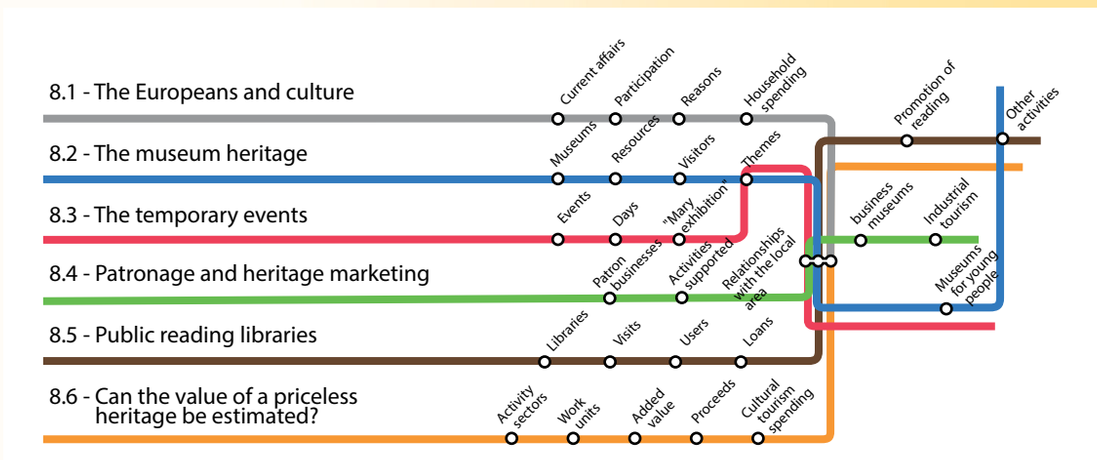
Culture is synonymous with civilisation, knowledge, skills, education, traditions, habits and customs, passions and creativity.

Culture is our history and is an essential part of our growth path.

In the collective imagination of foreigners, Italy is synonymous with culture in all its forms and expressions as revealed by the many surveys performed on those who have seen our Country or intend to do so. And yet, in Italy the "consumption" of culture and the participation in cultural activities is declining more than in other European Countries.

The wide and diversified range of museum equipment which Italy has available certainly represents an important part of its overall cultural heritage and should be suitably enhanced. Veneto plays a significant role in this context, as a large part of this wealth is located here, in our region. A census of the museum heritage and similar was performed in 2013: there are 302 institutes attracting almost 8 million visitors. Further details are proposed later in the chapter accompanied by an in-depth study of phenomena that are (in part) new, such as temporary exhibitions, patronage, heritage marketing.

A significant contribution to the diffusion of culture, particularly to children, comes from public reading libraries: 589 sites that, according to the 2011 census, made just less than 10 million documents available, recorded over 5,700,000 visits and offered lots of new initiatives to their users. Over recent years interest has been growing in the economic aspect of culture and its significance for the productive development of the area, its contribution and its role as driver to overcome the persisting recession. In the paragraph dedicated to this topic some aspects of the economic value of culture are estimated, such as the added value produced and the export activated, and the data are presented regarding the revenues from cultural events, performing arts shows and cultural tourism spending.



Everything is culture, there is culture in everything

8. Everything is culture, there is culture in everything

Is it trivial to ask ourselves what the term "culture" means or what we mean by this? We don't think so because often we take it for granted and do not reflect on its true meaning.

Culture is a term of Latin origin that means "to cultivate"; its use was then extended to all the activities and situations that required attentive care, from "caring" for the gods - that which we now call cult - to the cultivation of human beings or their education.

The modern concept of culture derives from the latter, referring to the wealth of knowledge and experience acquired that is deemed fundamental and is passed down from generation to generation. It is a huge concept that touches on so many aspects of our daily lives that we can venture to say "everything is culture and culture is in everything": from the famous museum we visit to culinary recipes passed down from mother to daughter, from the study of great classical authors to street artists that entertain children, from the great opera to the typical village food fair.

Culture is synonymous with civilisation, knowledge, skills, education, traditions and customs, passions and creativity. Culture is our history, it is an integral part of our growth path, of all that which has made us what we are today, for better or worse; and the cultural background which we have accumulated up until now will help us to face the future, its challenges and its uncertainties.

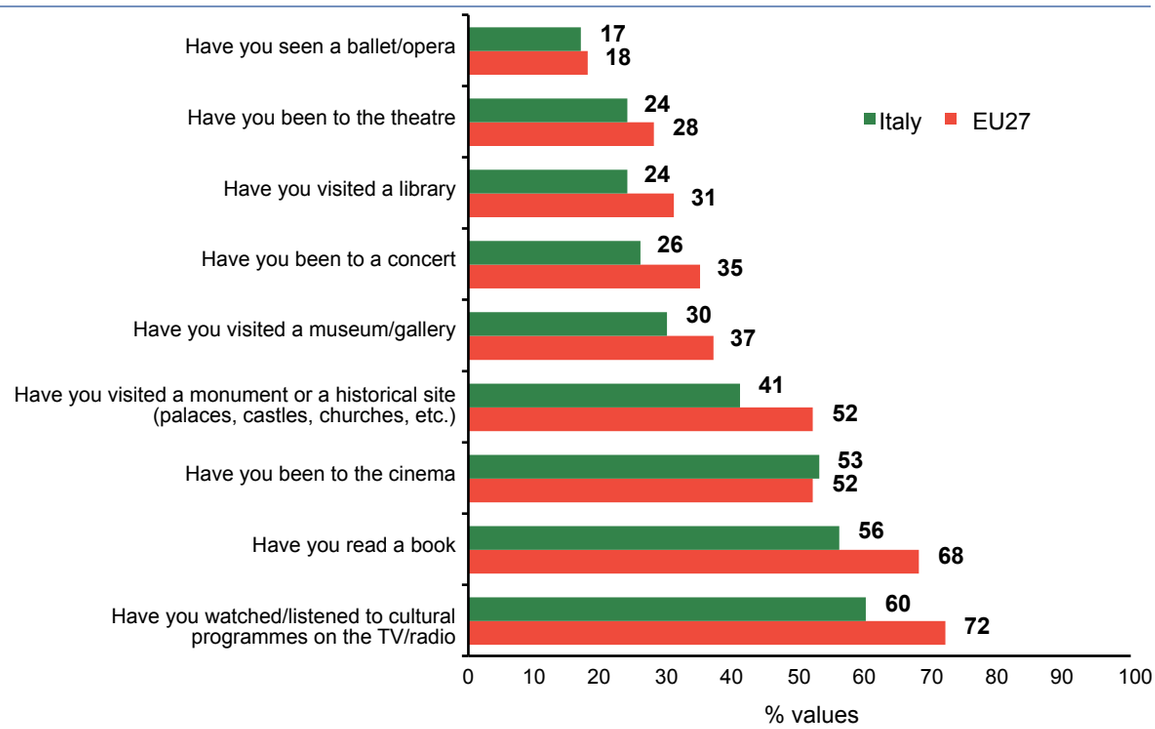
8.1 The Europeans and culture

Culture is an ornament in prosperity and a refuge in adversity (Aristotle).

However, some data released recently seem to contradict Aristotle's words.

In fact, during the last European Forum on Culture, the Eurobarometer of the European Commission presented the results of a survey on access and cultural participation in the EU which involved 27,000 citizens in 27 Member Sstates. The interviewees were asked whether they had participated in some activities[1] over the last 12 months and how many

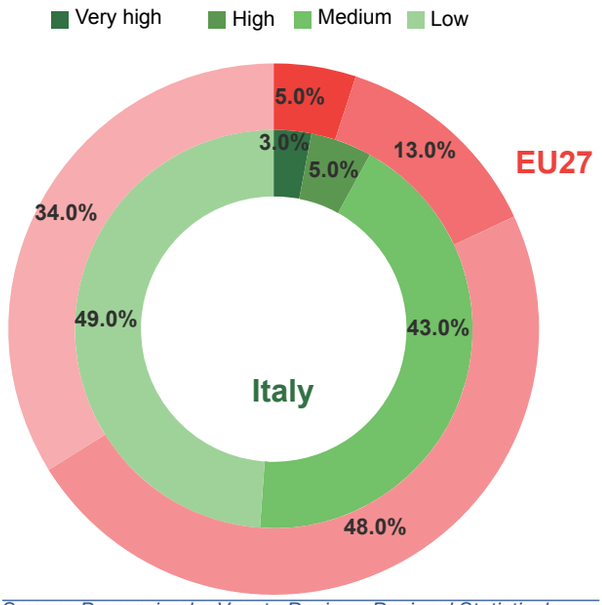
Fig. 8.1.1 - How many times over the last 12 months ...?(*). Italy and EU27 - Year 2013



(*) Total "At least once"
Source: Processing by Veneto Region - Regional Statistical System Section on Eurobarometer data

[1] Visiting museum/gallery/monument/historical site, going to the cinema/theatre/concert/opera/ballet, reading a book, watching/listening to cultural programmes on the TV/radio.

Fig. 8.1.2 - Cultural participation index. EU27 and Italy - Year 2013



Source: Processing by Veneto Region - Regional Statistical System Section on Eurobarometer data

times; the results were compared with that declared in the previous survey performed in 2007. A synthetic indicator of cultural participation was also calculated, assigning each interviewee with a score on the basis of their frequency of participation (low, average, high, very high). It appears that over the last six years access and participation of European citizens in cultural activities - from reading a book to visiting a museum - has decreased in all the Member States.

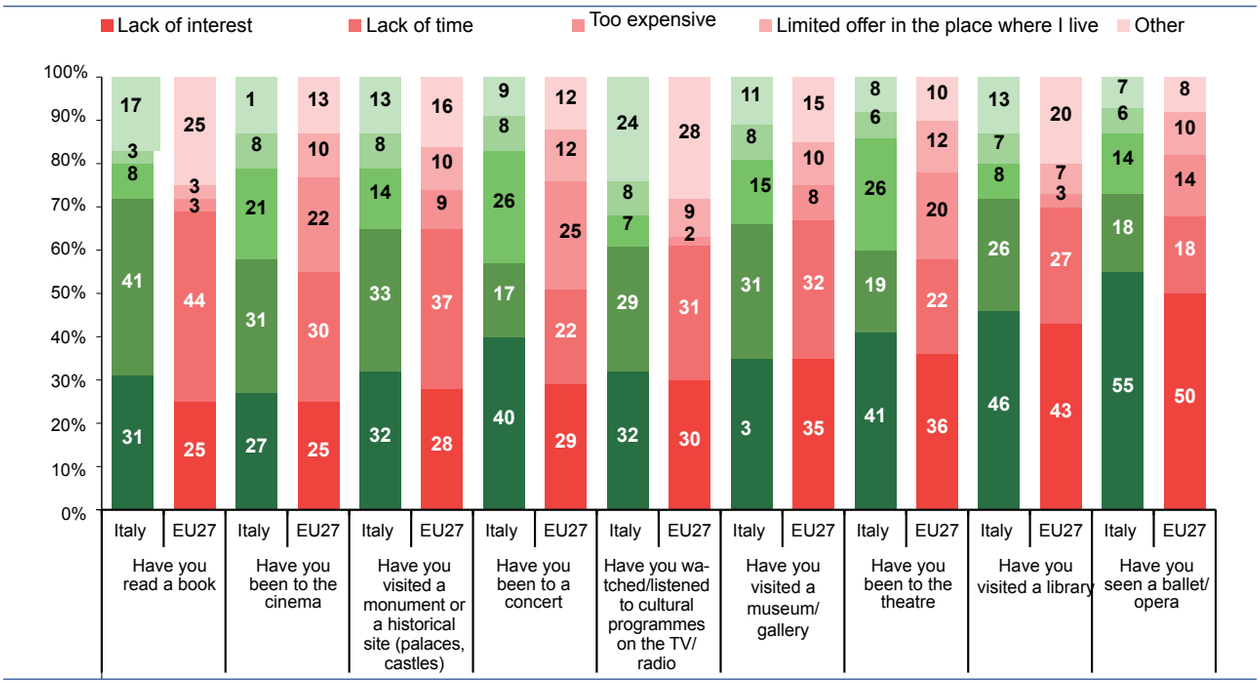
How much do European citizens take part in cultural activities?

Compared to 2007, the number of European citizens that had participated in a cultural activity with "high" or "very high" frequency dropped by three points to 18%, while the percentage of those who rarely participate increased from 30 to 34. The Northern European Countries are in first place: in Sweden (43%), Denmark (36%) and the Netherlands (34%) the citizens participate more regularly in events and cultural initiatives.

A significant difference is also noted between the Countries with a "low" frequency: it ranges from 8% in Sweden to 63% in Greece.

And the Italians? In Italy, land of culture par excellence, the culture "consumption" and participation in cultural activities is decreasing more than in other European Countries. A real joke for a Country that boast a

Fig. 8.1.3 - For each of the activities listed, why have you not done it or not done it more in the last 12 months? Italy and EU27 - Year 2013



Source: Processing by Veneto Region - Regional Statistical System Section on Eurobarometer data

practically limitless artistic heritage and a historical and cultural heritage to rival all the European partners. Our Country is in 23rd place in the continental ranking with participation index equal to 8% with only Hungary and Romania behind with 7%, Cyprus and Portugal with 6% and Greece with 5%. Our Country only exceeds the European average for one item: cinema. 53% of Italians went to the cinema at least once in the last year compared to 52 of the European average.

Among the main obstacles that restrict access to culture there is a lack of interest - when it involves going to the theatre (36%), to the opera (50%), to a public library (43%) or to a concert (29%) - or of time - in the case of reading a book (44%), a visit to a museum (37%), watching and listening to cultural programmes (31%). Concerts, cinema and theatre are usually considered too expensive. With respect to the European average, Italians are less interested in concerts (40%) and in opera (55%). As regards the reasons declared by the Italians to justify this huge lack of participation in culture, it is not only money but above all a lack of interest and time. In the Eurobarometer survey, the Italians explained that they do not "frequent" culture due to a mixture of lack of interest (ballet, opera, theatre and libraries at the top) and a lack of time (for reading, museums and cinema). Finally there are money concerns: the concerts and theatre shows are too expensive for a quarter of the sample and the cinema is too pricey for a fifth.

But why is there such inattentiveness in a Country with one of the richest artistic and cultural heritages in the world? Perhaps it is because, as Gianni Riotta[2] suggests, today Italy is a Country that is intimidated and fatigued "since nothing wears out like the life of the unemployed and temporary employee". There is an elite group that continues to allow for great culture, but in this situation of general crisis,you have to contend with job hunting, short-term contracts, financial difficulties which become increasingly urgent, spending cuts of all types. "And yet it is right that in times like these culture is a saviour". Culture is essential in the dark years since it makes us reflect, smile and is never boring".

In 2011, the last year for data is available concerning the EU 27, the share of recreation and culture[3] in the total spending of European households was 8.8%.

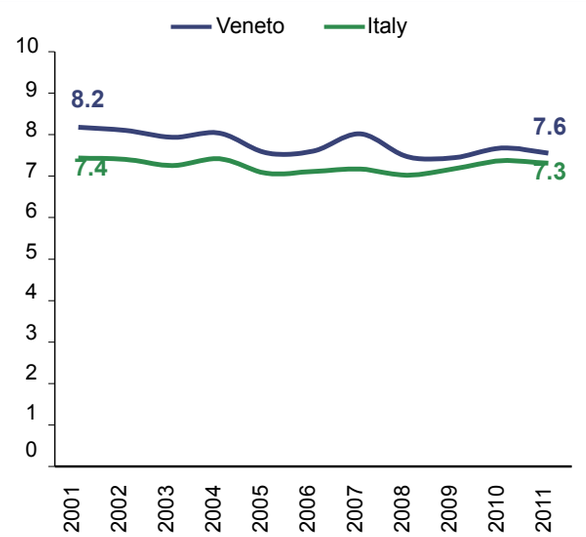
How much do households spend on recreation and culture?

Only Finland and Sweden are above 11%; Italy was in twentieth place with 7.3%.

In 2012 - the most recent data - the Italian households spent 68.9 billion Euros on recreation and culture (7.1% of their total spending), which is 4.4% less than in 2011, thus interrupting a positive pattern of ten-year growth. However, in such a context, one cannot fail to highlight that the drop in cultural demand of the Italians goes hand in hand with the drop in investments and offer. The last decade was characterised by a constant reduction in public commitment to culture: in ten years the budget of the Ministry for Cultural Heritage - which now is also in charge of tourism - reduced by almost one billion Euros and further cuts are outlined for the three years 2014-2016. The same trend is recorded both for the Municipalities, the last available accounts of which demonstrate that annual investment in cultural policies was cut by 11% between 2010 and 2011, also with reference to private investments and sponsorship.

At the international level Italy is last place in Europe for the percentage of public spending on culture (1.1%) and at the back with respect to the main competitors (sixth place after France, Germany, United Kingdom, Spain, Holland) for the financial resources allocated to culture.

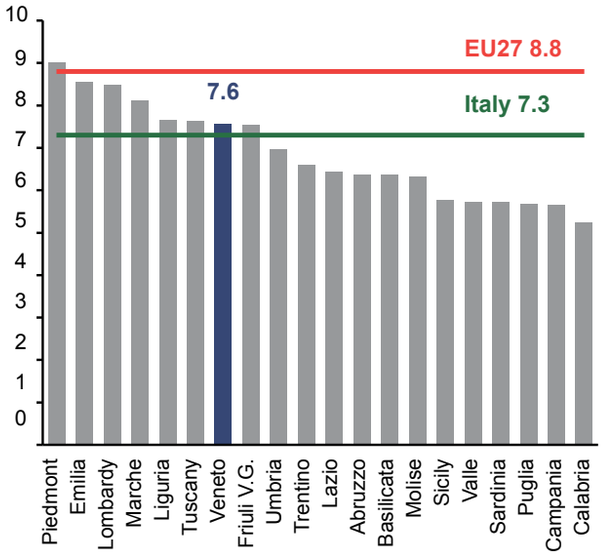
Fig. 8.1.4 - Percentage spending of households on recreation and culture (*) out of the total spending for final consumption. Veneto and Italy - Years 2001:2011



(*) The spending on recreation and culture includes spending on services provided by libraries, archives, museums and other cultural and sports activities and the spending on services supplied by cinemas, radio and television activities and other entertainment activities (discos, games rooms, fairs and fun parks), the cost of the services of gambling games (lotto, lottery, bingo, etc.)
Source: Processing by Veneto Region - Regional Statistical System on Istat data

[2] http://www.lastampa.it/2013/11/05/cultura/opinioni/editoriali/eppure-la-cultura-ci-pu-salvare-wQhIR6ef1gNyBIkZfRZimK/pagina.html
[3] According to the Coicop (*Classification of individual consumption by purpose*) the spending on recreational and cultural services include the services supplied by cinemas, radio and television activities and by other shows activities (discos, games rooms, fairs and fun parks), services supplied by libraries, archives, museums and other cultural and sports activities; finally the cost of the services of gambling games (lotto, lottery, bingo, etc.)

Fig. 8.1.5 - Percentage of household spending on recreation and culture (*) out of the total final consumption spending by region - Year 2011



(*) The spending on recreation and culture includes spending on services provided by libraries, archives, museums and other cultural and sports activities and the spending on services supplied by cinemas, radio and television activities and other entertainment activities (discos, games rooms, fairs and fun parks), the cost of the services of gambling games (lotto, lottery, bingo, etc.)
Source: Processing by Veneto Region - Regional Statistical System Section on Istat data

Moreover there is data that contradicts the perception that foreigners have of our culture, since Italy continues to rank first in the collective imagination of the whole world for aspects such as cultural wealth, gastronomy, fashion and natural beauty.

And the Veneto inhabitants? As regards the percentage spending of households on recreation and culture, over the decade 2001-2011 it always remained above the Italian figure and fluctuated between 7.5 and 8.2 with an average annual growth of 1.4%. In 2011, the last year for which data is available, it was 7.6%, a figure that is higher than the national average (7.3%) but still lower than the European one (8.8%).

8.2 The museum heritage

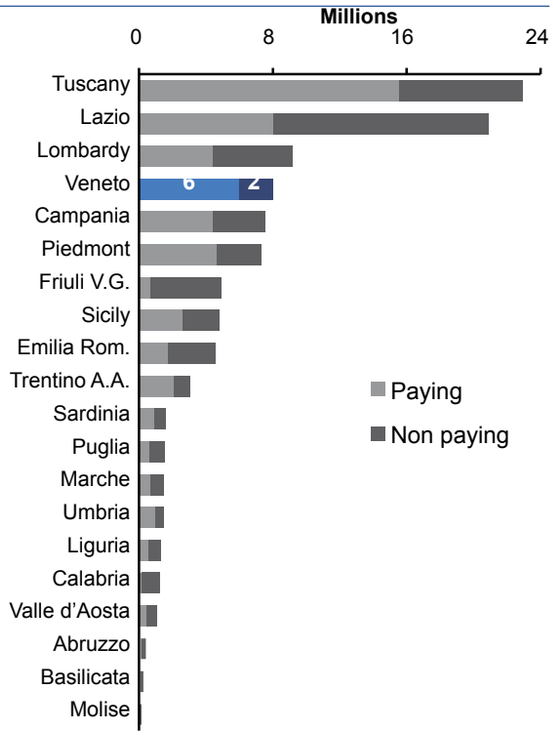
The wide range of museums available in Italy is certainly an extremely important part of the cultural heritage of our Country and should be suitably enhanced. In this regards Veneto plays an important role as it hosts a large part of this heritage. In 2013 the Regions, Istat and the Ministry for Cultural Heritage and Activities and Tourism jointly organized a census of the the museum and similar heritage. The census concerned all the museums and the other public and private museum-like exhibition venues (hereinafter referred to as institutes) which acquire, conserve, arrange and present to the public objects and/or collections of cultural and natural interest.

Tab. 8.2.1 - Offer and demand of museums and similar institutes by province Veneto and Italy – Year 2011

	Institutes open to the public		% of municipalities with at least one institute	Average number of visitors (*)	
	Total	of which museums		Paying	Not paying
Belluno	42	39	37.7	2,017	2,765
Padua	41	40	22.1	10,297	4,411
Rovigo	17	17	28.0	3,222	3,480
Treviso	38	35	24.2	2,965	6,448
Venice	57	52	45.5	67,818	9,129
Verona	45	41	27.6	29,429	8,140
Vicenza	62	57	28.9	4,271	9,753
Veneto	**302**	**281**	**28.9**	**20,559**	**6,975**
Italy	**4,588**	**3,847**	**28.3**	**12,393**	**11,061**

(*) The value is calculated net of the units that did not soecify the number of visitors (around 4% of the institutes)
Source: Processing by Veneto Region - Regional Statistical System Section on Istat and Veneto Region data

Fig. 8.2.1 - Number of paying and non-paying visitors of museums and similar institutes per region (*) - Year 2011



(*) The value is calculated net of the units that did not specify the number of visitors (around 4% of the institutes)
Source: Processing by Veneto Region - Regional Statistical System Section on Istat and Veneto Region data

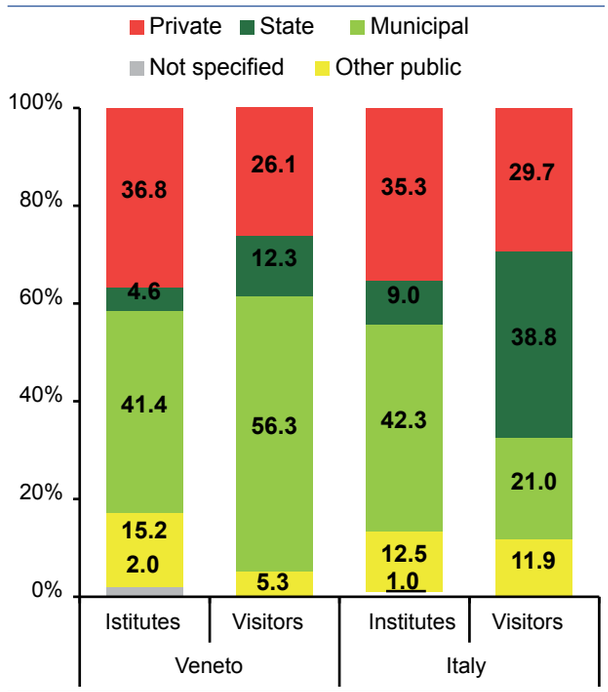
The density of these museum institutes in the area is considerable: in Veneto, as in Italy, almost one

Veneto: 4th region for number of visitors

municipality out of three hosts at least one structure and there are 1.6 museums for every 100 square kilometres.

Veneto predominantly offers museums in the strict sense of the term: the 302 units censed are in most cases museums, galleries or collections (281), with in addition 19 monumental complexes and two archaeological areas. Veneto ranks sixth place among the Italian regions for the overall number of institutes, but ranks fourth for the number of visitors, with almost 8 million visitors per year (out of whom paying visitors are around 6 million). Every Veneto site is visited on average by over 27 thousand people per year, out of whom around 20 thousand are paying and 7 thousand non paying. This data is very different from the Italian total of an average of 12 thousand paying visitors and 11 thousand non paying visitors.

Fig. 8.2.2 - % share of institutes and visitors by type of owner. Veneto and Italy - Year 2011



Source: Processing by Veneto Region - Regional Statistical System Section on Istat - Veneto Region data

In Veneto, as in Italy, most institutes are State-owned (over 60%); moreover, our region is characterised by the strong attractiveness of municipal institutes, which receive over half of the total number of visitors.

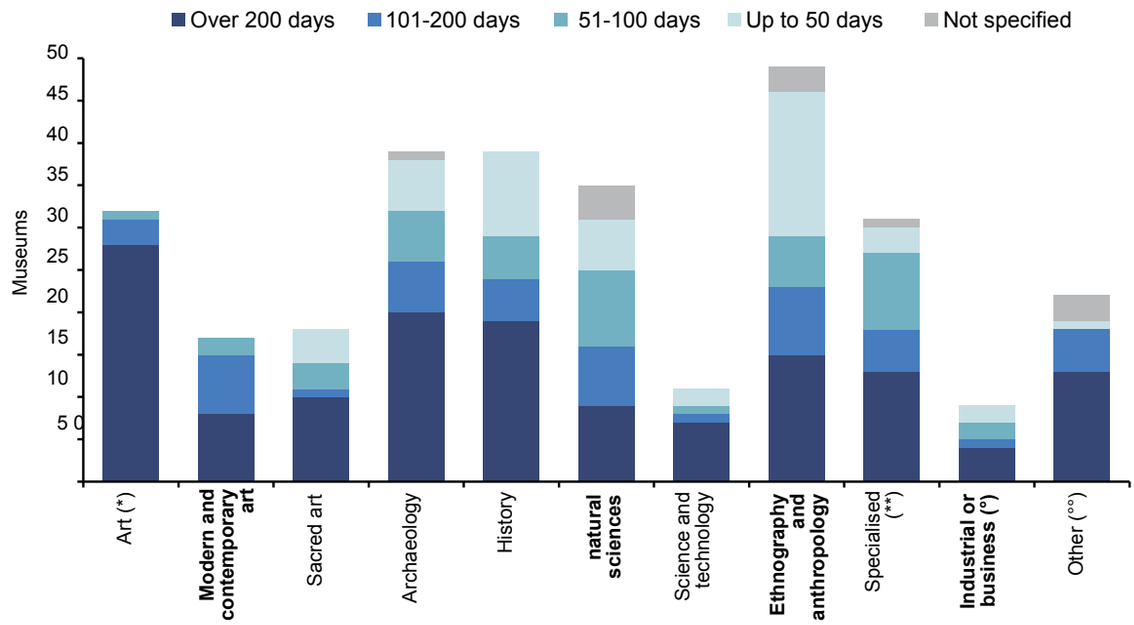
Characteristics and visitors

The Veneto museum heritage provides visitors with a wide range of possibilities. Among the art museums, which in total make up around a fifth of the institutes but attract over half of the visitors, those dedicated

Strong diversification of offer

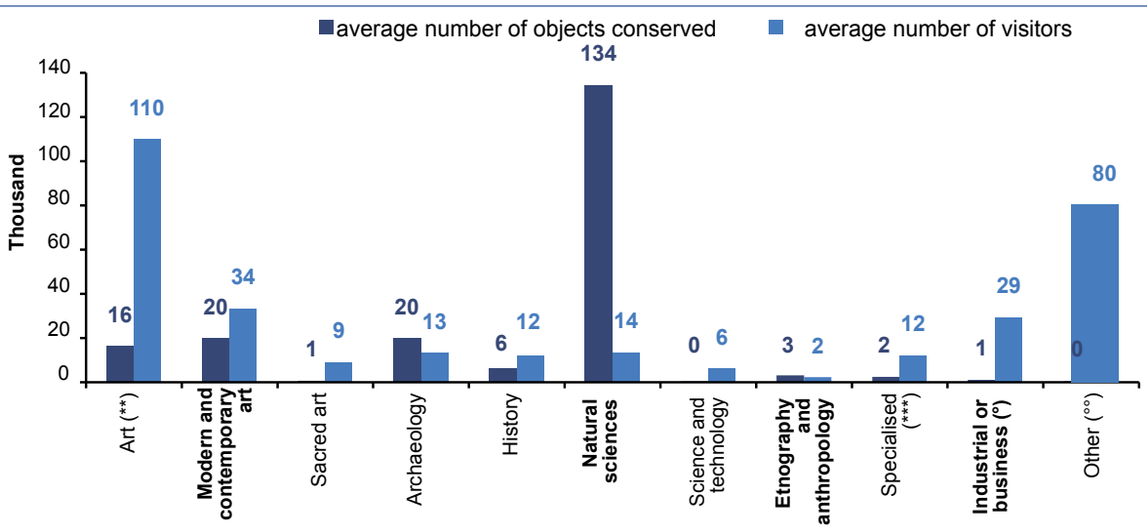
to the period from the Middles Ages to the 19th century stand out, with the highest number of visitors (on average 110 thousand per year) and an opening period that often cover the entire year. Museums of ethnography and anthropology are very widespread on both a regional and national level. The science and technology museums stand out for the high number of conserved objects, 134 thousand on average. The category "other" includes archaeological areas, monuments and monumental complexes, among which Arena amphitheatre and the house of Juliet in

Fig. 8.2.3 - Museum institutes by main type and number of opening days Veneto - Year 2011



(*) From Medieval art to the entire 19th century
(**) Collections with precise typological orientation such as the museums of unusual objects and curiosities as well as particular single-themed collections.
(°) Museum that conserves and diffuses the technique and art heritage, historical memory and testimonies to the identity of a business.
(°°) Archaeological areas, monuments and monumental complexes
Source: Processing by Veneto Region - Regional Statistical System Section on Istat - Veneto Region data

Fig. 8.2.4 - Average number of objects conserved and visitors by main type of the museum institute (*). Veneto - Year 2011



(*) Values calculated net of the units that have not specified the number of visitors (4%) or the number of objects conserved (9%)
(**) From Medieval art to the entire 19th century
(***) Collections with precise typological orientation, such as museums of unusual objects and of curiosities as well as particular single-themed collections.
(°) Museum that conserves and diffuses the technique and art heritage, historical memory and testimonies to the identity of a business.
(°°) Archaeological areas, monuments and monumental complexes
Source: Processing by Veneto Region - Regional Statistical System Section on Istat - Veneto Region data

Verona, the Scuola Grande di San Giovanni Evangelista in Venice, the Museum of the Military Memorial Cemetry of Cima Grappa and the National Museum of Villa Pisani in Stra, all sites that attract a very high number of visitors.

Ranking the institutes of Veneto based on the number of visitors, it is found that the first eight have welcomed over half of the total number of visitors. The other "Top 8" institutes of Veneto, besides the two aforementioned monuments of Verona, are the Doge's Palace, the Guggenheim Foundation, St Mark's Museum, the Academy Galleries and the Archaeological Museum in Venice and the Town Museum in Padua.

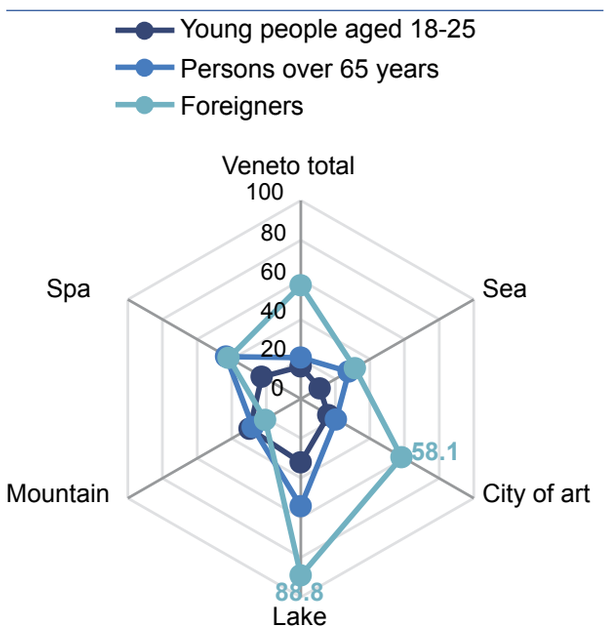
The Veneto population demonstrates to be very interested in the museum offer, so much so that around one third of residents aged over 6 visits a museum or institute during the year, against a national average of 25.9%. However, the international attractiveness of our museum institutes is very strong - 57.5% of visitors come from abroad - and is even stronger for the institutes situated in the renowned locations of Lake Garda (88.8%). However, the number of young visitors aged between 18 and 25 is low (16.6%), probably due to a still little developed relationship with ICT. Lots of institutes have websites (56.7%) and it is common practice to publish the calendar of the events online (42.8%), however, for example, only a few institutes offer free access to the internet via WiFi or make it possible to purchase tickets online (around 10%).

More foreigners in the museums of Lake Garda and more old people in the museums of the spa locations

Human and financial resources

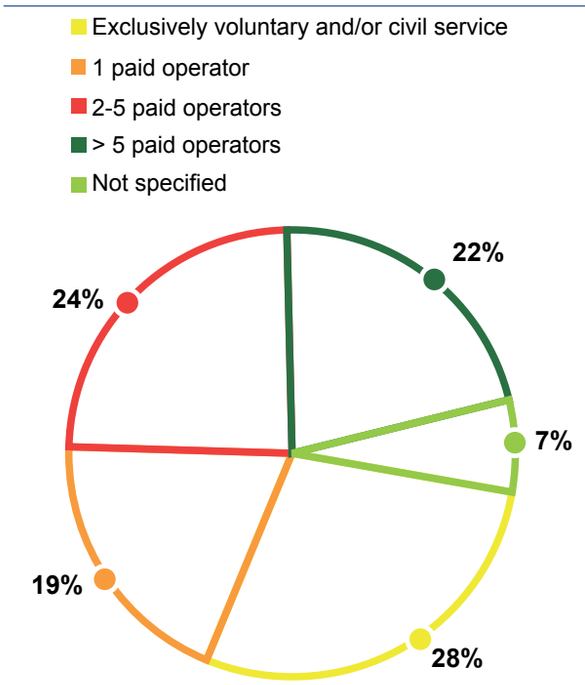
The operators working in the museum institutes of Veneto are 2886, with an average of around 10 per institute. This simple average is not enough to describe and represent the varied phenomenon of museum staff. In fact, a significant number of these operators are volunteers (1,455 people) and about fifty operators are from the national civil service. Therefore, considering only the paid work, the average number of employees per institute decreases to 3, plus 2 operators made available by businesses or external authorities.

Fig. 8.2.5 - Characteristics of visitors by location of the institutes (*). Veneto - Year 2011



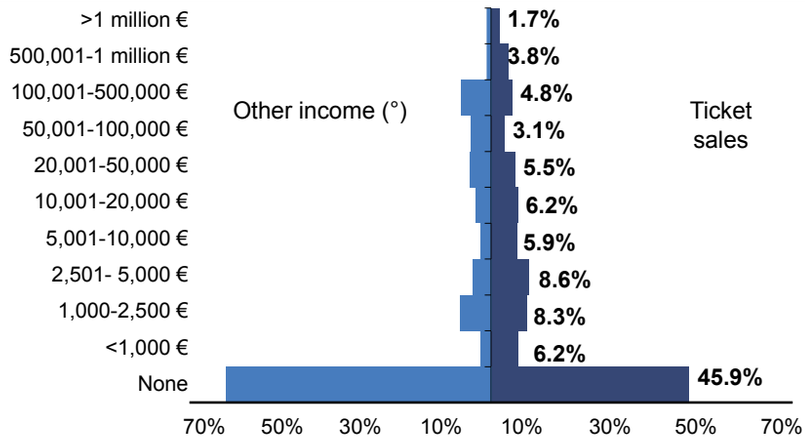
(*) Values calculated net of the units that did not specify the number of visitors by age group (13%)
Source: Processing by Veneto Region - Regional Statistical System Section on Istat - Veneto Region data

Fig. 8.2.6 - Museum institutes by number and type of operators. Veneto - Year 2011



Source: Processing by Veneto Region - Regional Statistical System Section on Istat - Veneto Region data

Fig. 8.2.7 - Percentage distribution of the museum institutes by income made and type of income (*). Veneto Year 2011



(*) 4% of institutes did not answer to the question on income from tickets
(°) Include public contributions and funding, private funding and other revenues
Source: Processing by Veneto Region - Regional Statistical System Section on Istat - Veneto Region data

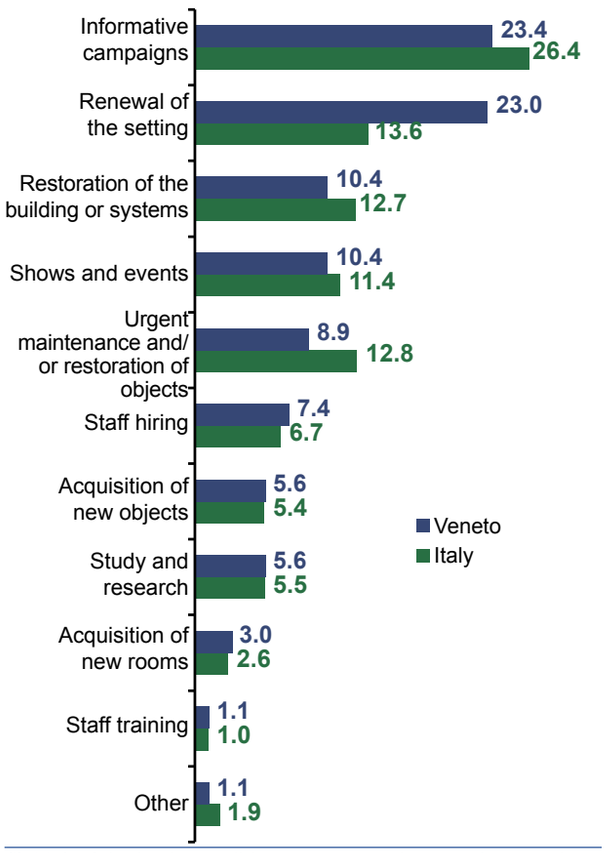
Around one third of Veneto institutions are supported exclusively by volunteer staff. The number ofinstitutes having paid staff, in-house or outsourced, is split equally between institutes with one operator only, with 2 to 5 operators and institues with more than 5 operators.

Museums open also thanks to volunteers

The staff's ability to interact with visitors is very similar to that found in the rest of Italy: in 45% of facilities you can receive information in English, in 21,9% in French, in 5,3% in Spanish, and as regards German, Veneto is the most German-speaking region of the Country (17,2% against a national average of 9,7%). The museum heritage is made up of worldwide famous institutes that in economic terms actually create added value, but it also includes several local realities that exist and are open to the public - often for free - only due to their love for culture. Entry is free of charge in over 40% of Veneto's museum institutes , in line with the national trend. Ticket prices are in the European average, but the number of free entries is so high that it impacts on ticket sales proceeds so much so that for a third of the institutes, ticket sales proceeds in not higher than 20,000 Euros; the other types of their income are also quite low.

A world of free entry museums

Fig. 8.2.8 - The areas of intervention/investment deemed prioritary (*). Veneto and Italy - Year 2011



(*) 11% of the institutes did not answer to the questions on the areas of intervention
Source: Processing by Veneto Region - Regional Statistical System Section on Istat data

If they could increase their spending budget by 10%, around one quarter of the institutes would invest this

The significance of communication and renovation

10% in information and communication campaigns as a priority in order to raise awareness and increase the number of visitors; another quarter would spend it on the renewal of the setting and then, gradually, on other interventions considered essential, down to the tail end, which is staff training.

Museums open to the local area

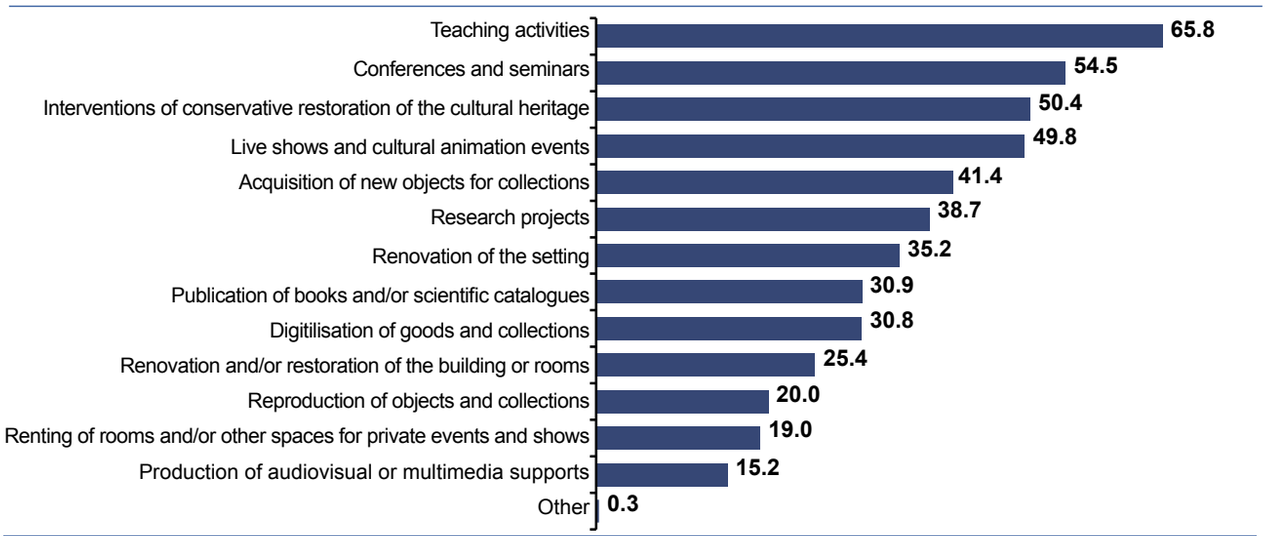
The relationships of the museum institutes with the other local subjects are created and mantained via multiple instruments and strategies. Joining in networks, sharing human, technological and financial resources and the possibility to make use of shared services is essential also for museums, in particular for the small ones and in this period of shortages such as this one.

In this regard, the adhesion to organised museum systems, despite this still being a practice limited to less than a half of the Veneto organisations (46%), can

A wide range of interactions

be defined as an increasingly widespread trend (the number of organisations involved in 2006 was 37%). Today the participation in networks is particularly high for public institutes (58.9%) and reaches 100% for ministerial facilities while among private institutes it is limited to a quarter of the subjects. Slightly diffused than the networking system is the tendency to collaborate with other cultural institutions (56.7%) for example with libraries, universities, cultural centres, etc. The museums are confirmed as essential cultural access doors for their area. In fact in 69.5% of cases they provide information material on cultural offers of the local area (musical and performing arts events, festivals, conventions, food fairs, etc.) Moreover 68.5% of museums are inserted in tourism and cultural routes. These are themed itineraries organised, equipped and also of interest for naturalistic reasosns as well as for their landscape, food and wine offer, folklore and religion, such as for example the "Wine Routes" and the "Po River Delta" intineraries.

Fig. 8.2.9 - Percentage of museum institutes that have carried out cultural and scientific acitivties (*). Veneto - Year 2011



(*) 10 % of the institutes did not answer the question of the activities performed
Source: Processing by Veneto Region - Regional Statistical System Section on Istat - Veneto Region data

The aims of education and study, related to the role of the museums, are also achieved via many cultural and scientific activities that, if well managed, are able

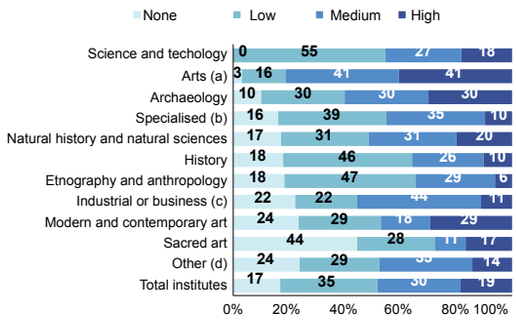
Training and recreational activities

to support the growth of human capital in addition to producing direct and indirect effects on employment and the economy. In this regards Veneto is very active, with 65.8% of the museum institutes undertaking teaching activities and 54.5% organising conferences and seminars.

THE MUSEUMS INVEST IN THE FUTURE

THE TYPES MOST ATTENTIVE TO YOUNG PEOPLE

% of museum institutes by type and level of attention to young people (*) Year 2011



(*) Attention shown via the application of reduced prices, the provision of specific services, the creation of communication campaigns or promotion aimed at children, young people and students

(a) From Medieval art to the entire 19th century

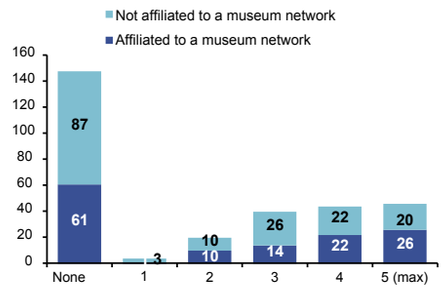
(b) Collections with precise typological orientation, such as museums of unusual objects and curiosities as well as particular single-themed collections

(c) Museum that conserves and diffuses the technique and art heritage, the historical memory and testimonies to the identity of a business

(d) Archaeological areas, monuments and monumental complexes

HALF OF MUSEUMS ADOPT PRICING POLICIES

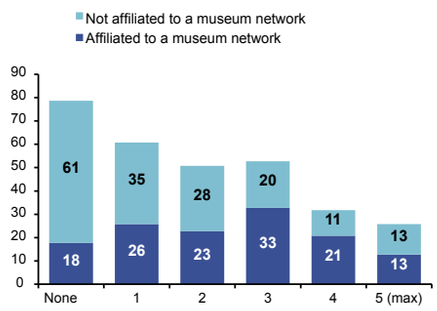
Institutes by number of young users categories to which reduced prices areapplied (*) and affiliation to a museum network. Veneto - Year 2011



(*) The categories are: children aged up to 11 years, children aged 12 - 17, young people aged 18 - 25, individual students, school groups

THE INSTITUTES BELONGING TO MUSEUM NETWORKS ... PROVIDE MORE SERVICES AIMED AT THE YOUNG PEOPLE

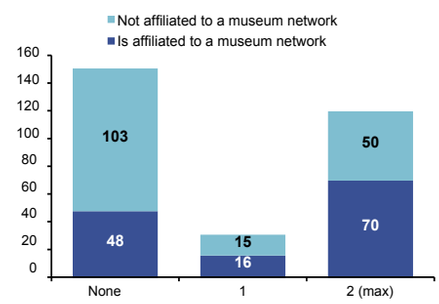
Institutes by number of service and of activity aimed at the young people (*) and affiliation to a museum network. Veneto - Year 2011



(*) The services and activities in question are: workshops for teaching,
study or research activities; informative routes and informative materials dedicated to the children, entertainment for children (games, etc.), teaching activities (courses, workshops, educational projects); live shows and cultural animation events

… AND CARRY OUT MORE PROMOTIONAL CAMPAIGNS AIMED AT YOUNG PEOPLE

Institute by number of promotional activities aimed at young people (*) and affiliation to a museum network Veneto - Year 2011



(*) The promotional activities concern guided visits, themes, courses, educational workshops and shows for children and students

Source: Processing by Veneto Region - Regional Statistical System Section on Istat - Veneto Region data

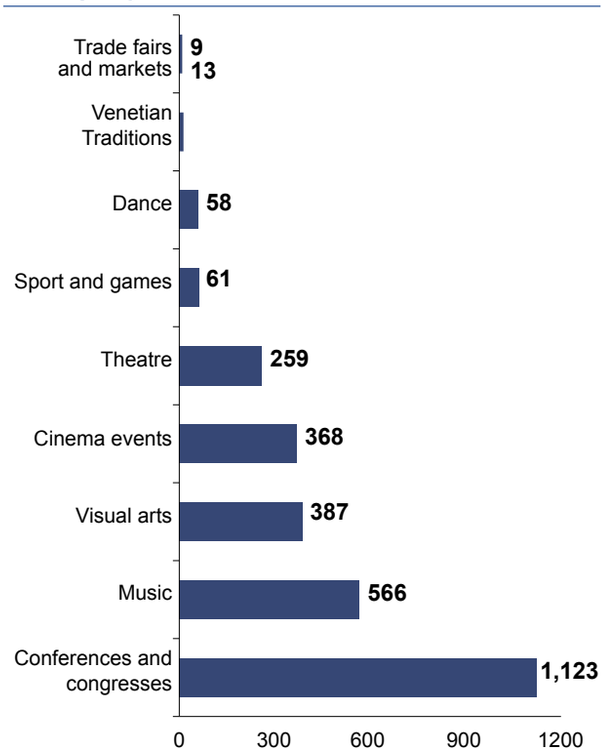
In 2011 half of the museum institutes also organised live shows and cultural entertainment events, and the same number demonstrated an attention to the restoration and conservation of the objects they conserve and display. Around one third undertook research projects and published books or scientific catalogues.

8.3 Temporary events

In addition to the permanent cultural and museum structure there is the vast sea of the so-called "temporary events" or events of short duration (shows, exhibitions, conferences, dance and theatre shows, concerts, etc.) a phenomenon of no small significance above all in the large municipalities such as the capitals. An example among the many ones is Venice, where a highly varied cultural proposal, varied and built around different subjects, manages to attract all types of people: tourists, city users, students and residents.

In ten years of monitoring[4], the phenomenon of temporary events has shown constant growth:

Fig. 8.3.1 - Temporary events and days by type Municipality of Venice. Year 2012



Source: Processing by Veneto Region - Regional Statistical System Section on AgendaVenezia data

in 2004 there were around 1500 events, 9200 days and 90 organisers. In 2012, 2844 events were carried out in the city over 18,974 days (with an average of 52 events every day), which involved 315 organisers and 316 places spread over the city. The sector of visual arts is the one with the greatest number of events: 387 exhibitions spread over 14,928 days, equal to 13.6% of the events and 78.7% of the days[5]. With regard to the other types, it is observed that 19.9% of events concern music, 11.1% theatre and dance, 12.9% cinema, 39.5% conferences and seminars, while the Venetian traditions, Sports and games, Trade fairs and market sectors amount to 2.9%.

In order to measure the intensity of numerical growth of the events over the last years, an index number can be calculated by giving the data on the year 2003 the value of 100. In 2012 the index for the total of organised events reaches a value of 190, highlighting continual growth of this sector of the Venetian economy over the last decade.

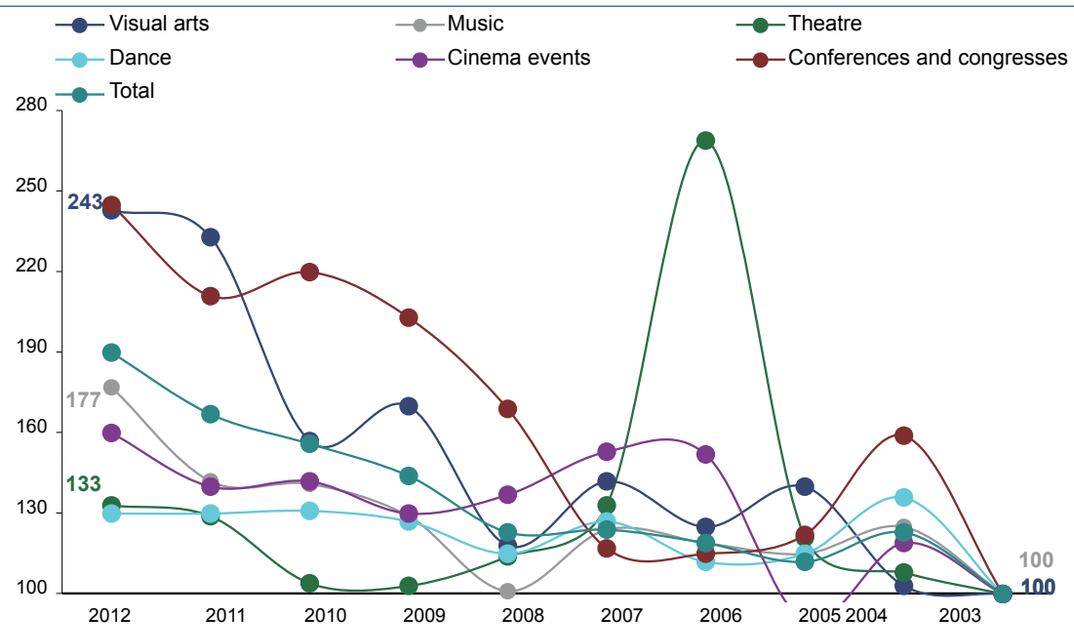
The temporary exhibitions

Exhibitions represent the majority of temporary events not only in Veneto and Venice but all over the Italian peninsula. To try to define the extent of the phenomenon, we should consider that out of the overall number of exhibitions set up for non-commercial purposes in Italy in 2009, 2011 and 2012 at public and private facilities, 9419 were organised in 2009, in 1548 different urban centres and 3876 different exhibition sites, and 8460 exhibitions were set up in 2012, in 1136 urban centres and 3653 sites[6]. These figures are really surprising, especially if considered in the light of the considerable reduction in funding granted to museums, libraries, archives, etc. This situation has led to coin the neologism "mostramania" (exhibition mania)[7]. Only just less than one third of these exhibitions is hosted at museum facilities, with "museum facilities" meaning museums that host permanent exhibitions but also have space for temporary exhibitions. Another important amount of events equal to 27.3% is set up at exhibition venues used only for temporary events (historical houses, castles, churches, convents, monasteries, etc.).

In 58% of cases these exhibitions are dedicated to contemporary art, in 13% to photography. The rest are documentary exhibitions, shows of illustration/graphics,

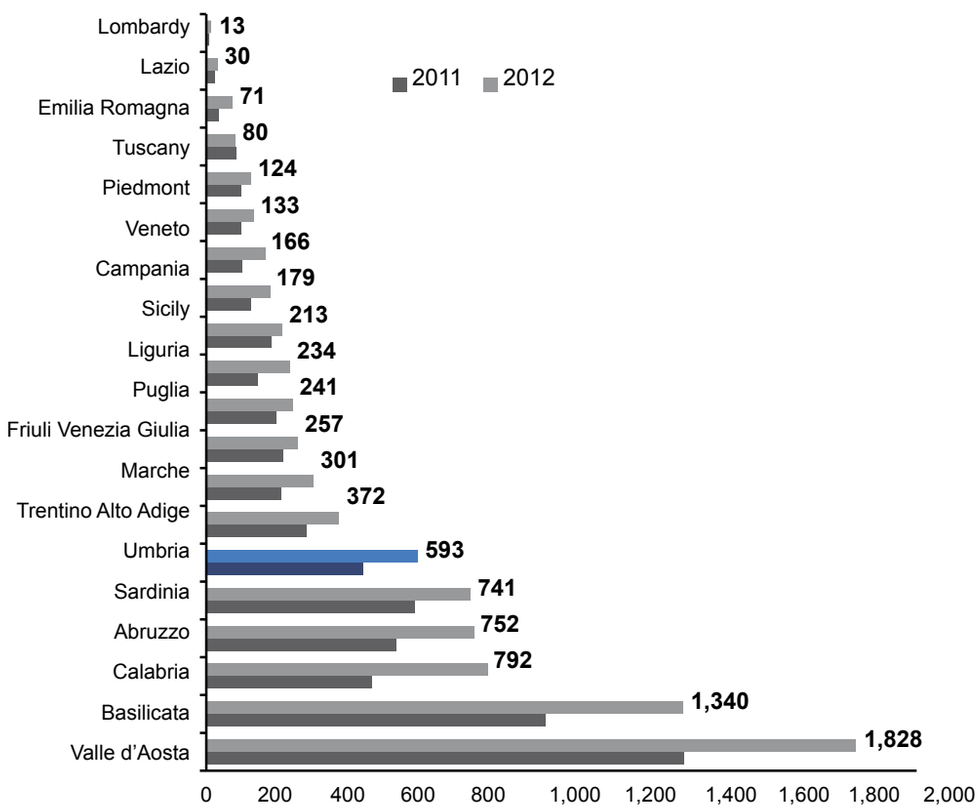
[4] Data from AgendaVenezia.org
[5] In 2012 the Biennale di Architettura was carried out which, in comparison to the Biennale d'Arte of 2011, takes up fewer event days. Nevertheless, visual arts exhibitions continue to grow.
[6] Survey carried out by Fondazione di Venezia using two different databases: Allemandi and PressRelease by UnDo.Net.
[7] Fondazione di Venezia, "Le mostre al tempo della crisi. Il sistema espositivo italiano negli anni 2011-2012", edited by Fabio Achilli, Venice, March 2014.

Fig. 8.3.2 - Temporary events by type: index number (2003=100) - Municipality of Venice. Years 2003:2012



Source: Processing by Veneto Region- Regional Statistical System Section on AgendaVenezia data

Fig. 8.3.3 - Temporary exhibtions by region - Years 2011:2012



Source: Processing by Veneto Region- Directorate of Regional Statistical System on Fondazione di Venezia data

design/fashion, ancient and modern art. In the last positions of this ranking are exhibitions dedicated to scientific themes, architecture, archaeology and ethnic art. The good news is that nine exhibitions out of ten are free entry.

Looking at the geographical distribution of these events, the clear prevalence of the northern regions is noted: the total of events in the North was higher than the total of those set up in the Centre, South and islands. The regions with a greater tourism vocation and/or having a large urban/metropolitan reference centre are first in the ranking. In 2012 Veneto was the sixth region by number of events organised, and together with the first five regions (Lombardy, Lazio, Emilia Romagna, Tuscany and Piedmont) hosted 71.5% of the national exhibitions.

In particular, 130 Veneto museums (equal to 43%) set up temporary exhibitions: 341 events for a total of 2,950,242 visitors.

The regions characterised by greater tourism flows also seem to be those where the free exhibition access policy is less diffused. The average national data shows that 82.5% of the temporary exhibitions can be accessed for free and the remaining 17.5% require an entry fee, and the analysis shows significant differences at the regional level . In particular, with the exception of Lombardy and Emilia Romagna, the regions that mostly apply the paid entry policy are those ranking first to tenth place for the number of tourist arrivals. Veneto (25.4% of events are paying), Tuscany (25.2%) and Liguria (22.3%) stand out among these.

8.4 Patronage and heritage marketing

As said above, over the years private sponsors and investments in the culture sector, i.e. patronage, are decreasing. The most classic form is that of a business making investments to support third party cultural activities.

Since Veneto is an area characterised by an important and widespread entrepreneurial fabric and at the same time by a considerable cultural vocation, a pilot project was set up to take a census of the cultural patronage activities carried out by local businesses[8]. The first survey collected data from a significant sample of 263 businesse and revealed that patronage is is a widespread phaenomenon that involves businesses of all sizes and the entire region, not being a prerogative of the major companies.

Patronage in Veneto is perhaps more widespread that could be imagined

The capacity of interaction of the businesses with the socio-cultural system is high.

Among the businesses surveyed, 77% have invested in one or more areas relating to culture and its enhancement, and 70% of the cases involve small- and medium-sized businesses.

The interventions relate to all the areas according to a rather balanced distribution: Design/multimedia products 13%, theatre, Television and radio shows (14%), Editorial products (20%), Events linked to local or religious traditions (18%), Technical sponsoring (18%), Other (17%) and have the collectivity as the main addressee (37%).

The size of investments varies considerably in relation to the initiatives and the size of the business involved: small size investments are prevalent but there is no lack of large size investments, even continual over time.

80% of the businesses are satisfied by the investment and only 24% declare an economic return level ranging from "high" to "very high", whereas the majority of businesses (31%) place themselves at the "average" level: this could mean that the activities carried out are expressions of that "true" patronage required by the area rather than "investments" linked to precise business strategies. However, another form of investment in cultural activities is developing and has as its point of departure a reflection on the positive effect that enhancement of the historical-cultural heritage of the business (museums, archives, production traditions, historical machinery, etc.) can have in supporting the manufacturing activity that is the source of this heritage and in keeping it alive. This enhancement can certainly lead to positive relapses of the image of the business and also to its productions, thus combining business results with benefits for the local area and community. We are referring to the so-called "heritage marketing", which is a form of marketing aiming to communicate new content by revisiting the traditions of businesses.

A new form of investment in cultural activities by businesses

[8] From “Il mecenatismo d'impresa nel Veneto. Censimento delle iniziative", in the framework of the Project Industria e/è Cultura (Memorandum of understanding between the Veneto Region and Confindustria Veneto).

The heritage tools include: the institution of historical archives and business museums; communication initiatives such as events celebrating the heritage; economic initiatives like heritage merchandising and the reproduction of new products. The value of these tools is mainly that of being unique and allowing the business to stand out from its competitors on the market. In addition, there is the image return ensured by this type of events; demonstrating to stakeholders and competitors that it has a solid history and takes care of it, the business builds loyalty and increases the confidence of consumers, investors and collaborators, since it appears as a financial party "you can rely on".

Heritage marketing in turn pushes the development of the so-called industrial tourism, which already boasts large numbers in France, Spain and Germany and has all the characteristics to play an important part in the tourism sector of an area characterised by a strongly rooted and widespread entrepreneurial fabric as Veneto is.

But what does industrial tourism mean?

The opening of museums, historical archives of small, medium and large sized businesses that contributed to the entrepreneurial history of Italy. Therefore, industrial tourism in the strict sense means enhancement of the businesses' historical heritage. In a broader sense, industrial tourism also includes actual paths for discovering what businesses do today. These are enterprises of yesterday and today that open their doors and make their know-how, their essence, their product and their history available to the tourist and visitor.

From this new awareness acquired by the businesses, the first initiatives were created, even in Veneto.

The project "Fabbriche aperte" (open factories), for example, is in its fifth edition this year. It was born from the appreciation of the great significance of the manufacturing activity in the local area, the excellent skills of its workers as well as the professionalism and creativity of the entrepreneurs, mainly in small- and medium-sized enterprises. The whole world is interested in Veneto's know-how, and it can also raise the tourists' interest, particularly of those arriving from emerging Countries. "Fabbriche aperte" offers all enthusiasts the chance to visit industrial archaeological spaces, business museums, manufacturing and service businesses, industrial districts, industrial villages and company outlet stores, plunging into the history of the local area and discovering the more vital side.

In July 2013 the Project "DOC - Di Origine Culturale" (DOC: of cultural origin)" also took off, with a scattered museum of Veneto production culture supported by the Veneto Region, Federturismo Veneto and Confindustria Veneto: a network between companies that have chosen to invest in culture and in their production history as a strategic instrument for their development. Those who participate in the project tell the story of the business and its protagonists, via the conservation and enhancement of documents, iconographic materials, objects, products and machinery.

The official Istat-Mibac data show that the nine Veneto industrial museums received 264,512 visitors in 2011.

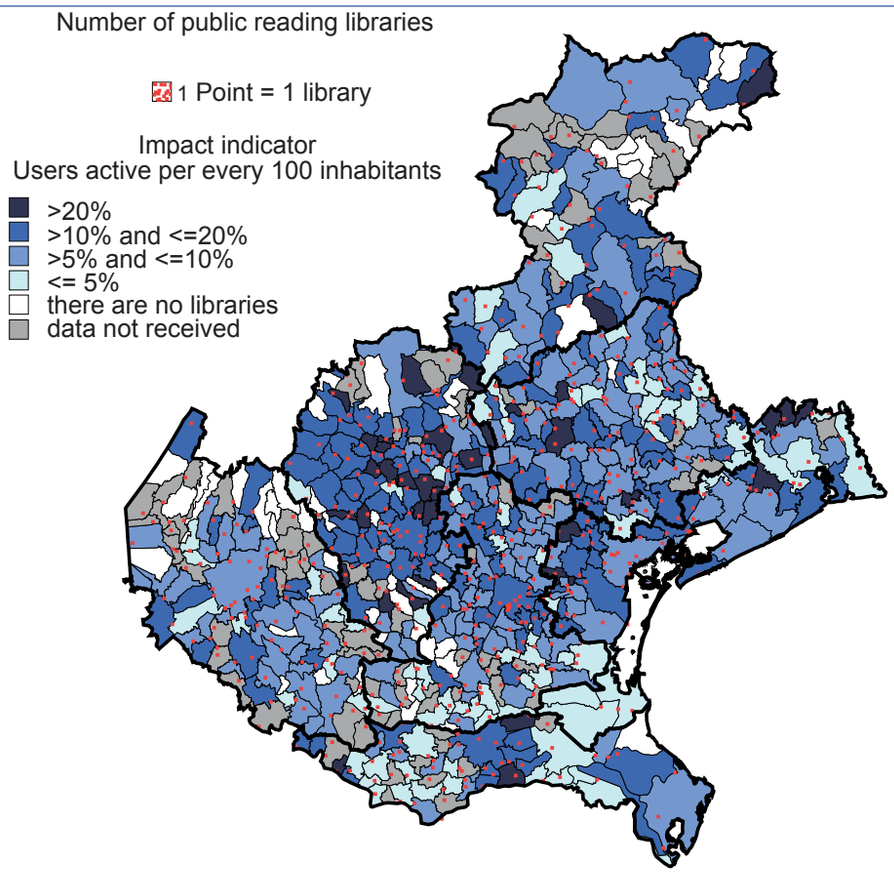
8.5 Public reading libraries

The public reading library, by vocation strictly linked to the cultural needs of people, is in continual evolution to best satisfy the ever-changing informative requirements of today's society. This analysis attention aims to focus attention on the role assumed by this widely diffused type of library in the promotion of cultural and reading activities, which are essential to the growth of individuals and the society.

The term "public reading library" (biblioteca di pubblica lettura, BPL in Italian) refers to libraries that perform for all citizens a free lending service of their book and document collections and collect and store publications produced locally. In the most cases, the public reading library belongs to the municipality and also offers a place where to find valuable information on a wide range of topics with the guarantee of a staff who is able to provide invaluable assistance. The Veneto Region, with the "Project of Measurement and Evaluation (PMV)"[9], since 2006 has monitored the functioning of its 589[10] public reading libraries, mostly located in Vicenza (115), Padua (109) and Treviso (99), via a rigorous collection of data.

[9] http://www.regione.veneto.it/web/cultura/pmv
[10] Data on the presence of public reading libraries in the PMV database as of 13.11.2013.

Fig. 8.5.1 - Diffusion and impact factor (*) of the public reading libraries. Veneto - Year 2012



(*) Impact indicator = (users who borrowed at list one book over the course of a year / average population) x 100
Fonte: Processing by Veneto Region - Regional Statistical Section System on data from Veneto Region - Cultural Heritage Section

Tab. 8.5.1 - Offer and demand of the public reading libraries Veneto - Year 2012

Province	Offer		Demand in the municipalities which have libraries			
	Libraries as of 2013-11-13	% municipalities with a library	Average no. of visits per library	Lending index di frequentazione (*)	Lending index di impatto (**)	Lending index di prestito (°)
Belluno	58	84	3,488	1.0	10.5	1.0
Padua	109	94	12,124	1.3	10.8	1.2
Rovigo	53	98	5,644	1.0	11.0	0.8
Treviso	99	99	15,087	1.7	10.2	1.1
Venice	61	100	28,273	2.0	10.0	0.8
Verona	94	84	21,249	1.5	9.7	1.3
Vicenza	115	88	22,387	2.6	16.5	2.5
Veneto	**589**	**91**	**17,022**	**1.8**	**11.4**	**1.3**

(*) Expresses the number of visits per inhabitant and verifies the attractiveness that the library holds with the citizens
(**) Expresses the number of active users per 100 inhabitants and reveals the ability of attraction of the library with respect to the potential users
(°) Expresses the number of loans per inhabitant and assesses the effectiveness of the library and the ability of its collections to respond to the users''demand.
Source: Processing by Veneto Region - Cultural Heritage Section on Veneto Region data

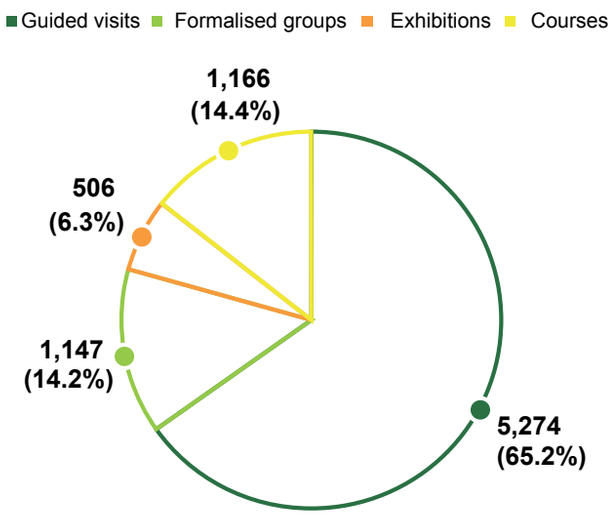
In 2011, the Region also promoted a Census[11] of these libraries, with a dual aim of updating the only census performed until then - twenty years before on the initiative of the Ministry - and checking the correctness of some methodological choices adopted in the PMV project. The counting of other types of library (conservation, special, etc.) is still underway. In 2012 all over Veneto the public reading libraries made available to the public

9,781,679 documents consisting of books and pamphlets, audiovisual and multimedia materials (2 for each inhabitant), and recorded 5,719,465 visits, a number equal to an average of around 17 thousand visits per library.

Breeding ground of meetings and proposals

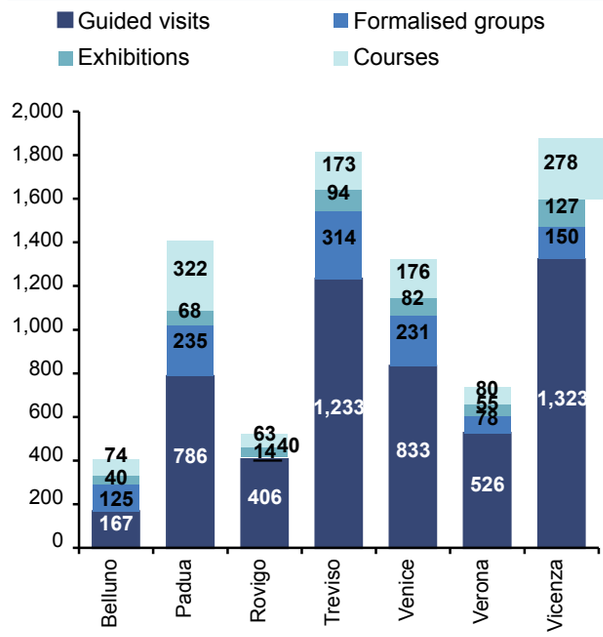
It is a commonly held belief that libraries are dusty places where nothing ever changes. The data collected by the Project of Measuring and Evaluation and referring to public reading libraries all over the region suggest the exact opposite. In fact libraries not only offer services, loans and advice, but also dynamic places that propose and host courses and exhibitions; they are the meeting places of the citizens associations, organise guided visits to discover their services and collections, in particular for schools, with the dual aim of advertising themselves and promoting culture.

Fig. 8.5.2 - The activities of the public reading libraries. Veneto - Year 2012



Source: Processing by Veneto Region - Regional Statistical System section on data from Veneto Region - Cultural Heritage Section

Fig. 8.5.3 - Meetings and proposals in the public reading libraries per province. Veneto - Year 2012



Source: Processing by Veneto Region - Regional Statistical System Section on data from Veneto Region - Cultural Heritage Section

Between 2011 and 2012 the organisation of courses and exhibitions increased respectively by 10.7% and 2.4%. The first are more frequent and in considerable growth in Padua, the second in Vicenza. The meetings of recognised recognised groups or associations ("formalised groups") and guided visits are also increasing and, if the groups are a characteristic of the offer of Treviso, guided visits are the distinguishing feature of the libraries of both Treviso and Vicenza.

Tab. 8.5.2 - 2012/2011 % variation of the activities of the public reading library per province. Veneto - Year 2012

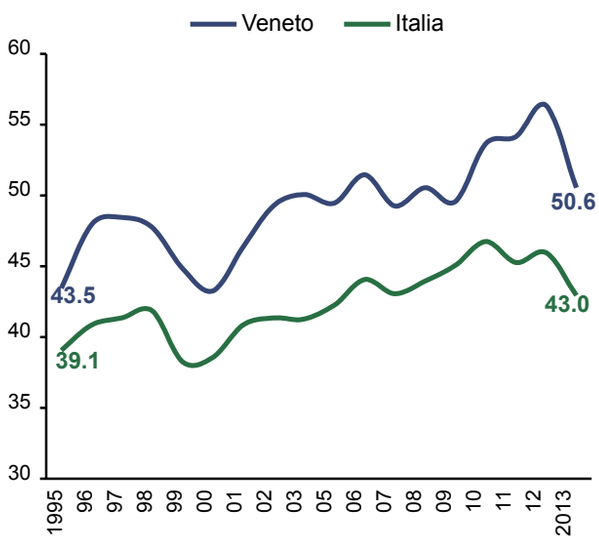
Provinces	Courses	Exhibitions	Formalised groups	Guided visits
Belluno	-8.6	14.3	60.3	-2.9
Padua	26.3	-13.9	3.5	11.5
Rovigo	46.5	11.1	-51.7	10.6
Treviso	-1.7	-6.9	18.5	9.8
Venice	-3.8	-10.9	0.9	13.3
Verona	63.3	22.2	81.4	-11.3
Vicenza	4.5	19.8	12.8	11.5
Veneto	**10.7**	**2.4**	**14.2**	**8.0**

Source: Processing by Regione Veneto - Regional Statistical System Section on data from Veneto Region - Cultural Heritage Section

[11] http://www.regione.veneto.it/web/cultura/censimento-delle-biblioteche-venete

Overall, citizens were proposed 7,433 activities in 2011 and 8,093 in 2012 with an increase of around 9% over the two years. The decision of organising this type of initiatives is explained also by the fact that the libraries, consistently with their aim of addressing all citizens in an indistinct manner and becoming places of social aggregation for the community, propose the most varied occasions of meetings and cultural training.

Fig. 8.5.4 - People aged 6 and above that have read at least one book per year (per 100 people with the same characteristics). Veneto and Italy - Years 1995:2013



Source: Processing by Veneto Region - Regional Statistical System Section on Istat data

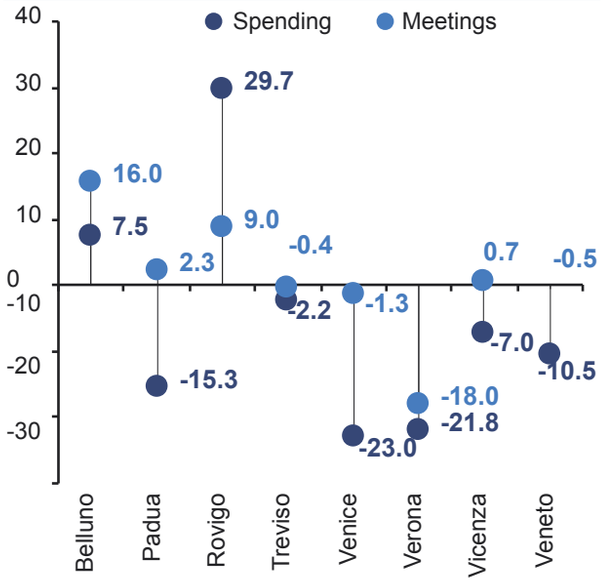
In an offer so rich and varied the first cases of e-book loans and services for disadvantaged readers (partially sighted, blind, people with hearing or walking impairment) also appear: the most common are large print books (14.5% of libraries at the 2011 census) and audio books (11.7%), whereas the spoken book service is offered by 4.7% of libraries. Therefore, it can be concluded that libraries, despite the cuts and thanks to the enthusiasm and ingenuity of the librarians, are lively and propose a rich offer, thus being fertile ground for their residents' education.

The promotion of reading

One of the main tasks of the libraries is the promotion of reading, i.e. of those activities useful for spreading the culture of reading, which is an essential tool for growth for residents of all ages. In Veneto, people reading at least one book a year in their free time shows an upward trend and in 2013 amounts to 50.6% of the population (compared to 43% at a national level). Among the readers of books around 42% have read from one to three while only 16.2% have read at least one a month. Considering the fundamental role played by reading in the updating of knowledge of the individual and in the improvement of their social interactions, the importance of promotional activities performed by the libraries is essential. The number of activities/meetings aimed at promoting reading - therefore addressed to organised groups such as school classes, associations, etc., but also accessible by anyone interested - has remained stable over the last two years (-0.5%) and in 2012 was equal to 7,194. Belluno and Rovigo record an increase: by 16% the former and by 9% the latter. This data is particularly interesting when considering that the spending capacity of the libraries for the organisation of these activities is decreasing: it went from over one million Euros in 2011 to around 900 thousand Euros in 2012, with a shrinking of 10.5% compared to the previous year. Therefore the libraries, although undervalued, and hassled by gradual financial cuts and in difficulty from an organisational point of view, nevertheless demonstrate the ability to offer stimuli that are new, original and in step with technology. They are therefore a service to rediscover, support and reevaluate to improve the life of the citizen within the community. The Veneto Region is also active in the promotion of reading[12], in particular through its support to the "Veneto lettura" (Veneto reading) project. This activity also included the production of an advertisement on the importance of reading and on the functions performed by Veneto libraries as well as the creation of a website[13] aimed at becoming an important information tool for the residents. This website publicizes the local reading promotion activities and the activities of reading groups, voluntary and professional readers operating in Veneto. The reading promotion activities also include a project for the children, "Nati per leggere -NPL" (born to read), also promoted, inter alia, by the Italian Library Association (AIB), which highlights the importance of reading activities even for children aged from 6 months to 6 years. The Region, in

[12] http://www.regione.veneto.it/web/cultura/la-promozione-della-lettura
[13] www.venetolettura.it

Fig. 8.5.5 - Spending for promotion of reading by the libraries and number of meetings per province. Veneto - 2012/11 % variation



Source: Processing by Veneto Region - Regional Statistical System on data from Veneto Region - Cultural Heritage Section

agreement with the Veneto Section of the Italian Library Association, has carried out a survey this year on the public reading libraries taking part in the project.

The questionnaire, agreed with AIB and referring to the activity carried out in 2012, was administered to all the libraries taking part in the project, i.e. to 164 facilities, equal to almost 28% of the public reading libraries of Veneto, covering 130 municipalities 43% of which are above 10,000 inhabitants).

The analysis carried out shows that in the framewotk of the NPL project the libraries organised both activities for children and awareness-raising meetings addresses to the adults. Among the activities for children, 58% of the libraries proposed from 1 to 10 activities over the year (in particular library visits and animated readings), in most cases with the participation of over 100 children per library. Among the activities proposed, less widespread but interesting nonetheless, are the meetings with authors or illustrators, workshops, book donation days for newborn babies, parties with special entertainment activities, presentation of books made by children. The same activities and more besides have also has the result of raising awareness about the project, mainly among teachers, educators and voluntary readers. More rare, even if much sought-after, is the collaboration with pediatricians, who, like others, may participate in the project on a voluntary basis.

The trend of the libraries for combining with each other in networks also emerged in this project: many declared they were collaborating with other libraries as well as health, school and education facilities to better promote the "Nati per leggere" project.

The high value of the project, which favours a harmonious and balanced growth in the child and above all a love for books and reading, is recognised by an increasing number of libraries, as shown by the increase in the number of adhesion to the project over the course of 2013 (+6%).

8.6 Can the value of a priceless heritage be calculated?

Over recent years interest has been growing in the economic aspect of culture and its importance for the development of local production activities.

This paragraph aims to quantify some aspects of the economic value of culture such as the added value produced, the export activated, the revenues from shows and events and spending on cultural tourism.

Our analyses are presented herein, sometimes alongside those performed by other reliable sources to provide a comparison parameter and to try and put a bit of order in this wide sea. In fact, on the one hand the economic data on the economic value of culture is ever more the subject of study and research, but on the other hand this data often comes from different sources and the methods for its processing are not uniform and shared yet.

The economic impact of culture

Culture is no longer seen as just a fundamental social and educational service for citizens aimed at improving their well-being and quality of life, at understanding of diversities and social cohesion of the community, but is now also considered as being a driver able to help overcoming this persisting recession.

Literature[14] is teaching us that culture, intended in its complexity as the ensamble of the arts and artistic events and also of cultural production activities, has a number of positive effects at a local level.

[14] Throsby, 1999, Koboldt C. (1997) "Optimizing the Use of Cultural heritage in Economic Perspectives" in Hutter M. and Rizzo I. (1997), Economic Perspectives on Cultural Heritage, London, European Commission (2000) and (1996), Unesco (2000), Cernea, M.M. (2001), "At the Cutting Edge: Cultural Patrimony Protection through Development Projects", in Historic Cities and Sacred Sites. Cultural Roots for Urban Futures (on behalf of I. Sarageldin, E. Shluger and J.Martin-Brown), Washington, D.C., The World Bank, pp. 67-88, Michele Trimarchi. University of Catanzaro "Magna Graecia" - Department of Public Organisation

The following can be considered as the positive effects potentially linked to culture: the growth of income and life standards via improvement of the local economy, quantitative growth of jobs and improvement of employment conditions, increase in investments, local development, urban renewal and development and improvement of infrastructures, increase in tax revenue and in purchasing power at a retailing level, and development of tourism attractiveness. Obviously the relationship between the different effects is not unambiguous, which makes their monetary quantification difficult. In this paragraph we will therefore try to estimate the wealth produced by culture in Veneto. Ours is a two-staged simplified estimate: identification and delimitation of the cultural production system composed of businesses as well as public and not-for-profit institutions, and estimation of the added value it produces and of its employment ability, based on regional accounting data.

According to David Throsby, expert in cultural economy, the exchange between culture, cultural industries and creative industries can be represented by circle formed by a series of concentric layers and having in its core artists and cultural organisations that send ideas, talent, creativity and experience out to the neighbouring layers of the circle, which include sectors that become increasingly commercial as you moving away from the core of the circle. Next to the core of the circle are the cultural industries, the organisations that produce cultural goods and services such as theatres, museums and publishing houses. The creative industries such as fashion, architecture and design follow. Creative ideas generated at the core spread through the various layers of the circle but are in their turn influenced by them via an osmotic process.

The identification of the economic activities relating to culture is difficult just because of the extremely wide definition of culture

The economist Pier Luigi Sacco[15] divides the concentric system of Throsby into seven sub-areas, mutually different in their orientation, which may be more or less industrial, as well as for the relative weight that creative contents have on their value chain. More precisely:

1. the non-industrial core, which is composed of sectors that have high density of creative contents but that due to their nature cannot be organised industrially and have their foundations in the production of objects and experiences that are unique or reproducible only in part: visual arts, live shows, historical and artistic heritage;

2. the cultural industries, which have an industrial organisation even if maintaining a high density of creative contents and are therefore based on the production of a potentially unlimited number of identical and completely interchangeable goods: publishing, music, cinema, radio-television, video games;

3. the creative industries, which maintain an industrial organisation but have a relatively low density of creative contents since they also respond to non-cultural functional needs: architecture, design - including fashion and, in perspective, food design - and communication;

4. the digital content platforms, which even if maintaining a partially industrial organisation also contain a vast, non intermediate area of the market and are based on an economy of sharing and voluntary exchange that is full of creative contents with a significant component of contents generated by the users;

5. the complementary sectors: education, cultural tourism, information technology, i.e. sectors that do not belong to the cultural and creative sector in a strict sense but are strongly and strategically complementary with it;

6. the experience economy, i.e. all those non-cultural sectors in which the creative contents are nevertheless penetrating in an increasingly pervasive way; the experience economy by now also includes almost all consumer goods and even a growing number of instrumental goods - a trend that can only increase with the growing degree of computational equipment of the next generation goods.

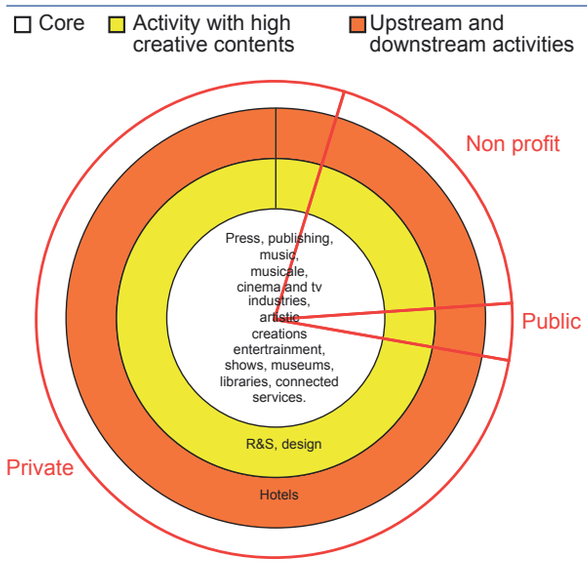
7. science and technology, which operate according to rules that are peculiar to them and partially different from those of cultural production, but still are markedly complementary to cultural production, above all in view of the growing pervasiveness of use of technological platforms - increasingly sophisticated - in many forms of artistic production such as visual

[15] Index 24. Italian culture and economic development

arts, performing arts, cinema, electronic music, etc. The description of this seven sub-areas shows that the border between the cultural sector and the non-cultural sector is complex and non clear-cut, and added value measurement is therefore difficult. Aware of the arbitrariness of our selection, we defined a perimeter of economic activities reflecting the supply chain mentioned above, taking into consideration the availability of quantitative information and the closeness of these activities to the "core" of the circle, based on their understanding of the Veneto area. Ours study is in the making and we deem it worthy of further analysis for making it really complete.

For the purposes pf our analysis , we selected the legal-economic units of Veneto having activities connected to the production of goods strictly linked to the main artistic activities such as, for example, publishing, the music industry, cinema, television, artistic creations and entertainment and realted services. Following this, the activities with high creative content were added such as Research & Development and design activities. Finally, also hotel accommodation businesses were considered as a source of indirect supply to users of culture. The aforesaid economic activities, in private businesses as well as in public and not-for-profit institutions, are estimated to use over 133,000 work units overall, i.e. 5.4% of the Veneto total, and produce 7.8 billion Euros of added value in 2011, equal to 5.8% of the total added value of Veneto. The importance of the sector is considerable if you consider that it is almost equal or even greater to some key segments of Veneto manufacturing industry such as mechanics

Fig. 8.6.1 - Sectors of activity selected for the estimation of the economic impact of Veneto culture

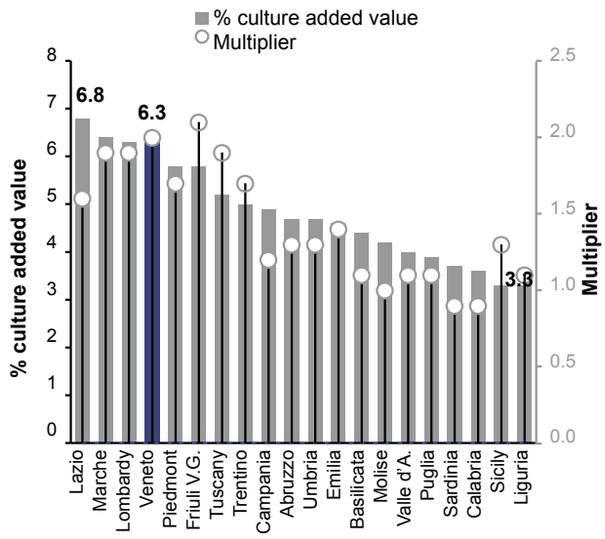


Source: Processing by Veneto Region - Regional Statistical System Section

Culture generates a lot of wealth in Veneto

and electronics - that together produce 5.9% of the total added value - metallurgy (4.5%), textiles and clothing (3.2%). The economic significance of culture measured in this way is above that of some segments of the tertiary sector such as transport services (4.7%), financial and insurance activities (4.9%), health and social assistance (4.8%).

Fig. 8.6.2 - Percentage of the added value of the cultural supply chain and its multiplier by region - Year 2012



Source: Processing by Veneto Region - Regional Statistical System Section on Fondazione Symbola data

Over recent years, the need has spread to understand the importance of the economic aspects linked to culture so as to be able to compare them with each other and thus decide in what events/investments use the resources available, which are ever more poor.

Among the studies made on this topic, we believe it interesting to deal with the Report drawn up by Fondazione Symbola[16], which estimated the impact of culture on added value using a method similar to ours. The results are mutually comparable but not identical because the perimeter of economic activity considered by Fondazione Symbola is not the same as ours. They have in fact identified a series of activities grouped into the following sections: cultural industries, creative industries, performing arts and visual arts, historical-artistic and architectural heritage. However, we did not take into account the so-called creative industries, i.e. all those production activities

[16] Fondazione Symbola. I am culture - The Italy of quality and beauty challenges the crisis. Report 2013.

with high creative contents that carry out further functions with respect to cultural expression, such as ergonomy of the inhabited spaces, nutrition, products visibility, etc. The main components of this section are architecture, communication and branding - i.e. things concerning the communication and image - the most typical activities of made in Italian, performed in artisan form - the most creative and artistic craftsmanship - or on a wider scale - export-oriented - which focusing on the design and style of products manage to be competitive on the international markets. The activities also include the best expressions of Italian food and wine, unique and appreciated in the world, including catering.

We deemed it necessary to exclude these areas from our analysis because, at least in this stage, we only took into account the activities more linked to the Throsby's "core", only considering hotel accomodation as a sector generating economic and occupational value due to the presence of historical, artistic and architectural heritage of cultural events.

The study of Symbola includes a greater number of economic activities and estimates that the cultural production system ofVeneto produces 6.3% of the total added value of the region, an amount higher than the national average of 5.4%. It is estimated that 11.1% of the added value of the Italian culture supply chain is produced in Veneto. Veneto therefore ranks third among the regions for its contribution to the wealth produced by culture at a national level, after Lombardy and Lazio. In addition to its added value, the impact was also estimated of this cultural production system on the rest of the economy, taking into account the indirect upstream and downstream effects generated in the entire economic system.

In fact, culture also uses inputs from different activities upstream and favours other productions or services downstream, such as tourism, trade, transport.

It is calculated that the culture in Veneto has a multiplier equal to 3, which means that for each Euro of added value produced by one of he activities in the cultural chain, another 2 Euros are activated on the rest of the economy. Veneto, after Friuli Venezia Giulia (multiplier 2.1) is the region that has the highest multiplier of culture: on average in Italy this multiplier is equal to 1.7.

Culture promotes export

Historical, artistic and cultural heritage is surely one of the vehicles for promotion of local products. Cultural visits of tourists to Italy and Veneto andthe presence of foreign students are channels connecting foreign demand and internal supply, in particular regarding that with which foreigners comes into contact during their stay in Italy: from cuisine to fashion, from urban design to hotel design.

In particular, in the Beautiful, Well-Made and Good (BB&B) products which we spoke of in chapter 5, the consumers find the two identities of our heritage: on one hand the quality of the industrial craftsmanship, "know how" combined with accumulated culture, landscape, beauty, talent and culinary art, on the other hand cultural heritage, a source of new and significant contents to incorporate into the goods produced. The consumers purchase the Veneto goods both because of their distinguishing design and quality and because they recall the Italian good taste and good living which culture conveys to the rest of the world[17].

With reference to the description of the economic importance of the BB&B in chapter 5, we would like to focus now on the value of those exports more strictly linked to the cultural production system.

Culture is the driving force behind our products

Also in this case we have limited our analysis to two types of product, therefore adopting the statistical definition of "cultural" exports already present in literature and used by the United Nations: the classification of "creative economy" by UNCTAD[18].

Tab. 8.6.1 - Grouping of the goods exported by the cultural production system

Grouping	Goods
Visual arts	Antiquity, paintings, photography, sculpture
Arts and performing arts	Music and musical instruments
Publishing	Books, journals, etc.
Design	Furniture, fashion, jewellery, glass and ceramics, toys
Craftsmanship	Yarn, carpets, artifacts
Audiovideo	CD, DVD, film
Media	Multimedia players, videogames

Source: Processing by Veneto Region - Regional Statistical System Section on UNCTAD data

[17] Esportare la dolce vita 2014. Prometeia and Confindustria Centro Studi.
[18] http://unctadstat.unctad.org/

This considers the goods of thecultural production system which we have grouped into 7 categories: visual arts, arts and entertainment, publishing, audiovideo, media, design and artisan crafts.

The first three categories are very close to those that we called "core" in the calculation of the added value, the media and audiovideo are considered activities of high creative contents while design and artisan craft are more linked to the concept of upstream and downstream activities. Overall this cultural production system exports good from Veneto for 5.5 billion Euros, equal to 10.5% of the total value of Veneto exports, contributing to 8.2% of the national cultural export.

The economic weight of the Veneto cultural system exports is above that of entire Countries.

Comparing these values with those of other European and Extra-European Countires, it can be noted that Veneto is much more competitive than the entire United Kingdom, Germany, the United States and Japan.

Italy is the Country with the highest impact of the cultural system on overall export out of the Countries analysed: four times that of the USA, more than double of Germany and over 50% more with respect to France and Spain.

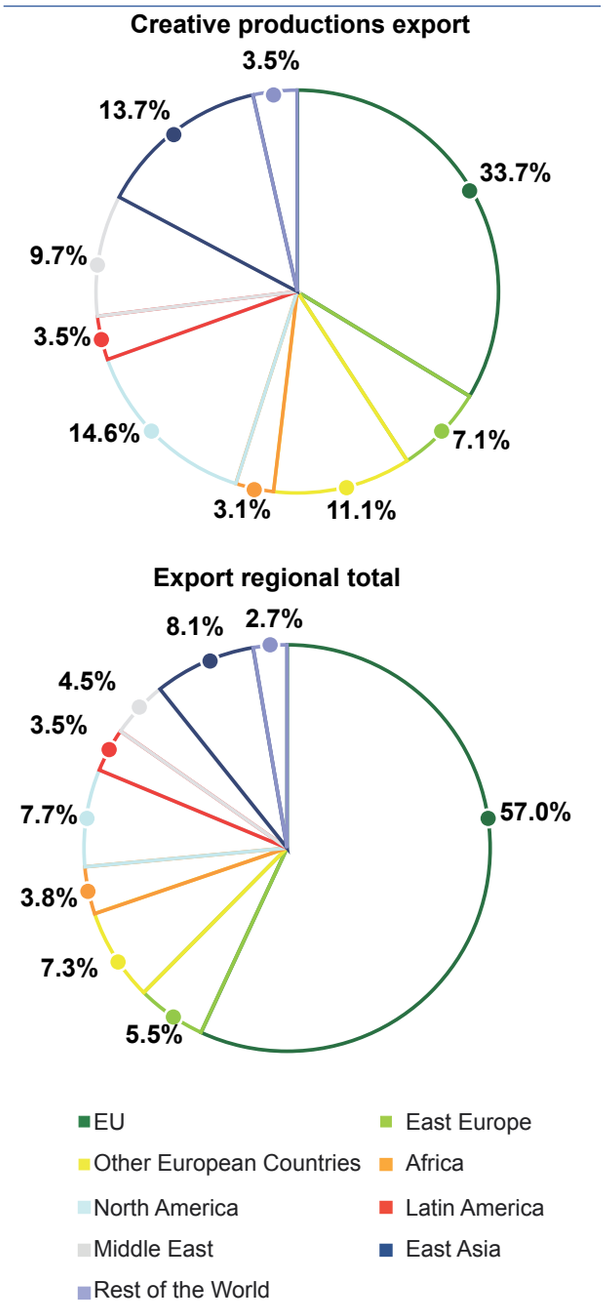
Returning to the Veneto and examining the individual sectors, we find that export main concerns design, with goods related to the fashion system (goods that concern 24.5% of the Veneto export linked to fashion), interior design (43% of the furnishing export), jewellery (96%), hand-made glass and ceramic products and toys, while the lower values are recorded in the visual arts, shows and audiovideo.

Tab. 8.6.2 - Export of the cultural production system. Values expressed in billions of Euros and % of the total exported by area - Year 2011

	Culture out of the total (%)	Billion Euros
Italy	17.9	67.4
Spain	11.6	25.5
France	11.3	48.6
Veneto(*)	10.5	5.5
United Kingdom	9.6	34.7
World	8.1	1,073.6
Germany	7.0	73.8
United States	4.4	46.5
Japan	1.5	8.7

(*) provisional data for the year 2013
Source: Processing by Veneto Region - Regional Statistical System Section on UNCTAD, Comtrade, Istat and Prometeia data

Fig. 8.6.3 - Percentage distribution of the Veneto export by geographical area - Year 2013



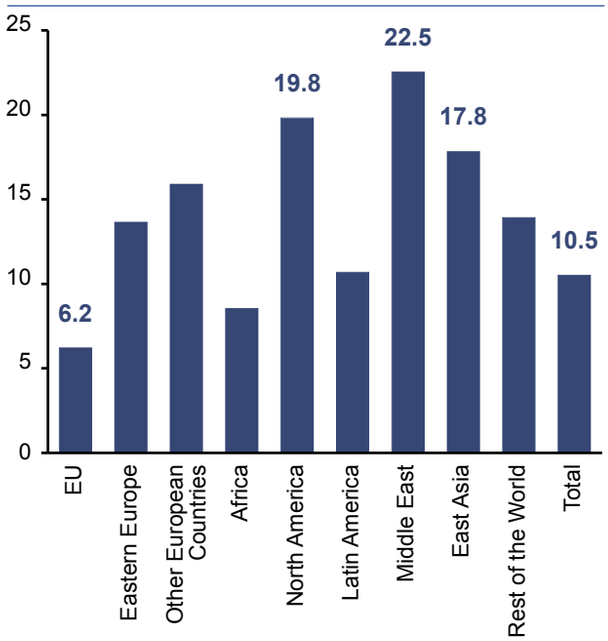
Source: Processing by Veneto Region- Regional Statistical System Section on Istat data

It can be said that the majority of Veneto's design export is considered to be produced by our cultural and creative industry. Moreover, the musical and cinema industry is not one of the specifities of our territory and favours other zones of Italy. It is interesting to find out what part of the world the demand for this type of product comes from: it comes for a third from the European Union, a good amount from North America (14.6%), East Asia (13.7%, essentially China) and the Middle East (9.7%).

Far-away Countries also love Veneto's cultural heritage

As regards the impact of the demand for cultural heritage on the total goods exported by Veneto, it is almost surprising to learn that the Countries that are furthest away in terms of geography and culture are the ones that appreciate our cultural production system most: 22.5% of the goods purchased by the Middle East from Veneto are cultural-creative goods, just as 19.8% of exports to North America and 17.8% of those to East Asia.

Fig. 8.6.4 - Percentage impact of export of creative products by geographical area. Veneto - Year 2013



Source: Processing by Veneto Region - Regional Statistical System Section on Istat data

The value of shows

Statistics on the entertainment events and on the support demonstrated by residents and guests are from the SIAE annual census. The offer of events of Veneto is similar in size and types to the national one but still mantains some peculiarities. As intuition suggests, the most widespread and attractive activity is cinema (34.3% of the Veneto entrances). Over the years, beyond the peak of entrances of 2010, in conjunction with the diffusion of 3D films in cinemas, the flow of spectators has been continually decreasing, so much so as to result in a loss of 12.2% of entries over the last five years and a corresponding decrease of 9.4% in spending at the box office, according to an index combining the sums paid for tickets and subscriptions. Again, from more recent data, provisional and referring to the first semester of 2013, new positive signs are detected also thanks to a cautious policy of ticket price containment. The role played today by television and internet, which have taken up a central position between the means of entertainment, clearly impacts on the aforesaid decrease. On the other hand, technological development has also triggered a renewal of the proposals that do not only involve the cinema but also the theatre and fun parks. One of the peculiarities of Veneto is actually linked to theme parks and water parks, which obtain the greatest spending at the ticket office, equal to almost a third of that recorded by the total of all the other types of events and entertainment. Over the last five years, entries have reduced by 22.4% - particularly due to a slump in 2011 and 2012 - with the subsequent shrinking of the spending by 4.1%, despite the 4 € increase in the average entry fee.

The theatre activity also recorded a decrease between 2008 and 2012: both theatre prose and opera, in faced with an increase of the events proposed, are hit by a reduction in the demand; however, there are positive signs for the ballet, the variety show and the circus. Concerts know no crisis, especially the classical concerts with strong increases both in the offer (+53%) and in the demand (+23.4%), with an increase of the average entry cost by 5€ and subsequent increase in the spending by 79.8%. The opportunities of visiting cultural exhibitions, trade fairs and other similar events with commercial aims (+24,5%) are also multiplying, and this type of offer is well appreciated by the public (+29,8%). The revenues of the entertainment sector do not only derive from the purchase of tickets or subscriptions but concern a group of activities that make the offer proposed complete and attractive. The audience spending includes other items besides the spending at the box office, such as the ticket presale, restaurant booking, cloakroom service, bar consumption, etc. In order calculate of the overall business volume, in addition to the spending of

the public, the revenues obtained by the organiser from other parties who contribute financially to the production of the shows (publicity services, sponsoring, public and private funding, television footage, etc.) should also be considered. Considering the entire panorama of the shows, Veneto ranks third place out of the Italian regions, both in terms of box office spending (259 million Euros) and in terms of audience spending (467 million), and finally in terms of turnover (604 million). The sector characterised by the highest turnover is sport due to the large sums that rotate around this sector outside of audience spending.

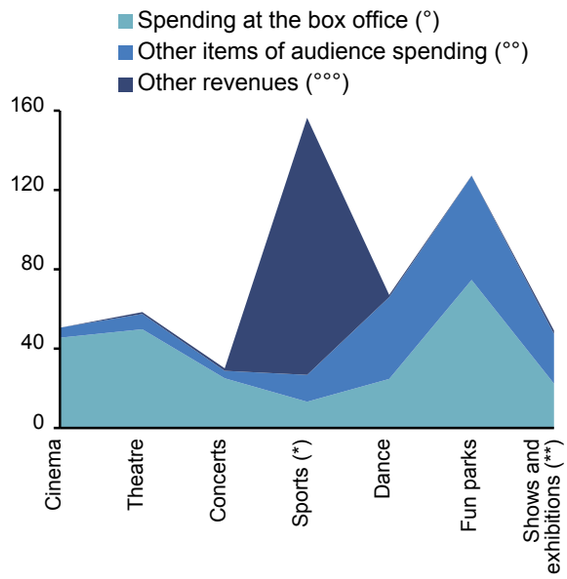
The activity that comes second in Veneto for its financial results is represented by theme parks, for which the audience spending exceeded 127 million Euros in 2012. The light and dark areas noted in the various entertainment activities in the long term become uniform in 2012, the year that finally showed all the signs of the financial crisis: -6.2% in the number of shows, -4.2% in entries, -24.8% in audience spending, -22% in the turnover.

Tab. 8.6.3 - Demand and offer for the main types of event. Veneto - Year 2012

Type of event	Shows		Entries		Box office spendings (€) (°°)		Average entry cost (€) (°°°)	
	2012	% var. 2012/08	2012	% var. 2012/08	2012	% var. 2012/08	2012	Var. 2012/08
Cinema	80,097 (°)	-3.4 (°)	7,674,772	-12.2	45,823,782	-9.4	6	0
Theatre activity	12,968	-19.1	2,148,914	-3.0	50,106,777	-8.4	23	-1
Theatre	5,694	6.6	1,057,443	-4.9	10,943,524	-15.7	10	-1
Opera	389	31.4	561,095	-6.8	30,860,397	-8.0	55	-1
Revue and musical comedy	83	-4.6	64,890	-11.0	1,657,356	-32.3	26	-8
Ballet (classical and modern)	649	28.5	181,439	1.3	2,825,957	29.9	16	3
Puppets and marionettes	55	-38.9	5,242	-52.8	22,088	-45.5	4	1
Variety shows and various arts	5,310	-39.5	213,432	22.8	3,109,901	11.6	15	-1
Circus	788	-14.6	65,373	3.9	687,554	-8.5	11	-1
Concert activity	3,384	21.1	1,028,556	10.0	25,306,998	14.5	25	1
Classical concerts	*2,191*	*53.0*	*350,408*	*23.4*	*6,087,499*	*79.8*	*17*	*5*
Pop concerts	*942*	*-11.3*	*647,583*	*4.7*	*18,698,053*	*2.4*	*29*	*-1*
Concerti jazz	*251*	*-16.3*	*30,565*	*-6.4*	*521,446*	*13.3*	*17*	*3*
Sports (*)	11,096	-21.0	1,804,702	5.1	13,520,886	2.5	7	-0
Ball (dancing entertainment)	22,140	-29.3	2,788,061	0.8	25,077,003	1.2	9	0
Fun parks	2,783	3.0	3,683,796	-22.4	75,021,001	-4.1	20	4
Shows and exhibitions (**)	5,852	24.5	3,046,525	29.8	22,754,067	25.6	7	-0

(°) For cinema activity shows, the number of days that the venues are open is considered.
(°°) The spending at the box office includes the amounts paid for the purchase of tickets and subscriptions
(°°°) Average entry cost = box office spending/ entries
(*) The following sports activities are included: football, basketball, rugby, baseball, cycling boxing, athletics, tennis, horse competitions, motor racing, motorbike racing, motorboat racing, horse racing, swimming and water polo, winter sports
(**) Including cultural shows and exhibition activities with commercial purposes such as trade fairs; visits to museums are excluded
Source: Processing by Veneto Region - Regional Statistical System Section on SIAE data

Fig. 8.6.5 - Turnover of the main performing arts activities (millions of €). Veneto - Year 2012

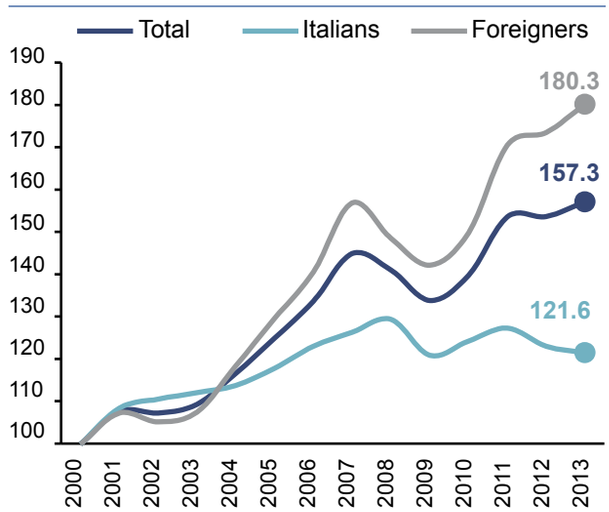


(°) The spending at the box office includes the sums paid for purchasing tickets and subscriptions
(°°) Including costs for ticket presales, table booking, cloakroom service, food and drink at the bar, etc.
(°°°) Revebue for publicity services, sponsoring, public and private funding, television footage ,etc. (*) The following sports activities are included: football, basketball, volleyball, rugby, baseball, boxing cycling, athletics, tennis, horse competitions, motor racing, motorbike racing, motorboat racing, horse racing, swimming and waterpolo, winter sports (**) Cultural shows and exhibition activities with commercial purposes are included, such as trade fairs. Museum visits are not included.
Source: Processing by Veneto Region - Regional Statistical System on SIAE data

Culture, the purpose of a journey

A Eurobarometer survey by the European Commission published in the month of February 2014 allows to analyze the tourism preferences of the European citizens and to assess how much the thirst for culture acts as a stimulus to embark on a journey. In 2013 one quarter of the respondents mentions culture as one of the main reasons of their journeys[19], with "culture" meaning the arts, food and wine, religion, etc. This motivation is in 4th place after more diffused reasons for travelling such as seaside holidays (46%), visits to parents and friends and green holidays, and is soon followed by another similar reason which is visiting cities of art (23%). Italians pay even more attention to the cultural aspect of the holiday. After preference for seaside holidays (51%) comes the experience of the cities of art (29%), soon followed by the attractiveness of culture (28%). The cultural aspect therefore is a driver for the tourism sector, as is also confirmed by the reasons for repeating the same type of holiday: landscape and a favourable climate always win first place, whatever the origin of the tourist, but the cultural and historical attractions, mentioned by 30% of those interviewed, rank third place for Europeans (after the quality of the accommodation) and for Italians it ranks second place.

Fig. 8.6.6 - Index number (*) of the presences of tourists in the area of the cities of art (base year = 2000). Veneto - Years 2000:2013

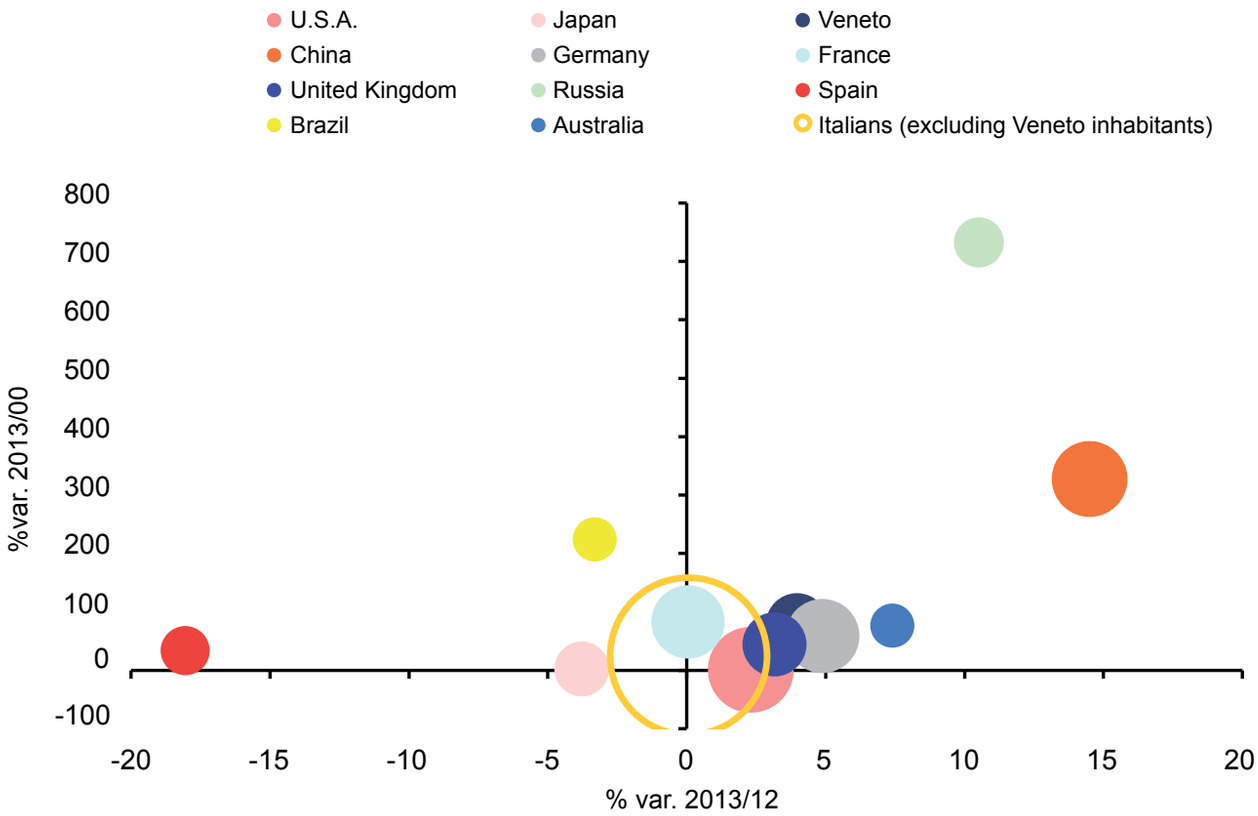


(*) Index number = (year t / base year) x 100
Source: Processing by Veneto Region - Regional Statistical System Section on Istat - Veneto Region data

Now we will focus attention on tourism attractiveness of culture in Veneto The cities of art represent the phaenomenon but not in its entirety. They are strong centres of attraction and in 2013 welcomed over half of the tourists that visited our region (52.8% of arrivals). They are appreciated above all by the foreign tourists (70.2%), whose incoming flows has become increasingly important over the years and has been acting as a driving force in moments when the domestic demand is stationary or in crisis, above all in more recent years: the Veneto cities had an increase by +2.2% in 2013 with respect to the previous year, with +3.9% of foreigners and -1.3% of Italian tourists.

[19] The sum of the percentages does not give 100 since the results combine primary and secondary motivations.

Fig. 8.6.7 - Arrival of tourists (bubble size) in the cities of art of Veneto by origin: % variation 2013/2012, % variation 2013/2000



Source: Processing by Veneto Region - Regional Statistical System Section on Istat - Veneto Region data

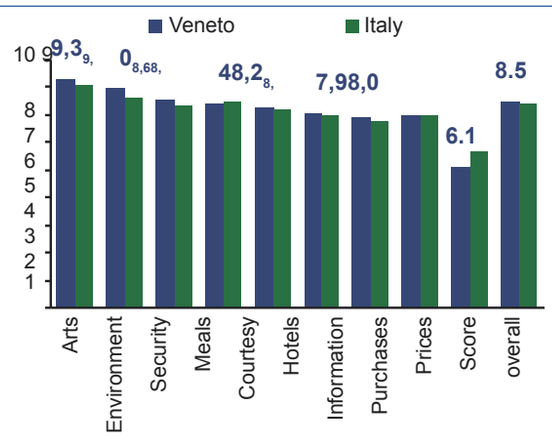
The majority of the foreigners who visit the cities of art come from the USA. Toutrists from the USA are stable in the 1st place of the ranking by number of arrivals. The Countries from second place donwards change with a particular frequency; China from 2013 overtakes Germany and France to take second place in terms of number of arrivals. The short stay of the Chinese tourists (1.3 nights), however, places them in fifth place for number of presences, after preceded France, Germany and the United Kingdom. The rapid ascent in the rankings of China is accompanied by that of other BRIC Countries such as Russia, which jumps into seventh position, and Brazil (9th). At the start of the crisis, the drop in the number of Italian, US and German tourists is evident. However, this was followed by a rapid recovery, while the French and inter-regional flow remain positive. The choice of tourists of staying in hospitality facilities relatively close to their place of residence is due to many reasons, including the pleasure of spending one or more weekends out of town, visiting relatives and friends and going to specialised care centres; these reasons are scarcely affected by economic factors and are good alternatives to long-distance travelling.

It is interesting and useful to have some indications on the shopping habits of the tourists who perform a cultural journey in Veneto and their judgement on this experience. The survey carried out by Banca d'Italia at the national borders allows to outline the profile of the foreign tourist, who declares explicitly to have chosen a cultural holiday, independently by their place of residence. Those in Veneto for a cultural holiday in 2013 with at least an overnight stay in a hospitality facility spent on average 129€ per day. This expense is largely due to the accommodation (42%), 23% is related to catering, 18% to purchases, 10% to local transport and the remaining 7% is for other services including entry tickets to museums, shows, fees for excursions with a guide, for hiring vehicles, etc. The per capita spending of the foreign tourist is next to 388€ and the spending estimated for 2013 is 1.9 billion €.

Over the last decade the spending on cultural holidays in Veneto has recorded its maximum in 2004 (on average 142€ per day and 450€ for the whole stay) and its minimum in 2011 (respectively 117€ and 364€).

The stay is deemed to be overall very satisfying, with an average score of around 8.5 on a scale of 1 to 10 in 2013. The arts are much appreciated (9.3%) but also the environment, security, meals, etc. The only aspect for which Veneto receives an average score which is just sufficient and slightly less than that for cultural holidays in Italy is prices.

Fig. 8.6.8 - Average scores on the stay of foreign tourists who have stayed in hospitality facilities by cultural holiday. Veneto and Italy - Year 2013



Source: Processing by Veneto Region- Regional Statistical System Section on Banca d'Italia data

What does the Veneto cultural system offer?

The cultural endowment of our region is wide and diversified: museums, galleries, monuments, exhibitions but also live music shows, classical opera, ballet, theatre, reading proposals, sports events. All this and much more.

302 museum institutes (arts, history, archaeology, ethnography and anthropology, science and technology) welcome almost 8 million visitors per year. Besides the permanent cultural and museum facilities there is now a wide sea of "temporary events", an increasingly widespread phenomenon: in 2012 in Venice 2,844 events were held over 18,974 days. 130 museums set up 341 temporary events for almost 3 million visitors.

And almost 13 thousand theatre shows, almost 3,400 concerts, more than 11 thousand sports events.

Last but not least, the 589 public reading libraries spread over the whole region in 2012 recorded more than 5,700,000 visits and did not only provide lending and consultancy services, but also proposed other activities such as animated reading, courses, exhibitions, guided visits, association meetings, etc., for a total of 8.093 events.

How much does the cultural system contribute to the economy of our region?

There are various analyses to measure the economic impact of culture but it can be affirmed that the cultural system of Veneto produces from 5.4% to 6.3% of the total added value and exports goods for 5.5 billion Euros, equal to 10.5% of the total value of the region's exports, impacting by 8.2% on the national cultural export

302 museum institutes and over 8 million visitors were counted in Veneto 2013

In 2012 in Veneto 2,844 temporary events for 18,974 days and 315 organisers

130 (43%) of Veneto museums set up temporary exhibitions in 2012: 341 events for just less than 3 million visitors

589 public reading libraries in Veneto have just under 10 million documents and over 5,700,000 visits

The per capita spending of the foreign tourists in a city of art is close to 388€, equal to around 129€ per day.