

Exhibitions and cultural heritage. A survey on exhibition policies of Italian cities

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Abstract

The transformation of the sustainability models of cities, in the last years, has modified the perception of the economic and political role of arts and, consequently, the expectations of the public sector on cultural institutions. In Italy, the growth of cultural tourism in the main urban centers and art cities has changed the cultural supply models, increasing the emphasis on temporary exhibitions and events. Moreover, the contraction of public resources has induced cultural institutions to develop new forms of collaboration with private organizations in order to negotiate their autonomy.

Starting from the Italian scenario, this research describes the activity of eight relevant institutions involved in the organization of exhibitions. The analysis of quantitative and qualitative data will show, in the first part, how these institutions have developed different models as far as their management structure, governance, nature of their offer and relationship with the cultural system as a whole.

In this perspective, the second part will be dedicated to the study of a specific exhibition recently held at Palazzo Te in Mantua, analyzing the role that exhibitions have taken in local contexts.

Keywords

Exhibitions, cultural policies, cultural events, local development, Palazzo Te.

1. Premises

In the last ten years, cultural and exhibition policies of Italian cities show some common tendencies.

First, and very generally shared, the shift of the art world (both in its historical and contemporary dimension) toward the mass culture market. One of its most evident manifestations, detectable since the second half of the XX century and accelerating in the '90s, is mass cultural tourism. The massive inflow of tourism in the major so-called "art cities" (Venice, Rome, Florence above all) generated relevant opportunities for economic exploitation on the basis of the so-called Ronchey Law of 1993¹ that ruled the possibility of externalizing part of the state valorization activities to private firms (Baia Curioni and Forti 2009). The frequent revision of regulation (the last was on June 2010) led to a growing influence of publishers and to the raise of an industry of heritage / cultural valorization including activities like exhibitions, bookshops and publishing, ticket services, specialized tour operators and guides, educational services.

Second, the transformation of the social and economic structure of cities. Important processes of deindustrialization and relocalization imposed since the Nineties a revision of urban sustainability perspectives and an enhanced use of arts and culture for tactical and strategic purposes. Exhibitions and cultural events were progressively perceived as communication tools for politicians and municipalities. Italian cities started a race for the restoration and the re-use of central historical buildings and sites for exhibition purposes (Rapporto Federculture 2007, 2008, 2009).

The most evident empirical consequences of these tendencies are:

- the creation of a significant number of new exhibition institutions (or sometimes museums) with the purpose of managing cultural policies in behalf of local public authorities, both directly and through foundations;
- a proliferation of events (mainly exhibitions and festivals) and a concentration of the cities' communication resources on those activities;
- a rise in the competition among different cities and programs, sometimes producing a relative sophistication of the strategies in the direction of local networks (museum systems) and districts;
- the growth of a private sector concentrated on publishing services and production of exhibitions that progressively overlapped public valorization policies;
- the crisis and transformation of the role of museums. Public and private museums, forced by the reduction of public resources, are rapidly shifting from a prevailing conservation role to a more market oriented perspective.

Each of these points is problematic and would deserve a discussion on the basis of shared evidences. On the whole, it is possible to suggest that they are a sign of:

- a deep transformation in the nature and meaning of the cultural policies, that tend to be considered as "sections" or supports of economic or infrastructural policies;
- a functionalization (and sometimes overexposure) of arts, culture and cultural heritage, view as productive factors of changing urban economies;
- the lack of shared empirical evidences on these themes: the existing systems to monitor the dynamics of the cultural field and their consequences are not transparent and not methodologically structured. Debates tend to polarize ideologically, on the one hand defending a "cultural quality" regardless of sustainability, service and relationship with the audience; on the other in favor of sometimes more cynical and mass-oriented positions.

¹ Law no. 4, 14th January 1993.

The present research aims at giving a contribution to this undoubtedly complex debate, with some concrete objectives:

- in the first part we'll try to highlight some evidences concerning the production of exhibitions in Italy with a concentration on the year 2009;
- in the second part we'll identify the trajectories and the strategic positioning of eight main Italian institutions that produce and host art exhibitions;
- in the third part we'll concentrate on the debate about the quality of exhibitions and the audience's participation analyzing the results of a specific case at Palazzo Te in Mantua.

2. Exhibitions in Italy²

The production of exhibitions in Italy has had a remarkable development: in the last years there have been extremely diverse solutions, that are being challenged by the general reduction of public contributions and by a certain contraction of cultural tourism³.

Figures 1 and 2 give a picture of the most relevant Italian institutions in terms of total attendance in 2009⁴.

Figure 1 – Exhibitions with independent ticket: attendance to main Italian institutions in 2009



Source: Elaboration on *Giornale dell'Arte*, Repubblica, Exibart

² This paragraph refers to a research on Palazzo Reale in Milan that the ASK Center developed for Comune di Milano.

³ From 2007 to 2009 Italian museums lost 2 million visitors, while the turnover decreased by 9 million euros. Nevertheless, from 1996 to 2009 attendance grew by 27% and the total turnover by 65% (Source: MiBAC Statistics Office).

⁴ For this analysis, we selected only those institutions that, between 2008 and 2009, have had a minimum of 25,000 visitors in at least two exhibitions.

Among the institutions we considered, Villa Olmo in Como and Palazzo dei Diamanti in Ferrara focus on modern art classics (in 2008/2009, for instance, Chagall, Schiele, Mirò, Turner, Courbet and Manet). Reggia di Venaria specialized in ancient art and decorative arts, while Palazzo Fortuny in Venice and Palazzo Ducale in Genoa have chosen contemporary culture. Nevertheless, the majority of the institutions is not specialized in a specific genre and alternates diverse themes.

In 2009 two kinds of proposals were mostly popular: on the one side the big names of ancient art (Giotto at Vittoriano, Canaletto in Treviso) and modern art (Hopper, Magritte, Monet at Palazzo Reale, Picasso at Vittoriano, Canova in Forlì) or the great civilizations (the ancient Egypt in Turin, the Etruscans at PalaExpo); on the other side the exhibitions based on the “genius loci”, that enhance local competences and collections: Parmigianino in Parma (2003), Duccio in Siena and Perugino in Perugia (2004), Correggio in Parma (first Italian exhibition in 2008), Raffaello in Urbino, Vanvitelli in Caserta, Boldini in Ferrara (2009) Finally, we can observe themes that are linked to recurrences and celebrations: in 2009 the exhibitions on Futurism have achieved success everywhere (165,000 visitors at Scuderie del Quirinale, 135,000 at Palazzo Reale, 25,000 at Macro Future of Rome, 8,000 at Museo Alinari per la Fotografia in Florence and, if we consider also the exhibitions linked to museum collections, 325,000 at Guggenheim in Venice and 133,000 at Mart in Rovereto. In 2010 the fourth anniversary of Caravaggio’s death gave inspired a series of big exhibitions, beginning from “Caravaggio-Bacon” at Galleria Borghese (190,000 visitors).

Table 1 – Attendance to the most visited Italian exhibitions with independent ticket in 2009

Total visitors	Visitors per day	Exhibition	Institution	City
365,502	2,223	53° Biennale d'Arte Contemporanea	Several places	Venice
243,262	1,622	Alla corte di Vanvitelli	Reggia di Caserta	Caserta
221,268	2,191	Egitto. Tesori sommersi	Venaria Reale	Venaria (TO)
212,249	1,343	Canaletto. Venezia e il suo splendore	Casa dei Carraresi	Treviso
208,923	1,727	Picasso 1917-37. Arlecchino d'arte	Vittoriano	Rome
202,127	1,854	Edward Hopper	Palazzo Reale	Milan
196,544	1,384	Giotto e il Trecento	Vittoriano	Rome
188,305	1,471	Magritte. Il mistero della natura	Palazzo Reale	Milan
172,589	1,135	Monet. Il tempo delle ninfee	Palazzo Reale	Milan
165,939	1,784	Futurismo. Avanguardie	Scuderie del Quirinale	Rome

Source: Il Giornale dell'Arte, 2009

Attendance is ostensibly concentrated in northern and central Italy: the only southern institution we trace with our criteria⁵ is Museo di Capodimonte in Naples, that joins ancient art (in 2009, Caravaggio and Vanvitelli) to contemporary art. In 2009, the Riso museum of contemporary art in Palermo has had an average of 10-15,000 visits; MADRE in Naples and Museo Regionale in Messina have similar results.

The second group of exhibitions (those with conjoint tickets, represented in Figure 2) is evidently less related to the characteristics of the specific cultural programming and more linked to the general tourist attractiveness of the art cities. It is therefore predictable the absolute prominence (at a national but also global level) of the Colosseum, whose “Divus Vespasianus” exhibition had an attendance of more than 4.5 million and of more than 6 million people over

⁵ See footnote 4.

the year. Even the following positions are concentrated in the most important art destinations: the institutions in Florence (Galleria degli Uffizi, Gallerie dell'Accademia), Rome (Castel Sant'Angelo) and Venice (Collezione Guggenheim) attracted 650-900,000 people. An exception is the contemporary and modern art museum in the little center Rovereto (MART), that has reached an audience of 560,000 with its eight exhibitions in 2009.

This group of institutions, in accordance with its stronger museum vocation, is more specialized on a collection or a theme, so exhibitions are more frequently focused on ancient art and rarely on contemporary culture.

Table 2 – Attendance to the most visited Italian exhibitions with conjoint ticket (exhibition + museum, historical building or archaeological site) in 2009

Visitors per day	Total visitors	Exhibition	Institution	City
17,407	4,525,976	Divus Vespasianus	Colosseo	Rome
12,660	1,481,210	Rovine e rinascite dell'arte in Italia	Colosseo	Rome
5,259	888,644	Il fasto e la ragione	Galleria degli Uffizi	Florence
8,522	749,991	Bernini e la nascita del ritratto barocco	Mus. Naz. del Bargello	Florence
3,805	749,405	Mapplethorpe. La perfezione nella forma	Gall. dell'Accademia	Florence
1,150	326,726	Capolavori futuristi	Coll. Guggenheim	Venice
2,317	259,420	Memorie dell'antico nell'arte del '900	Mus. Argenti e Porcell.	Florence
2,106	237,976	Tesori invisibili	Castel Sant'Angelo	Rome
1,863	212,325	Van Gogh: coll. Kroller-Muller	Santa Giulia	Brescia
2,080	187,213	Beato Angelico. L'alba del Rinascimento	Musei Capitolini	Rome
2,241	183,685	Il corpo e l'acqua	Castel Sant'Angelo	Rome

Source: Il Giornale dell'Arte, 2009

3. The trajectories of Italian exhibition institutions: a benchmark

Together with the necessity to respond to the new needs of cultural tourism, the last ten years have witnessed a search for new solutions to manage big exhibition spaces and public historical buildings. This has produced, in the different Italian cities, very diversified choices that we analyzed by selecting a benchmark of eight main Italian institutions that produce or organize exhibitions, among those we identified in the first paragraph⁶.

⁶ We would like to thank all those we had the opportunity to interview and shared with us ideas, projects and technical information: Enrico Voceri (Palazzo Te), Giovanna Cattaneo Incisa (Torino Musei), Giandomenico Romanelli (Musei Civici di Venezia), Luca Bartoli (Palazzo Strozzi), Luca Borzani and Pietro Da Passano (Palazzo Ducale), Mario De Simoni (PalaExpo), Roberta Biglino and Reanata Sansone (Zètema), Lorenzo Lamperti and Domenico Piraina (Palazzo Reale).

Table 3 - Benchmark institutions

Institution	City	Form	Establ. in	Perm. collect .	No. of build-ings	Exhib. spaces (sqm)	Exhib. / Year	Events / Year	Year
Musei Civici	Venice	Foundation	2008	x	11	21.160	22	115	2009
Zètema	Rome	Srl	1998	-	25	-	38	19	2008
Palaexpo	Rome	Special agency Municip. of Rome	1997	-	6	3.886	10	1	2009
Torino Musei	Turin	Foundation	2002	x	4	2.817	9	12	2008
Pal. Ducale	Genoa	Foundation	2008	-	1	4.248	20	102	2009
Pal. Strozzi	Florence	Foundation	2006	-	1	2.350	8	-	2008
Palazzo Te	Mantua	Association	1990	-	1	1.500	4	-	2008
Pal. Reale	Milan	Within Municip. of Milan	-	-	4	9.155	30	-	2008 / 09

The dimensions that characterize the different experiences are:

- the presence or absence of a permanent collection and of the status of museum. Some institutions have been created to coordinate the civic museums system, others are prevalingly dedicated to the management of vents and temporary exhibitions;
- the spectrum of the services and the activities. Some institutions are markedly centered on few and selected activities (either exhibition management or administration), other are dedicated to a wide range of activities, including the so-called “additional” services (ticket-office, guided tours, educational activities, bookshops and so on).

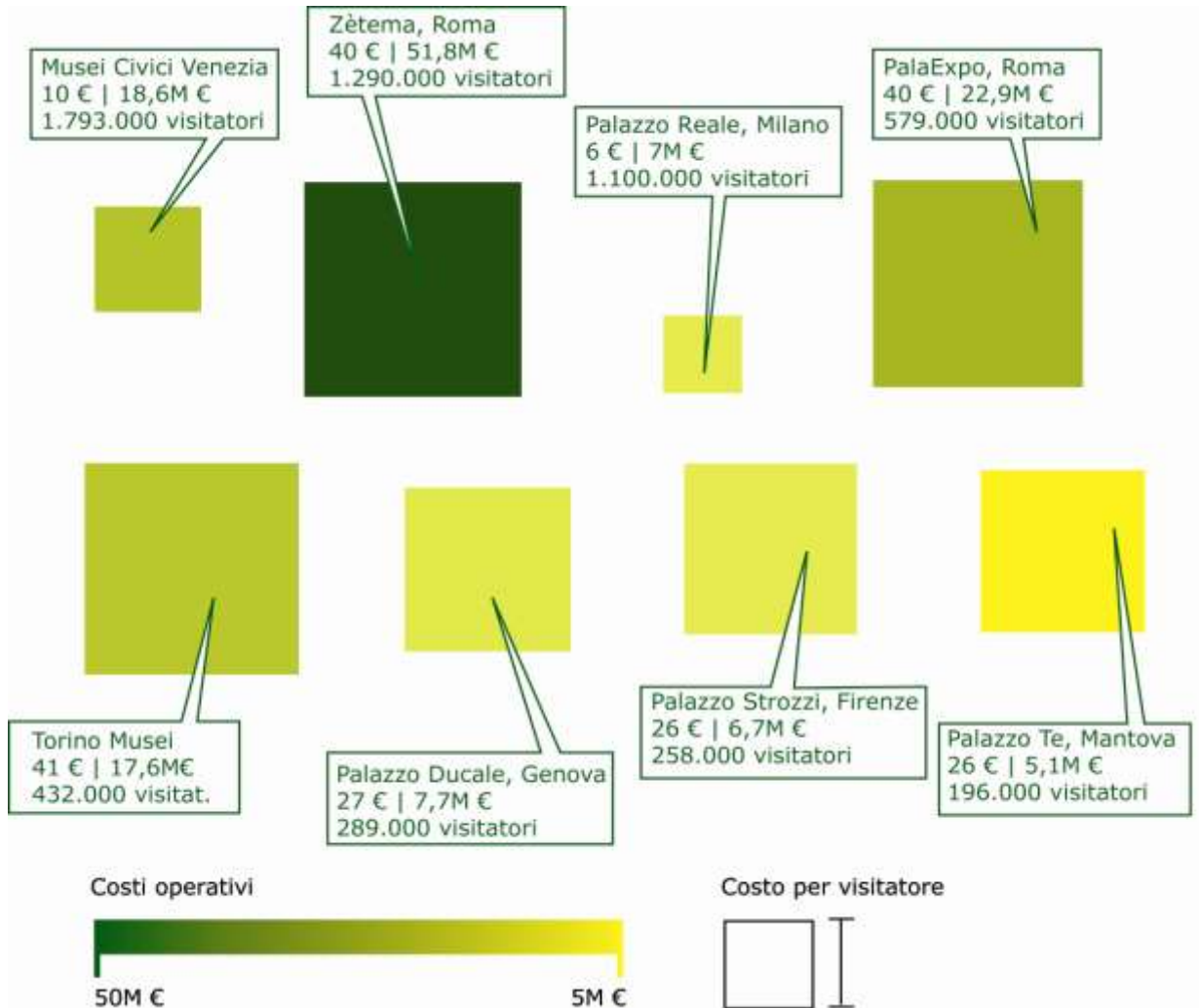
Figure 3 - Positioning of benchmark institutions



We observed significantly different profiles in terms of strategic, institutional and organizational models, levels of activity, costs, efficiency and efficacy.

Some institutions have a curatorial department that allow a greater independence in their programming, while others are more affected by political influences - unless their top management can limit them with personal power.

Figure 4 – Cost per visitor, total operating costs, number of visitors per year. Institutions are ordered by attendance; the cost per visitor is proportional to the squares' surface, while the color intensity is related to the total operating costs⁷



Source: Institutional balance sheets, 2008/2009

As we can observe in Figure 4, the Italian scenario, as for the case we considered, is characterized by:

- two foundations devoted to the management of museum systems, with similar budgets (about 18 million euros per year) but strong performance differences in terms of cost per visitor (10 euros of Musei Civici di Venezia versus 40 euros of Torino Musei). These diversity is partly due to the specificities of the cities, contents and endowments, partly to the different missions, values and structures. The Torino Musei Foundation has been designed as a corporate, dedicated to administrative, financial and coordination services and it does not substitute the single museums' heads; in Venice, on the contrary, there have been the conditions to concentrate in the foundation the government and management of the whole system;

⁷ At present Palazzo Reale in Milan doesn't have a separate accounting, as it is directly managed by the Municipality of Milan: the numbers in the figure are therefore an estimate produced by the ASK Research Center. Visitors of Musei Civici di Venezia, Torino Musei, Palazzo Te and Zètema include the admittance to museums.

- four structures (Palazzo Strozzi, Palazzo Te, Palazzo Ducale in Genoa, Palazzo Reale) specialized in the management of historical exhibition spaces, with one building each. At times they produce or co-produce temporary exhibitions, at others they buy external projects. They have similar operating costs (5-8 million euros) and performances (26-27 euros per visitor). The only exception is Palazzo Reale (6 euros per visitor), that however is more central and attractive and has a different model, sharing the risk with private partners that ideate and organize exhibitions;
- two institutions with special structures and wide operating objectives, both created with the Municipality of Rome's support. The first, PalaExpo, manages several cultural spaces and has a complex curatorial department that produce or co-produce exhibitions with international partners; it has a high budget (23 million euros) and a low performance (40 euros per visitor). The second one, Zètema, is even more complex: it has 25 structures in charge, with a wide mission that extends from the conception and organization of exhibitions to the management of services and whole institutions. Its budget is therefore high (52 million euros); it has a cost per visitor similar to that of PalaExpo (40 euros).

Another comparison can be made referring to the different capability to attract the potential audience in the areas surrounding the institutions. A rough estimate of this potential was obtained by considering two components: 1) the residents who live in an area of 50-80 square kilometers away, at most, from the institution, and who can reasonably travel and visit the exhibition in a single day; 2) the incoming tourism flows, in terms of arrivals, within the same geographical area⁸.

Rome has a potential audience of 14 million people, Venice and Milan reach around 8-9 millions; Florence has an intermediate result of 5 millions, followed by Turin (3.6 millions) and by smaller cities like Genoa (2 millions) and Mantua (600,000). So, predictably, big institutions like Musei Civici di Venezia, Palazzo Reale and Zètema have an audience of more than one million per year⁹.

However, if we divide the total number of visitors by the potential audience (residents plus arrivals), we have a measure of the attractiveness of the institution. A small-scale space like Palazzo Te, within a local context, can reach more than 33% of its potential audience, thanks to a lower competition as well.

Musei Civici di Venezia's high attractiveness (22%) is mainly due to tourists, pulled by its renowned museums; those of Palazzo Te and Torino Musei is more relevantly determined by residents instead.

Palazzo Reale, Palazzo Ducale and Torino Musei attract more than 10% of their potential audience, while Zètema, Palazzo Strozzi and Pala Expo converge on a level of 5-9%, even because cultural tourism competition is strong.

It must be also taken into consideration that, for those institutions producing a high number of exhibitions and activities (as Palazzo Reale with 30 exhibitions per year, Palazzo Ducale with 20 and Zètema with 38), the residents component is underestimated because there could be repeated visits to an institution during the same year: the 12% achieved by Palazzo Reale has to be weighted in this perspective.

⁸ In order to compare different countries, that use inhomogeneous regional divisions and criteria, we based on Eurostat's NUTS2 and NUTS3 areas. Centering on the museum's cities, we included in the analysis all the NUTS regions at a maximum distance of 50-80km from the center.

⁹ As already mentioned in footnote 7, it must be considered that the number of visitors of Musei Civici di Venezia, Torino Musei, Palazzo Te and Zètema include the admittance to museums.

Table 4 – Audience, potential audience and attractiveness of benchmark institutions

Institution	District	Visitors	Residents in 50-80km area	Arrivals in 50-80km area	Residents + Arrivals	Attractiveness
Palazzo Te	Mantua	196,008	409,775	181,507	591,282	33%
M. Civ. Venezia	Venice	1,792,556	853,787	7,435,396	8,289,183	22%
Palazzo Ducale	Genoa	288,558	884,635	1,251,430	2,136,065	14%
Palazzo Reale	Milan	1,091,731	3,930,345	5,075,590	9,005,935	12%
Torino Musei	Turin	432,244	2,290,990	1,362,130	3,653,120	12%
Zètema	Rome	1,289,868	4,110,035	9,617,458	13,727,493	9%
Palazzo Strozzi	Florence	258,000	984,663	4,082,656	5,067,319	5%
Pala Expo	Rome	578,910	4,110,035	9,617,458	13,727,493	4%

Source: Elaboration on Eurostat (2007), institutional balance sheets

These results ask for a deeper research on the processes and aims leading to such heterogeneous solutions to substantially similar problems. Although recognizing the necessity of an *ad hoc* approach to different contexts, the impression is that processes were managed in a highly “experimental” way and with the need to mediate among institutional and sometimes political stakes.

The competition among institutions and urban centers is driving public administrations’ choices towards events able to reduce the risk, maximizing economic and political short-term returns. Therefore, we can observe:

- a concentration on few producers / institutions able to organize blockbuster exhibitions;
- the proliferation and diffusion of exhibitions of low / medium quality and cost that exploit single paintings and “star” painters;
- a competition among cities, places and exhibition institutions, with an increasing difficulty to fund their activity;
- a growing difficulty to distinguish and to give a specific identity to the different cities’ cultural programs;
- a lack of shared evidences about the results of those policies on local contexts. Cultural tourism is a resource but there is a need for an accountability of its positive and negative externalities and consequences.

Which are the practices that can mediate among the different layers of the value of culture? In general terms, it could be suggested to foster institutions that are able to balance economic, political and cultural drivers and that produce an independent, wide-ranging and quality program, therefore developing their community’s cultural and social growth, the sustainability of their own activity and of the connected services and the accumulation of symbolic capital by their partners. But in reality this may be a mere wishful thought.

A number of issues still need to be solved in order to have the possibility of orienting the policies on the basis of strong empirical evidences about issues like the productions quality, the audience reactions, the social and economic consequences of those efforts.

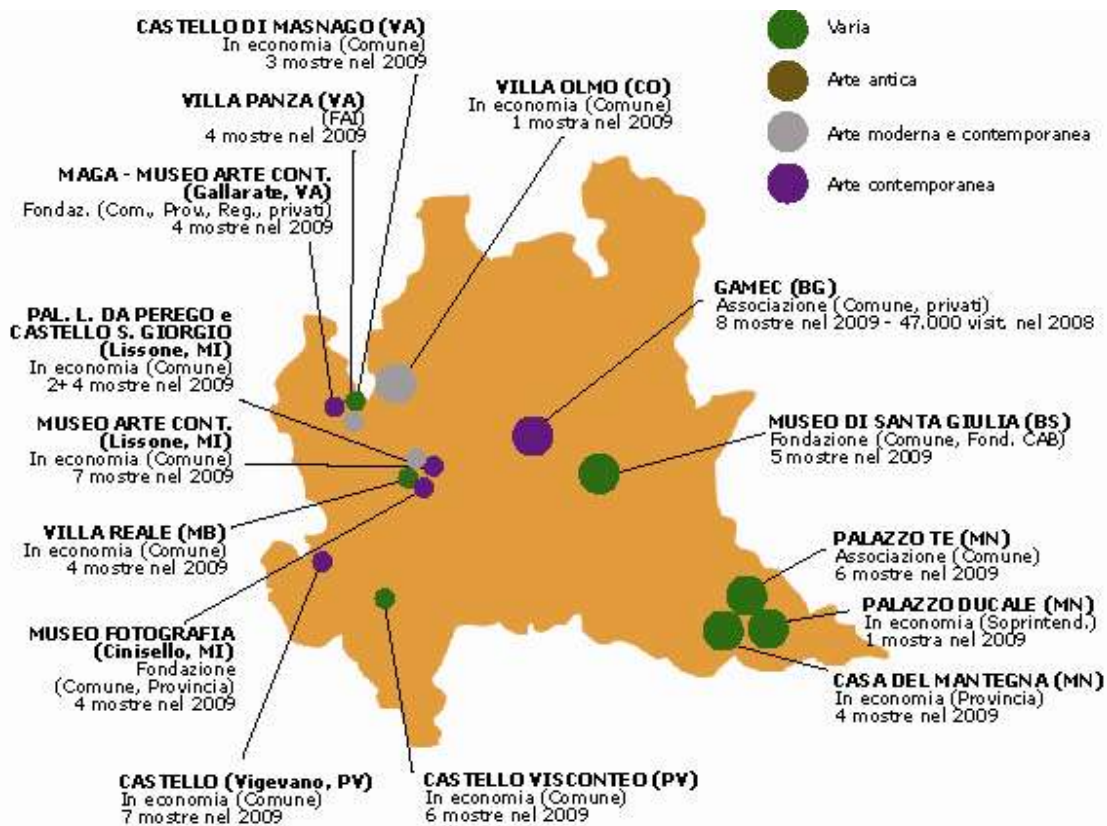
4. The perception of an exhibition quality: the case of “Gli Arazzi dei Gonzaga nel Rinascimento” in Mantua

4.1 The research

Lombardy is one of the richer regions in terms of number of exhibition structures. In Milan alone there are thirty main institutions that organize exhibitions (13 dedicated to contemporary art and culture, 3 to modern and contemporary art, 2 to photography, 2 to ancient art, 8 to variable fields).

Figure 3 shows the distribution of other relevant institutions in the region, apart from Milan. The most visited sites are in Como (Villa Olmo), Brescia (Santa Giulia), Bergamo (GAMEC - Gallery of Modern and Contemporary Art) and Mantua, which has three relevant historical institutions that organize different genres of exhibition¹⁰.

Figure 3 – Exhibition institutions in Lombardy (except Milan)



Source: Il Giornale dell'Arte, Exibart, institutions' websites

Palazzo Te, a XVIth century building in Mantua¹¹, currently hosts the Civic Museum and organizes exhibitions through an association participated by the Municipality, the District of Mantua, the local bank foundation and some private partners.

Its positioning is centered around Renaissance art and culture, with some exhibitions about modern and contemporary art. The attention for the scientific dimension has maintained over time a strong qualitative tradition and relevant international partnerships (“La forza del Bello” in 2008 and “Il Cammeo Gonzaga” in 2008 with Hermitage; “Alvar Aalto” in 1998 with MoMA). Some projects gained a great audience success: for instance, “Gonzaga. La Celeste Galeria” in 2002, “Mantegna a Mantova” in 2006 and “Giulio Romano” in 1989.

The exhibition “Gli Arazzi dei Gonzaga nel Rinascimento” (“Gonzaga’s Tapestries in the

¹⁰ We included in the map the institutions that in 2008 or 2009 were cited in the exhibitions top charts.

¹¹ Palazzo Te was the summer residential villa of Federico II Gonzaga, created by the architect and artist Giulio Romano in 1525-1535.

Renaissance”), held between March and June 2010, inaugurated a season characterized by a systematic collaboration with a scientific committee¹². The committee has an effective responsibility to define the cultural program of Palazzo Te and is particularly careful to the quality of internally produced exhibitions, avoiding to buy or rent other national or international projects.

The exhibition was not only coherent with the history of the city and its Renaissance, but extended also to other main urban locations (the State-owned Palazzo Ducale and the Diocesan Museum), allowing a conjoint visit.

However, the theme –tapestry– was far from the large audience’s taste, a sign that the exhibition has been conceived starting from Palazzo Te and its idea of scientific quality. The budget was that of a medium-scale exhibition and there were no significant innovations in set up or communication.

The operation was risky, even if it was traditional under many aspects, also for the lack of evidences about similar exhibitions in Italy: the success of an exhibition on tapestry at the Metropolitan in New York couldn’t be seen as a comparable precedent.

The aim of our survey was therefore to understand if Palazzo Te achieved its objective of introducing a high-quality programming and which were the limits and problems of this approach.

The research design had to take into consideration some elements of complexity that affect the general cultural consumption scene and the specific context of Palazzo Te:

- a first point is the possibility that people are not able to distinguish and recognize the specific quality of an exhibition, compared to other similar ones. Many scholars have underlined the average “lack of perception” of big exhibitions’ audience in Italy. Rosanna Cappelli (2002) talked about “visual coma”, a syndrome of the average visitor in archaeological sites denouncing that the relationship between art and public is not based on experience but on mere consumption, with a drastic cancellation of the critical dimension; apparently, this indication is confirmed by the average time of observation of paintings at Musei Vaticani, often a few dozen seconds per work. Therefore, we had to test if in Mantua there was an excessive distance between the quality perception of the scientific committee and the audience’s valuation;
- a second point concerns the “omnivorous” nature of contemporary cultural consumption. Unlike what Bourdieu (1979, 1993) wrote about the segmentation of consumption, more recent researches (Chan and Goldthorpe 2007; Sullivan and Katz-Gerro 2007; Peterson 1992, 1996) converge to a strong differentiation between people generically and intensely interested in culture and those substantially not interested in any kind of cultural good. The first group mainly distinguishes itself for the fact of “consuming a lot” (in relation to the addictive nature of cultural consumption), more than for stable tastes and choices. So, a second element to test was if the attendance to the “Arazzi dei Gonzaga” exhibition was determined by the explicit recognition of its quality or by a generic propensity to see art exhibitions;
- a third, more specific point emerged from previous surveys commissioned by Palazzo Te, that revealed how, basically, its audience wasn’t attracted by exhibitions but by the historical building and its unique fresco paintings. This element led us to test the presence of a segment specifically interested in the exhibition..

Following these contextual evidences, our research questions were: was the exhibition on the Gonzaga’s tapestries a qualitatively different cultural initiative? Was this difference perceived by a relevant part of the audience? Which factors contributed the most to this perception of quality? Were they specific elements of the exhibitions or generically attributable to the building or the city of Mantua? Does the recognition of exhibition quality produce a significant

¹² The exhibition is the result of a multi-year research work led by Guy Delmarcel of the Leuven University (Belgium), with the contribution of Nello Forti Grazzini, Stefano L’Occaso and Lucia Meoni.

and stable segmentation of the audience¹³?

4.2 General analysis of the exhibition and sample description

A first, significant element is the number of total visitors to “Gli Arazzi dei Gonzaga”, that is higher than other exhibitions on applied arts at Palazzo Te. Its direct cost per visitor (18 euros) is consistent to the average of the institution (26 euros of total cost per visitor, including direct and indirect costs).

Table 5 - Audience of applied arts exhibitions at Palazzo Te

Year	Exhibition	Days	Total visitors	Visitors per day
2009	Gli Arazzi dei Gonzaga	106	80.447	759
1995	I Gonzaga. Moneta Arte Storia	92	66.877	727
1998	L’Uomo d’Oro	93	62.727	674
2008	Il Cammeo Gonzaga	91	40.720	447

If we consider that tapestry has features that are quite similar to painting, we can observe that this exhibition obtained a good, average result in terms of public, ranking ranked 12th out of Palazzo Te’s 38 exhibitions.

Table 6 - Audience at Palazzo Te’s most visited exhibitions

Year	Exhibition	Days	Attendance	Attendance per day
2002-3	Celeste Galeria	133	513,930	3,864
2006-7	Mantegna	134	316,358	2,361
1989	Giulio Romano	72	270,000	3,750
2004-5	Le Ceneri Violette	126	153,457	1,217
1994	Alberti	92	145,502	1,582
1999	Raffaello	83	134,173	1,617
2008	La Forza del Bello	100	116,033	1160
1998	Alvar Aalto	92	101,698	1,105
2001	Un Paese Incantato	98	94,373	963
1991	Wiligelmo	149	89,467	600
2001	Perino Del Vaga	83	80,746	973
2009	Gli Arazzi dei Gonzaga	106	80,447	759
2006	Semeghini	78	78,554	1,007
1993	Pinxit Et Delineavit	78	77,555	994
2002	Viviani	91	76,779	844

¹³ In order to carry out our research project, we used a cross-section, sample survey. A questionnaire was administered to visitors by the staff of Palazzo Te during all the period of the exhibition “Gli Arazzi dei Gonzaga”. This methodology implicitly defines the limits of the project, with particular reference to the problem to evaluate the institution’s cultural policies. The main limits can be summarized as follows:

- the difficulty to analyze the cultural and qualitative effects of Palazzo Te exhibition policies with a quantitative tool;
- the limited period of observation in opposition to the fact that educational and formative dimensions are visible in the long run and can be studied only with a qualitative and historical study;
- the impossibility to isolate the effects of a single exhibition from the overall cultural activity of Palazzo Te.

In total 288 questionnaires have been gathered by the staff of Palazzo Te during different moments of the visit and for all the exhibition length.

Organized groups and visits are underestimated (27% of the total visitors and 13,5% of our sample).

By comparison with the previous exhibition “Il Cammeo Gonzaga” -with a similar theme, style and historical period- we do not observe significant differences in gender (63% of women and 37% of men) and education level (7% compulsory education, 48% secondary school, 45% graduate). There is a higher concentration of 35-50 years-old people (41% versus 33%) and less young people of 21-35 years (22% vs. 30%). Around 4% are younger than 20 years and 33% are older than 51 years.

The nationality is almost completely Italian (97%), with a geographical provenience concentrated in the northern part and similar to that of “Il Cammeo Gonzaga” (41% Lombardy, 16% Emilia-Romagna, 9% Veneto, 8% Piedmont). Therefore, the general description of the population seems to identify a stable potential audience, to whom the cultural activities of Palazzo Te can be addressed. Nevertheless, this exhibition was able to attract more people from outside district (92% vs. 84%).

The existence of the event on tapestries has been widely known thanks to internet (22% vs. 11% of “Il Cammeo Gonzaga”); there has also been a growth of the word-of-mouth (14% vs. 10%), probably a sign of the audience’s satisfaction. Other relevant channels were press (23%), posters (8%) and brochures (7%).

Synthetically, the description of the population points out that “Gli Arazzi dei Gonzaga” has, more than other exhibitions, reached an audience of a group between 35 and 50 years. This group is reasonably characterized by independent choices and few free time, by a higher influence of internet and word of mouth; they more frequently come from outside the city. All these are a sign of a specific interest in the exhibition, its theme and the pieces on display. Moreover, almost 58% of the visitors stated they expressly came to Mantua to see the exhibition, while on previous situations attendance to exhibitions often appeared to be an unexpected consequence of a visit to Mantua and Palazzo Te.

4.3 Evaluation of the exhibition

“Gli Arazzi dei Gonzaga” was appreciated by 94% of visitors, of whom 43% expressed the highest evaluation possible (“very positive”). In addition, 24% considered it better than the last exhibitions they visited in other international institutions.

The audience’s answers concerning their relative and absolute appreciation of the exhibition have been considered as variables in relation to a set of questions on the general satisfaction for the overall quality of the system of Palazzo Te and Mantua.

We firstly proceeded with a linear regression to check which, among all the variables in the questionnaire, significantly influence the appreciation of the exhibition.

As we can observe, the variables with a sufficient significance are “quality of the objects” and “quality of the exhibition setting”, followed by “Palazzo Te” (the influence of the building) and by a variable linked to the booking service and the access to the exhibition without queues.

Table 7 – Model summary

Model		R	R Square	Adjusted R Square	Std. Error of the Estimate
dimension0	1	.580 ^a	0.336	0.316	0.538

a. Predictors: (Constant), Access time, Access to several sites, Palazzo Te, Quality of objects, Quality of exhibition setting, City, Possibility of single ticket

Table 8 - Coefficients

Model		Unstandardized Coefficients		Standardized Coefficients	t	Sig.
		B	Std. Error	Beta		
1	(Constant)	.165	.149		1.112	.267
	Quality of objects	.161	.055	.170	2.912	.004
	Quality of exhib. setting	.173	.042	.238	4.112	.000
	Access to several sites	.052	.034	.085	1.534	.126
	Possibility of single ticket	.004	.045	.006	.097	.923
	Palazzo Te	.200	.057	.193	3.499	.001
	City	.101	.060	.092	1.666	.097
	Access time	.271	.056	.266	4.810	.000

Dependent variable: Overall satisfaction

Table 9 - Total variance explained

Component	Initial Eigenvalues			Rotation Sums of Squared Loadings		
	Total	% of Variance	Cumulative %	Total	% of Variance	Cumulative %
1	2.8	25.452	25.452	1.711	15.558	15.558
2	1.321	12.011	37.463	1.656	15.058	30.616
3	1.205	10.954	48.417	1.536	13.962	44.577
4	1.064	9.676	58.092	1.487	13.515	58.092
5	0.961	8.735	66.827			
dim.0	6	0.831	74.381			
	7	0.733	81.041			
	8	0.67	87.134			
	9	0.564	92.261			
	10	0.495	96.762			
	11	0.356	100			

Extraction method: Principal component analysis

The analysis allowed to identify four synthetic variables that contain the information of eleven questions.

- **Accessibility.** The first variable expresses the satisfaction for the system of services connected to the visit and in particular parking facilities and welcoming services.
- **Building and city.** The second variable comprehends the evaluation of the monumental quality of Palazzo Te and the interest for the city of Mantua, with a further indication on the access time to the exhibition (absence of queues that consents to do other things in the city). As it is also connected to the overall satisfaction for the exhibition, this variable shows a positive effect of the historical value of the context.
- **Quality of the exhibition.** The third variable represents the recognition of the specific quality of the exhibition, its pieces and its setting. The comparative evaluation of the quality is also absorbed by this variable: those who liked this exhibition more than other previously seen have appreciated the contents and the setting, with a low influence of other contextual elements.
- **Offer system.** The fourth variable groups the elements linked to a positive perception of a well-constructed offer. In this case, visitors could buy a single ticket for Palazzo Te, Palazzo Ducale and the Diocesan Museum.

Table 10 – Rotated component matrix

Original variables	Synthetic variables			
	Accessibility	Building and city	Quality of exhibition	Offer system
Parking	.868			
Welcoming	.685			
Palazzo Te		.677		
Access time	.423	.583		
Overall satisfaction	.383	.582	.337	
City		.579		.322
Compared to other exhibits			.721	
Quality of objects			.670	.423
Quality of setting			.593	
Presence of several sites				.811
Possibility of single ticket				.573

Extraction method: Principal component matrix

Rotation method: Varimax with Kaiser normalization

Rotation converged in 8 iterations

The presence of these four factors segments the sample in relation to the exhibition offer. As we can observe in Table 11, the population splits in three main groups characterized by the prominence of a factor and the lower or negative significance of the others.

Table 11 – Final cluster centers

	Cluster		
	1	2	3
Accessibility	-.52527	1.06955	-.20483
Building and city	-.39818	-.61599	.88238
Quality	.56125	-.26219	-.42159
Offer system	.08847	-.00438	-.09333

The largest group (72 people) is made by those who are exclusively attracted by the quality of the exhibition, appreciating the positive difference compared to others, and who don't express an interest in the city, the building or the services.

The second group in importance (66 people) is influenced by contextual elements (the building, the city) and do not show a particular interest in the intrinsic quality of the exhibition.

Table 12 – Number of cases in each cluster

Cluster 1 - Quality	72
Cluster 2 - Accessibility	48
Cluster 3 - Building and city	66
Valid	186
Missing	102

On the whole, it is therefore possible to identify a relevant segment of the audience who is able to recognize the differential quality of the exhibition “Gli Arazzi dei Gonzaga” and who chooses on the basis of this awareness.

Table 13 – Cluster number of case “Expressly come for the exhibition” – Cross tabulation

		Expressly come for the exhibition		Total	
		Yes	No		
Cluster no. of case	Quality	Count	37	12	49
		Expected Count	32.1	16.9	49
	Access	Count	11	15	26
		Expected Count	17	9	26
	City	Count	30	14	44
		Expected Count	28.8	15.2	44
	Total	Count	78	41	119
		Expected Count	78	41	119

Finally, those who appreciated the exhibition the most are the same who attend exhibitions assiduously (more than three during the last year), both in Italy and abroad. This element confirms that quality has been especially recognized by the more active and attentive segment.

5. Conclusions

The analysis of the evolution of the exhibition producers’ strategies and practices in Italy showed how significantly heterogeneous models have been developed. An increasingly competition has led institutions to develop different structures, organizational models and cultural programs, that are evidently influenced by their budgets and geographical position, but also by a different capability to balance cultural, political, economic and social issues.

The concentration of exhibition producers and the success, in terms of number of visitors, of events that tend to privilege few big names of art and entertainment elements seem to drive institutions to a standardization of their programs. Especially for small-scale sites, this context has increased the difficulty to gain economic sustainability with more specific research exhibitions and to communicate to their potential visitors the differential of quality.

On the other side it is relevant to understand the need for quality expressed by visitors, their capability to recognize the scientific research behind of an exhibition and the consequences – in terms of sustainability – of a scientific-oriented exhibition strategy.

The results of the considered case emphasize:

- the fact that a quality-oriented production is clearly acknowledged by visitors and produces interesting effect of low-cost dissemination of information;
- this perception is apparently limited to a population of cultivated and expert visitors, that represent the standard profile of frequent customers of exhibitions;
- the quantitative dimension of this segment is consistent with a sustainability of the institution in the perspective of a stability of the public contribution in the long term;

- these specific visitors do not have a high expected economic impact, as they often come for the exhibition and seldom spend a night on site, but they can be considered as an additional component to the most economically relevant segment (those who come for an overall visit to the city and consider the exhibition as an added value).

In the long run, the capitalization of the value of trustful relationships with this quality-sensitive segment can heighten the cultural quality of the institution's messages and their progressive sophistication. In order to fully develop this potential, it is essential to integrate the institution's cultural programs with the overall policies concerning schools and local communities.

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