities. Available financial resources and the need to break even or to make a profit might turn engagement repertoires upside down. The relationship with different stakeholders should be stressed as well: sometimes museums' cooperation with other organizations results in audience engagement, and thus the networking of museums may affect engagement repertoires.

Material and technological resources and infrastructure are also of high importance, specifically in the era of digitalization. These are also related to the capacity of museum staff to use the infrastructure and technologies for engagement purposes. Currently, there is room for improvement on this front. Due to financial problems in the Latvian museum sector many museums, particularly in rural areas, fail to attract young professionals and, according to some museum annual reports, a crucial proportion of museum workers are at retirement age – in some institutions up to one third of all employees. Thus, many museum workers might not be very familiar with digitalization and digital tools for engagement, although the Latvian cultural policy guidelines stress the necessity to modernize museum exhibitions and to strengthen the professionalism of staff. Another internal influence, which has not been discussed much in this introductory article, is the spatial aspect of museums – engagement is likely to be more active if the space is welcoming and suitable for purpose. Furthermore, data from Latvian museums shows that museums have a perception of the status of the institution (Study II) that can occasionally prevent them from implementing some activities – for instance, work with their audiences on social networking sites. If some engagement modes seem inappropriate for the perceived status of the museum, this can influence their engagement repertoire.

Apart from the two significant groups, I have identified some mixed influences as the third group of factors affecting engagement in museums. This is an open category where the factors are a matter of negotiation between the museum and the active audience. For instance, the activity of the local community can be regarded as a mixed influence depending on the situation – on one hand

it constitutes a property of the audience, while on the other hand, the museum can strive to activate the passive local community by using tools of communication.

Figure 5 illustrates the museum engagement repertoire as a result of the factors above. In practice the significance of each factor is case specific and can be balanced in very different ways. For example, audience properties will dominate more in small rural museums than in national museums. The figure is based on both empirical findings (Studies I–IV) and the analysis of the Latvian museums context.

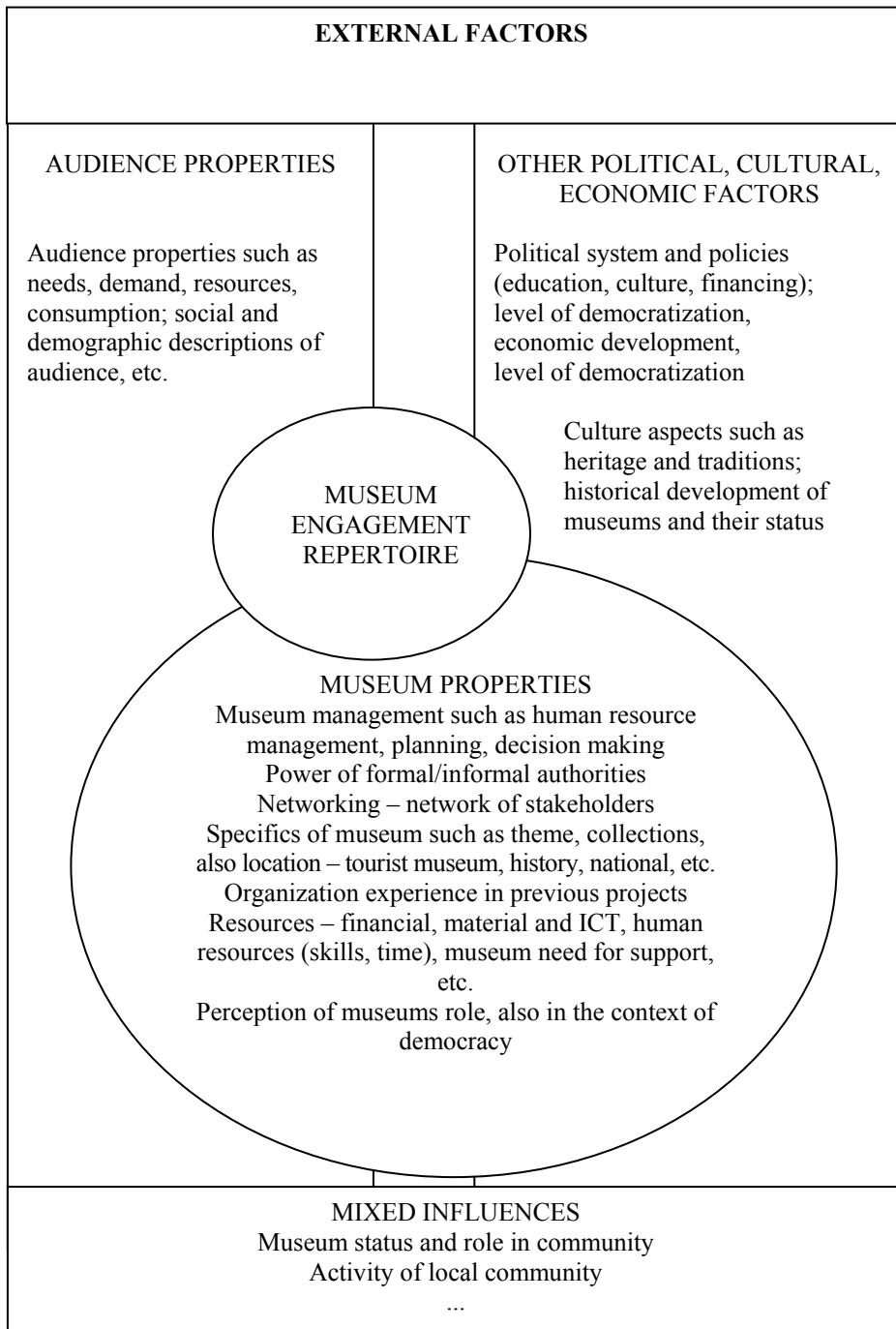


Figure 5. Factors impacting on the engagement repertoire in Latvian museums.

Which of the above-mentioned factors play the most important role in Latvian museums? The research data suggests that, in many cases, the main barriers for museum democratization and audience engagement in Latvian museums are not related to the much-debated aspects of the power-knowledge institution (Gaudibert et al. 1972; Schick & Damkjær 2010; Gable 2006). At least in part this can be explained by the fact that a significant proportion of Latvian public museums are small institutions located in rural communities and dependent on their close relationships with local communities. The principles embedded in power-knowledge institutions and their authoritative nature appears to be more pronounced in national museums; however not in all of them. Studies **I** & **II** indicate that a shortage of resources negatively affects museum professionals to open their institution for democratic processes as over worked staff do not find free time to encourage dialogue with society even if they have the motivation to do so. In terms of financial provision, there are big differences between museums because Latvian museums are financed from different sources. Thus, the human resource capacity varies, and some institutions are forced to struggle for survival and search for extra profit opportunities. To some extent museum managers have become preoccupied with business concerns about costs, financing, evaluation, development and profitability (Tobelem 2007). I would not like to underestimate the role of finances in audience engagement in museums, but I would also not like to define it as a mandatory prerequisite for a balanced engagement repertoire – the Latvian experience demonstrates that a motivated and creative staff can design engaging activities with very limited financial resources.

Professionals in Latvian museums are well aware of and positively evaluate their on-site engagement work, but they tend to underestimate online engagement opportunities and their efforts online. Social media engagement is not on the list of priorities in many Latvian museums as it is a time-consuming activity. The perceptions of museum professionals about their online activities are reflected in Study **II**, and in comparison, Study **IV** offers an analysis of the contents museums have created on Facebook. Study **II** shows that, in general, museum staff do not consider social networking sites as a very engaging platform. However, in practice the content created by museums is engaging emotionally, socially, intellectually and spiritually, and it supports the multiple functions of the museum such as education, curation and collection. Interviews for Study **I** were conducted in 2011, while the Facebook content was retrieved in 2013 and 2014. In a rapidly changing social media environment two years could make a significant difference.

Study **IV** presents the list of audience online engagement modes in Latvian and Estonian museums. The study was not quantitative, but it still allows some conclusions about the widespread engagement modes to be drawn. Museums do have the desire to implement some engagement modes, like marketing and informing, more frequently than others, but as there are representative examples of all the engagement modes it means that museums do not seem to be funda-

mentally opposed to developing any of them. In my opinion, this shows the potential of engagement not only in an online environment but also on-site.

A balanced engagement repertoire online and on-site represents a variety of engagement modes in terms of audience activity, personal connection and power sharing. The repertoire is museum context sensitive and should be viewed from a broader perspective not just the 'internal matters' of each museum but as significant elements in the process of society democratization.

7. CONCLUSION

It is not long since Latvian national cultural policy guidelines stressed the significance of Latvian museums as engaging cultural institutions for the first time. This PhD dissertation is a part of the response to the increasing trend of democratization of museums on one hand, and to the shortage of audience engagement- and participation-related academic studies in Latvian museums, on the other. The introductory article is based on four interconnected studies exploring museum relationships with audiences online and on-site in Latvian public museums.

The empirical aim of the introductory article was to explore how museums understand audience engagement and interact with active audiences. In addition, theoretical research aim to introduce a novel conception of museum audience engagement was defined and empirical data from Latvian museums have been used to conceptualize audience engagement. In the framework of the research, the museum is considered as the democratizing institution and the overall context for the study is provided by the trend towards democracy.

Four main research questions concerning the engagement process and museum relationship with audiences were defined to meet the empirical aim of the PhD introductory article.

1. What kind of engagement modes do different museum activities support?

The results of Studies **I**, **II** and **IV** identified engagement activities in Latvian public museums from the perspective of museum professionals, and generated and classified a variety of engagement modes. The studies have found that museums engage their audiences both online and on-site, but it is not always easy to identify audience engagement because engagement can be manifested as spiritual, emotional, social or intellectual involvement. The first two studies were designed as an analysis of participatory activities in Latvian museums, but during the research process the focus shifted to audience engagement, which has impacted on the differences in the definition of the categories of engagement modes.

The list of main online and on-site engagement activities was identified:

- From the perspective of museum professionals, on-site audience engagement includes information and collective expertise collection; raising resources; building loyalty among participants; the attraction and education of school audiences; the attraction and education of the general audience; and the engagement of stakeholders providing a range of benefits for an institution (Study **I**);
- From the perspective of museum professionals, online audience engagement includes marketing the museum; educating the users; gathering collective expertise; being closer to audiences; and mobilising audiences (Study **II**);
- From the perspective of visitors, national identity construction in museums was analysed. Re-analysis of data suggested national identity construction as

- a type of audience engagement activity that is not self evident but still demands emotional and intellectual engagement from visitors (Study **III**);
- Judging by the content created by museum professionals online in Facebook the main audience engagement modes include informing; marketing and advertising; consulting; collaboration; connecting with stakeholders; connecting with participants and audiences; and connecting with professionals (Study **IV**).

At the final stage of the research the categories of engagement modes from all studies were considered in a bid to find a universal categorisation of audience engagement modes in museums. The seven ideal categories of online audience engagement modes were discussed and adapted to on-site performance. Thus, there are seven ideal types of audience engagement modes in museums: marketing and advertising; consulting; collaboration; connecting with stakeholders; connecting with participants and audiences; and connecting with professionals. This approach to audience engagement identifies that some engagement modes are generally more participatory and demand power sharing to greater extent (e.g. connecting with professionals) than others (e.g. marketing), but none of modes are superior to others as together they all form the museum audience engagement repertoire. In a balanced engagement repertoire, all engagement modes are present but the significance or frequency of use of each mode depends on the specifics of the museum and its audiences. Overall on-site and online audience engagement modes should be considered as complementary and alternate parts of the entirety – the audience engagement repertoire.

2. How are museum functions communicated through different engagement modes?

The following findings regarding the communication of the museum function through different engagement modes came from Studies **I-IV**. The most visible function is education and this was confirmed by both the analysis of interviews and by the online content created by the museum. Education is explicitly manifested through both online and on-site engagement modes. Museums are keen to educate their audiences about heritage issues, conservation, restoration, and cultural traditions. Audience engagement also highlights the significance of the collection function. It often becomes visible when museums engage their audience in the activity of donations for museum collections. Marketing and the relationship with the public, conservation, entertaining, and curatorial functions also are well communicated in either or both of two ways: in the content of information created by the museum to communicate activity and they are integrated in the design of engagement activities. The research function is the only function in a very latent position, which might be explained by the fact that research is a low priority issue in Latvian museums because of financial restrictions (Study **I; II; IV**). The specifics of each museum affect the communication of functions through engagement modes – for example, for art museums the curatorial function is well communicated, and local museums invest a lot of

effort in engaging their audiences in collection processes. Self-evidently some museum functions are manifested through a greater variety of engagement modes, but it should be noted that significant museum functions are implemented by using less obvious engagement activities, e.g. educating the public will always demand intellectual engagement. At the same time it depends on the museum how efficiently *attractors* and *sustainers* are exploited to gain the attention of visitors and keep them intellectually engaged for longer.

3. What kind of power sharing different engagement modes involve?

Not all activities within the concept of engagement have to involve the power sharing aspect. What is more important is the idea of a balanced engagement repertoire – the diversity of activities with a different level of power sharing defined by the specifics of the museum and its audiences. Studies **I** & **II** showed many examples of museums sharing power during their audience engagement; however, occasionally there were some cases where museums were more open to participation. A positive effect on the readiness of museums to share power usually occurs when audience possess some specific expertise or resources needed by the museum. The findings showed that museums want to share power with stakeholders and, occasionally, trust in these groups is so high that institutions are ready to completely give up control over some processes. Thus, public Latvian museums have a well-established tradition of working with and sharing power with formal or informal groups and individuals whose activities overlap with the museums' field of expertise (Study **I**). However, there are always opportunities to work more actively to turn anonymous museum audience members into stakeholders. The analysis of the Latvian context presented Latvian society as passive, and to some extent, museum professionals agreed with this opinion and considered their general audiences to be passive as well. There is still unused potential to develop a rich engagement repertoire for the general audience (Studies **I** & **II**). To reach this goal, museums genuinely have to be interested in the results of engagement. The interest in creating a rich repertoire could increase if there was greater trust and belief in the collective expertise of audiences. The use of ICT is one way to improve the collective expertise of audiences.

4. How are engagement modes connected to different audiences?

The PhD introductory article focuses on the three types of audiences that museums work with and develop engagement modes for:

- The 'general audience' refers to groups having no specific relationship with the museum apart from visiting exhibitions, attending museum-organised events or using museum-related resources online. Overall, activities designed for this group do not involve power sharing and they mostly refer to the engagement activities which are complicated to measure and not pronounced, such as emotional or intellectual engagement with museum content and so on. However, this PhD introductory article considers engagement as an all-inclusive concept and does not neglect less evident manifestations of

engagement, as this would not allow the exploration of museum work with all audiences. Emotional, spiritual, social or intellectual audience engagement in the content exhibited by museums is significant in developing familiarity with the collections and demands activity from the audience. Thus, in the framework of the PhD introductory article the general audience of museums is considered as an *active* not a passive entity.

- A significant audience in Latvian public museums is school pupils, a group making up a high proportion of museum visitors. In general, pupils visit the same exhibitions or attend the same events as adult visitors and their schoolteachers often bring about their visits to museums. School children are identified as a distinct audience as the importance of this group was stressed by the interviewees (Study I).
- The third audience group is ‘stakeholders’ and this includes a wide range of individuals and both formal and informal groups with closer or more intense relationships with museums than the general audience. Their relationship goes beyond museum visits as they are volunteers, participants, members of youth organizations, field experts, students in the field, colleagues from other museums and so forth. This group was most visible in Study I. The Latvian museum experience showed that some local community groups are especially active, e.g. organizations of victims of deportations.

Another perspective of how to classify audiences and explore their connection with museums was presented in Study IV. The relationship between the museum and its audiences can be manifested in the roles of teacher–pupil; professionals–professionals; the traditional museum–visitor relationship; partner–partner; visitor–stakeholder. This relationship can be also described in a temporal fashion, as permanent, short-term or continuous.

The type of museum and the context that a museum works within defines the importance of audiences. For example, the increased role of the audience can be observed in municipality museums where, occasionally, it is almost impossible to apply the term ‘general audience’ because local community groups, institutions and many local inhabitants are active participants in one or another museum related project. Also, the limited size of a community does not support the notion of a rather anonymous general audience. In these museums the responsiveness of the institution to the needs of the local community is high and, to some extent, they approach the ideal of a transformed museum because they are deeply integrated in community life and fulfil a multiplicity of functions. Because of the limited resources available for Latvian public museums, many museums have already achieved the saturation of audience engagement in their institution. However, there are also unused opportunities to activate audience engagement in other museums.

The results of the study lend weight to the claim that the unique context of each museum institution does not support a normative approach towards a standardized engagement repertoire in museums. The whole process of this PhD research was characterized by an increasing awareness of the significance of

external and internal factors in constructing the engagement repertoires of museums.

Audience engagement has previously been researched from a variety of angles – as a process, a relationship, a precondition, as as a myriad of activities. Because of the richness of interpretations, there are always possibilities to integrate other elements into the audience engagement concept. Overall I believe that this novel audience engagement conceptualization will be a helpful approach to the work of museums with audiences from a holistic perspective and it is easy to use for both academics and museum professionals.

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SUMMARY IN ESTONIAN

Kaasamisviise kontseptualiseerides: mõtestades muuseumi – auditooriumi suhet Läti muuseumides

Doktoritöö „Kaasamisviise kontseptualiseerides: mõtestades muuseumi – auditooriumi suhet Läti muuseumides” põhineb neljal omavahel seotud uuringul, mis käsitlevad Läti muuseumides kohapeal ja *online*-keskkonnas suhtlevate auditooriumide suhet muuseumidega. Töö eesmärgiks on uurida, kuidas muuseumid mõistavad auditooriumide kaasamist ja kuidas suhtlevad aktiivsete auditooriumidega. Muuseumidel on väljakutse üle vaadata ja arendada osalemisvõimalusi ja koostööd auditooriumidega (Pruulmann-Vengerfeldt & Runnel 2014). Üldist ühiskondlikku demokratiseerimisprotsessi on toetanud ka info- ja kommunikatsioonitehnoloogiate (IKT) areng ja seetõttu on muuseumi ja auditooriumide suhet uuritud ka IKT muutuste kontekstis. Kaasaegses muuseumis on auditooriumi roll üha olulisem. Kuid teisalt tekib küsimus, kas muuseumid kui teadmusalased autoriteedid ja tunnustatud eksperdid peaksid olema nii demokratiseeritud. Samuti seab demokratiseerimisprotsessidele piire globaalselt üha rohkem turundusloogikale alluvas maailmas muuseumi vajadus majanduslikult toime tulla.

Töös käsitletakse muuseumi kui „mitte-tulunduslikku, püsivat institutsiooni, mis on ühiskonna ja selle arengu teenistuses, avatud avalikkusele, mis kogub, säilitab, uurib ja kommuneerib ning näitab füüsilist ja vaimset inimkonna ja keskkonna kultuuripärandit hariduslikul, uurimuse ja nautingu pakkumise eesmärgil“ (ICOM 2010–2015). Töö teine keskne kontseptsioon on aktiivsed auditooriumid, millega rõhutatakse, et muuseumi auditooriumid loovad ise tähendusi, tuginedes oma varasematele teadmistele, uskumustele ja väärtustele (Hooper-Greenhill 1999; Cooperstein & Kocevar-Weidinger 2004). Kolmas keskne mõiste on auditooriumi kaasamine. Selle mõiste kasutamise tingis vajadus leida laiem ja üldisem mõiste kui osalus, selleks et kirjeldada ja mõista, kuidas Läti muuseumid oma auditooriumidega töötavad.

Uurimuse raames on välja arendatud uus muuseumiauditooriumide kaasamise definitsioon – kahesuunaline protsess, mis kombineerib nii muuseumi kui aktiivse auditooriumi tegevusi, vastates kaasatud osapoolte stiimulitele ja algatades tegevusi eesmärgiga parandada muuseumitööd, tugevdada auditooriumide kogemust või muuta midagi ühiskonnas laiemalt.

Auditooriumide kaasamine on muutunud muuseumide lahutamatuks osaks; sellegipoolest on eri vormide hulk väga suur, sõltuvalt muuseumide asukohast ja eripärast. Uuring on piiritletud ning see keskendub kitsamalt Läti avalikele muuseumidele.

Läti on üks kolmest Balti riigist; kes taasiseseisvus 1990. aastal ning kel on oma poliitiline, majanduslik ja kultuuriline kontekst, mida on mõjutanud ka 50 aastat kestnud Nõukogude võim. Käesoleva uuringu kontekstis on oluline rõhutada, et Nõukogude okupatsiooni ajal olid Läti muuseumidel piiratud

võimalused demokraatlike institutsioonidena toimida. Iseseisvuse taastamise järel algasid suured muutused: muuseumisektori juhtimise reorganiseerimine, seadusandluse arendamine, taasintegreerumine rahvusvahelise muuseumiringkonnaga ja erialaste kontaktide taastamine välismaal, muuseumitöötajate intensiivne väljaõpe sellistes valdkondades nagu turundus, projektijuhtimine jne. Iseseisvumise järel oli muuseumidele väljakutseks ka erastamine. Kaasajal juhitakse muuseumisektorit kooskõlas rahvusvaheliste standarditega ja avalike (riiklikud, kohalikud ja iseseisvad) ning eramuuseumide võrgustik katab kogu Läti. 2013. aastal oli Lätis 111 muuseumi, mis andis tööd 1813 inimesele ja 1321 muuseumikülastust 1000 elaniku kohta. (LR CSP 2015) Viimastel aastatel on muuseumisektori eelarveid kärbitud, mis mõjutab dokumendis “Kultuuripoliitika põhisuunad 2014–2020. Loov Läti” määratletud strateegiliste eesmärkide saavutamist.

Käesoleva doktoritöö eesmärgiks on uurida, kuidas muuseumid mõistavad auditooriumide kaasamist ja kuidas nad suhtlevad aktiivsete auditooriumidega. Uuringus kaetavaid teemasid käsitleb neli peamist uurimisküsimust:

1. Milliseid kaasamisviise toetavad erinevad muuseumitegevused? (Uuring I & II & III & IV)
2. Kuidas väljenduvad erinevad kaasamisviisid muuseumi põhiülesannetes? (Uuring I & II & IV)
3. Millist võimu jagamist erinevad kaasamisviisid endas hõlmavad? (Uuring I & II)
4. Kuidas avalduvad erinevad kaasamisviisid erinevate auditooriumide puhul? (Uuring I & II & III & IV)

Uurimistöös on kasutatud nii kvalitatiivseid kui kvantitatiivseid andmeid. Peamisteks allikateks on kvalitatiivsed intervjuud Läti muuseumides (uuringud I, II & III) ja Eesti Rahva Muuseumis (uuring III) ning sotsiaalmeedia sisu (Uuring II & IV). Andmeanalüüsi meetodid hõlmavad kontentanalüüsi (Uuringud I, II & III) ja põhistatud teooriat (Uuring IV).

Väitekiri uurib muuseumitöötajate vaateid auditooriumide kaasamisele Läti muuseumides *online*-keskkonnas ja kohapeal (Uuringud I & II). Põhifookus on auditooriumide kaasamisel Läti ajaloo-, koduloo- ja kunstimuuseumides, mis on uuringu põhivalimiks.

Uuring I vaatleb kohapealseid osalevaid tegevusi Läti muuseumides ja muuseumitöötajate suhtumist osalejatesse. Uuring II uurib *online*-keskkonnas toimuvaid osalustegevusi Läti muuseumides. Uuring III vaatleb identiteedi konstrueerimist kui auditooriumide kaasamise viisi ja analüüsib, kuidas muuseumikülastajad konstrueerivad rahvusidentiteeti Läti ja Eesti rahvusmuuseumides. Uuring IV uurib, kuidas muuseumid kaasavad oma auditooriume ja kommunikeerivad sotsiaalmeedias. Rakendades põhistatud teooria printsiipe, defineerib uurimustöö võrguauditooriumide kaasamise viise Läti ja Eesti muuseumides.

Uuringutes I & II on informantideks muuseumide turundus- ja kommunikatsioonispetsialistid, kuraatorid ja muuseumijuhid. Esindatud muuseumide hulgas on nii era-, munitsipaal-, riiklikud muuseumid kui nende iseseisvad filiaalid,

mis käsitlevad erinevaid teemasid, asuvad erinevates kohtades ning mille suurus ja staatus on väga varieeruv. Uuring III esitab nii kohalike kui välismaalastest muuseumikülalistajate arvamust Riia Vabaõhumuuseumist. Uuring IV keskendub *online*-auditooriumide kaasamise viisidele sotsiaalmeedias. Uuringu andmetikuks on postitused, mille on loonud Läti ja Eesti muuseumid Facebookis ühe aasta vältel. Analüüsimeetodiks on lähilugemine, kontentanalüüs ja põhistatud teooria.

Uuringu sissejuhatavas osas kontseptualiseeritakse muuseumi kui demokraatlikku institutsiooni ja antakse ülevaade muuseumide väljakutsest demokraatia kontekstis. See hõlmab demokraatia defineerimist ja kultuuri rolli demokraatias: osalusuuringud kultuuriasutustes kasvasid välja poliitikauuringute, konkreetsemalt demokraatiateooriate kontekstist. Selles osas käsitletakse ka IKTde rolli demokratiseerumisprotsessis, esitatakse muuseumide väljakutseid globaalse turu tingimustes ja muuseumide kui autoriteetsete ekspertinstitutsioonide väljakutseid.

Teine osa keskendub auditooriumide kaasamise teemale. Esiteks sõnastatakse aktiivse auditooriumi kontseptsioon. Edasises vaadeldakse kaasamise kontseptsiooni. Kaasamise mõistet võetakse tihti enesestmõistetavana ja sellel on jätkuvalt arenguruumi teoreetilise mõistena. Seni ajani on seda kontseptualiseeritud erinevatest vaatenurkadest lähtuvalt ning mõiste tõlgendused on väga erinevates uurimisvaldkondades ja erinevatel autoritel väga varieeruvad. Seetõttu on teksti kolmas osa hübriidseksioon, mis hõlmab nii teoreetilist kui empiirilist materjali. Defineeritakse “kaasamine” ja teised sellega seotud kontseptsioonid, mida töös kasutatakse, nagu “kaasamise võttestik” ja “kaasamisviis”. Samuti selgitatakse detailselt kaasamisprotsesse muuseumi kohapealses ja võrgukeskkonnas.

Kolmas osa on pühendatud Läti konteksti esitamisele ja Läti muuseumide ülevaatele. Läti konteksti andmisel rõhutatakse majanduslikke, poliitilisi ja kultuurilisi aspekte ja arutletakse osaluskultuuri potentsiaali üle. Läti muuseumide tutvustus annab lühiülevaate nende arengust Nõukogude ajast tänapäevani ning analüüsib sealsete muuseumide spetsiifilisi väljakutseid.

Uuringute tulemuste kokkuvõtete osa otsib vastuseid uurimisküsimustele. Eriti pööratakse tähelepanu kaasamisviiside kategooriate üle arutlemisele – uuringutes I, II ja I V on kaasamisviise kontseptualiseeritud erinevalt ning tulemuste osa võrdleb neid kontseptualiseeringuid omavahel.

Diskussiooniosas selgitatakse auditooriumide kaasamise protsesse Läti muuseumides ning põhjendatakse kaasamise kontseptsiooni kasulikkust muuseumiuuringutes. Läti muuseumide kaasamisvõttestikku mõjutab suur hulk väliseid tegureid (auditooriumide omadused ning poliitilised, kultuurilised ja majanduslikud faktorid), sisemised tegurid (muuseumi omadused) ja erinevad segunenud tegurid (osapooltevahelise interaktsiooni tulemus). Diskussiooniosas arutletakse ka peamiste barjääride üle auditooriumide kaasamisel Läti muuseumides.

Viimases osas esitatakse peamised kokkuvõtted ja vastused uurimisküsimustele.

1. Milliseid kaasamisviise toetavad erinevad muuseumitegevused?

Uuringutes I, II ja IV loodi erinevaid kaasamisviiside kategoriseeringuid. Esiimesed kaks uuringut kavandati Läti muuseumide osalustegevuste analüüsiks, kuid uurimistöö käigus nihkus fookus auditooriumide kaasamisele ja see on avaldanud mõju erinevustele kaasamisviiside kategooriate defineerimises. Uuringutes leiti, et muuseumid kaasavad oma auditooriume nii kohapeal kui *online*-keskkondades, kuid auditooriumide kaasamist ei ole alati lihtne identifitseerida, kuna see võib väljenduda vaimses, emotsionaalses või intellektuaalses kaasatuses.

Muuseumitöötajate vaatepunktist on peamised auditooriumide kaasamise tegevused kohapeal järgmised:

Informatsiooni ja kollektiivse ekspertiisi kogumine; ressursside kogumine, osaliste hulgas lojaalsuse tekitamine; kooliauditooriumide harimine ja nendes huvi tekitamine; üldise auditooriumi seas huvi tekitamine ja harimine; institutsioonile erinevat kasu toovate sidusrühmade kaasamine. (Uuring I)

Muuseumitöötajate vaatepunktist on auditooriumide *online*-keskkonnas kaasamise põhilised eesmärgid:

Muuseumi turundamine; kasutajate harimine; kollektiivse ekspertiisi kogumine; auditooriumidele lähemal olemine; auditooriumide mobiiliseerimine. (Uuring II)

Uuringus IV võimaldas muuseumide Facebookis tehtud postituste analüüsimine identifitseerida seitse võrguauditooriumide kaasamise viisi:

Informeerimine; turundus ja reklaam; konsulteerimine; koostöö; kontakt sidusrühmadega; kontakt osalejate / auditooriumidega; kontakt professionaalidega.

Uurimise viimases etapis koondati kõik kaasamisviisid erinevate uuringute lõikes kokku eesmärgiga leida universaalne muuseumi auditooriumide kaasamisviiside kategoriseering. Seitse *online*-kaasamisviisi sobitusid kenasti ka muuseumis kohapeal toimuvate kaasamisviiside süstematiseerimiseks. Mõned neist kaasamisviisidest on rohkem osalust pakkuvam, kuid kokku moodustavad nad muuseumi auditooriumide kaasamise võttestiku. Tasakaalustatud võttestikus on kõik erinevad kaasamisviisid esindatud, kuid erinevate viiside osakaal sõltub konkreetse muuseumi ja selle auditooriumide spetsiifikast.

2. Kuidas väljenduvad erinevad kaasamisviisid muuseumi põhiülesannetes?

On oluline rõhutada, et muuseumi põhiülesande ja ülesannete kommunikatsioon sõltub iga põhiülesande rollist. Doktoritöös on muuseumi funktsioonide kommunikatsiooni osas järgmised tulemused:

Kõige nähtavam on hariduslik põhiülesanne. Seda peegeldab nii muuseumi loodud infosisu kui ka erinevate tegevuste koostamine. Hariduslik funktsioon on selgelt olemas nii võrgus kui ka muuseumis kohapeal toimuvates kaasamisviisides. Muuseumide jaoks on väga oluline kaasata oma auditooriume muuhulgas pärandi ja kultuuritraditsioonide säilitamise ja taastamisega seotud küsimustes. Auditooriumi kaasamine on näha ka kogumise põhiülesande juures. See muutub nähtavaks sageli siis, kui muuseumid kaasavad oma auditooriume üleskutsega annetada muuseumi kogudesse. Põhiülesannetest on kaasamistegevustes hästi esindatud ka turunduse, avalike suhete, konserveerimise, meelelahutuse ja kuraatori tegevuses. Neid kommuniqueeritakse kahel viisil: muuseumi enda loodud põhiülesannet tutvustava informatsiooni kaudu, teisalt integreeritakse neid ülesandeid ka kaasamisviiside loomisesse.

Uurimine kui muuseumi põhiülesanne on esindatud vaid väga latentsel kujul. Läti muuseumides on keeruline rahaline olukord, seetõttu on uurimistöö ka halvas seisus (Uuring I, II, IV). Muuseumi eripärad mõjutavad põhiülesannete kommuniqueerimist: näiteks kunstimuuseumis on hästi kommuniqueeritud kuraatoritegevus, kohalikud muuseumid panustavad palju auditooriumi kaasamise kogumistegevuste kaudu.

3. Millist võimu jagamist erinevad kaasamisviisid endas hõlmavad?

Kaasamisest rääkimine võimaldab meil näha, et kõik tegevused pole võimu jagamisega seotud. Siit ka tasakaalustatud kaasamisvõttestiku mõte, et erinevatel tegevustel on erinev võimu jagamise ulatus, mille määrab konkreetne muuseum konkreetse auditooriumiga. Uuring I ja II esitavad hulga näiteid sellest, kuidas muuseumid jagavad kaasamisprotsessis auditooriumiga võimu; samas on seal näiteid ka avatud osalusest. Võimu jagamine on tõenäolisem olukorras, kus kas konkreetsel või üldisel sidusrühmal on ekspertiisi või ressursse, mida muuseumil vaja on. Tulemused näitavad, et muuseumid tahavad tõenäolisemalt jagada võimu konkreetsete sidusrühmadega kui üldise auditooriumiga ja vahel usaldatakse sidusrühmi piisavalt, et anda kontroll kogu protsessi üle täielikult neile (Uuring I). Läti muuseumid on harjunud koostööd tegema ja võimu jagama nende formaalsete või informaalsete gruppidega, kelle tegevusvaldkond kattub muuseumi omaga. Läti konteksti analüüs näitab, et ühiskond üldiselt on suhteliselt passiivne ja teatud piirini on muuseumid selle hinnanguga nõus, pidades ka oma auditooriume passiivseteks. Seega on kasutamata potentsiaali, arendamaks kaasamisviise, kus jagatakse võimu ka laiemale auditooriumiga (Uuring I, II). Arendamaks mõtestatud tegevusi, peab muuseum olema huvitatud kaasamise tulemustest. Huvi selliste võimu jagavate kaasamisviiside vastu saab muuhulgas tulla veendumusest, et auditooriumidel on spetsiifilist teadmist. IKT kasutus annab võimaluse kollektiivse teadmuse ärakasutamiseks.

Ühe konkreetse rühmana kaasavad muuseumid kooliõpetajaid ja eriti neid, kes organiseerivad õpilastele muuseumikülastusi. Isegi, kui muuseumid teadlikult õpetajatega võimu ei jaga, siis õpetajate arvamus mõjutab olulisel määral muuseumi tegevust.

4. Kuidas avalduvad erinevad kaasamisviisid erinevate auditooriumide puhul?

Uuring näitab, et on kolm peamist rühma, kellega muuseumid tööd teevad ja kelle jaoks kaasamisviise arendavad:

- 1) Üldine auditoorium viitab gruppidele, kellel puudub muuseumiga põhjalikum suhe, on vaid: muuseumi külastamine, muuseumi korraldatud üritustel osalemine või muuseumiga seotud *online*-ressursside kasutamine. Üldiselt ei ole selle grupi jaoks planeeritud tegevustel võimu jagamise elemente ning need ei nõua ka eriti aktiivset tegevust. Samas tuleb märkida, et uuringus kasutatud kaasamise kontseptsioon ei jäta kõrvale ka mitte-osalevaid ja mitte-interaktiivseid kaasamisviise. Muuseumikülastaja emotsionaalne või intellektuaalne kaasamine muuseumi kollektsioonidesse on oluline osa kaasamisvõttestikust. Muuseumi võimekusest annab aimu see, kui mitmekülgsed tegevusi kaasamisvõttestikus on.
- 2) Teine oluline grupp on kooliõpilased, kes moodustavad suure osa muuseumi külastajatest. Kooliõpetajad vahendavad selle grupi kaasamist ja üldiselt külastavad õpilased samu näitusi või osalevad samadel üritustel kui täiskasvanud. See on üks põhjustest, miks õpilaste kui eraldi grupi rõhutamist saab kritiseerida. Samas selgub Uuringus I informantide rõhutusest, et muuseumipedagoogikas koostatakse palju programme, hoidmaks laste huvitatust ja uudishimu.
- 3) Märksõna “sidusrühmad” alla on paigutatud suur hulk inimesi ja grupe, kellel on muuseumiga intensiivsem suhe. Nende suhe on kaugelt suurem kui vaid külastamine – need on vabatahtlikud, osalejad, noorteorganisatsioonid, erinevate valdkondade eksperdid, seotud erialade üliõpilased jne. Läti muuseumide praktikates on suur hulk kaasamistegevusi nimetatud gruppidele, ja muuseumid on valmis nendega ka võimu jagama. (Uuring I)

Uuringu IV raames analüüsitud tegevused toovad sisse täiendava dimensiooni auditooriumi kaasamisest. Suhe muuseumide ja auditooriumide vahel võib ilmneda järgmistes vormides: õpetaja – õpilane, professionaal – professionaal, traditsiooniline muuseum – külastaja, partner – partner ning külastaja – sidusrühm. Suhteid saab ka kirjeldada kui püsivaid, lühiajalisi või edasiarenevaid (Uuring IV).

Analüüs toetab ühtlasi ideed, et iga institutsiooni unikaalsus ei võimalda normatiivset lähenemist, standardiseeritud kaasamisvõttestike arendamist muuseumide jaoks. Demokraatliku institutsioonina saab iga muuseum toimetada mitmel erineval viisil. Selle uuringu raames mõistetakse kaasamist kui väga laia ja kõikehõlmavat mõistet, mis respektseb nii muuseumide kui ka auditooriumide mitmekülgsust.

Kaasamise mõiste sisaldab endas osalust, interaktiivsust ja ei jäta ka kõrvale teisi, vähem nähtavaid kaasamistegevusi. Kontseptsioon viitab sellele, et erinevates situatsioonides saavad auditooriumi liikmed täita erinevaid rolle, olles näiteks osalejad või külastajad, ja ühtki neist ei tohiks kõrvale jätta.

Doktoritööst tuleb välja seos auditooriumi kaasamise ja muuseumi demokratiseerimise vahel. Kontrolli andmine auditooriumidele protsesside või otsuste üle ei ole kohustuslik, kuid auditooriumi kaasamine pakub võimalust arendada oskusi ja teadmust, mis on vajalikud demokraatia praktiseerimiseks.

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