statistiche report

November 28, 2013

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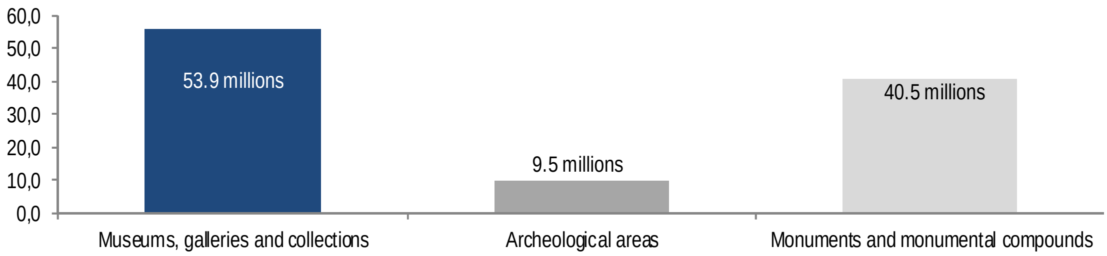
2011

MUSEUMS, ARCHEOLOGICAL AREAS AND MONUMENTS IN ITALY

- 4,588 museums and similar institutions, both public and private, were open to the public in Italy in 2011: they included 3,847 museums, galleries or collections, 240 archaelogical areas or parks and 501 monuments or monumental compounds.
- In Italy, one museum or similar structure can be found in nearly one municipality out of three: a widespread heritage of 1.5 museums/institutes every 100 sq km, one every 13,000 inhabitants.
- 52.1% of the archaelogical sites are concentrated in the South and the Islands, whereas 48% of museums and 43.1% of monuments are located in the North of the Country.
- The arts and archaeology collections are very frequent: fine arts (11.9%), religious art (10.2%) modern and contemporary arts (9.9%), archaeology (15.5%), but ethnography and cultural anthropology (16.9%) and history (11.4%) are also well represented.
- In 2011, the Italian museums reached 103,888,764 admissions. Alone, three regions make up 51% of the total admissions: Toscana (22.1%), Lazio (20.1%), Lombardia (8.8%).
- The top 15 museums/institutes recorded in 2011 about one million admissions each, and have absorbed nearly 1/3 (30%) visits.
- The majority (63.8%) of Italian museums are held by public bodies. 1,909 institutes, i.e. 41.6%, belong to municipal governments and only 9% to the Ministry for Cultural Heritage, Activities and Tourism; State museums attract, however, over 40 million visits (38.8%).
- Admission is free in nearly half of the Italian museums (49%).
- One third of the institutes cash in from ticketing no more than 20,000 euros per year. One fourth of the museums collect no more than 10,000 euros, but megastructures, with over 500,000 admissions per year, cash in over 1 million euros each.
- 44.9% of the Italian museum visitors are foreigners. For more than half of the institutes (53.3%) foreign visitors represent, however, only a minor percentage of the public, not exceeding 10%.
- In about 40% of the structures, museum staff are able to provide assistance in English to their foreign visitors.
- For the most part, the institutes are operated by small staff: about 80% of them employ no more than 5 persons and only 1.5% employ 50 people and over. Volunteer workers total about 16,000 and support 60% of the museums.
- The Web is an environment where Italian museums are moving baby, althought relevant, steps. 50.7% of the institutes own a website, 42.3% publish their program online, 22.6% send newsletters to their visitors, 16.3% offer online access to individual items and 13.3% offer an online catalog.

2011 ADMISSIONS OF MUSEUMS AND SIMILAR INSTITUTES BY INSTITUTE TYPOLOGY.



The census survey has been carried out in 2012 by Istat, the Ministry for Cultural Heritage and Activities and Tourism, the Regions and Autonomous Provinces. It covers not only museums, monuments and archaeological areas, but also other similar institutes, public and private alike, that acquire, conserve, research, communicate and exhibit the tangible and intangible heritage of humanity and its environment for the purposes of education, study and enjoyment.

The information thus collected describes a galaxy of over 4,500 institutes, spread over the entire national territory and greatly diversified in their typology, collections, dimensions, forms of management and relationship with their public.

This complex and varied system, mostly made of small and very small sized institutions, and operated by a small number of employees, supported by nearly as many volunteers, was visited in 2011 by about 104 million people.

Witnesses of the history and civilizations of our country, museums and similar institutions represent true strongholds of culture intended in its broadest sense. In addition to their fundamental functions of conservation, research and exhibition, they also promote education and dissemination, debate, performing and visual arts creation, i.e. add vitality and cultural contents to the local communities.

The Country of Museums: 1.5 museums every 100 sq km

4,588 museums and similar institutions, both public and private, were open to the public in 2011: 3,847 of them are museums, galleries or collections, 240 archaeological areas or parks and 501 monuments or monumental compounds.

52.1% of the archaeological sites are concentrated in the South and Islands, whereas 48% of museums and 43.1% of monuments are located in the North of the Country (Tabs.1-4).

The expression “Country of Museums” defines perfectly Italy, with its 1.5 museums every 100 sq km, one every 13,000 inhabitants.

One museum or similar institution can be found in 2,359 out of 8,092, i.e. in nearly one out of three (28.3%) municipalities, but in some regions the distribution is even more widespread (Tab.1).

Slightly more than one tenth (10.8%) of the museums/institutes are located in the 12 cities with 250,000 inhabitants and over, where the average number of museums is 41. In Rome, Florence and Venice, the national and international tourism capital cities, about 200 museums are located: 4.8% of the units identified by the 2012 census.

Besides those major poles of attraction, the Italian territory boasts a vast and rich endowment of cultural resources. A relevant amount of structures (16.9%) is sprayed among municipalities with less than 2,000 inhabitants (with an average 0.2 museums each). About one third (30.6%) of the museums/institutes are distributed among the 3,327 centres ranging between 2,001 and 10,000 inhabitants (0,4 museums each) and 26.3% can be found in the centres belonging to 10,001-50,000 class (1.1 museums) (Tab 2).

Collections: a varied and rich heritage

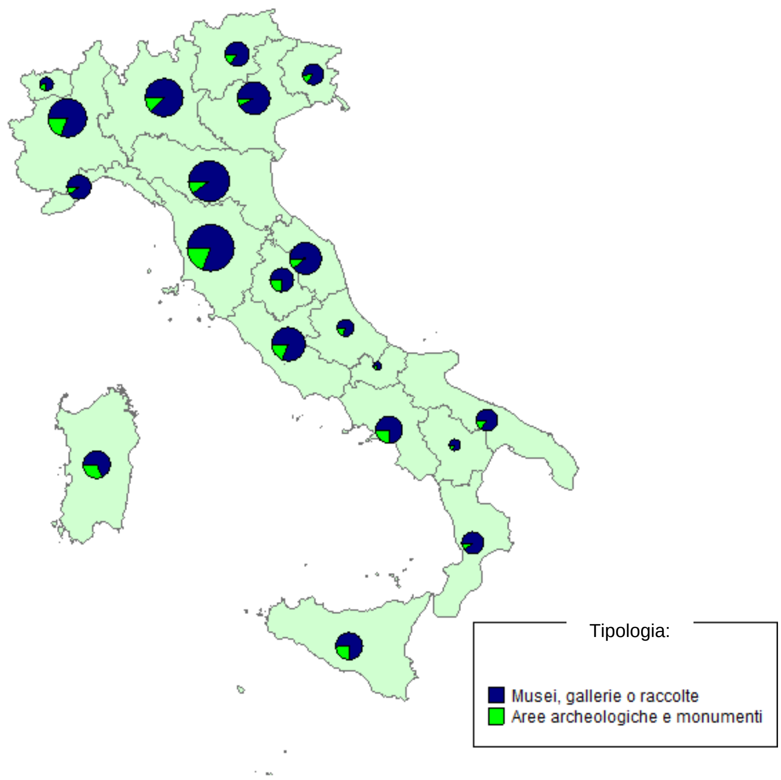
Italy counts 3,847 museums, galleries and collections (83.8% of the institutions investigated by the survey), 501 monuments and monumental compounds (10.9%), and 240 archaeological sites (5.2%).

Alone, the region-island of Sardegna covers 19.6% of the archaeological sites, while Toscana concentrates the highest amount of museums (11.6%) and monuments (16%). (see Fig.1, Tab.4).

The variety of the Italian museum universe is reflected by the varied nature of its collections. Ethnography and cultural anthropology cover the 16.9% of the institutes; 11.4% history; archaeology the 15.5%, fine arts 11.9%, religious arts 10.2% and 9.9% modern and contemporary arts. Such a rich offer is further widened by science and natural science museums (9.3%) and specialized museums (8.6%) (Tab.6).

Alongside with their collections, the museums buildings themselves are often highly valuable from a cultural point of view. About 70% of the museums are located within historical or artistic buildings (Tab.7). Reasons of interest for visitors are therefore many. For 51.8% of the institutes in the survey, the main reasons of attraction are the collections; for 30.2%, building and collections concur equally to attract the public, while for 14.5% visitors are mainly attracted by the building itself (Tab.24).

FIG. 1. MUSEUMS AND SIMILAR INSTITUTES BY REGION - 2011



Structures and services

Guided visits are offered by a vast majority (77.8%) of institutes. Ticket and visit booking services are also common (58.3%). Little less than half of the museums (44.2%) run a bookshop/museum shop and in 34.7% of them disabled people can find assistance and dedicated services. 19% of the structures entertain children and offer playrooms or other facilities. Strange enough, cafeterias or restaurants are still quite rare, being offered by only 13.2% of the museums/institutes (Tab.65).

81% of museums and institutes offer printed information material and 74.6% information boards on individual works/items. Reception points, where visitors receive orientation and information, are available in 68.7% of the structures. Visit paths are proposed in 41.2% of the institutes, and in 39.5% information and news about the local area are also available. However, only one museum out of four (25.2%) offers visit paths for children, only 24.5% offer multimedia stations and 11.6% audioguides (Tab. 63, Fig. 2).

Museum staff are able to provide information to the public in English in 42.5% of the cases. For French, the share drops to 23.2%, for German to 9.7% and Spanish to 7%. Only rarely is there staff who are able to communicate in Arabic or Japanese (0.2%) or Chinese (0.1%).

Written information in English is provided by 21.3% of the museums, German in 4.4%: the other languages disappear almost completely (Tab. 64).

34.9% of the institutes maintain an archive, while 29.3% are equipped with a documentation centre or a photo library, 32.7% a library, 34.2% a room for research or educational programs and 10.3% a restoration laboratory (Tab.62).

Museums and the Web

The Web is an environment where Italian museums are moving baby, although relevant, steps. 50.7% of the institutes run a website, only 42.3% publish their program online, 22.6% send newsletters to their visitors, 16.3% offer online access to individual items and 13.3% offer an online catalog (Tab. 66).

16% of the museums are actively taking part in the Web communities, either via social networks like Facebook or Twitter, or via blogs and online forums. Less than 10% offer free WIFI connection to their visitors. Very few (5.7%), mainly the largest, use the Internet for booking visits and selling tickets, and those that have developed dedicated apps for smartphone or tablet are even less (3.4%).

Temporary exhibits, educational activities, workshops and conferences

In 2011, 64.2% of the Modern and contemporary arts museums and 62.6% of fine arts museums have organized temporary exhibits (Tab.68).

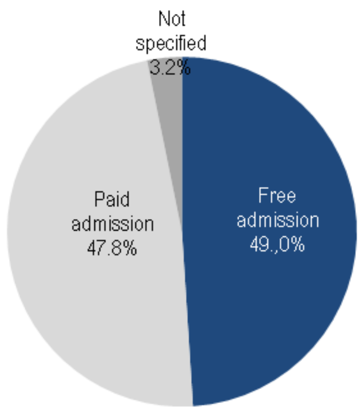
As a whole, temporary exhibits in 2011 have recorded 33.1 million admissions, averaging 18,000 admissions for each institute (Tab.70).

In the same period, 58.6% of the museums/institutes have promoted educational programs, 52.3% conferences and seminars, and 46.9% live performances or other cultural events. One third of the museums/institutes have started or have been involved in research projects (Tab. 67).

Free and paid admissions

Admission is free in almost half (49%) of the institutes in Italy (Tab.40). Where admission is paid, tickets have yielded revenues up to 10,000 euros per year for 26% of the respondents, while 7% has cashed in less than 1,000 euros per year.

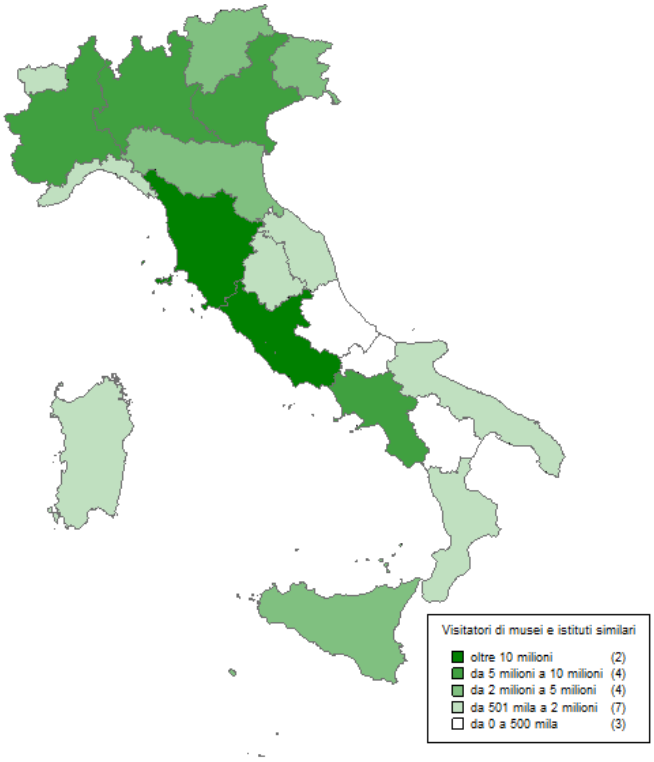
FIG. 3. MUSEUMS AND SIMILAR INSTITUTES WITH FREE AND PAYING ADMISSION. 2011, percentages



Very few museums/institutes – around 100, i.e. 1.2% - have totaled 500,000 to over 1 million euros by selling tickets (Tab. 57).

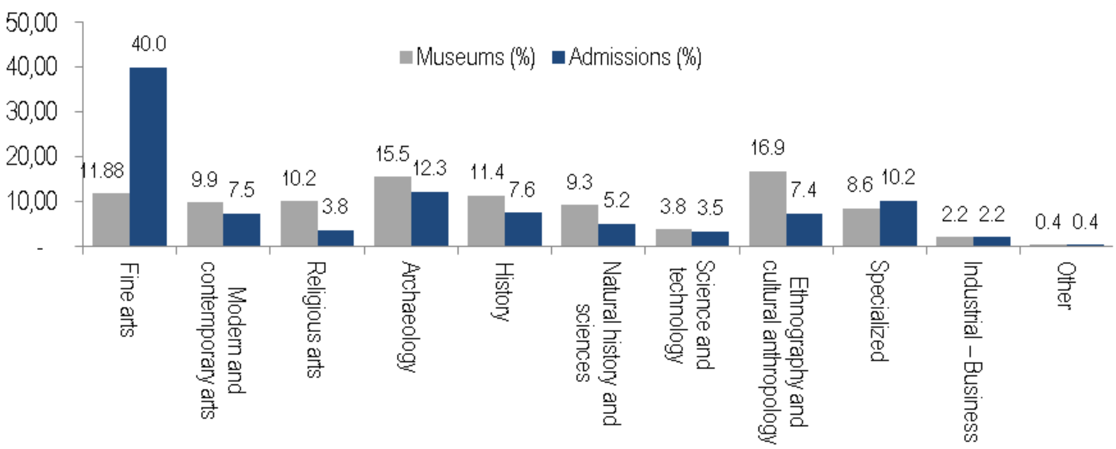
As a whole, in 2011 103,888,764 people visited the Italian museums, archaeological areas and monuments. The survey shows that paid admissions have been 54.9 million, vs. 48.9 million free admissions (Tabs. 49-51).

FIG. 4. ADMISSIONS TO MUSEUMS AND SIMILAR INSTITUTES BY TYPOLOGY AND REGION, 2011.



State museums/institutes, which make up less than 10% of the total, attract alone 38.8% admissions: over 40 million in 2011. The average amount of admissions per institute is nearly 24,000, but State structures reach about 100,000 and non-state structures about 16,000 (Tab. 48).

FIG. 5. MUSEUMS AND ADMISSIONS BY SUBJECT OF COLLECTIONS, 2011.



Young people aged 18-25 represent little more than one fifth (21.1%) of total admissions (Tab. 52). This may be related to price policy (no reductions for young visitors in the majority of sites), lack of dedicated exhibitions and of ICTs equipment in most museums. However, also the share of senior citizens is limited: it reaches 26.3% of the admissions.

The estimated share of visitors from abroad is 44.9% of the total admissions. Nonetheless, for over half of the museums/institutes in Italy, they remain below 10%.

SUMMARY TABLE 1. MUSEUMS AND SIMILAR INSTITUTIONS FOR SHARE OF FOREIGN VISITORS. 2011

SHARE OF FOREIGN VISITORS	% museums and similar institutes
Up to 10%	53.3
10.1 to 25%	20.1
25.1 to 50%	19.0
50.1 to 75%	5.6
Over 75%	2.0
Total	100.0

Small and large museums and their public

Three institutes out of four in Italy are small or very small, with less than 10,000 admissions per year. Big structures, with over 500,000 admissions, are conversely rare (less than 1% of the total), are concentrated in few regions, in metropolitan areas, but attract alone 43.3% of the total public (Summary table 2).

The Italian model is characterized by organizations of small dimension (less than 1,000 admission/year), spread over the territory and located even in the smallest centres, often isolated, with limited resources (the average staff in these museums is 1.2; English is spoken in 28.6% of them; those owning a website are 36.2%), limited cultural activity (educational programs, temporary exhibits, other forms of cultural initiatives are regularly less frequently offered as compared to larger organizations) and limited capacity to generate additional financial resources (only 17.7% of these museums access public funding schemes, less than 10% get private funds and support or obtain revenues through commercial activities). 46.1% of these structures are held by Municipalities, 40% by private subjects. Small museums are frequently (22.2%) devoted to ethnology or cultural anthropology and are tied to local history and culture.

SUMMARY TABLE 2. CHARACTERISTICS OF MUSEUMS AND SIMILAR INSTITUTES BY VOLUME OF ADMISSIONS. 2011

Volume of admissions (12 months)	Their share	Admissions share	Average yearly revenue via ticketing	Access to public funding /contributions	Access to private funding, sponsorships, contributions from Foundations, donations, bequests, etc.	Generate other revenues from services, shops, loans, concessions, royalties, etc.
Up to 1,000	(34.6%)	0.7%	Up to 1,000 euros (16%)	17.7	9.1	9.1
1,001 to 10,000	43.4%	7.2%	Up to 2,500 euros (15%)	33.4	16.1	18.2
10,001 to 100,000	18.5%	23.2%	Up to 20,000 euros (20%)	33.2	21.7	29.5
100,000 to 500,000	2.8%	25.7%	100,000 to 500,000 euros (26%)	34.4	29.5	37.7
Oltre 500,000	0.8%	43.3%	Over 1 million euros (78%)	20.0	22.9	51.4
Total	-	-	Up to 20,000 euros (33%)	27.9	15.2	17.9

This kind of structures, however, act as cultural gateway to their own territory (40% of the small museums provide information on cultural resources in their area, compared to 6.1% of the large ones) and their capacity of attracting young people and the elderly is above the average: the share of young people, about 20% of the total admissions in the larger structures, increases up to 29.6% in the small ones: senior citizens represent 31.1% of admissions in small museums, while structures over 500,000 visits are less than one fifth: 19.5%. Needless to say, small museums, which are often excluded by most tourist tours, attract less foreign visits (14.3%), whereas the largest institutes boast a full 60.8%.

Public and private museums

Italian museums, archaeological sites and monuments are mostly (63.8%) public (see Summary Table 3). No less than 1,909, i.e. 65.3% of the public set, are held by municipalities, and only 414 (14.2%) by the Ministry for Cultural Heritage and Activities and Tourism, while Universities hold 3.7% of the public museums (Tab. 11).

SUMMARY TABLE 3. MUSEUMS AND SIMILAR INSTITUTES, TOTAL ADMISSIONS AND PAID ADMISSIONS BY HOLDER. 2011

HOLDER	Museums/institutes		Admissions		*Of which, paid admissions*	
	N.	%	N.	%	N.	%
Public institutes:	2,925	63.8	74,531,386	71.7	35,765,337	65.2
Of which:						
Ministry for Cultural Heritage and Activities and Tourism (State)	414	9.0	40,280,194	38.8	18,006,768	32.8
Municipality	1,939	42.3	21,859,987	21.0	11,835,528	21.6
Private institutes:	1,618	35.3	30,880,338	29.7	20637321	37.6
Church or religious body	454	9.9	3,977,727	3.8	2,080,186	3.8
Foundation	221	4.8	4,942,802	4.8	3,642,717	6.6
Private citizen	200	4.4	696.086	0.7	383.814	0.7
Total	4,588	100.0	103,888,764	100 ,0	54,876,648	100.0

Museum economics

Only slightly more than one quarter (25.4%) of the Italian museum/institutes have an individual budget, because they often are part of a wider and more complex organization (e.g.: a branch of the Ministry or a Municipal administration) (Tab. 21).

Ordinary running costs represent over 90% of museum expenditure for 23.2% of the respondents. Less than one fifth of them (18.5%) state that their incidence does not exceed 25% of the total expenditure.

For one third of the institutes, the yearly revenue from ticketing is less than 20,000 euros. One fourth of museums earn less than 10,000 euros per year, while big structures, with over 500,000 admissions, cash in over 1 million euros each (Tab. 57). 10% of the Italian museums with paid admission have recorded no revenues from ticketing in 2011.

27.9% of the institutes have access to public contributions and funding, but only 17.7% of museums with less than 1,000 admissions receive public support, as compared to 34.4% of museums between 100,000 and 500,000 admissions. Private funding, sponsorships, donations and bequests – which, however, are infrequent in Italy – contribute to the budgets of 15.2% of the institutes, but only 9.1% of small museums benefit of those contributions. Revenues from commercial services and concessions are generated by 51.4% of the largest institutes and only by 9.1% of the small ones. Private support benefits 29.5% of museums with 100,000 to 500,000 admissions and 22.9% of the institutes with over 1 million admissions.

The 15 most visited museums

Museums in Italy are characterized, on the one hand, by a large amount of small and medium sized structures, spread over the entire territory, which represent important cultural strongholds, but are unable to attract a large public; on the other hand, by a short list of big institutes, of an international appeal, able to absorb a large part of the visitor flows.

The top 15 structures count over 900,000 admissions each per year. Among them, Venezia's Palazzo Ducale, Castello Sforzesco in Milano, Scavi Vecchi e Nuovi in Pompei, Anfiteatro Flavio and Foro romano e Palatino in Roma, Galleria degli Uffizi and Corridoio Vasariano in Firenze.

For their value, these places represent an heritage that requires top quality management, aimed at reaching strategic cultural and economic development goals.

They represent less than 1% of the institutes in the census, but they attract nearly one third (over 29%) of the public. For over one fourth (27%) they are arts museums and galleries. Over half of them (53%) are in the care of the Ministry for Cultural Heritage, Activities and Tourism.

Their catchment area is composed mainly of foreign tourists, who represent 71% of their public, whereas local and domestic demand is minor. Such orientation is confirmed by the fact that in 87% of those structures foreign visitors can find assistance and information in English.

Almost all the big museums (93%) have carried out in 2011 conservative restoration of their goods. They are also active in the field of temporary exhibits, live performances and other cultural events.

SUMMARY TABLE 5. TOP PERFORMING MUSEUMS 2011 (a), average values and share

Indicators	Values
No. museumsi/istitutes	15
Share of the total museums/institutes	0.3%
Share of State museums	53%
Main typology	Fine arts (27%)
No. of admissions	30.8 millions
Share of the total admissions	29%
Share of foreign visitor admissions	71%
Share of senior citizens admissions	28%
Share of young people (18-25) admissions	21%
Average number of employees	49
Average number of external staff	28
Average number of volunteers	6
Average number of admissions per staff unit	28,238
Share of museums with English-speaking staff	87%
Share of museums with a Website	73%
Share of institutes by activity:	
Conservative restoration	93%
Setting up of temporary exhibits	64%
Educational activities, live performances, other cultural activities	71%
Digitization of items and collections	64%
Refurbishment or restoration of the building	71%
Sudy and research	57%
Occasional audience surveys	46%
Priorities:	
Urgent maintenance/restoration of items and collections	36%
Staff increase to provide continued high quality essential services	21%

(a) Museums and institutes with over 1 million admissions per year.