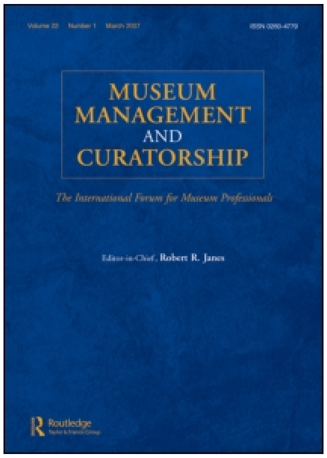

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Museums and Related Institutions in Poland Following Political Transformation

MAREK M. NOWACKI

ABSTRACT *The purpose of the research was to analyze the state of museums and related institutions in Poland, with comments on the market segmentation of these attractions. The research focused on the identification of the objectives set by museums and the programs used to achieve them. A survey questionnaire was distributed to a sample of 300 museums and data obtained from 147 of them (a 49 per cent response rate). Market segmentation was analyzed on the basis of the activities of the museums and resulted in the identification of groups of organizations with similar missions, price strategies and economic features. Four segments were identified: two "leading" (active/recreational and modern) and two "traditional" (traditional and traditional/recreational). Recommendations are provided regarding possible improvements to the operation and facilities that could lead to increasing attendances. The research concluded that the Polish market of museums and related institutions is dominated by institutions with traditional forms of presentation and interpretation, little activity in the community, and a traditional managerial approach to facility management.*

KEY WORDS: Visitor attractions, Organizational change, Museum marketing, Museum management, Market segmentation

Introduction

Museums and Political Transformation in Poland

Museums and related institutions, such as botanical and zoological gardens, constitute one of the primary visitor attractions. According to research on foreign tourist travel to Poland (Dziedzic 2005), they are the most important destinations for foreign tourists visiting Poland. Sightseeing is said to be the main purpose of travel by almost a half of foreign tourists (45.2 per cent). The system transformation that took place in Poland in the 1990s resulted in changes in the operating conditions of museums—the most important of which was the decentralization of the management of cultural facilities (including museums). Handing the management and financing of cultural institutions over to self-governing units tied their activity to the local community and authorities. This resulted in an increase in competition among cultural institutions for financial support from local authorities and created the need for modernization, a change of management style, and increased activity within the community (Prawelska-Skrzypek 2003). The fall of communism made it possible to interpret the past more freely, without the fear of censorship, and to present cultural

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relations with other areas and civilizations without regard for political correctness (Krzyzaniak and Prinke 2000). The development of museums in Poland in the recent past was also facilitated by the improved economic condition of towns and regions, as well as by the decision creating independence for self-governing authorities. Nonetheless, a rapid drop in attendance occurred. In 1989, attendance at museums in Poland reached nearly 24 million and in 1992 it dropped to 13 million. The drop in attendance was most probably the result of several factors: a slump in domestic tourism caused by the change of the organizational model (the elimination of company trips and holidays and the cutting back of grants for holidays), the relative increase of entry fees (putting prices on market basis), and the decrease of real income and impoverishment of families resulting in a decrease in school trips and changes in lifestyle. These statistics were also probably influenced by the presentation of more realistic data that became available when the economy switched from a command economy to a free-market economy.[1]

Since then, attendance has been rising regularly, reaching a level of over 18 million in 2005. However, there has also been an increase in the number of museums since 1989, which increased by 22 per cent in 2005, reaching a total of 690 (Central Statistical Office 1989–2005). Nevertheless, the number of visitors per museum remained relatively low, fluctuating around 25,000.

This Study

The goal of this research is to assess the condition of Polish museums and related institutions after the ownership and organizational changes that took place in the economic situation after 1995. In particular, the research was intended to provide information on the mission of museums, their economic condition, criteria on establishing prices of entry tickets, tourist infrastructure, methods of interpretation and presentation, modernization of exhibits, public relations activities, as well as activity in the local community. Market segmentation, based on the museums' characteristics, was aimed at identifying groups of institutions applying similar strategies that could be described using selected economic features, such as income, employment, attendance, entry ticket price, attendance growth, grant growth, and income growth. The research was also designed to identify institutions that had problems functioning in the market, and to highlight the activities that contributed to economic success. The activities and strategies of the leading attractions would allow the managers of other facilities to modernize their managerial approach.

Methods

The research was preceded by interviews with directors of several institutions in the Wielkopolska region.[2] The discussions focussed on funding, entry fee models, and managerial activities. A questionnaire was used during the interviews to evaluate the condition of the managerial and organizational transformations of the organisations. The questions addressed various tools and techniques used in the management of museum institutions proposed by Kotler and Kotler (2001), including research in the community and among competitors, applying techniques of market segmentation, product development, distribution of the offer beyond the facility, publicity, appropriate price modelling, marketing of services, relations with visitors, and strategic planning. The final questionnaire (based on the interviews and mailed out) included specific questions regarding the type of attraction, attendance, income, grants, entry ticket prices, employment, types of reduced fare tickets, interpretation forms, services rendered by the attraction, as well as its mission and price strategy. Open-ended questions concerning institutional activity, as proposed by Kotler and Kotler (2001), were also used, including services for the community, improvements in the exhibits, promotion in the local community, forms of presentation, infrastructure, competitiveness, and the conduct of market research.

Answers to the open-ended questions were grouped in categories and encoded. Price strategy was identified by means of a scale consisting of nine statements as per Fyall and Garrod (1998) and Leask et al. (2002),[3] such as *We maintain the price at a competition-close level* (for details see Table 5). This was assessed on a five-level Likert scale from *very important* (five points) to *not important* (0 points). The scale used to measure the mission of the facility included eight statements, including the elements of the facility mission based on the Act on Museums (1997) and the research by Fyall and Garrod (1998). For details see Table 6. The respondents were asked to rank the level of importance of the various statements to the facility mission using numbers from one (the most important) to eight (the least important). The data were organized in tables showing the percentage distribution of the examined variables. Second, a cluster analysis was prepared to segment institutions into homogeneous groups based upon the identified characteristic features. Third, economic, price strategies, and mission profiles of institutions in each cluster were developed and compared using non-parametric χ^2 and H Kruskall-Wallis tests, to determine if there were statistical differences among clusters. The STATISTICA 5.5 package was used for calculations.

The research was conducted in June and July of 2005, and the sample included institutions selected from a population of 668 museums, 13 zoological gardens, and 12 botanic gardens in Poland (according to GUS[4] data for 2004). From this total number of 693 facilities, 300 were selected with the help of a random numbers table, and questionnaires were sent to the directors of these attractions. A total of 147 questionnaires were filled in, with a return of 49 per cent, which is relatively high and sufficient for a questionnaire conducted by mail (according to Babbie 2001). The most frequently omitted item was the *attraction's annual income*, of which the non-response rate was 69 per cent. In order to assess if the sample was representative, the structure of the data was compared to GUS data in terms of type of institution. The respondent sample does not differ considerably from the population in terms of the kind of attractions (Table 1). Several categories of institution are actually quite poorly represented. However, the biggest difference in this respect does not exceed five per cent (in terms of regional museums). The sample included 25 per cent of small attractions (attendance below 10,000 visitors annually), 43 per cent per cent of medium-size attractions (attendance of ten to 50,000), and 28 per cent of big attractions (with annual attendance exceeding 50,000 visitors). Almost 30 per cent of the tested respondents had an annual income below 500,000 Polish zlotys (PLN; at the time of writing a PLN was equivalent to about 38 cents Canadian). A similar number of respondents had incomes above two million PLN. The researched attractions received grants in amounts ranging from zero to 20.6 million PLN.

Table 1. Structure of respondents in terms of the attraction type

	All		Sample		Respondents		
Attraction type	Number	% of the total	Number	% of the total	Number	% of the total	% of the total population
Art museums	78	11.3	29	9.7	9	6.4	1.3
Archaeological museums	14	2.0	8	2.7	7	5.0	1.0
Ethnographic museums	47	6.8	21	7.0	11	7.9	1.6
Historical museums	114	16.5	48	16.0	23	16.5	3.3
Biographic museums	48	6.9	14	4.7	3	2.1	0.4
Martyrdom museums	20	2.9	8	2.7	3	2.1	0.4
Natural environment museums	39	5.6	15	5.0	5	3.6	0.7
Technology museums	31	4.5	13	4.3	5	3.6	0.7
Regional museums	192	27.6	89	29.7	45	32.6	6.5
Other museums	85	12.3	40	13.3	19	13.7	2.7
Zoological gardens	13	1.9	8	2.7	5	3.6	0.7
Botanical gardens	12	1.7	7	2.3	4	2.9	0.6
Total	693	100	300	100	139	100	20.1

Their own income, apart from grants, ranged from 400 to 4.7 million PLN, and the share of this income in the attraction budget varied from 0.21 per cent to 100 per cent (in the case of museums that received no grants).

Descriptive Findings

Criteria for price modelling. The highest importance of the nine selected criteria was assigned to *moral duty to maintain the lowest price in order to make it possible for all interested persons to visit the facility* (mean of respondents' answers[5] was 4.05). For three-quarters of the managers, this parameter is important, or very important, and the managers do not differ from each other in this respect. A similar number of respondents consider *maintaining the price at a level corresponding with the visitors' expectations* as important, or very important (average = 3.88). The third parameter considered to be important, or very important, by the managers is *maintaining the lowest possible price to maximise the attendance level* (66.6 per cent, average = 3.63).

Tourist infrastructure. The most frequent infrastructure elements in all of the attractions are: washrooms (present in 88 per cent of attractions), gift and bookshops (80 per cent), and foot traffic signs (52 per cent) (See Figure 1), while rest areas and car parks are fairly frequent (44 per cent and 42 per cent respectively). Food and drinks are provided in less than one-third of the attractions, and even fewer have amenities for the disabled (27 per cent). Sixteen per cent have a garden, room or a playground for children.

Interpretation, presentation, and improving of exhibits. The most common forms of presentation in the attractions are static displays (95 per cent), guided tours (89 per cent), and folders and brochures (87 per cent). Just over half of the attractions (51 per

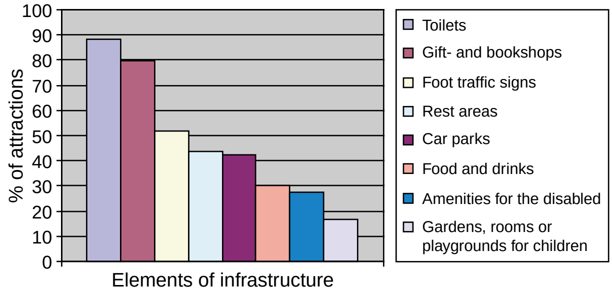

Figure 1. Tourist infrastructure.

cent) have maps, layouts of the facility, and interpretation panels. Audiovisual presentations are also helpful in museum education and are offered by almost one half of the attractions (43 per cent). The remaining forms of presentation and interpretation are used by few of the attractions. Live interpretation was reported by 21 per cent of the respondents, and movable equipment in 17 per cent. Modern technology, live interpretation, and attempts to engage the visitors are present in only a few institutions. Dioramas, a traditional technique, are present in only 11 per cent of the institutions. The least common element is interactive computer installations, considered to be a prime feature in contemporary display techniques. Only 16 institutions are so equipped—just ten per cent of the respondents. As many as 86.3 per cent of the managers stated that expert staff are in the exhibits area every day and are available for the visitors.[6]

The most frequent way of improving exhibits was adding new ones or replacing old ones (38 per cent) (Figure 2). Another was renovating the interiors and exhibit equipment (e.g., suspended and standing display cabinets) and modernising the lighting system (29 per cent). These arrangements were changed in one-quarter of the institutions by extending or reconstructing the displays. Verbal and presentational changes, such as altering descriptions, panels and notices, making new exhibition programs, or introducing new forms of interpretation, were undertaken in 15.8 per cent of the institutions. The exhibits were extended by setting up new permanent displays in only 6.5 per cent of cases. As many as 93.5 per cent of the institutions create temporary exhibits.

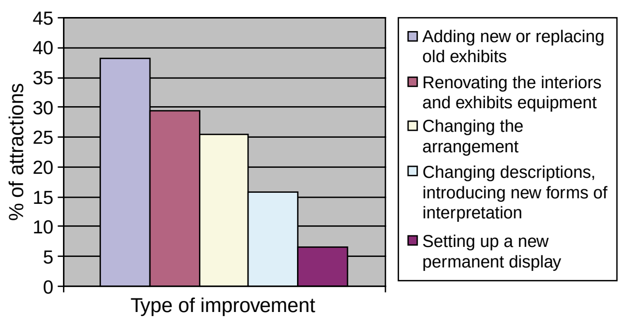

Figure 2. Exhibit improvements in the last three years.

Promotion. Almost 95 per cent of institutions promote themselves in their own town or region. The most popular form of promotion is media advertising in the community through the press, radio, and TV. Almost 60 per cent of respondents use this form (Table 2). Distributing information booklets, folders or invitations for exhibits or events is also a very popular way of advertising (40 per cent). Such materials are most often sent to schools, offices, nearby hotels, and guesthouses. Similarly, information is given through the media: the press (37 per cent), television (20 per cent), and radio (16 per cent). Visual advertising is also very popular and takes the form of posters, banners, and billboards, and is used by one-third of the respondents under research. Every fifth institution reported being present on the Internet.[7]

Competition and research. Almost a half of the respondents (47 per cent) attempt to compete with other institutions in the town or region. However, it is often said that they are the only institution in the town or county and hence they have no competition. Over one-third of the respondents (37.4 per cent) conduct research on visitors. This research most often addresses the visitors' assessment of the exhibits (22 per cent), the visitors' expectations of the facility and its exhibits (8 per cent), the specific qualities of the visitors and their satisfaction (7.2 per cent and 6.5 per cent respectively), as well as the assessment of the quality of service (5.7 per cent) and availability of information about the facility in the region (2.9 per cent).

Activity in the local community. All the attractions studied maintain cooperation with schools and other cultural and educational institutions. The most popular activities are museum lessons: workshops or field trips conducted in the museum area or in schools and other institutions (93 per cent). Most of the attractions organise or co-organise various kinds of events, anniversaries, bonfires or rides (64 per cent). About the same proportion (60 per cent) organise concerts, cultural and folk festivals, knightly tournaments, festive events, and fairs. In addition, other popular forms of activity are knowledge contests (45 per cent), conferences, seminars, and academic sessions (44 per cent). Various societies co-exist with the museums, such as circles of museum friends and regional societies. The cooperation with schools involves helping them organise school exhibits, lending exhibits, organising word and music shows, as well as organising excursions.

Table 2. Promotion of the institutions

Method	n	%
Information in media (general)	83	59.7
Distributing information brochures, leaflets, invitations	55	39.6
Information in press	52	37.4
Information on posters, banners, and billboards	46	33.1
TV	28	20.1
Internet	27	19.4
Radio	23	16.5
Display cabinets and boards in town and on public transport	19	13.7
Municipal, regional, and tourist information centers	18	13.0
Presence at fairs	9	6.5

Mission. Assessment of the institution's mission was another element of inquiry. As expected, *the protection and maintenance of the possessed collection* was considered to be the most important element of the mission (a result of the Act on Museums), and this was expressed by almost 70 per cent of the respondents. The second important element of the mission was *making the collections available to as many visitors as possible*, and this element was considered to be the primary one by almost one-third of the respondents. The third most important element was *passing the knowledge about the collections* (16 per cent of the respondents considered this to be the most important one). Only a small number of respondents (10 per cent and less) considered the remaining elements of the missions to be the most important.

Summary. The data show variations in the condition of the infrastructure in the examined institutions, as well as different methods of management. Signs of modernity include widespread promotional activities in the media (particularly on the Internet), dynamic activity in the local community, and fairly good tourist infrastructure (apart from catering services). Weaknesses include outdated methods of presenting and interpreting exhibits, a widespread lack of interactive equipment, and only cosmetic changes in the modernization of exhibits. The dominant pricing strategy of maintaining entry fees at the lowest possible level, taken with the perception of the mission, reflect the significant conservatism of the managers of the attractions.

Segmentation Analysis

Segmentation of the attractions market. Segmentation employs statistical methods of cluster analysis to classify individuals into groups with similar characteristics. The segmentation was conducted on the basis of the features noted above: community services, exhibit improvements, promotion, forms of presentation, infrastructure elements, competitiveness, and audience research. The four most often repeated categories were selected from each of the above-mentioned features, including: 1) community service: museum lessons, occasional events, contests, and conferences; 2) exhibit improvements: new exhibits, renovations and repairs, rearrangement, and description changes; 3) promotion: media, posters, folders, and display cabinets; 4) presentation forms: panels, AV presentations, live interpretation, and interactive elements, and 5) infrastructure elements: shop, food and drinks, children's playground, and rest areas. Additionally, the analysis included two individual categories—competitiveness and audience research. As a result, the cluster analysis included 22 binary variables representing all of the above-mentioned categories.

Grouping with the k-average method was applied in the analysis by selecting the observations in such a way as to maximise the distances between clusters. This is a technique in which the basis for creating clusters is accepting a given number of k points as initial centres of gravity of the clusters. The problem of choosing the appropriate number of clusters is to be solved by the researcher. The number of clusters was established based on the possibility of interpreting the obtained results, and also by assuming that the size of the obtained cluster was not less than five per cent of the sample (Aldenderfer and Blashfield 1984). Exclusion of nine questionnaires because of missing values led to 138 respondents in the final version of the cluster analysis. After analysis of variants of two, three, four, five, six, and seven clusters, it was assumed that the most useful option consisted of four clusters.

Variants five, six, and seven contained too few clusters for further analysis, while variants of two and three clusters were illegible and therefore hard to interpret. Each of the clusters was named on the basis of variables specific to it (Table 3).

Cluster 1: There are 33 respondents (23.9 per cent of the sample) in this cluster. They are very active attractions in terms of the community, organising events and contests. They improve their displays by replacing exhibits (the majority of respondents that replace the exhibits belong to this cluster—56.6 per cent), changing descriptions and exhibit programs. They try to raise their profile, especially in the local community, by distributing leaflets and posters about displays and events, and use modern forms of interpretation, particularly live interpretation (dressed performers). Furthermore, their infrastructure is the best in the market, including souvenir shops, food and drink outlets (almost half of the respondents that provide food services belong to this cluster), children's playgrounds, and rest areas. They try to be competitive in the market and they conduct audience research. Based on the above description, this cluster was labelled "active and recreational."

Cluster 2: Contains attractions (36 facilities, 26.1 per cent of the sample) that are strongly focused on academic activity (almost half of the researched respondents that organise conferences and seminars belong to this cluster). Displays undergo few improvements. There is, however, a strong presence in all kinds of media, with the distribution of information posters, leaflets, and folders. The facilities have the most modern equipment, including interpretation panels, AV presentations, movable installations, and interactive computer applications (60 per cent of respondents with such applications belong to this cluster). Infrastructure includes souvenir shops (at an average level) and, occasionally, other features. The cluster includes an above-average number of institutions that conduct market research and try to be competitive. This cluster is labelled "modern."

Cluster 3: Contains the most attractions (39 facilities, 28.3 per cent of the sample), which are not very active in the community—the only activity is contest organisation. Nevertheless, they try to modernise their displays through rearrangement, changing descriptions and exhibition programs (half of such respondents belong to this cluster). Their publicity is not extensive in the community; they apply traditional forms of presentation and are poorly equipped with tourist infrastructure. They are only marginally competitive in the market and they do not conduct any audience research. These attractions are labelled "traditional."

Cluster 4: Consists of 30 researched attractions (21.7 per cent of the sample) and is marked by a focus on occasional events and museum lessons. Exhibits are not replaced, and descriptions and screenplays are not changed. These facilities are present in the media to a limited extent and live interpretation is used. The vast majority of them are equipped with tourist infrastructure, mainly in rest areas for visitors (the most of all clusters), gardens and playrooms for children, as well as food services. These facilities are unlikely to conduct market research and they are uncompetitive in the market. This cluster is called "traditional and recreational."

Economic Distinctions

The analysis entailed a detailed description of the derived clusters by means of economic features and attendance. It was found that clusters varied with respect to

Table 3. Results of cluster analysis

Variables	Clusters 1 Active and recreational	2 Modern	3 Traditional	4 Traditional and recreational	χ^2	p	N
Sub-sample proportions	33 (23.9%)	36 (26.1%)	39 (28.3%)	30 (21.7%)			138 (100%)
Community service							
Museum lessons	25.00%[1]	27.34%	25.78%	21.88%	5.8	0.12	128
Occasional events	**32.95%**	29.55%	(10.23%)	27.27%	40.7	*0.0000*	88
Contests	**44.44%**	22.22%	22.22%	(11.11%)	28.6	*0.0000*	63
Conferences, seminars	26.23%	**47.54%**	(13.11%)	(13.11%)	32.1	*0.0000*	61
Improvements							
New exhibits	56.60%	(16.98%)	26.42%	(0.00%)	59.9	*0.0000*	53
Renovations/ repairs	34.15%	14.63%	31.71%	19.51%	5.8	0.11	41
Re-arrangement	25.71%	(14.29%)	**45.71%**	14.29%	8.8	*0.03*	35
Change of descriptions, exhibition programs	**36.36%**	(9.09%)	**50.00%**	(4.55%)	12.5	*0.005*	22
Promotion							
Media	19.28%	**37.35%**	25.30%	18.07%	13.9	*0.003*	83
Posters	**41.30%**	**43.48%**	(8.70%)	(6.52%)	33.4	*0.0000*	46
Folders, leaflets	**40.00%**	32.73%	25.45%	(1.82%)	28.3	*0.0000*	55
Display cabinets	36.84%	31.58%	10.53%	21.05%	4.2	0.23	19
Presentation							
Panels	25.35%	**35.21%**	22.54%	16.90%	8.0	*0.04*	71
AV presentation	**30.00%**	38.33%	(16.67%)	15.00%	15.0	*0.001*	60
Live interpretation	**46.67%**	23.33%	(6.67%)	23.33%	14.8	*0.002*	30
Interactive elements, multimedia installations	26.47%	**58.82%**	(5.88%)	(8.82%)	30.1	*0.0000*	34
Infrastructure							
Gift and bookshop	**28.18%**	27.27%	22.73%	21.82%	10.2	*0.01*	110
Food and drinks	**42.86%**	(9.52%)	(11.90%)	**35.71%**	26.5	*0.0000*	42
Children's garden/playroom	**34.78%**	21.74%	(4.35%)	**39.13%**	10.9	*0.01*	23
Rest areas	**37.70%**	(18.03%)	(0.00%)	**44.26%**	67.8	*0.0000*	61
Competition	**30.16%**	33.33%	22.22%	(14.29%)	7.7	*0.05*	63
Research	**36.54%**	32.69%	(15.38%)	(15.38%)	12.9	*0.004*	52

[1]Proportion of respondents in a researched cluster.

Note: p-statistical significance of χ^2 test (values less than 0.05 are in italics); figures in bold font are high-scoring items relative to the sub-sample proportions. Figures in parentheses are low-scoring items relative to these sub-sample proportions.

eight out of 11 tested features. **Active and recreational** attractions have a relatively large income, as well as the highest grants and income from their own activities (Table 4). These attractions have the highest employment, a high and stable attendance (average attendance is about 70,000 visitors), and a considerable income growth. **Modern** attractions have the largest income and the highest grants, with a relatively small income from their own activities. The facilities are medium-size, with an average staff of 24 and attendance of approximately 57,000. The majority are characterised by a growth in attendance and income. **Traditional** facilities have the lowest income and grants. The facilities are small with the lowest employment rate (7.5 positions on average) and poor annual attendance (26,000 visitors on average). The entry price to these facilities is the lowest, and the attendance is unstable with a downward trend. Despite increased grants, income growth is the least stable of all. Last, **traditional and recreational** facilities are the biggest ones, with a relatively large income, comprising high grants and income from their own activity. Their employment rate is high (33 persons on average), and they are characterised by the highest attendance and the highest entry price. Their attendance is stable, as is their income growth, in general.

Due to small numbers of groups reflecting particular attraction types, a full analysis of the variability of clusters with respect to attraction types was not possible. The only clear relations are seen by the presence of all zoological gardens (5) in Cluster 4, the majority of archaeological museums in Cluster 2, and one-third of regional museums in Cluster 3. The obtained attraction clusters do not vary from each other due to the organizer.

Finally, it was decided to investigate whether groups of attractions differ from each other because of price strategies and missions. An essential variability was identified with respect to *maintaining the price at a competition-close level* (Table 5). Managers of attractions belonging to Cluster 2 are most inclined towards this parameter, whereas managers of facilities from Cluster 3 are the least inclined. Managers of attractions from the third segment opt for maintaining the lowest prices to the greatest extent, and managers from the first segment to the smallest extent. This approach is also confirmed by the attitude to parameter no. 7 (*we maintain a high price so that the number of visitors is at a suitable (not too high) level*), which was most acceptable for persons from the first segment and the least acceptable for persons from the third segment. Further, parameter no. 8 (*we try to maintain the price at a level corresponding with the visitors' expectations)* is most preferred by the managers belonging to the fourth and second segments, and least preferred by the managers representing the third segment.

Role of Mission

Attractions differ from each other with respect to the importance ascribed to two missions (Table 6). Managers of facilities from **Cluster 2** give lower importance than other facilities to the *protection and maintenance of the possessed collections*, whereas the facilities from **Cluster 1** ascribe a higher importance than other facilities to *providing a high quality service to the visitors in order to compete on the market.*

Table 4. Clusters in terms of economic features

Variables	Clusters: 1 Active and recreational	2 Modern	3 Traditional	4 Traditional and recreational	H	P**	N
Total income (in PLN)	2,364,323	2,556,809	1,099,327	1,941,473	15.4	**0.001**	98
From grants	1,829,633	1,795,119	840,052	1,620,811	10.4	**0.01**	100
From own activity	542,188	272,047	261,802	477,395	17.7	**0.0005**	105
Own activity/income	23.8%	18.0%	17.9%	29.8%	4.3	0.22	99
Employment	35	24	7.5	33	17.3	**0.0006**	129
Attendance	70,473,42	57,342,26	26,333,16	82,134,69	13.13	**0.004**	134
Entry ticket price (in PLN)							
Full tariff	5.7	5.3	4.4	6.1	10.9	**0.01**	126
Reduced tariff	3.4	3.2	2.7	3.6	8.1	**0.04**	124
Attendance growth*	1.00	1.29	0.91	1.00	7.17	0.06	129
Grant growth*	2,19	2,00	2,08	2,07	0,89	0,8	125
Income growth*	2,58	2,58	2,15	2,46	9,59	**0,02**	124

Note: * 0: lack of any growth between 2002 and 2004; 1: growth in 2002–2003 *or* 2003–2004; 2: growth in 2002–2003 *and* 2003–2004; ** figures in bold mean that differences among groups are significant for levels below $p < 0.05$.

Table 5. Clusters of attractions and price strategies

Price strategies	Clusters				H	p
	1	2	3	4		
1. We maintain the price at a competition-close level.	3.1	**3.3**	(2.4)	2.8	12.2	***0.006***
2. We maintain the highest price acceptable to visitors.	2.9	2.7	2.5	3.0	1.8	0.5
3. We maintain the lowest possible price so as to maximize attendance level.	3.3	3.4	4.0	3.8	5.5	0.1
4. We maintain a high price in order to obtain funds necessary for the maintenance of the facility and collections.	2.4	2.1	2.1	2.7	3.5	0.3
5. We have a moral duty to maintain the lowest price in order to make it possible for all interested persons to visit the facility.	(3.5)	3.9	**4.4**	4.2	12.5	***0.005***
6. We establish the price in order to gain the expected profit.	2.6	2.3	2.1	2.2	3.0	0.3
7. We maintain a high price so that the number of visitors is at a suitable (not too high) level.	**1.7**	1.3	(1.2)	1.5	8.9	***0.02***
8. We try to maintain the price at a level corresponding to the visitors' expectations.	3.8	**4.1**	(3.4)	**4.2**	12.4	***0.005***
9. We maintain the highest possible price in order to maximize profit.	1.8	1.9	1.4	1.5	6.2	0.1

Note: Figures in bold and parentheses refer to groups of institutions among which differences on the level equal to p due to the analyzed variable have been found.

Discussion

The goal of this research was to assess the condition of Polish museums and related institutions after ownership/organizational changes took place. In the study period, there was a change in the method of financing the facilities and in the method of managing them. It was found that the studied institutions began to use a number of marketing techniques and also have fairly good tourist infrastructure. Outdated methods of presenting and interpreting the exhibits are usually their weaknesses.

The studied facilities, despite the fact that most of them have museum status, are situated in various kinds of buildings. The buildings are often historical castles (e.g., Malbork Museum), palaces (Museum Palace in Wilanów, Łańcut Museum), mines (Cracow Salt-Works Museum in Wieliczka) or historical merchant houses. Their attractiveness for visitors is not only a result of the valuable exhibits, but also because of the historical and architectural value of the facilities where they are located, including their recreational, food and entertainment services (cf. Nowacki 2001). As the main tourist destinations, they are an important part of the tourist economy of the region and, consequently, require the special care of local government authorities and tourist organisations.

Table 6. Clusters of attractions and their missions

Mission of attractions	Clusters 1	2	3	4	H	p
Protection and maintenance of the collections	1.6	(2.4)	1.7	1.6	9.9	***0.01***
Making the collections available to as many visitors as possible.	2.4	2.7	2.3	2.0	1.2	0.7
Passing knowledge about the collection subject matter on to the visitors.	3.0	3.2	2.6	2.7	3.4	0.3
Making knowledge about the collections available to everyone irrespective of their education and age.	4.0	3.7	3.4	4.0	3.0	0.3
Providing visitors with entertainment and recreation.	5.8	6.5	6.1	5.9	4.0	0.2
Cooperation and integration with local community.	4.5	4.7	4.4	5.2	2.8	0.4
Obtaining funds for own needs.	4.9	5.9	6.0	5.3	5.4	0.1
Providing a high-quality service to the visitors in order to compete in the market.	**4.1**	5.1	(5.6)	(5.6)	9.7	***0.02***

Note: Figures in bold and parentheses refer to groups of institutions among which differences on the level equal to p due to the analyzed variable have been found.

The analysis showed variability between managers with respect to their perception of the mission and the modelling of entry prices. A general trend to remain in the market, and to maintain the lowest possible prices, has certain deviations in the case of medium and large attractions that apply price policy to regulate the numbers of visitors or adjust their price to that of competitors. Big facilities take account of market criteria to a greater extent, and they maintain the prices at a competition-close level, or use price as a means to reduce excessive crowding in the facility. In this way, they can apply price policy as a marketing instrument in facility management. However, the dominant strategy is maintaining the lowest possible price.

The analysis of the mission of the facilities showed the predominant role of protection and maintenance functions. This confirms that traditional thinking among managers prevails—their attention is focused on the exhibit/object rather than on the visitor and client. This is characteristic of museums in post-communist countries, in contrast to the United States and the United Kingdom, where the focus is on the visitor and the visitor experience. Such an attitude is reflected by the low importance assigned to the mission elements aimed at providing recreation and entertainment for visitors, or for activities for the community. With regard to cooperation with the local community, small facilities are more active than big ones.

Based on selected features of the attraction, four groups of facilities could be differentiated that vary, both by way of presentation and activity for the community, as well as by the criteria for price modelling and the mission hierarchy. Two initial clusters (active/recreational and modern) are active attractions and are conspicuous in the community. They are competitive, conduct market research, and have displays rich in various forms of interpretation and presentation. They can rightly be called market leaders. The facilities are relatively modern and offer a high-quality tourist product. They use price as a marketing tool and an instrument for heritage protection. The traditional facilities segment (third) includes mainly small attractions (museums, exhibits) that are not primary destinations for tourist traffic because of

Table 7. Characteristics of clusters

Cluster	Characteristic
Active and recreational (24%)	High attendance and employment, high income (high grants and own activity), active among local community, improved displays, changes of displays, conspicuous through posters, leaflet distribution, modern forms of interpretation, best infrastructure (souvenir shops, food and drink service, children's playrooms), competitive in the market, conduct market research, maintain a high price to control the number of visitors, high importance assigned to the quality of service in order to compete in the market.
Modern (26%)	Medium attendance and employment, highest income (large grants and low own income), large growth of attendance and income, focused on academic activity, few improve their displays, strong presence in the media and on posters, modern equipment and furnishing, interpretation panels, AV presentations, movable and interactive installations, poor infrastructure (apart from shops), competitive in the market, conduct market research, maintain prices at a competition-close level acceptable to visitors, less importance assigned to the protection and maintenance of collections.
Traditional (28%)	Poor attendance and the lowest employment, the lowest income and grants, the lowest entry prices, unstable attendance with a downward tendency, low activity among the community (apart from organizing contests), improve displays (re-arrangement change of descriptions and programs), traditional forms of presentation, poor infrastructure, maintain the lowest price.
Traditional and recreational (22%)	Activity—occasional events and museum lessons, no improvement of displays, relatively inconspicuous in the media, life interpretation, good infrastructure (rest areas, gardens, children's playgrounds, food and drink service), cluster includes all zoological gardens, maintains a price acceptable to visitors.

poorly developed tourist infrastructure. The fourth segment includes facilities with no specific features, but that operate quite efficiently, despite traditional forms of display. Frequently, this is thanks to the special nature of the facility, e.g., a zoological garden. They are managed in a conventional way and their exhibits are not modernised. Low grants and downward attendance put their operation in jeopardy.

Conclusion

The results from the analysis lead to the conclusion that Polish museums apply the elements of the strategy proposed by Kotler and Kotler (1998, 2001) to varied extents and aim for varied targets. Facilities in the first segment (active and recreational) try to achieve all three groups of objectives: orientation to the public and orientation to the product, as well as organisation and competition. Thus, their development strategy focuses on providing experience, community activity, entertainment and recreation. Segment no. 2 (modern) is clearly oriented towards the organisation, competition, and the product itself; thus, elements of the second strategy are dominant—providing experience to the visitors. Facilities in segment no. 3

(traditional) and no. 4 (traditional and recreational) are the opposite. These facilities are focused on the product, i.e., the display and services, and it is difficult to assign to them any of the described strategies. Such facilities, especially the traditional ones, need help, including improvements to the exhibits, the development of tourist infrastructure, better management methods, and clear strategies for development. Market orientation is recommended (towards clients/visitors), as is greater independence (also financial), quality service, and extending both the educational and recreational offerings. It appears that the strategy focused on activity in the community would be the most suitable (cf. Kotler and Kotler 1998). It does not require large capital investments, but can increase the attractiveness of the facility and help in obtaining support from the local community. Technical training in attraction development, interpretation, activity in the community, and obtaining structural funds, supported by the Ministry of Culture and National Heritage and Ministry of Economy, would be of considerable help in assisting each facility create its development strategies.

Finally, this research indicates that many of the postulates of Garrod and Fyal (2000) regarding the mission of attractions, such as providing entertainment and recreation, suitable financing and co-existence in harmony with local community, are not being implemented by Poland's museums and related institutions.

To sum up, the Polish market of attractions has been dominated by facilities with traditional forms of presentation and interpretation, and limited activity in the community. A traditional approach to facility management results in relatively little focus on obtaining funds for their own activities and little flexibility in price modelling. Despite the fact that self-generated income increases every year, this still continues to be a small share of facilities' total income. Therefore, stimulating this segment of the tourist economy seems necessary in light of the growing importance of cultural tourism in Poland.

Notes

[1] To the author's knowledge, data on attendance before 1989 in some cases was overstated.

[2] Region in western Poland, where the author's university is located.

[3] The original scale consisting of 12 items was shortened to nine items after initial research.

[4] Central Statistical Office.

[5] The mean was calculated by ascribing the following values to the answers: very important – 5, important – 4, fairly important – 3, less important – 2, unimportant – 1.

[6] It seems that these data have been much exaggerated in this case. From the author's earlier research (Nowacki 2001), and subsequent observations, it appears that normally there are only guardians in the exhibits area who have no expert knowledge.

[7] However, other research by the author (Nowacki 2001) shows that the museum presence in this medium reaches almost 100 per cent. If not on their own homepages, information about the respondents is found on the websites of local government, regional tourist or information portals.

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