Study regarding the National Museum of Art of Romania Visitors` Perception on Improving Its Competitiveness

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Abstract: The contribution of cultural organizations to the increase of the competitive position of cities has become increasingly significant in recent years through the role they play in urban development. Thus, increasing the number of visitors is a fundamental objective for the development strategy of cities, and these "many small investors" bring not only funds, but also determine an improvement in the "urban offer". In this context, cultural organizations are an important strategic option for achieving this fundamental objective and the competitiveness of cultural organizations is reflected directly proportional into the success of cities. Within this type of organization, museums occupy a primary place due to their ability to attract tourists, which is focused on at least three determinants: special symbolism, the importance that museums have among leisure preferences and the educational role. In this paper, we intend to present the findings of a study on the perception of visitors on the National Museum of Art of Romania in terms of actions for improving the competitiveness of this logo-museum.

Keywords: competitiveness, competitive advantages, culture, cultural organizations, marketing mix, museums, urban competition, urban development, visitors, visitor perception.

JEL: L32, L82, R00, R58, Z10.

Introduction

In recent years, the concern of the management research for the competitiveness of cultural organizations has begun to be more coherent worldwide. This was generated by the translation into a certain area of activity of the applicability on a large scale of the concepts of the competitive economy, the cultural field, recognized traditionally, as being under the tutelage of the state. Also, the contribution of cultural organizations to the increase of the competitive position of cities has become increasingly significant, thanks to the the role it plays in urban development, while the competitiveness of cities is reflected directly proportional into the cities' success.

This study can provide a starting point for the Romanian field research, even if, sometimes, it has some limitations. Other research papers on this subject

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have had an empirical character and have been complementary examples in research studies on related areas, and can't be considered stand-alone research carried out on the Romanian museum organizations. Moreover, this is the first study of its kind conducted at the National Museum of Art of Romania. Therefore, it can be considered to be more generally, it has basic assumptions, and perhaps too few, but it has the advantage of setting clear conclusions that are useful to deepen the later approach, as well as the actions to improve the competitiveness of this "museum trademark".

1. Theoretical framework

"In recent years, the importance of museums in society has become more visible, taking into account the increased importance among the leisure activities, as well as the ability to attract a large number of tourists. Consumers spend substantial amounts of money when it comes to visiting museums, such as for purchasing tickets, or for purchasing goods or services offered by restaurants or stores that operate on the museums' premises. Thus, museums have a positive contribution to the local economy" (Ginsburgh and Throsby, 2006). Also, the cultural organizations have the potential to play the role of key stakeholders that can effectively shape a city branding strategy and provide cities with competitive advantages in attracting tourism. According to Burlacu (2011) and Popescu (2012), "actors from cultural, educational and sports fields are usually involved in shaping and implementing the city branding strategy".

Initially, marketing was associated only with private organizations. Before entering the cultural environment, marketing has been used by non-profit organizations, however currently marketing has expanded its scope on museums.

"The marketing activity within museums, art galleries and other cultural institutions has recently acquired significance" (French and Runyard, 2011).

Kotler and Kotler (2000) have come up with the following definition of museum marketing: "... museum marketing aims to organize and direct the activities of the institution towards the visitor".

According to Tobelem's (1997) belief, the need for marketing in the museum sector can be attributed to four factors:

• "The first factor relates to the particular development of this sector in recent years" Tobelem (1997). For example, the author refers to the museums in the United Kingdom, whose number has increased considerably, from 900 such institutions in 1962 to over 2,500 today". In addition to the numerical evolution, there have been significant changes in the complexity of these institutions. Museums have evolved from simple collections of art to national or global institutions financed from government revenues" Tobelem (1997)". A successful museum can be defined as the institution that attracts people in search of new information and leisure, offering them alternative ways to experience the products and services beyond the walls of the museum, through attractive websites" (Kotler, 2001). "Museums should include in their basic offer recreational activities,

complementary to educational programs, in order to attract a wider and diverse audience" (McPherson, 2006)". The staff of the museum must be aware of its role within the institution, to endeavour to please even the most demanding guests, offering them quality services" (Tobelem, 1997). There aren't many museums with personnel specialized in marketing. Tobelem (1997) states that "many museums do not have a department or a person with specific marketing responsibilities, the public activity includes only statements or press releases".

- The second factor concerns the financing of museums. "Marketing plays an important part in creating additional revenues apart from the traditional sources, such as state budgets" Tobelem (1997).

- "Another factor is that museums must compete for customers with other cultural institutions and leisure organizations" Tobelem (1997), being forced "to adapt their actions according to the strategies and pressures of the competitors" (Barbu, 2011). More, several authors (Androniceanu, 2009; Plumb et al., 2003; Suciu and Ivanovici, 2008; Zamfir, 2011) have shown that the unprecedented expansion of services and the increase of their importance in society involved adapting the work to the diverse requirements of the beneficiaries of these services. Finally, "in the context of globalization, cultural institutions must face the competition from institutions with similar offerings, but especially from businesses that offer a variety of offers for relaxation, fun and culture at the same time. In order to attract consumers of culture, institutions must include in their marketing plan creative strategies designed to transform products into a mix of culture and entertainment. This objective can be achieved through the collaboration between different types of cultural institutions, by combining art with urban events (concerts, festivals), as well as employing new distribution channels" (Kolb, 2005).

- The last factor, equally important, is the need to understand and know the visitors' requirements. Thus, "in contemporary society, museums are focused mainly on consumers, and try to become more than just exhibition spaces for objects. Marketing strategies are mainly used to increase the number of visitors, and transform the conservative image into an attractive one that can generate success" (Gilmore and Rentschler, 2002). The visitors' needs and requirements have become too demanding and difficult to satisfy by the traditional institutions. For this reason, the use of modern marketing strategies is imperative for ensuring competitiveness. Given Rowley's statement "satisfied customers become loyal customers" (Rowley, 1999), museums must set as main objective to increase visitor satisfaction.

2. The National Museum of Art of Romania...

2.1. Mission and objectives

"The National Museum of Art of Romania (NMAR) is a public cultural institution of national importance, with legal personality, [...] subordinated to the Ministry of Culture and National Heritage". [...] "Established by the Law no. 803/1946 on the organization of national museums, NMAR is accredited according to the Law no. 311/2003 of museums and public collections" (NMAR, 2010a).

"The main objectives of the museum are to preserve, restore, account and valorise the heritage of fine art and decorative art that it manages" (NMAR, 2010b; NMAR, 2010c). Its main mission aims to "preserve, enhance, restore, study, exhibit and promote the richest heritage of national and foreign art in the country, by offering a consistent and extensive range of exhibition projects, which will give visitors access to the works of art in order to educate their sense of aesthetic, enrich their culture and for spiritual development" (NMAR, 2010c).

2.2. Material basis

The headquarters of the museum consists of three buildings:
- "Ştirbei" building which has 18 rooms for permanent exhibitions, temporary exhibitions, 2 entrance halls (with cloakroom, toilets, shops for selling publications and tickets), the Hall for educational activities and the Auditorium Hall, with annexes, heritage warehouses, maintenance workshops.
- "Kretzulescu" building has 12 rooms for permanent exhibitions, temporary exhibitions, 2 entrance halls (with cloakroom, toilets, shops for selling publications and tickets) and the Mirrors Hall with annexes, offices, restoration workshops, heritage warehouses.
- The Central building, is in renovation since August 2009, and will host 15 rooms for permanent exhibitions, which are in connection with the Oriental Art Gallery and the European Decorative Arts Gallery, 2 entrance halls (with cloakroom, toilets, shops for selling publications and tickets), representative historical spaces, the Royal Throne Room and Dining Room and heritage warehouses.

"The total area of the building is 60,000 square meters, of which 17.5% represents exhibition halls (10,500 m^2); 11% represents heritage warehouses (6,500 m^2); 7% represents areas intended for other activities: Auditorium Hall, Throne Room, Royal Dining Room, Hall of Mirrors (approx 4,000 m^2); 64.5% represents restoration laboratories, technical workshops, offices, hallways, administrative areas (about 21,000 m^2)" (NMAR, 2009a).

At the same time, "the museum owns a specialized library with about 46,861 books and 18,666 periodicals, a photo lab and a documents section. The library holds 190,954 photographic materials" (NMAR, 2011).

Also, "under the NMAR administration there are the Art Collections Museum, the K.H. Zambaccian Museum, The Theodor Pallady Museum and the Museum Ion and Dr. Nicolai Kalinderu" (NMAR, 2010a).
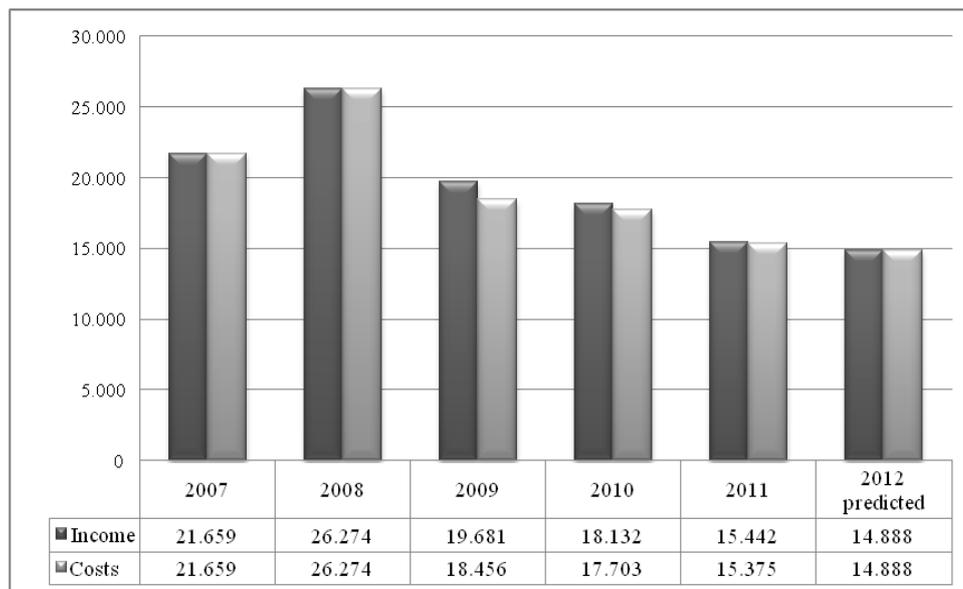
2.3. NMAR Funding. Revenue and expenses

NMAR funding is achieved through own revenues and subsidies from the State budget, through the Ministry of Culture and National Heritage (NMAR, 2010b).

The budget (subsidies / grants, attracted resources / own revenues) is approved annually by the chief credit officer, with respect to the typology of creating its own income, the amount of fees approved by the Ministry of Culture and National Heritage. The subsidies granted from the State budget are the museum's main source of income. To these are added the revenues obtained through entrance fees, guide fees, shooting and filming fees. Other funds may come from sponsorships, donations, research projects (according to art. 42 of the Rules of Organization and Operation of the institution) (NMAR, 2010a).

The expenditure budget (staff: employment contracts / agreements concluded under special laws; goods and services, capital expenditure, maintenance expenses, expenses for repairs) is approved annually by the chief credit officer, together with the positions and investment lists.

The evolution of the revenue and expenditure budget of the museum in the time frame 2007-2012 can be seen in Figure 1.

	2007	2008	2009	2010	2011	2012 predicted
■ Income	21.659	26.274	19.681	18.132	15.442	14.888
□ Costs	21.659	26.274	18.456	17.703	15.375	14.888

Figure 1. The evolution of the revenue and expenditure budget NMAR
in the time frame 2007-2012 (thousand / lei)
Source: NMAR, 2008; NMAR, 2009b; NMAR, 2010b; NMAR, 2011

2.4. Marketing organization. NMAR marketing mix

The Communication, Cultural Projects, Marketing offices, within the Education department, is responsible with the organization of the cultural marketing activity (NMAR, 2010a).

A. Product policy

"Product policy is strongly determined by the content of the product, which is more than in any other type of service based on people. In most cases, the product can be "represented" through the simply "exposure" of a work of art or a renowned artist" (Olteanu, 1994, p. 200). "Developing a product policy in the cultural field requires the distinction between the basic offer, auxiliary offer and additional offer. Auxiliary offers are indispensable to basic benefits, while additional offers add extra value and attractiveness" (Moldoveanu şi Ioan-Franc, 1997).

Within NMAR, the product policy can be described as:

- *Basic offer:* represented by the permanent exhibition and its associated services, such as public lectures. The exhibition resources of NMAR (2012a) are housed in three galleries and three graphic and decorative art collections, as follows: (1) the Gallery of European Art (includes 2,742 artworks, of which 2,214 paintings and 528 sculptures); (2) The National Gallery (includes Romanian Medieval Art and Romanian Modern Art); (3) Graphic Art Collection (includes over 17,000 drawings and 40,000 prints); (4) Decorative Arts Collection includes approximately 11,500 pieces and (5) Oriental Art Collection brings together works of Islamic art, Japanese and Chinese;

- *Auxiliary offer:* represented by temporary exhibitions, publications for informing the target audience, various events (such as film screenings or night screenings), special programs (programs for families, teenagers, "Cultural Rendes-Vous ","An hour for art", "Opera under a magnifying glass ... ");

- *Additional offer:* guidance services - general and thematic, information services, contests (for example, the contest held on the occasion of the event "Night of Museums 2012"), artistic circles;

- *Educational offer:* includes programs for high-schools and kindergartens, aiming to complement the curriculum, and which are seen as an alternative to teaching.

B. Price policy

"In the cultural field, the pricing policy takes into account the psychological motives of the customers, appreciating that the price is an indicator of quality or celebrity of a cultural product" (Moldoveanu and Ioan-Franc, 1997).

In 2012, NMAR applied the following prices (NMAR, 2012b):

- *General access:* [8 lei/ person – The Gallery of European Art; 10 lei/ person – The National Gallery (Treasure included); 15 lei/ person combined tickets – The Gallery of European Art + the National Gallery (Treasure included)].

- *Discounts:* pupils, students, pensioners and Euro 26 card holders benefit from a 50% discount from the original price of the ticket.

- Tickets are *free of charge* for: journalists working in cultural departments, members of the Artists Union, war veterans, soldiers on leave, pre-school children, students of fine arts schools; the employees of the Ministry of Culture and Religious Affairs; the employees of the departments and institutions subordinated to the Ministry of Culture and Religious Affairs; the employees of the museums' network in Romania; the employees of the National Research Institute for Conservation and Restoration; the holders of ICOM cards; official delegations, with the approval of the Ministry of Culture and Religious Affairs, within the museum's opening hours; the members of Friends of the NMAR association. Also, entry is free of charge on the first Wednesday of each month, as well as during the event "Night of Museums".

- *Guided tours:* Romanian guide - 70 lei / per hour; French / English guide - 150 lei / per hour; for the Old Romanian Art Gallery, the museum provides an audio guide, available in Romanian, English and French, for a price of 10 lei / per person.

- *Prices for kindergartens and schools*: visit - 2 lei / per child; creative workshop - 5 lei/per child; teacher attendant – free; for all participants in a cycle of lessons, the fourth program is free.

- *Prices for programs addressing adults*: for the program the "Cultural Rendez-Vous": the ticket price for entering the exhibition + a fee of 5 Euro / per person; for the programs An hour for art", "Opera under a magnifying glass": the ticket price for entering the exhibition

- *Photography and video recording:* fee / for amateur photography / filming: 50 lei; fee/professional photography / filming: 2.000 lei / per hour.

C. Distribution policy

The experts (Moldoveanu and Ioan-Franc, 1997) consider that "distribution policy is an important variable of the marketing mix, because the distribution itself is the condition of cultural creation fulfilment".

The NMAR products are distributed to visitors *directly inside the museum main buildings* located in Victoria Boulevard, no. 49-53, location which is the primary distribution network. The works of art from the museum's heritage can be seen by the public in the *permanent* and *temporary exhibitions organized at home or abroad*.

Publications are another form of distribution of the museum's products and ideas, derived from scientific research. These offer visitors an overview of the galleries and the works exhibited, and contribute, at the same time, to promote the image of the institution.

To facilitate the understanding of the offer, the museum provides customers paid *guide services*, available if scheduled, and *free information service* at the ticketing counters.

D. Promotion policy

Advertising and media services are, through their impact, an essential component for achieving the goals stated by the management activity in this cultural institution.

Promoting exhibitions and educational events for the public is done through various channels, and is the responsibility of the Education, Communication, Cultural Projects and Marketing departments:

a) Mass-media. To valorise the activities carried out by NMAR, the management of the organization has implemented a communication strategy with the mass-media. In this regard, there have been identified the media partners who have become regular supporters of the activities carried out by NMAR, complementing the direct actions of the museums and ensuring the publicity of the museum's events. Currently, the museum has concluded six long-term media partnerships with media institutions (see Figure 2), which support, free of charge, the events organized by the museum: radio stations **- RFI Romania**, **Radio Romania Cultural** (broadcasts audio spots, provides editorial coverage for the museum's events), **Radio Romania News** (provides editorial coverage for the museum's events, organizes competitions with prizes offered by the museum - catalogues or free entries to exhibitions), magazines - **Seven Nights**, **Zeppelin** and e-magazine **Bucharest Herald** (publishes the museum's layouts and articles about the museum's exhibitions).

Figure 2. Media partners of NMAR
Source: http://www.mnar.arts.ro/Sponsori-şi-parteneri

The exhibition "From Dada to Surrealism. Jewish Avant-Garde Artists from Romania, 1910-1938" (2011) has attracted a group of 13 foreign journalists, who have written chronicles in prestigious newspapers, such as Le Monde and The Guardian.

b) Online marketing. The museum benefits from online promotion (see Figure 3a), the museum's official website site (www.mnar.arts.ro) was launched in March 2007 in order to increase the visibility of the cultural organization. The website is constantly updated, has English and French versions and has proven to be a useful tool for informing the public, but also for receiving feedback through the section "Guestbook". The website's visitors can take a virtual tour of the galleries, and can see some of the works exhibited in the museum's halls.

The museum is also present on social media platforms Facebook and Twitter. The museum's first Facebook page was launched in 2009, but due to some technical problems, was closed in 2010. During the period when it was functional, it attracted over 14,000 page likes. A new page (see Figure 3b) was created in December 2010 and so far it has gathered 1,678 feedbacks.

Figure 3. (a) Official Site of NMAR and (b) Page on Facebook
Source: http://www.mnar.arts.ro/Home şi http://www.facebook.com/pages/National-Museum-of-Art-of-Romania/128825600511759?ref=ts

c) Direct marketing. Direct communication with the target audience is mainly accomplished through:

• *Newsletters* - sent regularly to contacts from the museum's database (there were approximately 600 contacts at the end of 2011). The messages are differentiated according to the public interest: programs for teenagers, families or for the adult audience;

• *Impression books* available to visitors in the galleries with permanent exhibitions, but also temporary exhibitions, leaflets and posters announcing the program of the activities;

• *Guides and publications* (the economic crisis of recent years has led to canceling, merging or moving to the online format of some publications) (see Figure 4):

Old Romanian Art Gallery Guide

Publication 2009

European Art Gallery Guide

Figure 4. Guides and Publications
Source: http://www.mnar.arts.ro/Publicaţii

- *posters and banners* of small and large dimensions: placed in the main building of the institution, or on the official website (see Figure 5):

Figure 5. Promotional posters
Sources: NMAR 2009b and NMAR, 2010b

d) Events. "Night of Museums" attracts every year a large number of visitors, who benefit from free entry. In order to promote the museum circuit organized on this occasion, thematic posters have been created, and also, special partnerships have been concluded (see Figure 6).

Figure 6. Posters themed "Night of Museums" (2010 - 2012)
Source: http://www.mnar.arts.ro

3. NMAR visitors

NMAR is a nationally important cultural organization that addresses multiple target audiences. Using age and area of origin as customer segmentation criteria, the management of the museum has identified the following categories of beneficiaries of its activities: preschoolers, students, adult audience, pensioners, local and foreign visitors (NMAR, 2009a).

The number NMAR visitors have registered a downward trend during the time frame 2008-2010 (see Figure 7). This phenomenon was due not only to the economic crisis, but also to the temporary closure of the Pallady Museum for a

period of 7 months, during 2009, and of the Museum of Art Collections in 2010.
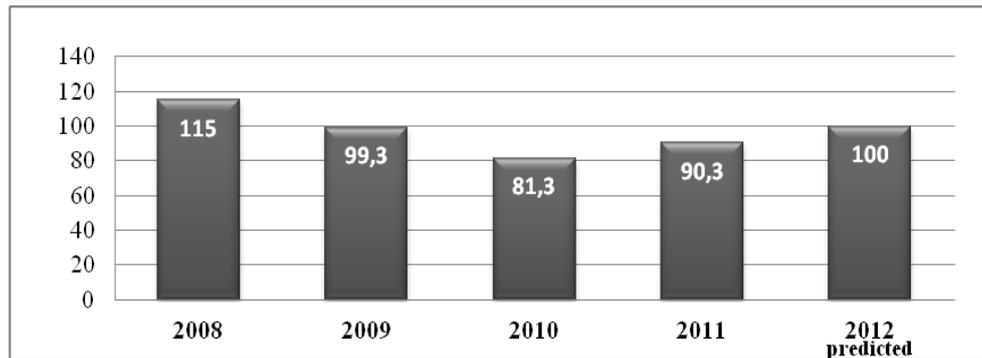

Figure 7. Evolution **of the number of visitors to NMAR (2008-2012) (thousand people)**
Source: data was processed from the NMAR activity reports, from the time frame 2008-2011

Taking into account the analysed period, in 2008, it was recorded the highest number of visitors - about 115,000. This is due mainly to numerous exhibitions organized by the museum, which attracted as many as 34,000 people (NMAR, 2008). Also, the event "Days of Bucharest", initiated by the Bucharest City Hall on September 21-22, brought 2,200 visitors at NMAR (NMAR, 2009a). An important contribution to this figure, have had the "satellite museums", which have recorded about 17,000 visitors (see Table 1).

Table 1. Evolution of the number of visitors to NMAR (2008-2011)

Year / Visitors	2008	2009	2010	2011
TOTAL	115.000	99.300	81.300	90.300
Headquarters	98.000	92.500	75.600	79.800
Galleries	64.000	64.000	50.500	64.000
Temporary exhibitions	34.000	28.500	25.100	15.800
Museums Satellite (Total)	17.000	6.500	5.700	6.500
Theodor Pallady Museum	1.800	1.400	2.100	2.250
Zambaccian Museum	1.000	4.200	3.600	4.250
Art Collections Museum	14.200	400	temporarily closed	

Source: data was processed from the NMAR activity reports, from the time frame 2008-2011

As it can be seen in table 1, the lowest number of visitors was recorded in 2010 (about 81,300 people), when only 5 temporary exhibitions have been organized in the museum main buildings, which attracted about 25,100 people, according to the information from the 2010 Activity Report (NMAR, 2010b). However, NMAR ranked 7 in the hierarchy of the most visited museums in Romania (see Table 2), and 3rd in the hierarchy of the most visited museums in the capital.

Table 2. Top 10 the most visited museums in Romania, in 2010

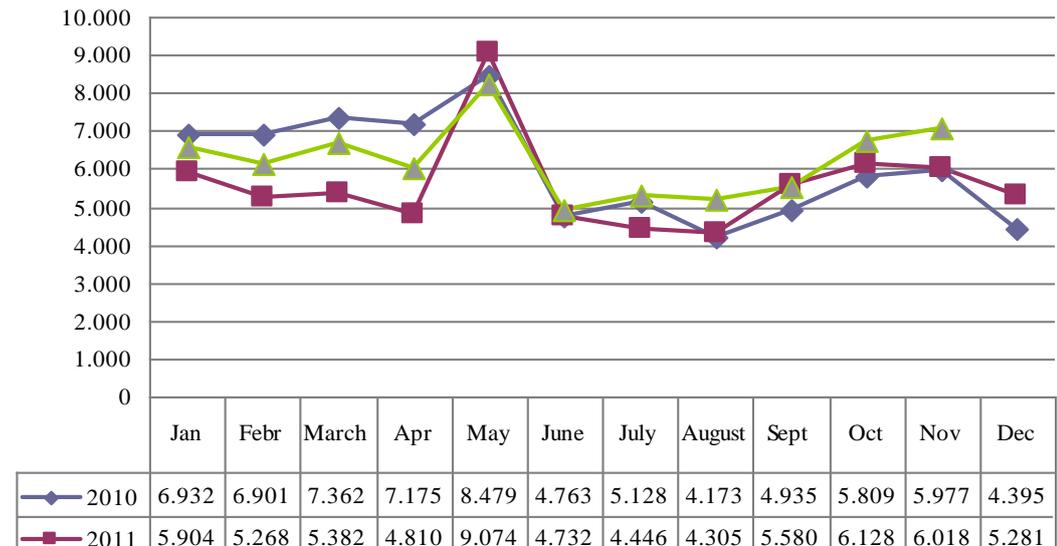| Rank	Museum	No. visitors
1.	Bran Castle Museum (Bran)	517.000
2.	Brukenthal National Museum (Sibiu)	372.731
3.	"Dimitrie Gusti" Village Museum (Bucharest)	303.296
4.	Peles National Museum (Sinaia)	280.871
5.	"Astra" National Museum (Sibiu)	230.504
6.	Museum of the Romanian Peasant (Bucharest)	94.200
7.	National Museum of Art of Romania (Bucharest)	81.300
8.	Bucharest History & Art Museum (Bucharest)	80.000
9.	National Museum of Romanian History (Bucharest)	59.224
10.	National Museum of Contemporary Art (Bucharest)	45.000

Source: data processing Cerban and Mitra, 2011

The cultural event "Night of Museums", held annually since 2006, in May, is a good way to attract new visitors. In 2011, "Night of Museums" has attracted no less than 15,000 visitors (Night of Museums, 2011), who crossed the threshold of one of museum's galleries. This is a record number compared to the statistics recorded a year ago, when there were only 9,000 visitors. At the 2012 event have participated only 13,150 visitors (Night of Museums, 2012), the museum's representatives associate this decrease with the weather from May 19, 2012, which wasn't very favourable.

Also, NMAR had many visitors in the online environment (see Figure 8). Most hits were recorded in May, due to the event "Night of Museums":

- In the time frame May 1-14, 2010 there have been 4,080 unique visitors;
- In the same time frame, in 2011, the website has recorded 4,167 unique visitors;
- 6,013 unique visitors have accessed the website in the time frame May 1-19, 2012, during the day of the event have been recorded an unprecedented number of hits (1,247).

	Jan	Febr	March	Apr	May	June	July	August	Sept	Oct	Nov	Dec
2010	6.932	6.901	7.362	7.175	8.479	4.763	5.128	4.173	4.935	5.809	5.977	4.395
2011	5.904	5.268	5.382	4.810	9.074	4.732	4.446	4.305	5.580	6.128	6.018	5.281

**Figure 8. Monthly evolution of the number of unique visitors to the site
www.mnar.arts.ro, between 2010 and November 2012 (thousand)**
Source: data processing available at: http://www.trafic.ro/statistici/NMAR.arts.ro/vizitatori

4. The perception of visitors regarding the management
and marketing activities performed by NMAR

A. The aim of the study

The aim of the study is to identify the perception of visitors on NMAR, by using a statistical questionnaire, which should result in identifying the degree of awareness regarding the museum, the degree of satisfaction, and also, the types of competition that the museum is facing.

The questions of the survey were formulated based on four assumptions, each having a number of variables, relevant to the proposed research:

1) ***Hypothesis 1: The visitors' degree of awareness regarding NMAR is reduced.*** The variables for this hypothesis are: number of visits to NMAR, sources of information that led to the visit, reasons for the visit.

2) ***Hypothesis 2: The cultural offer and the quality of services provided by NMAR are high.*** The variables of this hypothesis are: type of ticket bought, prices, the education offer, the quality of the exhibition, location of the museum, visiting program, the reasons why a certain museum is not visited.

3) ***Hypothesis 3: The ways visitors spend their free time are varied.*** The variables related to this hypothesis are: Bucharest museums visited in the last 12 months by respondents, preferred cultural events, leisure

activities unrelated to the cultural field, the season in which visitors prefer to visit museums.

4) ***Hypothesis 4: The degree of satisfaction felt after the visit.*** The variables related to this hypothesis are: the overall impression regarding the museum, the intention to return, the intention to recommend the museum to others.

B. Research method

The first and most important step in developing a questionnaire-based survey is ***sample selection.*** In order to obtain realistic and relevant results is imperative that the sample is representative for the researched community.

The target population was represented by NMAR visitors, aged over 16. The sample was determined by a specific formula, available on the website www.smarquest.ro. For the total population was used the NMAR number of visitors from 2011, respectively 90,300. The degree of confidence was set at 95%, and the confidence interval (error) to 3.08%. After calculations, it was recorded that the sample size should be 1,000 visitors.

The sampling technique used is the stratified random sampling, because the respondents were randomly selected from the group of visitors, aged over 16.

The responses have been collected during June-September 2012, at the exit of the museum.

As a ***research method*** was used a questionnaire-based survey, thanks to the ease to analyse the results and the economic advantage.

It was an opinion questionnaire and included 20 closed questions, of several types:

- Identification questions, related to socio-demographic variables;
- Opinion questions;
- Motivation questions;
- Unique answer questions;
- Multiple-choice questions.

The questionnaire was structured into two sections:

- The first section was extremely vast and included 15 questions, and sought to demonstrate the variables and assumptions set, as follows:
  - In order to check the visitors' awareness, set as the first hypothesis, three questions were used. These aimed to identify the frequency of visits, information sources and reason for visit;
  - The second hypothesis was demonstrated by questions 4-8, which aimed to know the visitors' perception towards the quality of the cultural offer and NMAR services (type of ticket bought, prices, the educational offer, the quality of the exhibition, the location of the museum, the visiting program, the reasons why a certain museum is not visited);

- The third hypothesis aimed to identify the NMAR potential competitors, information that arose from the answers to questions 9-12;
- The latter hypothesis, regarding the satisfaction felt after the visit, has been demonstrated by the responses to questions 13-15, the questions were related to: the general impression of the museum, the intention to return, the intention to recommend the museum to others.

• The second section included five questions about the identification of the respondents, such as: the applicable age category, sex, area of residence, level of education and current occupation. The information resulted from the questionnaire, are the following:

- The most numerous visitors are those aged between 16 and 29 (61.3%), followed by the age group 30-45 years (22.8%). Visitors aged 46-60 represent a rate of 15.9%;
- Regarding the residence area, 85.4% of respondents live in urban areas, while 14.6% are from rural areas;
- Women accounted for 76.2% of all respondents;
- Most visitors are pupils / students (52.6%). Employed persons are 44.8% of those surveyed, and 2.6% fall in the "housewives" category;
- 62.6% of respondents are high-school graduates and 37.4% are college graduates. No respondent was classified as "without education", or as "only with secondary education".

C. The results of the research

First, it can be noticed that young people have a larger share in the total number of visitors, 61.3% of respondents were people aged between 16 and 29. Thus, it can be noticed the young people's interest in art and their desire to enrich their general culture, in the context where leisure activities have become more and more diverse. In addition, the results have helped to identify the typology of the NMAR visitor. The institution is visited mostly by a young audience, who has a high-school and an university degree, coming mainly from urban areas.

It was recorded that most visitors have visited more than once NMAR, which reflects the institution's popularity among the population, although the museum is under strong competition. According to the results, many respondents prefer as a leisure location the park, as it is a way of relaxation and entertainment for free. However, the museum remains one of the visitors' preferences, eager to enrich their general knowledge, if we consider the annual number of people who visit museums, as well as the received responses regarding the first reason of the visit.

Regarding the perception on the quality of the cultural offer and the services provided by NMAR, visitors had a good opinion regarding the aspects specified in the questionnaire. Thus, over half of respondents were satisfied with the location of the museums, visiting program, the museum staff, the diversity of

the programs and the variety of exhibits. The higher degree of dissatisfaction (29.6%) concerns the diversity of the programs.

However, all respondents said that they would recommend to other people to visit NMAR, which indicates that they formed a good opinion as a result of the visit.

After analysing the data, the following percentages and results have been obtained:

1. For Hypothesis 1:

• At the time of the interview, 60.3% of respondents were at their first visit to NMAR, 24.6% claimed that it is the second time they visit the museum, while a rate of 15.1% said they have visited more times the organization. These results indicate the public interest for NMAR, given the fact that over half of the persons surveyed were at their first visit. Gratifying is the fact that about a quarter of the respondents were at their second visit, this may reflect their interest in art and the MNAR cultural offer.

• Most of the respondents (55.7%) received information about the museum from acquaintances or friends. In second place, in terms of information sources, came the Internet, 31.3% of visitors were determined to visit the museum thanks to the information provided by the institution's website or partner websites. As it can be seen in figure 9, a relatively low percentage of visitors find out information from leaflets, or brochures, or through audio-visual channels. The responses to this question showed that the policy to promote the museum is not diversified enough, and doesn't seem to be a priority for the institution's management.
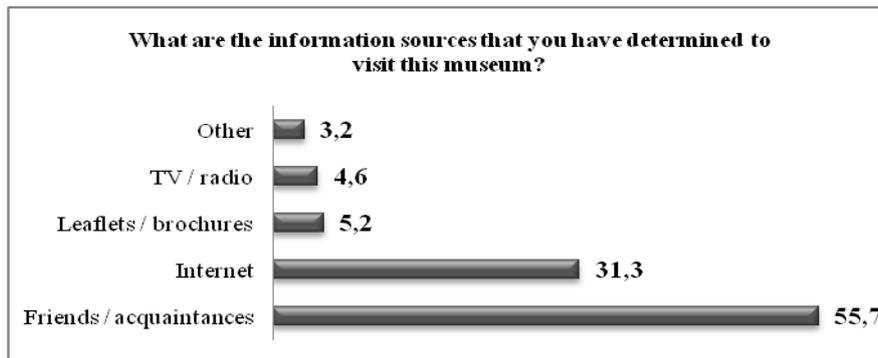

What are the information sources that you have determined to visit this museum?

Other	3,2
TV / radio	4,6
Leaflets / brochures	5,2
Internet	31,3
Friends / acquaintances	55,7

Figure 9. Sources of information on NMAR

• Curiosity is the main reason that prompted respondents to visit NMAR. However, according to figure 10, 16.3% of the respondents visited the museum for recreation, which means that cultural activities, and particularly museums, are still an option for leisure activities. 33.7% visited the museum to enrich their general knowledge, which is why we can say that in their spare time people aren't only looking for fun and entertainment, but also for educational activities. From the

received responses, it seems that the reputation of the museum is not a strong enough argument to attract more visitors. This response can be associated, as mentioned previously, with insufficient promotion of the institution.
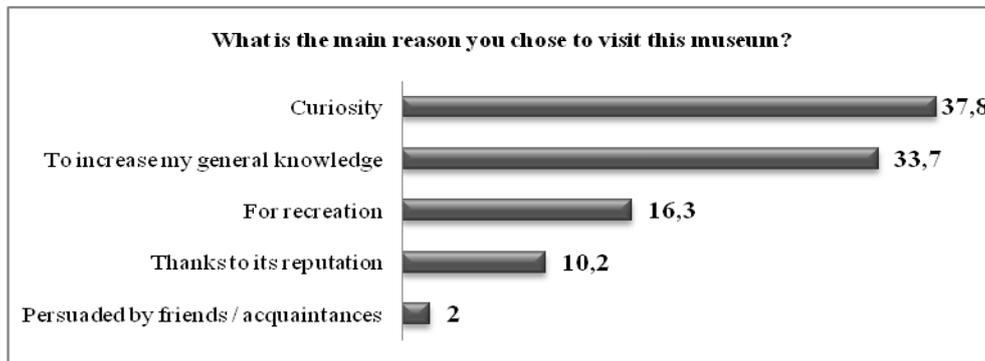

What is the main reason you chose to visit this museum?

Curiosity	37,8
To increase my general knowledge	33,7
For recreation	16,3
Thanks to its reputation	10,2
Persuaded by friends / acquaintances	2

Figure 10. Reasons for visiting NMAR

2. For Hypothesis 2:

• About half of the respondents (46.8%) have received a type of discount when they purchased the tickets, 35.4% have paid the entire price of the ticket, and 17.8% benefited from free access.

• Regarding the perception of respondents towards the museum prices, 77.2% of the visitors surveyed believed that they are "affordable". A percentage of 22.2% perceived the fees as being "high", while 0.6% believed that the prices charged were "very high". This perception may also be due to the fact that, because of the current economic context, the budget for leisure activities has been diminished.

• In figure 11 is represented, by percentage, the visitors' degree of satisfaction on various aspects, as following:

- Museum location: 73.7% of respondents were satisfied with this aspect, 25.2% were very satisfied, and 1.1% was dissatisfied.
- Visiting program: 80% of respondents said they are satisfied with the schedule set by the museum for visits, 16.4% were very satisfied and 3.6% were dissatisfied.
- Museum staff: 79.6% of respondents were satisfied with the capabilities and the approach of the staff, 9.7% said they were very satisfied and 10.7% were dissatisfied. Overall, it is clear that the institution's employees are trained to meet the visitors' requirements as best as possible.
- Diversity of programs: 58.6% of respondents were satisfied with this aspect, 11.8% were very satisfied and 29.6% were dissatisfied. These results show that NMAR doesn't have such a diversified offer, as the visitors might expect.
- The variety of exhibits: 68.2% of respondents were satisfied with this aspect, 27% were very satisfied, while 4.8% were dissatisfied.
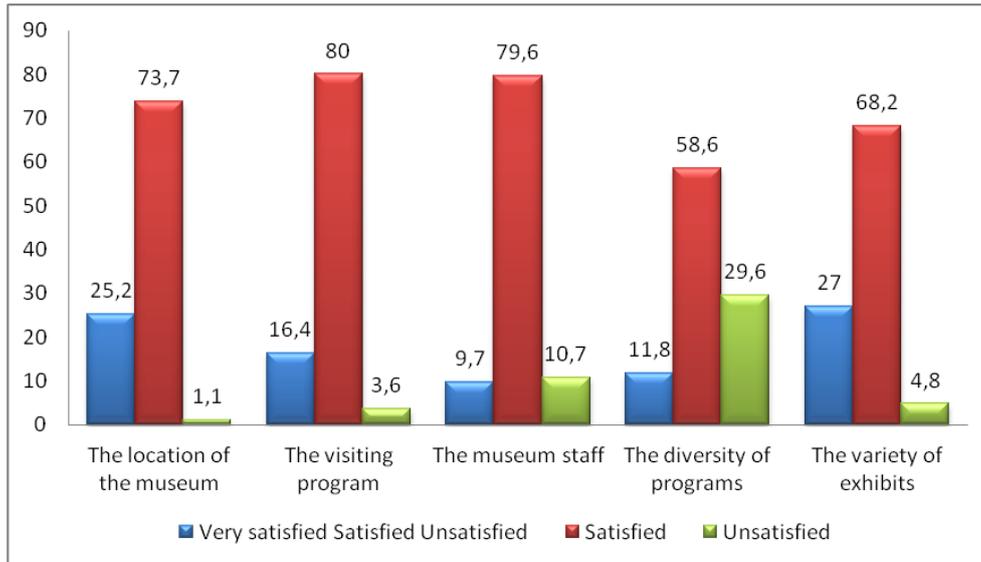
Figure 11. The perception of visitors towards the quality of the cultural offer and the services provided

Given the responses received regarding these aspects, we can say that, overall, the interviewed respondents are satisfied with the quality of the cultural offer and the services provided by NMAR. However, the greatest dissatisfaction of respondents is related to the diversity of programs.

- 60.8% of visitors are more attracted to temporary exhibitions. Undoubtedly, this is a good way to diversify the basic offer of any museum.
- The lack of free time (50.2%) is the main impediment of respondents to visit or revisit a museum (see Figure 12). In second place there is the lack of information (35.9%). This response reflects the low importance given by museums to the promotion activities. It seems that the marketing activity isn't very present in the museums of our country.
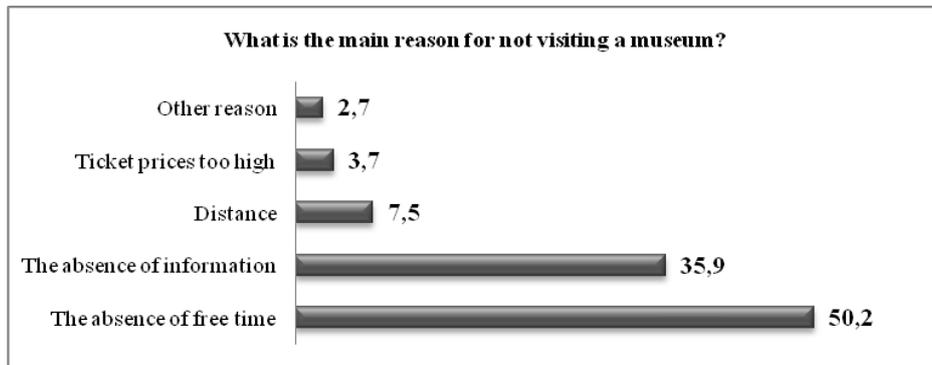

Figure 12. The main reasons that determine the visitors to not return to a museum

3. For Hypothesis 3:
- According to figure 13, the most visited museum in the last 12 months, by respondents, is the National Museum of Natural History "Grigore Antipa" (39.6%), followed by "Dimitrie Gusti" National Village Museum (33.8%), Museum of the Romanian Peasant (15.8%) and the National Museum of Romanian History (9.6%). Considering these percentages, we can say that NMAR is subject to strong direct competition represented by the other museums in the capital, especially those located in the central area of the city.
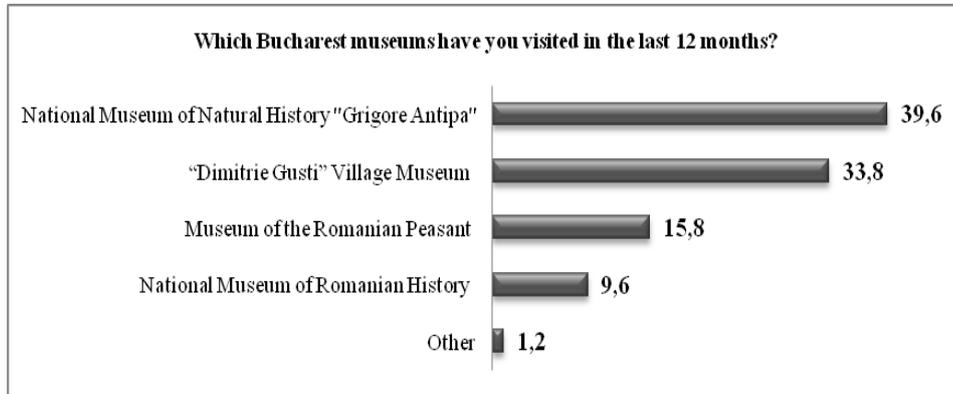

Figure 13. The main Bucharest museums visited in the last 12 months

- Among the favourite leisure activities, related to culture, the respondents prefer mainly concerts (41.6%), followed by theatre (29.3%), film festivals (12.9%), circuses (9.2%) and ballet (7%).
- Regarding the respondents' preference on other ways to spend their free time, the location preferred by the majority is the park (44.8%), which is a fun and free recreational activity. Cinema (27.6%) and bars / terraces (14.1%) are other places they prefer, followed by shopping malls (13.5%). In most cases, leisure activities are located in the same location or in nearby locations, which allows individuals to combine them easily. Therefore, NMAR is also subject to strong indirect competition.
- Most respondents tend to visit museums in spring (43.2%), this trend may be associated with the event "Night of Museums", when all visitors enjoy free access. Summer is another season in which the respondents tend to visit museums (32%), most likely due to additional free time, thanks to the school / university holidays or vacations.

4. For Hypothesis 4:
- After visiting NMAR, most visitors were left with a "good" impression (53.4%), 23.9% of them had a "very good" impression and 22.7% "acceptable". No person questioned was left with a "bad" or "very bad" impression after the visit.
- As a result of visiting NMAR (see Figure 14), 45.6% of respondents said that they intend to return when new temporary exhibitions will be announced,

while 34.5% of them intend to revisit the permanent exhibitions. These results can be explained by the responses to a previous question, according to which the overall impression of NMAR was "good".
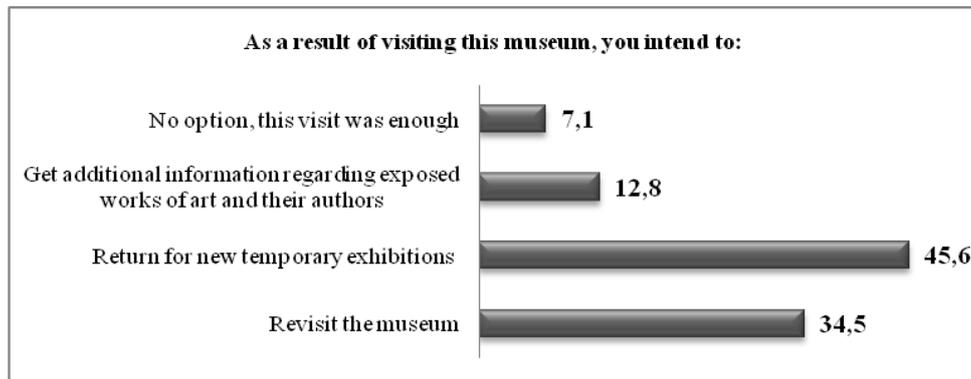

As a result of visiting this museum, you intend to:

No option, this visit was enough — 7,1
Get additional information regarding exposed works of art and their authors — 12,8
Return for new temporary exhibitions — 45,6
Revisit the museum — 34,5

Figure 14. The respondents' intentions as a result of visiting the museum

- Asked if they would recommend visiting this museum to other people, all respondents answered positively.

Conclusions

In conclusion, it can be affirmed that NMAR is still among the recreation options of the residents of the capital, who are pretty satisfied with the cultural offer and services of this institution. It can be said that the promotion policy of the museum is not diversified enough and doesn't seem to be a priority for the management of this institution, given that the main sources of information for visitors are acquaintances or friends (55.7%), and Internet (31.3%). Also, it was recorded that, in a society increasingly diversified in terms of leisure activities or cultural events, the mere reputation of the museum is no longer enough to attract visitors whose consumer requirements become more demanding. Given the poor promotion of NMAR, we consider to be necessary to adopt several measures:
- Perhaps one of the most important aspects, which have a negative impact on the number of visitors, is the lack tourist indicators and the poor signalling of the museum in the city. Quite often, NMAR is confused with the National Museum of Romanian History, also located on the Victoria Boulevard. Also, it would be necessary to place signs indicating the NMAR satellite museums, which are little-known among the inhabitants of Bucharest.
- Initiating an advertising campaign could increase considerably the popularity of the museum at national level. This initiative would be appropriate, given the recent restoration of the Central building of the museum (April 2012), where there will be set up two new permanent galleries (oriental art and decorative art), available to the public starting with 2013.

- Following the model of foreign museums, NMAR could conclude contracts with an advertising company in order to create a series of suggestive commercials, which could run on national TV channels and in cinemas.

- The publicity of temporary exhibitions can be achieved by free distribution of leaflets or brochures in key locations of the city, such as the old city centre, or the University passage. The same approach could be applied to promote the two permanent exhibition galleries and satellite museums.

- Posting a series of posters in English and Romanian, at the subway stations from the city centre (Union Square, University Square, Roman Square), could help attract foreign students and tourists.

- To improve the quality of the visit, at the entrance of the museum, as well as in the exhibition spaces, could be placed stands with flyers, brochures and mini-guides in Romanian and other international languages (English, French, German, Spanish, Italian) in order to provide details about the gallery and the museum circuit.

- Exhibition halls could be equipped with interactive panels, which would replace traditional explanatory plates, giving visitors more information about the works of art and their authors. This approach might contribute to increasing the attractiveness of the exhibition.

- Introducing a membership card or subscriptions, which could provide certain benefits and gratuities, could have a great success among the art consumers.

- Creating combined entry tickets that could provide access to both the museum main buildings and the satellite museums.

- Regarding NMAR presence on the online environment, concluding a partnership with Google Art Project could be a great advantage for the image of the museum, because Internet is an excellent promotion channel. This application would allow users and culture enthusiasts worldwide to take a 3D virtual tour of the museum.

- Building a café / tea house inside the museum could transform and ordinary visit into an enjoyable way of spending free time and relaxation. This would allow visitors to take a short break during the visit, and would change the conservative image of NMAR museum.

- Another essential element in a renowned museum is the gift shop. These items are very popular, especially among foreign visitors who are interested in keeping a tangible memory of the places they visited. Creating such a store inside NMAR may be a way of distributing publications and quality promotional materials (calendars, pens, diaries, presentation DVDs of the galleries, cups etc.), which are among the preferences of the culture enthusiasts.

After analyzing the results and presenting the conclusions of this study, we can say that there have been identified a series of useful elements for improving the competitiveness of MNAR: it was made an assessment of customer segments addressed by the museum, it was presented an analysis of the competition, there have been identified the positive elements from the customers' perception, which

can be transformed into competitive advantages, and there have been identified vulnerabilities in the competitive struggle. The objective evaluation of our scientific approach underlines a series of limitations, explained by being a pioneer in this type of research: the working assumptions have included only few aspects, with simple variables that didn't lead to more complex conclusions, while the dependencies between elements of the external environment, which generate the competitiveness of the organization and internal processes, have been insufficiently studied. However, these represent the main challenges for future studies.

Acknowledgment

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