

Chapter 1

Culture in New Tourism Trends

Tourism¹ In Europe and Worldwide

On the basis of the data provided by the World Tourism Organization (WTO) in 2003 international tourist arrivals worldwide were 703 million - approximately ten per cent of the world population and more than in the previous years. In 1950 international tourist arrivals were just 25 million; in 1990 they were already more than 450 million. If this trend with an average year growth rate of approximately three per cent consolidates, the international tourist arrivals are expected to be more than 900 million in 2010 and 1.5 million in 2020. Furthermore China with about 140 million arrivals is expected to become the main tourist destination worldwide, ahead of the United States with more than 100 million arrivals.

Main Tourism Destinations Expected in 2020

	Arrivals (millions)	Market %	Annual Growth 1996-2020 (%)
China	137.1	8.6	8.0
USA	102.4	6.4	3.5
France	93.3	5.8	1.8
Spain	71.0	4.4	2.4
Hong-Kong	59.3	3.7	7.3
Italy	52.9	3.3	2.2
Great Britain	52.8	3.3	3.0
Mexico	48.9	3.1	3.6
Russian Fed.	47.1	2.9	6.7
Czech Rep.	44.0	2.7	4.0

Source: Wto

In 2003 Europe - including Russia - with 400 million arrivals, over one third of which consists of foreign tourists, kept on being the most attractive international tourism market and is followed by the Asian region with 131 million arrivals, America with 115 million arrivals, Africa with 29 million arrivals and Middle East with 28 million arrivals. The high European proportion of arrivals can be

understood if we consider how close Old Continent countries are, which encourages trips across Europe. Three quarters of the European people leaving their countries travels across Europe and create a kind of cross-boundary tourism.

Apart from annual differences, France, Spain, United States and Italy are respectively the first four most popular tourist destinations worldwide while China is rapidly advancing to the top place list positions.

In spite of a doubled number in absolute values of international visitors in Europe, from 1980 to 2003 their relative influence on the whole flow of tourists decreased by 6% from 63% to 57%. This means that growth was smaller than in other world regions and it is very

likely that the European proportion will be lower than 50% by 2010. Nevertheless the

International Arrivals

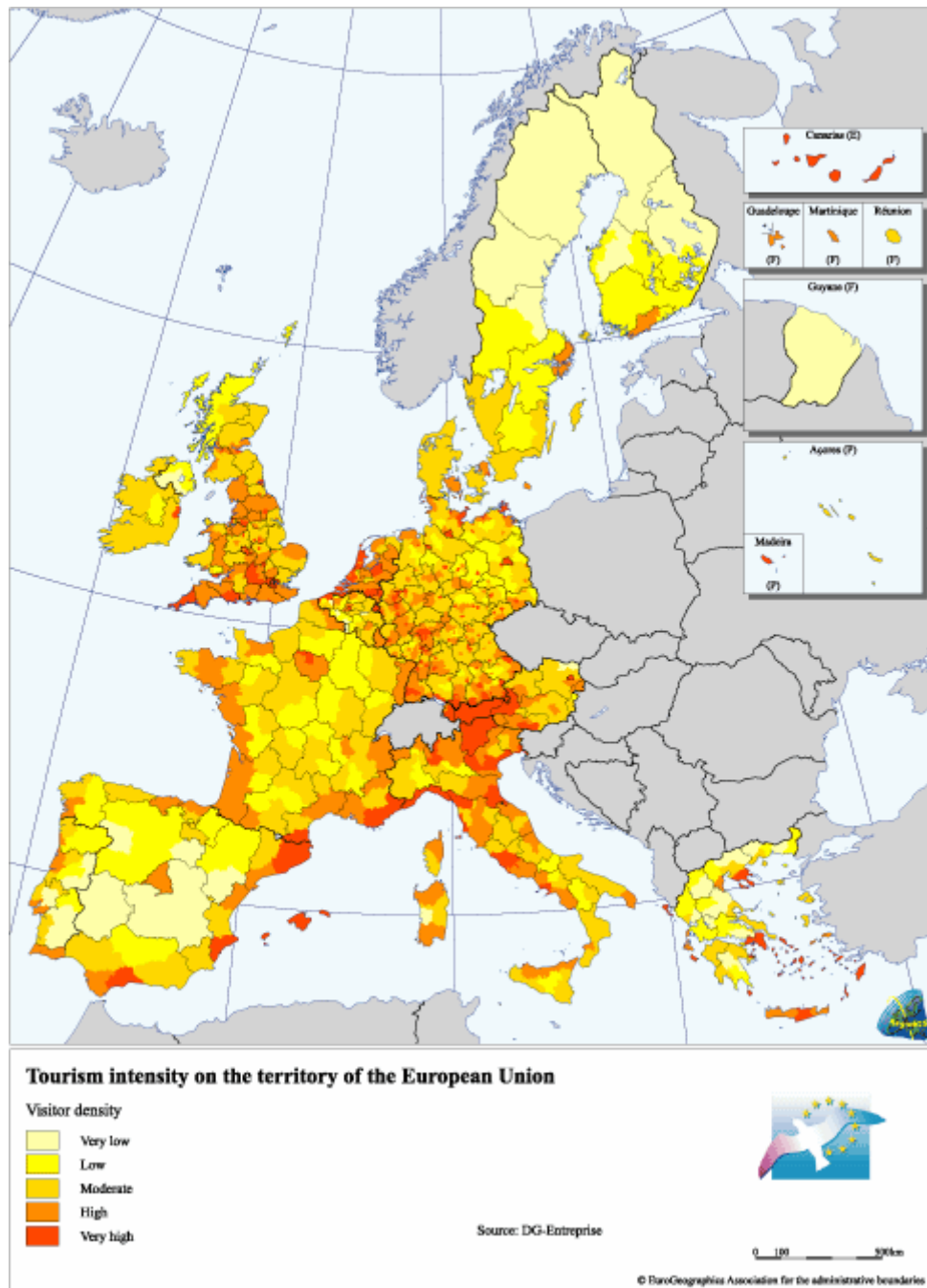
Rank	In millions		% difference		
	2002	2003*	2002/01	2003*/02	
1	France	77.0	75.3	2.4	-2.6
2	Spain	52.3	52.5	4.5	0.3
3	United States	41.9	40.4	-6.7	-3.6
4	Italy	39.8	39.6	0.6	-0.5
5	China	36.8	33.0	11.0	-10.3
6	United Kingdom	24.2	24.8	5.9	2.6
7	Austria	18.6	19.1	2.4	2.6
8	Mexico	19.7	18.7	4.6	-4.9
9	Germany	18.0	18.4	0.6	2.4

Source: Wto

* Provisional data

¹Tourism stands for people reaching destinations on a holiday, business, etc., trip to stay in locations other than the ones they are used to, for no longer than one consecutive year.

WTO expects Europe will double the number of arrivals totalling 800 million units in the next twenty years.



Different factors contribute to this upward trend: the availability of money, the retirement of the "baby boom" generation – after the 50's of the last century – still in good health and rich in spare time¹, the introduction of euro notes and coins as single market currency, the liberalization of the transport industry – in particular for flights – and reduced rates, the European enlargement opening new markets and simplifying travelling throughout Europe, the development of new technologies enabling travellers to improve their trip customization. All these factors increase the propensity to travel.

¹ In the next 20 years people older than 65 years of age is expected to increase by 17 million units.

This also proven by the increase in the number of nights spent away from home, even if the population growth is virtually stagnant. from 1980 to 2000 the number of stays in the European Union increased by 64%, but the number of local residents increased by 6% only.

Thanks to the number of stays the density of accommodation facilities per square metre increases without 1,154 regions Europe-15 is divided into can record the same number of stays and tourist facilities as shown by the map on the previous page.

Germany and Great Britain belong to the most important foreign markets for several European tourist countries in the European cross-boundary tourism industry. For this reason German tourists fell into the best market for Austria, Italy and Greece because they respectively had 59%, 32% and 32% of the stays in those countries. For the same reason English tourists fell into the best market for Ireland, Spain, Portugal and France where they respectively scored 37%, 32%, 31% and 23% of the stays in those countries.

The number of domestic holiday trips in the UK reached a peak of 175 million in 2000 but fell back to 163 million in 2001. In comparison to UK visits to overseas destinations have been growing steadily since 1997, from 46 million in 1997 to 58 million in 2001 (*National Statistics Office*)

Unlikely USA travellers are the most significant fraction for the stays of foreign tourists in Great Britain and Germany with respectively 24% and 12% of the stays.

Destinations and Stays

Which are the favourite destinations of this mass tourism? A few years ago a survey on European holiday-makers ranked first seaside (63 %) followed by mountains (25%), towns of art (25%) and countryside (23%).

This may help us realize the reason for the success of tourism in the Mediterranean Area, where both seaside resorts and history are present and which accounts for almost one third of all the international arrivals earning about a quarter of the total income. This flow of tourists is expected to escalate from 260 million arrivals in 1990 - 135 million of which in coast areas - to over 400 million units in 2025 – coast areas will score over 235 million arrivals¹.

After settings, climate and costs, cultural interest and environment belong to the criteria justifying tourists' preference for those destinations².

The latest data on the Italian people's holidays show that their preferences do not remarkably differ from the Europeans' ones apart from a smaller interest in mountain and countryside destination.

Only archaeological sites do not attract large number of people, but if they are added to towns of art, they show a demand for cultural tourism that covers approximately one quarter of the Italians' holidays.

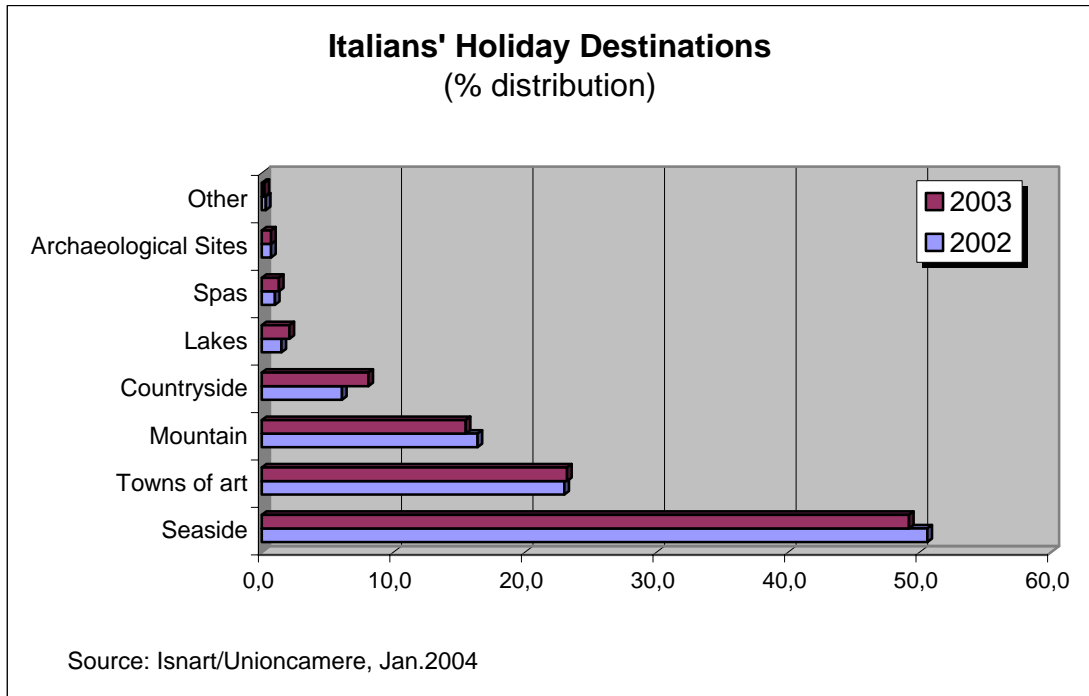
If we add the tourist stays in seaside resorts and towns of art and history, Italy scores 55% of the Italians' stays and 58% of the foreigners' stays. Briefly, seaside and history –

¹ CE, Defining, Measuring and Evaluating Carrying Capacity in European Tourism Destinations, 2002.

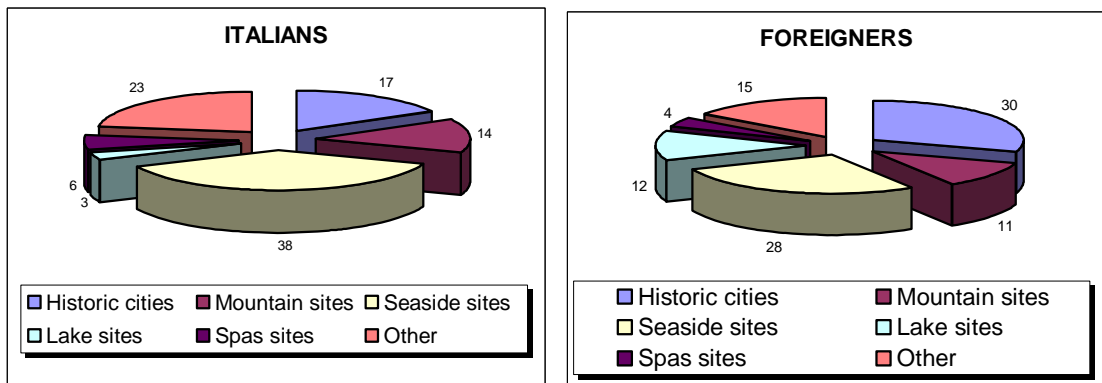
In 12 Mediterranean Sea's European Partner Countries, such as Algeria, Morocco, Turkey, the international arrival were estimated at 29 million units, 14 million of which are from Europe, in 1998 (Eurostat, Statistics in focus 4/1999).

² European Commission, The Europeans on holidays 1997-1998, Eurobarometer survey, 1998.

even if they may not interest the same people, foreigners¹ almost doubled the number of the Italians in destinations of history – help total more than a half of the stays. This result becomes a competitive lead not to neglect for those locations that can take advantage of both resources.



Italy: stays by location
Year 2002, percentage proportions

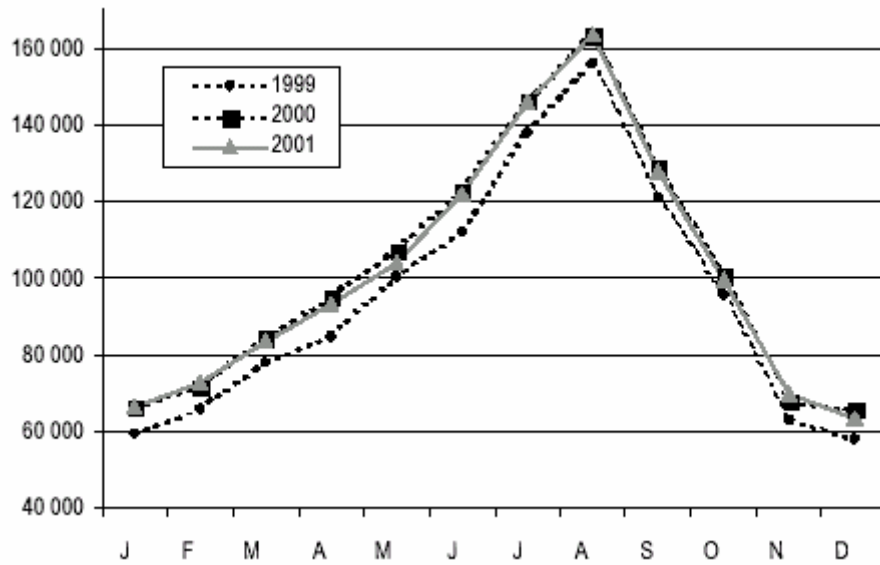


Source: Istat

The chart shows that holidays are mostly "sun and sea" and the summer season is mostly used to travel so that we can realize the reason for a very high concentration of tourist stays in the hot months and their drop over the rest of the year.

¹ In 2003 German tourists spending at least one holiday time Italy were 17% at the seaside and 13.4% in towns of art (Isnart/Unioncamere).

Month stays (residents and foreigners) in hotels and non-hotels in Europe-15 (data in thousands)

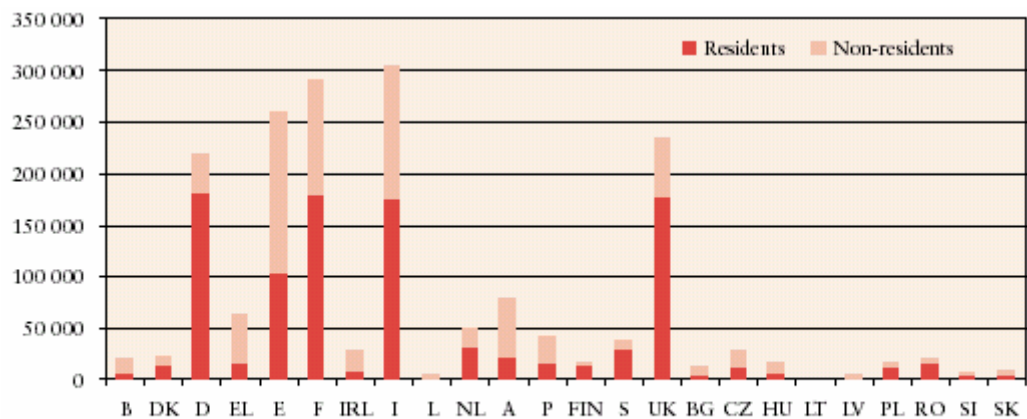


Source: Eurostat 2002

Note: Greece, Ireland and Sweden are not included

If we sort out the annual tourist stays by individual European country, Italy sets a record thanks to over 300 million overnights¹ spent in hotels and camping sites and it is followed by France and Spain.

Nights spent in hotels and camping sites by residents and foreigners in 2001
000 nights



NB: EL, IRL, A, UK: 2000.

Source: EC, Regions Statistical Yearbook 2003

¹ 350 millions if we also add nights spent in accommodations for rent, farms and other facilities. Further sources (Touring Club Italia 2003) estimate the total number of stays, including those ones that were not recorded, at 800 million units.

On the average travellers do not stay more than 2.4 nights, if they come from Italy and one night longer if they are foreign. This does not seem to be the case of Italy, where residents' stays (3.6 nights) are slightly longer than non-residents' ones¹. Even if those data match European average standards, they are lower than those ones recorded in countries known for summer tourism, such as Greece, Spain and Portugal, where foreigners respectively stay 6.3, 5.3 and 4.8 nights (*Eurostat 2001*)

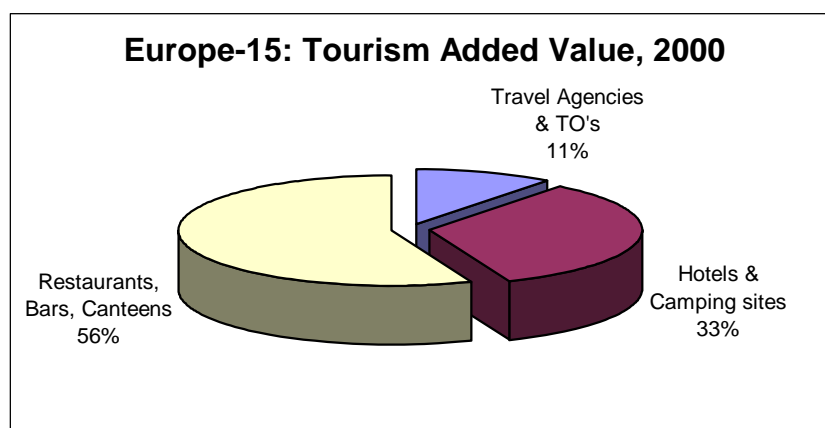
The main kind of holiday must surely have a connection with annual net employment rate of the European accommodation facilities, which is stable at 42% with higher rates in Greece, France and Spain. It is clear that this average rate reaches its top record in summer, in particular in Mediterranean countries, while Valle d'Aosta, Trentino Alto Adige and the Western regions in Austria reach top employment rates in winter.

NACE european classification of the tourist activities:	
55	Hotels and restaurants
55.1	Hotels
55.2	Camping sites and other provision of short-stay accommodation
55.3	Restaurants
55.4	Bars
55.5	Canteens and catering
63.3	Activities of travel agencies and tour operators; tourist assistance activities
92.22	Fair and amusement park activities

Tourism Contribution to Economy and Employment

The economic impact of tourism is not less significant than the flows it creates. In 2001 the tourist trade was approximately 5% of the European Union's GDP. However this record can be higher than 12% if the industries allied to the tourist trade are included in it.

Just the "hotels & restaurants" sector contribution is exceeds 3% of the GDP, which is higher than the overland transport industry and lower than the chemical industry. In 2000 the added value achieved by travel agencies, TO's, hotels, restaurants, bars, and cafeterias throughout Europe was estimated² at 163.3 billion euros – more than a half of this amount was achieved by the latter business group.



The tourism contribution to economy has also consolidated with regards to world trade since each service bought by tourists when travelling abroad is recorded as an export

¹ Latest data provided by Istat show an increase in the average stay duration of Italians to 4.3 nights and of foreigners to 4.0 in 2002 (Istat 2003).

² EC, European Business, Facts and figures, 2003, pag.321.

item of the country visited. For this reason in 1999 tourism was more than 40% of the export services and approximately 8% of the world export of goods and services and topped the food, clothing and chemical industries.

The place list of the international tourism incomes, not to be muddled up with tourism balance, which is the result of the deduction of local residents' expenses abroad¹, does not perfectly comply with the order of arrivals. USA has ranked first on the list and Turkey has joined the top nine countries. France and Italy loose international arrival but increase their incomes.

Tourism Incomes

Rank		Billions in \$		% Difference	
		2002	2003*	2002/01	2003*/02
1	USA	66.5	65.1	-7.4	-2.2
2	Spain	33.6	41.7	2.2	24.1
3	France	32.3	36.6	7.8	13.2
4	Italy	26.9	31.3	4.3	16.2
5	Germany	19.2	23.0	4.0	20
6	United K.	17.6	19.4	8.1	10.5
7	China	20.4	17.4	14.6	-14.6
8	Austria	11.2	13.6	11.1	21
9	Turkey	11.9	13.2	18.2	10.9

Source: Wto

* Provisional Data

The tourist trade is viewed as a labour-intensive industry able to directly employ approximately 8 million people throughout Europe². Two additional million jobs are expected to be created in the next decade³. However the only problem is due to the low added value per employed person, which must be affected by the particular nature of work in this industry – mainly low-skilled staff, large numbers of part-timers, self-employed people and family-run work – mostly carried out by women: 20.500 euros against 42.900 euros in the service industry on the whole⁴.

Worldwide the number of jobs that can be traced back to tourism is over 200 million, 8% of the total employment and its GDP share is more than 10%. By 2013 the tourism and travel industry is expected to include 240 million employed people and a total demand at constant prices is supposed to be 50% greater than the current one (*World Travel Tourism Council 2004*).

In 2000, travel and tourism contributed \$584 billion to the U.S. economy. Travel and tourism is the third largest retail industry in the U.S. behind automotive dealers and food stores. Travel and tourism supported more than 7.8 million jobs and indirectly supports another 11.5 million jobs, creating a total of 19 million jobs, including more than 650,000 executive level positions (*Travel Industry Association "Tourism Works for America", 2001*).

Tourism is an industry where small and medium sized enterprises (SME) prevail, since 94% of them employ less than 10 people and 99% of them have less than 250 employees.

¹ The tourism balance in 2002 totalled 10 million euros, on the decline with regards to the previous two years (Istat 2003).

² Number of employed people tourism industry in EU-15: 1.7 million in hotels and accommodation services, 5.1 million in restaurants, bars, cafes, catering services, 412 thousand in travel agencies and TO's etc. Please note that those data are based on an employed people number count without calculating seasonal variations and employment duration.

³ In wholesale and retail trade, hotels and restaurants the EU's employment rate is 2-3 percentage points below the USA's one (Employment in Europe 2004).

⁴ The International Labour Organization has found that workers in the tourism industry earn 20% less than people employed in other economic industries on the average.

At the end of the last century tourism enterprises in Europe were 7.4% of all the SME throughout Europe and their share of total SME turnover was 6.5%.

In Italy, where tourism industry has a turnover of approximately 83 billion euros - 6.6% of the GDP – and directly as well as indirectly employs over 2 million people, there are 256 thousand enterprises - 99% of them have less than 19 workers - in the hotel & restaurant branch, which all in all involves 905 thousand workers. All those workers accounted for 6% of all the enterprises and produced a little more than 3% of the total added value in 2001. Enterprises and employees are on the increase with regards to previous years.

Main Trends in Tourism Industry

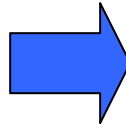
The tourism numbers are on the rise¹, but tourists' ways and choices to spend their holidays are changing, too. Travellers are far more aware of how much their spare time is worth, which is now running the risk of depletion as shows by a general increase in the number of working hours, and are getting more and more selective: they ask for more value in return of their time and their money and for this reason they consequently ask for better experiences and higher quality standards.

The diagram shows how to switch from old-style tourism to the new one.

The new consumers ask for a new tourism

Yesterday consumers

- Unexperienced
- Homogeneous
- Are foreseen
- Look the sun
- Take burn
- Security within the group
- Superiority sense
- Flight



To day consumers

- Mature
- Heterogeneous
- Spontaneous
- Look for sun and other
- Remain clothed
- Want to be different
- Comprehension
- Prolongation of the life

Suorce: Future of Travel Agents, A.Poon, 2001

The following trends are particularly remarkable among the emerging ones:

- shorter trips, but more frequent during the year;
- new tourists' more propensity to spend intellectually and physically dynamic holidays along with a growing demand for recreational activities, such as sport, adventure, knowledge of historical events, culture and nature in the places reached;
- increasing propensity to arrange independent non-standard package holiday of TO's - in Great Britain independent holiday makers have already topped TO-dependent ones;
- success of new tourism types, which are closely connected with culture, nature, health, religion, etc., and are developing 3 times faster – about 8% - than traditional holiday types in spite of the prevailing mass holiday destinations;

¹ In Italy families have been spending slightly more money for travelling and recreational activities in spite of the lack of trust in better economic conditions over the last few years (Censis 2003).

- creation of several themed tourist tours / routes on basis of the previous points: cultural tours, such as the pilgrimage route to Santiago de Compostela, Via Francigena, Mozart's route, etc.;¹, wine and food trips, naturalistic excursions, etc.;
- the success of European themed funfairs: in 1999 they welcomed 110 million visitors and Disneyland park in Paris achieved the largest number of guests with over 12.5 million visitors per year².

Visitors are increasingly seeking a variety of tourism experiences in one vacation, rather than a traditional and more simplistic “sun, sand and sea” . For example, in one vacation a visitor may: play golf, take part in a wine-tasting tour, visit an historic site and indulge in spa activities (*Canadian Tourism Commission, 2003*)

These are new trends previous travel experiences are familiar with. They urge to search for new destinations and new products. Changes in the population structure³, such as the growth of more cultured senior people⁴, dynamic and used to travelling, smaller and smaller families, increasing flexibility in working conditions will cause people to have shorter holidays as well as continuous learning culture to become more widespread so as to encourage not only recreational trips.

However younger age groups will keep on asking for products for teenagers, including people in their thirties, who progressively tend to view themselves as "young" people.

The proliferation of low-cost airlines using regional airports is going to promote the destinations covered by those companies, in particular with point-to-point services. On short and long distance trips new rates and e-market will change the way we manage bookings and favour customized, non-standard products at the expense of arranged as well as all-inclusive holiday packages.

Council of Europe's Cultural Routes:

- Santiago de Compostella pilgrim
- Via Francigena
- Rural Habitat
- Silk Routes
- Baroque Route
- Monastic influence routes
- Celtic Routes
- Mozart Route
- Schickhardt Itineraries
- Viking Routes
- Hanseatic Routes
- Parks and Gardens route
- Writing Frontiers - Pont de L'Europe
- European Cities discoveries route
- Phoenician Routes
- Routes of Humanism
- The Legacy of Al-Andalus Route
- Northern lights route
- Popular festivals & rites in Europe
- Gypsy Route



Full details on http://www.coe.int/T/E/Cultural_Co-operation/Heritage/Cultural_Heritage/European_Cultural_Routes/

¹ A comprehensive list of 20 Cultural Tours in Europe along with their features can be downloaded at the European Commission's web site www.coe.int

² The other famous parks and their amount of visitors in 2000 are as follows: Blackpool Pleasure Beach, UK, 6,8 million visitors; Tivoli, Danmark, 3,2 million; Liseberg, Sweden, 3.2 million; Efteling, Netherlands, 3.0 million (CE 2003).

³ In the next ten years European people older than 55 years of age will increase by 10%. Over-sixty people will increase by 22% and over-sixty-five adults will increase by 54%. That's the so-called "limbo generation": too ripe to be young, but too young to be old. At the same time the age group of 20-34 years will decrease by 15%.

⁴ Many people in this age group spend longer and longer periods of time in their tourist destinations offering pleasant living standards, above all in Southern Europe in low season. A large number of people move their residences more or less permanently to those regions that represent important tourist resorts or have the necessary potential to become a resort.

Cultural Tourism

On the basis of the new tourism industry demands, which are expected to be one fifth of the trips over the next twenty years because of their growth rate, the tourism industry experts of the European Commission had already pinpointed in 1998 that one of the limits preventing tour operators and local communities from completely taking advantage of new opportunities and offering new products and destinations currently made available was a lack of appreciation and optimization of the wealth and the variety of the historical and cultural heritage available in Europe, where UNESCO acknowledged over 200 places as historical heritage of mankind. This lack may have even worse results in backward low-tourist-density areas.



Cultural tourism that WTO defines as a flow of people mainly pursuing cultural goals involves the participation in several events and activities, such as: festivals, music, theatre, events, visits to old countryside farms, food and sampling typically local products, tours, visits to historical and religious monuments, archaeological sites, museums, classes, conferences, etc.

According to a survey of the European Commission, 20% of the tourists visiting Europe mainly meet their needs for culture and 60% of the European tourists are however interested in cultural discoveries during their trips.

However there are even people going beyond this and stating that there is no other type of tourism except for the cultural one. "People do not come to America because of our airports, hotels, recreational activities... They come here for our culture: no matter if our culture is high, low or medium-end, real or fancy ... they just come to America" (*Garrison Keillor, White House Conference on Travel&Tourism, 1995*). Obviously this can be the case of other regions in the world.

In 2000 the Canadian Tourism Commission found three main market segments after estimating North American tourists at 49 million units and tracking them back to any kind of cultural tourism:

- "Culture Seekers" consisting of approximately 18 million people;
- "Knowledge Seekers" consisting of 20 million people;
- "Entertainment Seekers" consisting of the resting 11 million people.

Tourist who take part in cultural activities while travelling outside their home communities are considered cultural tourists. What do cultural tourists look for in their travels?

- They tend to combine cultural with noncultural experiences
- They tend to look for learning/educational experiences
- They seek a sense of people and place (*Vancouver's Cultural Tourism Initiative, January 2001*)

Cultural tourism is that form of tourism whose purpose is to discover heritage sites and cultural monuments on their travel. (*Tourism Management Conference, Nottingham - UK, December 2003*)

Segments of the North America Tourism Market

Segment	% of the total	Market Size in Millions	Segment's Major Interests
Culture Seekers	10	18.4	Museums, art galleries, art events in historical places, gambling in casinos, shopping and cooking
Knowledge Seekers	10	19.8	Museums, art galleries and historical place
Entertainment Seekers	6	10.9	Concerts, festivals, art events and casinos
Amusement Seekers	9	17.1	Gambling in casinos
Action Seekers	7	13.4	Professional sports, shopping and cooking
Funfair Fans	10	19.6	Themed funfairs
Minimalists	29	55.6	It is unlikely they will ever participate in cultural and entertainment activities
Non-urban travellers	19	36.2	Non-urban travellers

Source: *Travel Activities and Motivation Survey, Cultural and Entertainment Segment Report*, Canadian Tourism Commission, 2000.

Facts about cultural tourism

- Cultural tourism is projected to grow globally at an annual rate of 15 percent through 2010 (*WTO and Canadian Tourism Commission*).
- Domestic travel involving culture/heritage activities numbered more than 14 million leisure trips in 1996 and almost \$3 billion in spending in Canada (*Statistics Canada, 1998*).
- In 2000, 65 percent of American adult travellers included a cultural, arts, heritage, or historic activity or event while on a trip of 50 miles or more (about 80 km) one-way (*TIAA*).
- Of the 92.7 million American adult travellers who included a cultural activity during a trip in 2000, 32 percent (29.6 million travellers) added extra time to their trip because of a cultural, arts, heritage, or historic event. Of the 29.6 million travellers who added time: 43 percent added part of one day, 31 percent added one extra night, 19 percent added two extra nights, and another 7 percent added three or more extra nights because of this activity or event (*TIAA*).
- The percentage of American adult travellers who added one or more nights to a trip due to a cultural, arts, heritage, or historic event increased from 49 percent in 1998 to 57 percent in 2000 (*TIAA*).
- The Historic/Cultural Traveler report shows that 118 million adults, or more than half of the U.S. adult population, are considered historic/cultural travelers (*The Historic/Cultural Traveler, 2003 Edition - www.tiaa.org*).
- Cultural tourism has grown 13 percent since 1996, increasing from 192.4 million person trips to 216.8 million person trips in 2002, which is twice the growth of overall travel. A majority of cultural-heritage travelers claim that a specific cultural/historic activity or event was the main reason for the trip (*Cultural Tourist News, Spring 2004, Washington*).
- Texas legislature has recognized historic preservation and the impact of heritage tourism as the most significant recent economic development strategy in the state (*Preserve America and Heritage Tourism, National Conference, June 2004*).
- More than one in six tourists visiting Florida in 1997 reported they enjoyed Florida's arts and cultural programming (18%). This percentage excludes commercial entertainment such as Disney World. (*The Economic Impact of the Florida arts, 2000*).
- Over half (59%) of the state's visitors tour historic sites, and 28 percent of them go to historical museum (*Cultural Heritage Tourism, practical application, September 2000*)

Beside the economic side, cultural tourism is important because it helps consolidate the identity of a place and protect the cultural-historical heritage, which would otherwise be neglected.

Cultural Travellers

However it is not easy to outline cultural seekers' profile because of their great variety of interests and the lack of specific researches in particular in Europe. However there are no better conditions for the segment consisting of a very few visitors of archaeological historical sites.

The first cultural tourist

Who was the first cultural tourist? Ulysses? Alexander the Great? Julius Caesar? Perhaps they, like the Venetian merchant Marco Polo and the great voyagers of the European Renaissance who journeyed “to make Christians and seek spices”, were essentially business travellers. The great 14th-century Arab traveller Ibn Batutah is a stronger candidate. He covered some 120,000 km in the Islamic countries and went as far afield from his birth place, Tangier, as China and Sumatra, “for the joy of learning about new countries and new peoples”.

More recent cultural travellers were the sprigs of the English aristocracy who went on the Grand Tour of continental Europe, a flexible itinerary usually including visits to Paris and the main Italian cities (*Tourism and culture* in The Unesco Courier, July/August 1999).

A German survey on tourists searching for nature and culture shows that they are rarely attracted by luxury hotels, but they prefer small accommodation run by local people, offering good level of comfort and service quality: tourists frequently appreciate two-star and three-star hotels, but like kind friendly accommodations set in refurbished buildings the most.

After reaching their destinations, cultural tourists are very interested in local food and products. Cultural tourists are from 39 to 59 years of age, have good education levels and a wide-ranging experience in travelling, are very sensitive to environmental issues and regularly take their holiday time away from seasonal peaks so that they are suitable to adjust seasonally.

The latest report by *Federculture 2004* shows that cultural tourists spend even more money: 101 euros per day against standard tourists' 72 euros.

In 2003 the description by product of German travellers, who had already been to Italy, produced the following results:

Tourist Product	Tourist Profile
North-East Seaside (Veneto, Emilia Romagna)	25-54 age group, intermediate educational level and low professional conditions (unemployed people looking for a job and workers), home in small towns with less than 20 thousand residents in South Western and South Eastern regions in Bayern and Thüringen.
Towns of Art (i.e. Venice, Bologna, Florence, Rome, etc.)	Young and very young people, high school or university degree, students and state officials or freelancers coming from medium-large cities with 100-500 thousand people in the Northern regions, such as Schleswig Holstein, Hamburg, Sachsen Anhalt, and Essen in South-Western regions.

Source: Isnart/Unioncamere, *Survey on Foreign Tourists: The German Market, 2004*

Another survey conducted in Scotland managed to outline the following profile of cultural tourists and activities:

Market analysis of a few tourist segments in Scotland¹

Type of Tourism	Type of Activity	Type of Tourist	Reason	Holiday Profile	Current & Potential Market
Cultural Tourism	Festivals, events, historical sites, excursions to villages, tours	Income above the standard, 45-64 age group, mainly couples, often "grey panthers"	Discovering, learning, coming across people	Less seasonal, generally short trips on the basis of the events. They prefer summer for tourist tours.	200,000 people are attracted just by culture and account for 50 million euros (250 euros per head). One visitor out of seven on holiday in Scotland also takes part in cultural events. This fraction increases to one visitor out of two if they come from abroad. Very good outlooks.
Educational Tourism	Tours, classes, lessons	Foreigners, such as groups of American students, mature people, generally groups of pensioners	Training, discovery, contact with people	All round the year with no peak in summer months and longer stays	High income per head without a specific market segment. Good outlooks.

If culture can also mix up with walking activities, such as arranging tours to archaeological sites, monuments, etc., in a pleasant natural environment, visitors' pleasure can be even greater if it is true that in Scotland the "walking market" produced 1.1 million trips in 1998 and totalled 600 million euros, 18% of the whole tourist expenditure².

Eventually the most comprehensive tourism industry-oriented research conducted by the Ministry of National Heritage and Culture in 2000 showed that more than one museum visitor out of three is an entrepreneur, a freelancer, an executive and manager. The four fifths of them have a high school certificate or a

Cultural Heritage Definitions

The "intangible cultural heritage" means the practices, representations, expressions, knowledge, skills – as well as the instruments, objects, artefacts and cultural spaces associated therewith – that communities, groups and, in some cases, individuals recognize as part of their cultural heritage (*Unesco 2003*)

¹ From www.scotexchange.net

² EC, Sustainable tourism based on natural and cultural heritage, 2003, page 9 and 10. Please note that in Scotland cultural tourists spend approximately one quarter of the total amount for food and beverages.

university degree. Similar data were found in the United Kingdom where it was observed that approximately one half of the museum visitors belonged to the Upper Middle class and Middle Class¹.

All the researches agreed that educational qualifications and income range are closely connected with the habitual attendance at museum and additional cultural facilities.

Cultural Tourist Profile

- 45 to 64 years-old
- Female
- Some post-secondary education
- Higher income level
- Spends between eight to ten percent more per day when travelling
- Stays almost an entire day longer at a destination
- Uses more commercial accommodation
- Spends more on consumer products such as souvenirs, arts, crafts, clothing, etc.
(*A Tourism Guide for Cultural Organizations, published by Vancouver's Cultural Tourism Initiative, January 2001*)
- Have higher education levels (41% university graduates, versus 32%)
- Spend more money (US \$615 per trip versus \$425)
- Take longer trips (4.7 nights versus 3.3 nights)
- Shop more (45% versus 36%)
- Tend to belong to older age categories (aging baby boomers; the 55+ market)
- Have managerial or professional occupations (31% versus 24%)
(*TIAA, Report on Cultural and Historic Tourism, 2001*)
- Cultural heritage visitors to Vermont were more likely to visit as part of a tour group
- Vermont's visitors who choose to visit cultural or historic sites spend nearly twice as long in the state as compared to other visitors (644 C\$ versus 340 C\$ per trip)
- Heritage visitors are on the average 5 years older than the average visitors
- Eighty-seven percent of cultural heritage visitors bought Vermont made products
(*2000 National Survey of the Vermont Visitor: the Cultural Heritage Visitor*)
- Heritage tourists spend slightly more per day (\$58 per visitor) than other tourists (\$55 per visitor)
- Heritage tourists stay in Colorado a little longer than other vacationers
- Tourists who include visits to historic sites or landmarks on their trip to Colorado are more likely to stay in a hotel or motel
- Heritage tourists tend to be older than other visitors. More than half of heritage tourists in 1999 were 45 years old or older
- Visitors to historic sites and landmarks are more likely to be retired than other tourists.
(*Colorado Heritage Tourist, 1999*)

¹ Cited by Fabio Pasquali's "Spese e consumi culturali in Italia" (Cultural expenditure and consumption in Italy), *Economia della Cultura* (review), il Mulino, Bo, 2/2002.

National and Regional Archaeological Heritage

Experts of the Italian old town centres say that 2,684 populated areas out of 8,145 municipalities are of Roman and pre-Roman origin and 4,164 ones were founded from the 18th and to the 13th Century. To put it briefly, it is easy to find one or more layers of pre-existing urban areas under every town or town of history. It is enough to dig a hole in the ground and they immediately come to the surface. This happened in Rimini. And the same happened in the neighbouring town of Pesaro where under the current old town centre a close net of roads and Roman houses with black and white mosaic floors. Starting with one of the first national maps dating back to 1995 in Italy monuments and archaeological sites account for 2,099 – on the basis of the ruins brought to surface - and there are 4,120 museums - including every kind of museum.

Latium (457), Campania (250), Sardinia (236) and Sicily (167) are in order of importance the regions with the largest number of archaeological site. In Emilia Romagna there are 62 sites. 734 archaeological sites and monuments are state-owned, 304 belong to private properties, 143 are municipal properties, 113 are governed by regions, 36 are churches' properties and 764 under the control of other organizations.

A survey conducted by Istat in 1992, and published in 1994, showed that there are 404 exclusively archaeological museums in Italy and 185 additional "mixed" ones, that is to say with both art and archaeological finds. As far as archaeological museums are concerned, Lombardy ranks first thanks to 41 museums (and 15 mixed museums), Emilia Romagna ranks second (32 museums and 18 mixed ones) followed by Veneto, Piedmont and Liguria. Ancient history and archaeological heritage on display were 1,613,988 at that time, but further 7,443,463 pieces had been stocked. Less than six million pieces have been recorded and classified and just 869,000 have been photographed or filmed out of nine million pieces.

In the classification list for early-history and archaeological materials already classified by museums Friuli-Venezia-Giulia ranked first thanks to 554,872 pieces on display against Emilia Romagna's 271,570 pieces, Lombardy's 60,005 pieces and Veneto's 50,732 pieces. The same survey carried out by Istat showed that there is an impressive difference between collected materials and the displayed ones (always prehistoric and archaeological). The collected pieces account for almost 1,200,000 units in Emilia-Romagna, 742,709 in Friuli-Venezia Giulia – the gap between the collected items and the ones stocked in museums is the smallest in this region - , 622,124 in Veneto and 335,000 in Lombardy. The most significant archaeological centre in the region of Veneto and Friuli consists of awesome ruins and Roman and Early-Christian collections in Aquileia, Udine, along with the Antiquarium of the Forum and two National Museums of Archaeology – a Roman and an Early-Christian one – with excellent mosaic floors. One of the most interesting areas in Lombardy is surely the urban one in Brescia, which was founded by the Cenoman Gallic warriors specialized in forging weapons, whose samples, such as shields and cuirass plates, are displayed in the town museum. This museum is right in the middle of a small Roman town with a temple, a forum and a theatre. As far as protohistory is concerned, the museums and the archaeological sites in Capo di Ponte and Cividate Camuno are fundamental.

The excavations and the collections in Pavia and Casteggio (once a strategic location called Clastidium) as well as the ruins of villas on the banks of Garda Lake are crucial for the Roman part. Besides a large number of Roman texts found, the ongoing urban excavations in Milan are now showing how old the town centre is and how essential the geopolitical role of the town was (at the age of Insubrian people).

Thanks to the Via Aemilia stretching from Ariminium to Placentia (not far away Velleia is wonderfully preserved town) and the port in Classe, Emilia Romagna was in the middle of the fight between the Romans and the Gallic people, who added to the Etruscans and integrated with them. The latter ones were fine dealers, but the first ones were farmers and warriors (essentially "Boi" in this area). This fertile region was very rich in settlements from its coast to the mountains (with a museum dating back to the 8th and 6th century in Verucchio, above Rimini) and the to the Etruscans.

Extraordinary materials came from this town and above all from the necropolis in Spina, close to today's Comacchio, the largest port in the Adriatic Sea for exchange with Attica. A complete collection is available in Ferrara in the National Museum of Archaeology (Palazzo Ludovico il Moro), which opened up again after being closed for a long time. The excavation on Bibeles Mount behind Bologna was very important for this historical period: it helped us confirm the simultaneous presence and integration of Etruscan and Celtic people in this area (a museum is in Menterenzio). The necropolis in Marzabotto and the collection of the town museum in Bologna with Etruscan and Celtic finds as well as Roman prestigious discoveries (there are also two Hebrew tombstones dating back to the Middle Ages). Very important lapidariums and museums are in Ravenna, Forlì and Rimini, where nowadays the awesome Augustan Arch (the oldest arch still available), the Tiberius bridge, dating back to the Augustan age, and the ruins of the city walls can be visited. The division into centurions can still be remarked in Romagna's countryside, in particular in the surrounding area of Cesena. Tombs of rare beauty, such as Rufi's majestic sepulchre with statues and columns, now in the National Museum of Archaeology, were found in Sarsina, Plautus' house, one of the first Umbrian territories, then conquered by the Romans, and set in dominating position high up above Tevere's Valley and the pass hosting the shortest road connecting Rome with Ravenna.

In the Marches, besides the necropolis with Etruscan stele in Novilara on Pesaro's Hill, sites, monuments and archaeological ruins essentially date back to the Roman age: the city walls, the underground theatre in Urbino – the largest Roman lapidarium outside Rome imported in 1970 - , mosaics in Pesaro (under the dome they date back to the Early Christian era), bronze statues of the end of Pergola's empire, Roman Villas in Matelica (Macerata), the ruins of Trea and Urbs Salvia (currently called Treia and Urbisaglia), Ascoli Piceno along the Salaria road where two Roman temples under San Gregorio Magno and San Vincenzo Churches, an impressive bridge in Solista crosses Tronto, Gemina Gate and the city walls, the ruins under the Palazzo dei Capitani right in the town centre, and the theatre show their Roman¹ origins. And so does the town plan.

Archaeological Sites, Museums and Museums by Region

Region	Archaeological Site and Monuments	Every kind of Museum *	Total
Aosta	23	53	76
Piedmont	44	354	398
Lombardy	89	432	521
Trentino Alto-Adige	27	111	138
Veneto	54	313	367
Friuli-Venezia Giulia	55	133	188
Liguria	40	190	230
Emilia Romagna	62	427	489
NORTHERN REGION	394	2,013	2,407

¹ From Touring Club, Archaeological Heritage in Italy, 1997.

Region	Archaeological Site and Monuments	Every kind of Museum *	Total
Tuscany	132	450	582
Umbria	127	156	283
Marches	79	234	313
Latium	457	346	803
CENTRAL REGION	795	1,186	1,981
Abruzzi	38	88	126
Molise	24	22	46
Campania	250	206	456
Basilicata	50	155	205
Calabria	57	28	85
Apulia	88	73	161
Sicily	167	199	366
Sardinia	236	150	386
SOUTHERN REGION	910	921	1,831
TOTAL	2,099	4,120	6,219

Source: Touring Club on data provided by Balance Ministry and Istat (1996)

* Archaeology, art and archaeology, art, history, science, technology, natural history, etc.

42 percent of a total number of 4,120 museums in Italy belongs to municipalities and just 13 percent are state-owned.

Distribution of archaeological sites and museums by region and property

Region	State	Region	Province	Municipality	Private Owners	Churches	Other	Total
Aosta	0	3	0	0	0	0	20	23
Piedmont	17	1	0	2	4	0	20	44
Lombardy	11	1	1	7	14	1	54	89
Trentino	6	0	0	0	0	0	21	27
Veneto	16	0	0	4	9	0	25	54
Friuli VG	12	0	0	7	20	4	12	55
Liguria	16	0	0	4	5	0	15	40
Emilia R.	33	0	0	3	13	1	12	62
Tuscany	81	0	1	4	21	1	24	132
Umbria	23	0	0	7	13	5	79	127
Marches	14	0	0	4	13	0	48	79
Latium	240	0	0	26	52	20	119	457
Abruzzi	25	0	0	3	6	0	4	38
Molise	11	0	0	5	0	1	7	24
Campania	90	1	1	12	31	2	113	250
Basilicata	20	0	1	8	6	0	15	50
Calabria	28	0	0	4	11	0	14	57
Apulia	39	0	1	5	8	1	34	88
Sicily	1	106	0	8	39	0	13	167
Sardinia	51	1	0	30	39	0	115	236
TOTAL	734	113	5	143	304	36	764	2.099

Source: Balance Ministry, 1995

Archaeological Museums by Region

Region	Archaeology	Art & Archaeology
Aosta	2	0
Piedmont	19	10
Lombardy	41	15
Trentino A.A.	3	6
Veneto	20	21
Friuli V.G.	9	4
Liguria	17	6
Emilia R.	32	18
Tuscany	39	18
Umbria	11	5
Marches	22	13
Latium	64	23
Abruzzi	5	6
Molise	3	2
Campania	17	7
Basilicata	6	2
Calabria	16	3
Apulia	30	11
Sicily	28	12
Sardinia	20	3
TOTAL	404	185

Source: *Statistical survey on museums and similar organizations on the 31st December 1992. Istat 1994.* Boscoreale, where the number of visitors increased from 2.2 to 2.4 million between 1997 and 2003 (*Archaeological Office*). Colosseum, the excavations of Pompeii and Villa d'Este are the first three most visited locations of highly rated archaeological sites and monuments.

Visitors and Incomes

Even if it seems there is no coincident data on the basically growing number of monuments and state-owned archaeological sites – the former Balance Ministry estimated them at more than 700 and in 2003 the Ministry of National Heritage and Culture estimated them 206 - , we surprisingly need to observe the number of paying and non-paying visitors to this specific heritage is not on the increase. On the contrary visitors dramatically decreased from 24 to 15 million units with regard to the peak in 1989: Furthermore incomes reached the lowest level in the last twenty years. This observation is true except for the archaeological site in Pompei, which includes Ercolano, Oplontis, Stabia and

Visitors to the main historical monuments and archaeological excavations in 2003

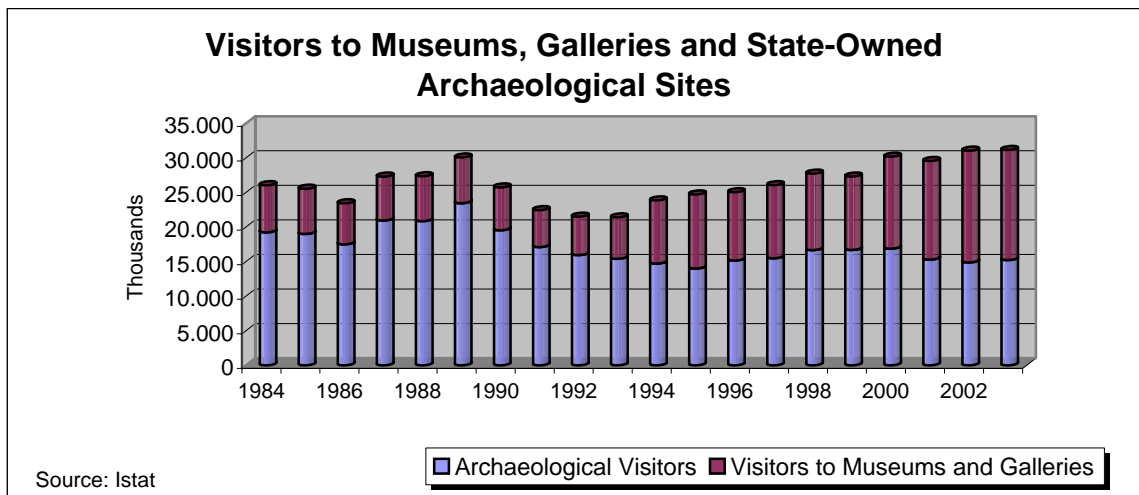
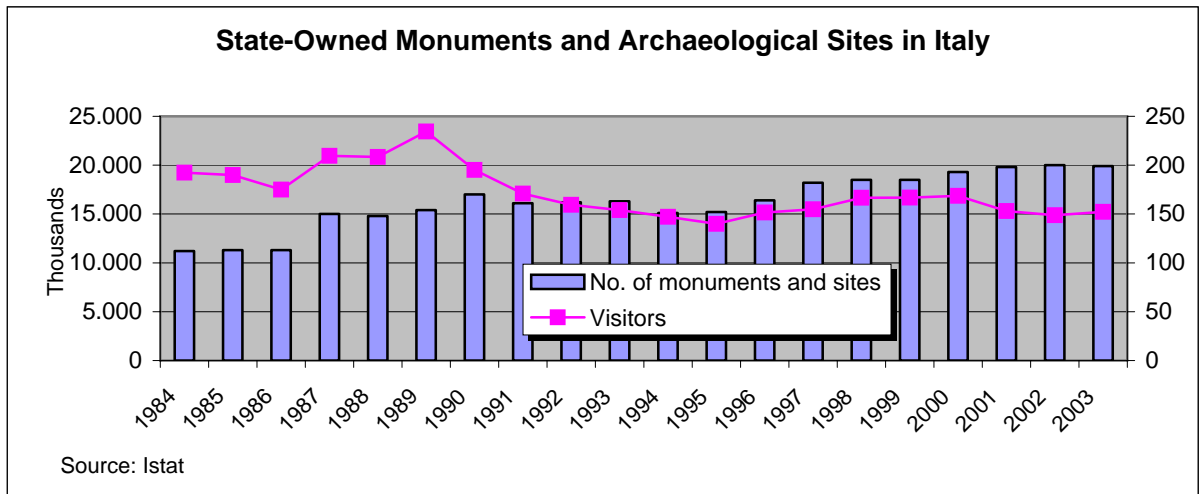
Monuments	Location / Municipality	Visitors
Colosseum and Palatinos' Archaeological Route	Rome	3,106,295
Old and New Excavations of Pompeii	Pompeii	2,101,823
Villa d'Este	Tivoli	533,730
Medicean Chapels	Florence	342,767
Adrian Villa	Tivoli	322,035
Sant'Apollinare in Classe Basilica	Ravenna	310,338
Excavations and Old Theatre of Herculaneum	Herculaneum	261,957
Excavations and Museum in Ostia Antica	Rome	259,255
Paestum's Temples	Capaccio	221,992

Source: *Ministry of National Heritage and Culture*

On the contrary the trend was different for the visitors to 194 **state-owned museums and galleries** – 112 in 1984 - on the increase in the last few years – from 10.6 million in 1999 to almost 16 million in 2003 achieving a growth of more than 50%): they have

recently topped the archaeological museums and galleries but they were less than one third in the early nineties.

Thus the most museum¹ and gallery visitors compensated the losses of the first facilities, managed to make up ground at the end of the eighties and totalled more than 31 million visitors². This means that the demand has not decreased, but it has found just one new orientation thanks to specific policies and initiatives. It is very likely that monuments and excavations, currently disadvantaged, still are a potential not completely exploited yet.



However those data do not include the very large number of visitors to all the other museums, galleries, monuments and excavations spread throughout Italy. To form an

¹ In Italy people older than six of age who visited museums and shows increased from 22.7 % in 1993 to 28.5% in 2003 (33% in Emilia Romagna) on the basis of Istat's multi-purpose survey in 2003. At the beginning of 2000 30% of the European people (max 52% in Sweden) and 23% of the Italian citizens had visited at least a museum (Eurobarometer, 2001).

² Those data are based on the total number of visitors to museums, galleries, museum routes, monuments and state-owned archaeological sites.

idea of these conditions, we just need to consider that in Piedmont alone, where there is a regional control¹, visitors to all the institutes, such as museums, galleries, castles, forts, picture galleries, foundations, etc. were 2.7 million in 2002 - two thirds of them just visited the Metropolitan Museum System in Turin – against 697 thousand visitors to state-owned museums – an approximately four times larger number of visitors. One third of those visitors paid a full price ticket or one ticked at reduced rate.

In 2003 the first three most visited museums (both stated-owned and non-stated-owned) in Italy were:

1. Vatican Museums, Rome	3,152,836 visitors
2. Uffizi Gallery, Florence	1,341,586 visitors
3. Academy Gallery, Florence	1,018,481 visitors

The visitors to all the other national museums accounted for 500,000. In 2003 the most visited museums in the rest of Europe² were:

Louver, Paris	5,726,640 visitors
British Museum, London (free of charge)	5,460,537 visitors
Prado, Madrid	2,318,525 visitors
Orsay Museum, Paris	1,829,576 visitors

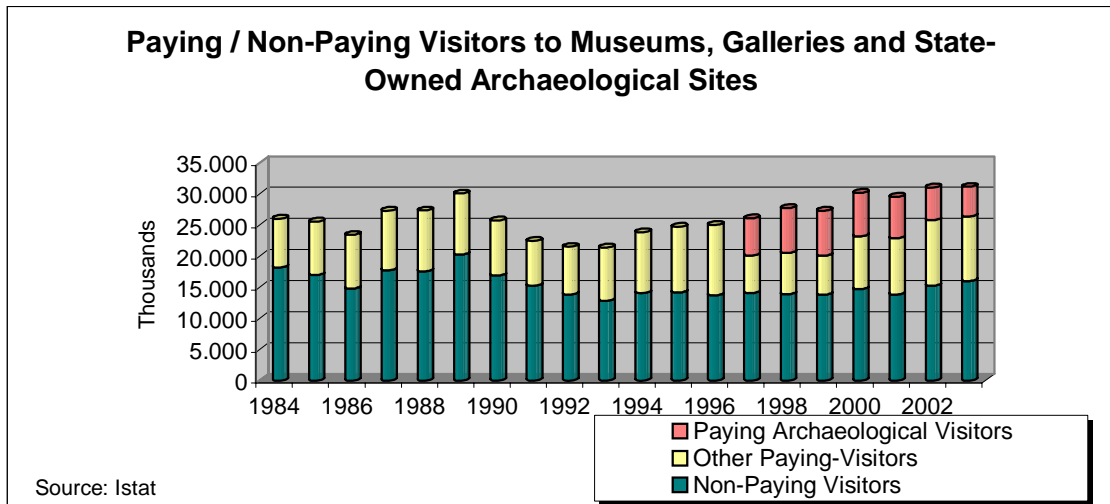
(Source: Touring Club Italia)

A positive result to notice is that from the middle of the nineties the increase in the number of visitors is almost exclusively due to the number of paying visitors, which exceeded 15 million units in 2003 starting from a little more than 7 million at the beginning of the nineties, equalled the number of non-paying visitors and topped it in 2002. In 2002 the full price ticket to visit museums and excavations ranged between 10 euros in the Vatican Museums and the Excavations in Pompeii and 2 euros in the National Museum of Archaeology in Taranto. The most expensive ticket to visit a state-owned museum was paid in Museo della Galleria Borghese in Rome: 8.0 euros.

Paying visitors to monuments and excavations suffered the consequences of this industry and in 2003 they were 4.7, one third of the total number of paying visitors. This has been the lowest number of the last seven years. The chart shows that archaeological site paying visitors add to other paying visitors.

¹ Cultural Office in Piedmont (OCP): www.ires.piemonte.it/OCP

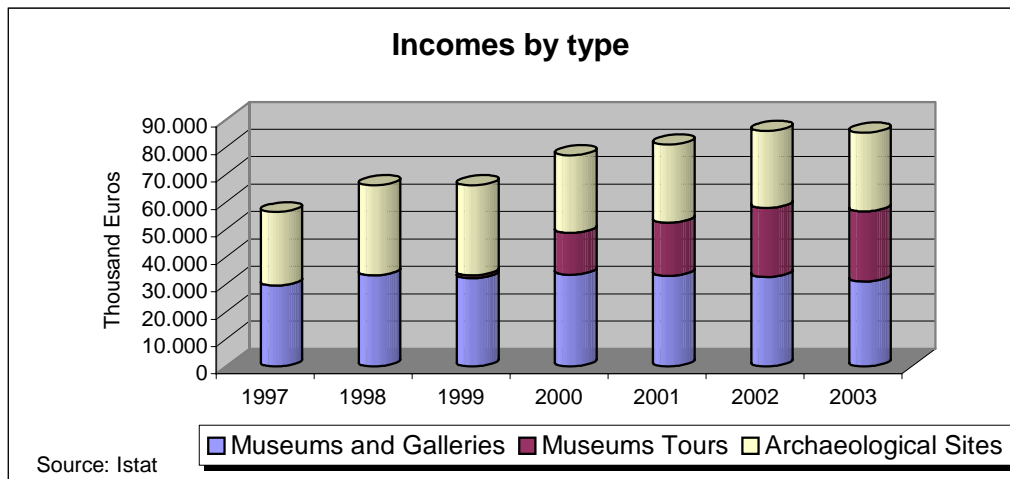
² In 2000, the Eiffel Tower in Paris and the National Gallery in London respectively welcomed 6.3 and 5.0 million visitors (Euromonitor 2001).



The rise in the number of paying visitors to state-owned institutes and higher prices increased incomes by more than 50% from 56 million euros in 1997 to 85 million euros in 2003. Visitors felt extremely attracted by just five institutes (Colosseum, Pompeii, Uffizi, Accademia and Castel Sant'Angelo), which accounted for 57% of the total gross income in 2003.

A special contribution to this result came from museum routes that could be accessed with just a group ticket. Their incomes increased from a little more than one million to 25 million euros within four years. This showed it was a profitable system.

In the period of time, the increase in the incomes per paying and non-paying visitor of the whole state-owned system was more modest: from 2.15 to 2.73 euros (+27%).



The Annual Report issued by Federculture in 2004¹, which announced a growing demand for culture in the last five years, showed that all the cultural tourism accounted for 1.3% of the GDP and had a turnover of approximately 21 billion euros, one fourth of the whole tourist industry. It also showed an interesting outcome: small towns of art

¹ Association of local bodies, private and governmental companies managing services for culture and spare time.

seem to have an increasing influence on cultural tourism and may have already become more important than big towns of art.

Museums and archaeology show another feature: longer seasons. They welcome an almost constant number of 1.5 million paying visitors per month from April to October and reach a peak in August so that they are a good balancing force for tourist systems forced to work for too short periods of time.



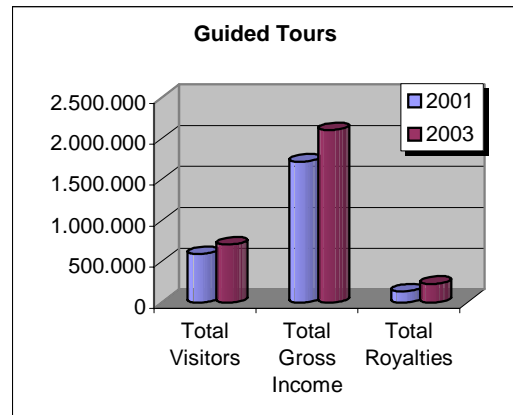
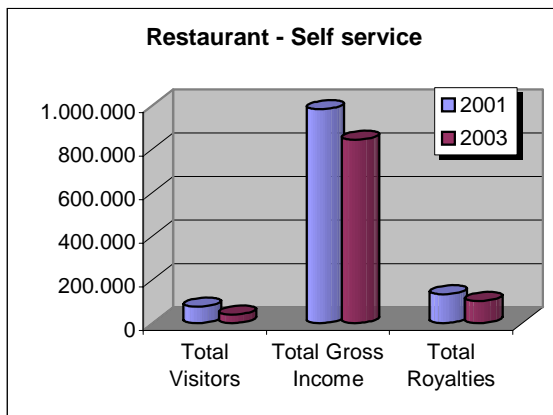
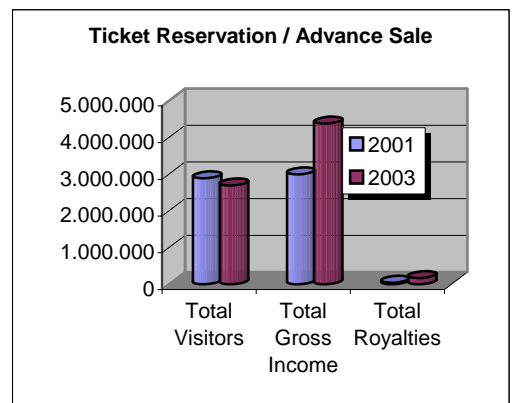
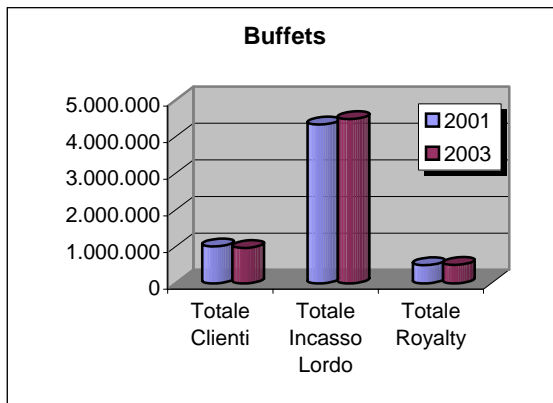
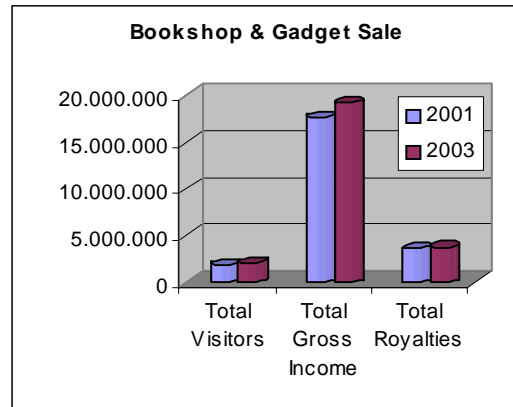
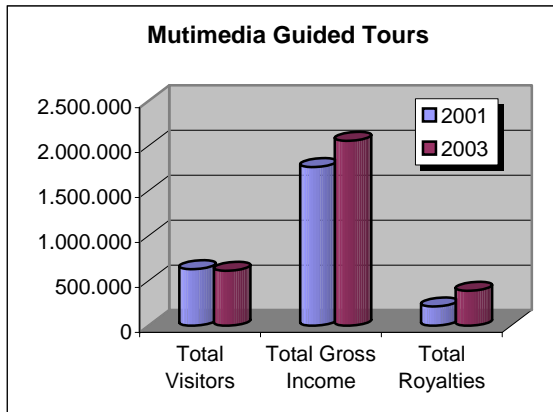
Additional Services

Besides income from the direct sale of tickets, museum, galleries and archaeological sites can increase directly and indirectly their revenues if they offer new additional services. This is what many institute have already done achieving the following results in the Italian market. If we make a list of the most profitable services, bookshops and gadget sale indisputably rank first and account for 60% of the total; ticket advance sale, buffets, guided tours, multimedia guided tours and restaurants stay back at a considerable distance.

In 2003 all those items constantly grew; the number of visitors taking advantage of new service was over 7 million so that the gross income, including royalties, was higher than 38 million euros.

If we divide the total income by the number of visitors, we achieve an additional average expenditure per head for tickets of 5.3 euros. This amount is little lower than the average income from paying visitors' ticket sale: 5.3 euros in 2003. This means that new services can double visitor expenditure to general advantage.

If we add the incomes from new services to the ones of the tickets sold, the total turnover of the national sector including museums, galleries, monuments and archaeological sites soars to 123 million euros in 2003 (*Ministry of National Heritage and Culture*).

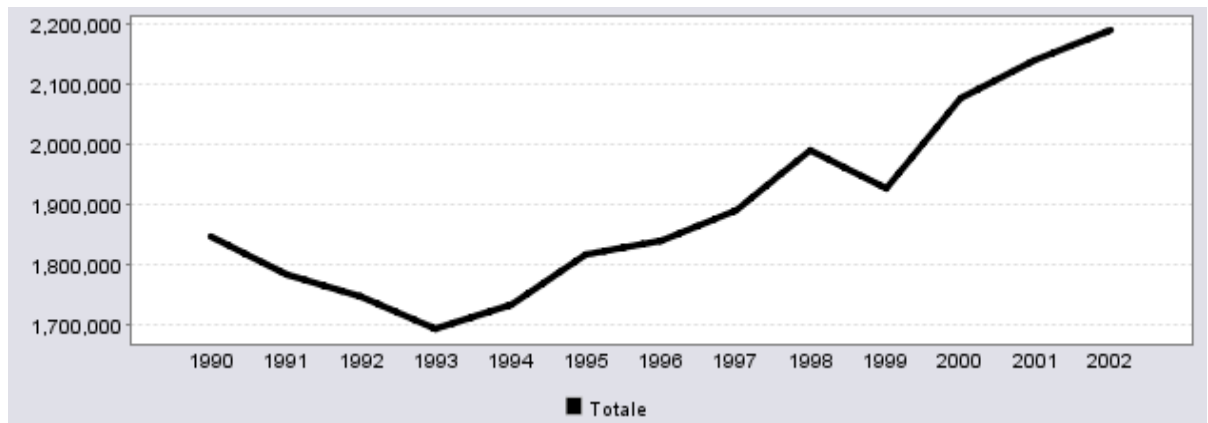


Available Cultural Heritage, Visitors and Incomes in Emilia Romagna

In 2003 Emilia Romagna welcomed 7.6 million tourists and totalled 36.6 million stays. Regional towns of art, - Rimini not included - welcome 1.7 million visitors and totalled 4 million stays, 11% of the total thanks to their museums, monuments, shows, etc.; this result increases to 25% if we focus on the total number of overnight stays in four-star and five-star hotels. Cultural visitors (probably including also people going to fairs and conferences) take advantage of better services and are prepared to spend more money.

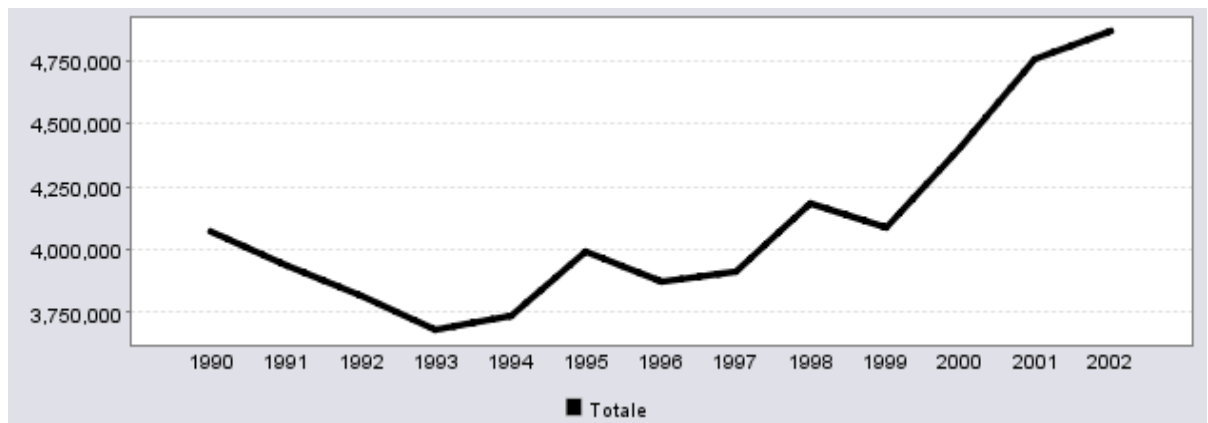
Furthermore the history of the tourist flow to regional towns of art shows that the number of stays and arrivals, in particular foreigners' one, was on the rise till 2002.

History of Arrivals in Towns of Art in Emilia Romagna



Source: Osservatorio Turistico Emilia Romagna (Tourist Statistical Office in Emilia Romagna)

History of Stays in Towns of Art in Emilia Romagna



Source: Osservatorio Turistico Emilia Romagna (Tourist Statistical Office in Emilia Romagna)

2.6 million tourists arrived in Rimini's Province in 2003 and were mainly attracted by seaside resorts. They accounted for 42% of all the regional stays. Bologna achieved 43% of the visits to towns of art.

Briefly, Emilia Romagna is a renowned region and cultural tourism can be an additional element to attract visitors and foster their loyalty. All the more so for the regional allocations for the restoration of building and monument heritage¹.

If we assign a score, just as guidebooks do, to the aesthetic value of cultural heritage items - scores should be also confirmed by visitors - , we can outline how offer is geographically distributed and assess each region's potential. This kind of procedure², which is based on Touring Club Italia's guidebooks and sets up a general indicator of

¹ Thanks to the funds of the former regional law 16/2002 approximately 50 projects were sponsored in 2004 totalling 9.3 million euros.

² From Geo-Economy of Cultural Heritage by Maietta, Spano e Valentino, in *La storia al futuro: beni culturali, specializzazione del territorio e nuova occupazione*, (History to the future: cultural heritage, specialization of territories and new employment) Giunti, Firenze, 1999.

museums and other cultural heritage elements available, helped divide Italy in four main groups sorted out by cultural heritage availability:

- the first group includes those regions that can be viewed as owners of territories with an excellent cultural heritage availability thanks to the attraction of their cultural heritage and the number of museums;
- the second group includes those regions provided with good cultural heritage items;
- the third group includes those regions provided with a cultural heritage availability rate close to the national average;
- the fourth group includes those regions provided with cultural heritage availability below the standard.

Excellent Availability	Good Availability	Intermediate Availability	Poor Availability
Tuscany	<i>Emilia Romagna</i>	Piedmont	Sardinia
Latium	Veneto	Campania	Trentino A.A.
Lombardy	Sicily	Marches	Abruzzi
		Apulia	Friuli V.G.
		Umbria	Calabria
		Liguria	Aosta
			Basilicata
			Molise

The chart shows that Emilia Romagna not only has a large number of visitors, but its availability of cultural heritage items is good. Contrary to national trends and the most important regions, museums, galleries and state-owned archaeological sites in Emilia Romagna did not welcome more visitors, but lost them in the last ten years. From 1991 to 2003 the total number of visitors to regional state-owned museums and galleries decreased from 1.9 to 1.0 million. This caused a heavy loss at national total amount level of visits decreasing from 8.8% to 3.3%. In list of the Region Emilia Romagna drops from the fourth to the seventh position.

The loss of visitors by state-owned "monuments and archaeological sites" is even heavier, since their number fell from 1.84 million in 1991 to 499 thousand in 2000, 190 thousand of which represents paying visitors totalling 375 thousand euros¹

This is not a recent problem because visitors to archaeological sites had already been halved in 1995. The influence of regional incomes on the national total is even lighter: in 2003 they accounted for a little more than 1% against 35% of the total national income from Latium, 27% from Campania and 24% from Tuscany. To partially justify these conditions, it must be noticed that the main museums and archaeological sites of Italy are in those regions.

**Visitors to Museums, Galleries,
Monuments and State-Owned
Archaeological Sites by region in
Thousands**

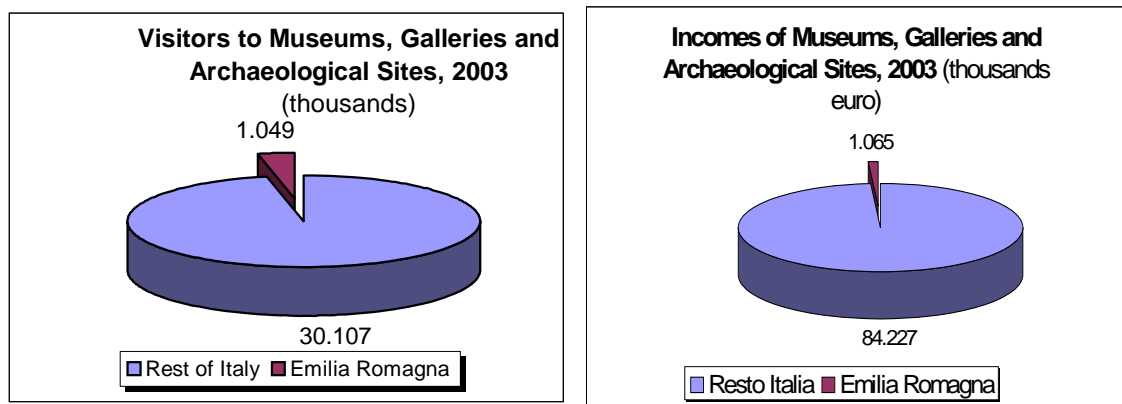
	1991	1999	2003
Latium	6.130	8.502	9.342
Campania	5.726	5.555	6.166
Tuscany	4.068	5.747	5.283
Friuli V.G.	1.405	1.755	3.386
Veneto	375	670	1.648
Lombardy	791	1.076	1.202
Emilia R.	1.978	820	1.049

Source: Istat

¹ In Emilia Romagna data are based on 15 institutes, 7 of which for a fee and the rest free of charge, distributed as follows: 2 in Ferrara, 2 in Forlì, 3 in Parma, 2 in Piacenza and 6 in Ravenna (*Ministry of National Heritage and Culture*).

Since there is not a lack of visitors, cultural heritage, and propensity of local residents to visit museums and excavations, offers must have decreased in terms of quality and accessibility. At least 34% of the people older than six years of age said that they visited a museum or an archaeological site in 2002 and this percentage is 4 points higher than the European average and 6 points higher than national standards¹. Furthermore the incidence of the expenditure for "recreational activities and culture" - including discos – on the internal regional consumption of local residents and non-residents increased from 7.5% in 1995 to 9.2% in 2001, so that Emilia Romagna ranked second after Piedmont.

Additional services in Emilia Romagna just include bookshops - on the increase - and guided tours - on the decrease. From 2001 to 2003 the number of their visitors almost doubled from 74 to 134 thousand, but incomes did not; they just increased from 445 to 489 thousand euros, which accounts for a little more than 1% of the national income along with a 3.6 euro expenditure, which is lower than the Italian average (5.3 euros).



Employment in Cultural Industry

It is easy to realize that the increase in the incomes and additional services do not automatically take place, but they are the result of additional work, too. Statistical data on employment only for museums and archaeological sites are not available, but we can form an idea of the working conditions in cultural industry in a broad sense.

In 2002 4.1 million employed people in cultural sectors² in the European Union-25 accounted for 2.5 % of the total employment. In Italy they account for 453 thousand, a slightly lower percentage of employed people.

¹ In 1994 Italian people older than 6 years of age who said they visited museums and shows were 24% (Istat).

² The European statistical data classify as cultural workers both people employed in cultural activities of the whole economy and people employed in specific cultural sectors, such booksellers, writers, artists, architects, etc. In Italy the "recreation and culture" sector includes the following activities: film and movie production and distribution, radio and television programmes, further show activities, such discos, amusement arcades, press agency activities, library activities, archives, museums and other cultural activities.

Employed People in Cultural Industry, 2002 (Thousands)

	Europe-25	Italy
Employed	4,164	453
Tot.Empl.%	2.5	2.2
% of graduates	40	27

Source: Eurostat

In the past the Report on Cultural Economy used the data of the survey conducted in 1991 and estimated the people employed in the direct cultural heritage management in Italy at 79 thousand, 89% of which were government workers. However a considerable share of those employees, 35,200 units, consisted of library officers of local governments, and the rest of the people promoted cultural heritage.

A specific survey carried out by Istat in 1992 estimated museum officers in Italy at 17 thousand units, 44% of which worked in state-owned museums and 27% in municipal museums. On the average each state-owned museum employs 23 workers, regional ones 18 workers, province ones 8 workers, municipal one 5 workers and all the other institutes related to universities, churches, self-employed, etc employ less workers.

54% of the total museum workers had scientific, technical or management qualifications, since 46% of them consisted of attendants. If we study the case of Uffizi Gallery, there is a scientifically qualified person per 160 thousand visitors, but the Louvre Museum can boast a skilled person per 28 thousand visitors so that the improvement opportunity is clear-cut.

The most striking point in the comparison with Europe is the difference between people employed in the cultural industry having a university degree: 40% in Europe against 27% in Italy just followed by Portugal at 25% - in France 51% of the same number of people employed in the cultural industry achieved a university degree. This result is nothing new, but it is the consequence of the underutilization of personnel with university degrees, which keeps on accounting for 14% of the employees against the European average of 24%. On the bottom of this list there are Czech Republic (13%) and Portugal (11%).

Promoting cultural heritage, which helps develop cultural tourism, in a better way will surely improve all these conditions.