CULTURE CONNECT

CULTURAL DIALOGUE SURVEY

MARCH 2021

THE FUTURE OF TOURING EXHIBITIONS

In collaboration with teo

All about touring exhibitions

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EXECUTIVE SUMMARY

For the first iteration of Culture Connect's new Cultural Dialogue survey series, Culture Connect collaborated with Teo, the Touring Exhibitions Organisation, and invited the global touring exhibitions community to answer our *Cultural Dialogue Survey 2021: The Future of Touring Exhibitions*. The survey ran from 3 December 2020 to 5 February 2021. The result of this global consultation is a snapshot of initial directions about what the future might look like, taken 10 months into the pandemic.

The findings are organised around three main emerging trends:

Trend 1 | A touring exhibition community that remains overall confident

Trend 2 | An activity that retains an international outlook and is increasingly perceived as a key tool of soft power

Trend 3 | In the face of new challenges, a sector that sees the timid emergence of new practices

Key Statistics

- 83% of the respondents think that touring exhibitions could be a tool for ongoing cultural exchanges across borders
- 77% of the respondents anticipate the same level of activity when comparing the frequency of hiring exhibitions pre-COVID and in the future and 66% of the respondents anticipate the same level of activity when considering sending exhibitions pre-COVID and in the future
- 73% of the respondents perceive the production of fresh content with fewer resources as one of the main benefits of touring, making it the most anticipated benefits of touring since COVID and 63% of the respondents perceive diversification of audience as one of the main benefits of touring, making it the second most anticipated benefit of touring since COVID
- 75% of the respondents consider funding as one of the top challenges for the future of touring exhibitions, followed by travel restrictions for couriers and curators (54%), a reduction in the number of temporary exhibitions (45%) and concerns about environmental and societal sustainability (43%)
- 48% of the respondents declare they experimented with or saw innovative solutions that have started to address the challenges facing touring exhibitions since the start of the COVID crisis
- 77% of the respondents anticipate an increase of outdoor spaces as venues to host touring exhibitions and 42% an increase in the hosting by shopping malls and retail centres

INTRODUCTION

INTRODUCTION

Over the past 20 years, the museum sector has witnessed a significant rise of touring exhibitions across the world. Dedicated touring teams emerged in major museums and touring exhibitions increasingly became a lucrative part of museums' activity, a sign of the sector's ability to be more resilient and an affirmation of its capacity to build strong international brands. It also played a great part in demonstrating the growing role of museums as a much-needed tool of soft power in response to the fragmented and uncertain world that emerged in the first two decades of the 21st century. This activity of touring and exchange was not completely new; indeed, exchanges across borders and cultures constitute the DNA of the museum sector and has, to a large extent, shaped it. However, these exchanges accelerated and were more formally structured as a business activity over the past 20 years due to the combination of a "museum boom", in particular in the Middle East and Far East with a surge of new buildings searching for content, and new demands on established museums to generate new income streams and contribute to raising the national and international profiles of their cities and/or countries.

Suddenly in March 2020, the COVID-19 crisis brought this booming activity to a sudden and global pause: objects were stranded across the globe, exhibition programmes put on hold and staff on furlough. 10 months in and after a series of lockdowns, closures and re-openings, the ambition of this survey was to consult those who make touring possible day-in and day-out to assess the global museum touring community's mindset in the wake of this unprecedented crisis and explore how they were anticipating the future of touring, especially in connection with cross-cultural dialogues which have formed a critical part of the development of this museum activity worldwide.

The results of this survey represent therefore a snapshot. It is intended to provide the museum touring community with some initial directions about what the future might look like. We also hope it will provide the sector with food for thought as well as opportunities to open a constructive global dialogue to imagine together the future of touring exhibitions and start answering, as our context of globalisation is being put into question, the following questions: How can ideas and cultural dialogues continue when circulation of people and objects are being challenged by lockdowns and environmental considerations? What role might touring exhibitions be able to play for cultural institutions and their audiences in that context and in the future?

For this first iteration of our new series of global surveys exploring the appetite for cultural dialogue across cultural fields, we are delighted to have collaborated with Teo, the Touring Exhibitions Organisation, on inviting the global touring exhibitions community to answer the *Cultural Dialogue Survey: The Future of Touring Exhibitions*.

- Anaïs Aguerre, Founder & Managing Director, Culture Connect Ltd. -

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METHODOLOGY & RESPONDENTS

METHODOLOGY

Objectives

The two main objectives of this global survey were to assess how individuals working on touring exhibitions, on a daily basis and worldwide, were anticipating the future of this booming museum activity, and to explore, from the ground, what role touring exhibitions could play at a time when globalisation is highly challenged. These objectives reflected the inherent challenges posed on touring exhibitions by the current COVID crisis, given that touring exhibitions have traditionally been dependent on the mobility of people and objects and that cross-cultural dialogues have formed a critical part of the development of this museum activity and represented a successful engine for the rise of museums globally.

Format

The survey consisted of 19 questions and was available via a Google form between 3 December 2020 and 5 February 2021. The survey link was circulated by Teo via LinkedIn, their website, their newsletters, and their partners. Culture Connect also shared the survey link on its website and through LinkedIn. It was an initiative open to all professionals involved in the hosting and touring of cultural exhibitions worldwide, museums, galleries, science centres, exhibitions venues, libraries, archives, and gardens.

All data submitted by respondents were processed and stored securely in accordance to EU GDPR, UK DPA 2018, and UK GDPR. Consent was gathered from all respondents and no data was shared with third parties. Respondents could withdraw their consent at any time by contacting info@culture-connect.net. Consent to use anonymised quotes was also gathered.

Limitations

Although the survey was circulated among professional museum networks and touring exhibitions networks, one of the main limitations of the survey is its open nature: it did not take a scientific sample of audiences and the completion of the survey was on a random basis by the generosity from the touring exhibitions community, relying on circulation by colleagues and on the respective social media platforms of Teo and Culture Connect (namely, their websites, LinkedIn, and mailing lists).

Limitations (continued)

Another limitation is survey fatigue, as the survey launch followed the work of multiple sector-wide surveys.[1] This could have contributed to fewer or less detailed responses.

Finally, the survey was intended to map global trends, and feedback was received from nearly all continents, with the exception of Africa. This may indicate the lack of reach by professional networks in the region, but it may also indicate the need to do a second iteration of the survey to specifically address this gap in knowledge. We have therefore prioritised concluding on general trends rather than geographic ones but when relevant we will be citing the results of our regional analysis alongside these.

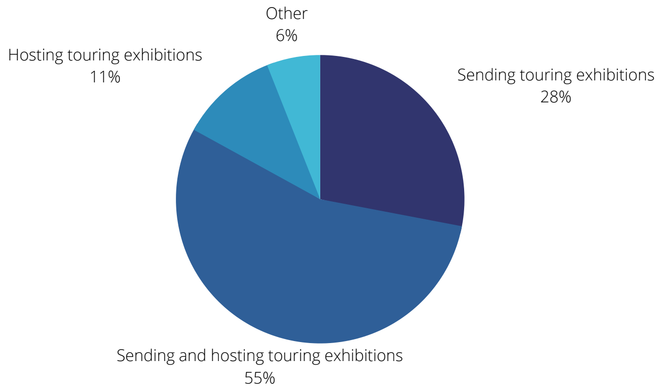
[1] These include Imagine Exhibitions' survey in January 2020 for the European travelling exhibition industry (awaiting publication); Touring Exhibitions Group's comprehensive research survey on museums, galleries, and cultural organisations across the UK that tour and hire exhibitions, Economics of Touring Exhibitions Survey Report: An Analysis of Touring Exhibition Practice in the UK (2016); and VASTARI's surveys on Exhibition Finance Trends and Vastari Global Trends on key trends in the exhibitions ecosystem launched in October 2018.

PROFILES OF RESPONDENTS

Cultural Dialogue Survey: The Future of Touring Exhibitions received a total of 136 responses from respondents across the globe from the Americas to Asia, Europe to the Middle East and representing all aspects of the touring activity in terms of hosting/sending as well as the types of exhibitions respondents engaged with. This broad reach has enabled the survey to provide a holistic and fairly global view of the touring exhibitions landscape pre- and since-COVID.

Fig. 1 | Profile of the respondents

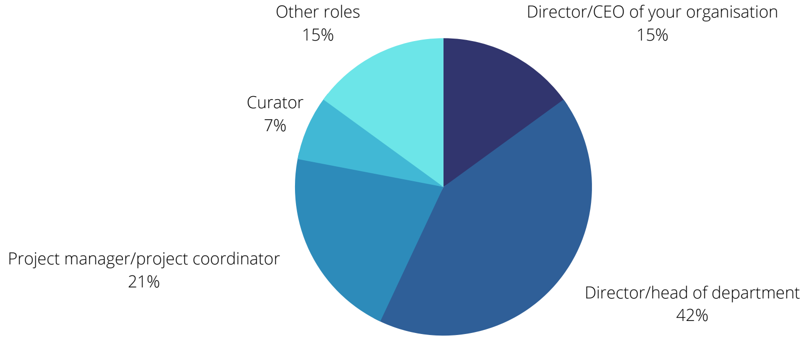
Q1. Broadly speaking, what is your organisation involved in?



All dimensions of the touring activity are represented among the participants, enabling the results of the survey to reflect a holistic view of touring from both sending and hosting perspectives. Notably, 55% of the respondents have the dual experience of sending and hosting, giving them a complete view and experience of the two facets of the touring activity. In addition, among the 6% of respondents who didn't select sending or hosting, we find consultants and production companies supporting museums.

Fig. 2 | Positions of the respondents

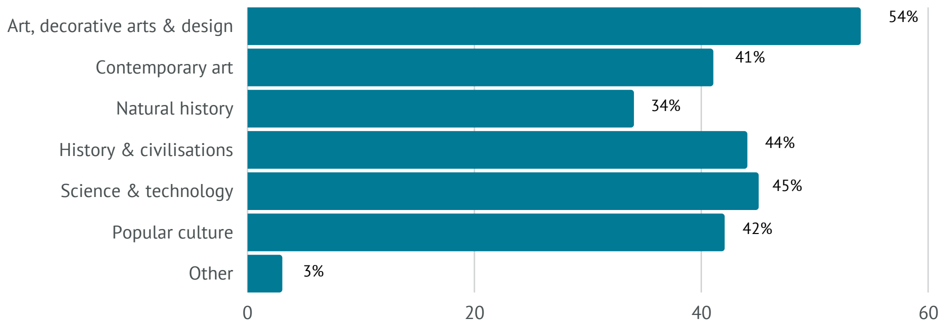
Q5. What is your job title at your organisation?



In terms of positions, the majority of the respondents are decision-makers with 42% directors or heads of departments in charge of exhibitions and/or touring programmes and 15% Director and/or CEO of their organisations. However, the survey received insight from a broad range of people involved in the museum touring activity, with 21% project managers/project coordinators, 7% curators and 15% other roles covering notably designers, consultants and registrars.

Fig. 3 | Types of exhibitions

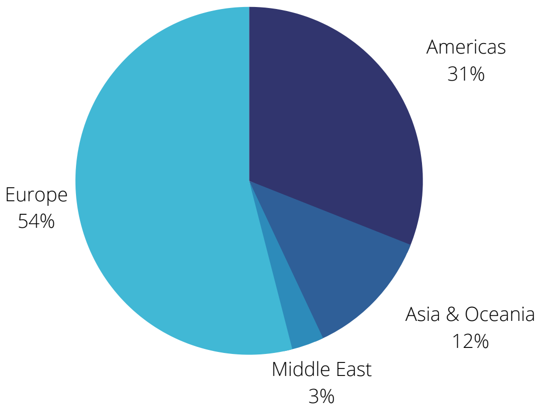
Q2. What type of touring exhibition do you engage with?
Percentage of respondents



When considering the types of exhibitions, it must be noted that **75% of the respondents engage with two or more types of exhibitions. This, again, provides a broad perspective of touring exhibitions. Similarly, nearly all types of exhibitions are represented**: 54% of the respondents engage with "art, decorative arts & design" exhibitions (including photography), 45% with "sciences & technology" exhibitions, 44% with 'history & civilisations" exhibitions and 42% with "popular culture" exhibitions (including fashion, music, cinema). Among the "other" category, the majority are "children's exhibitions".

Fig. 4 | Geographic breakdown of the respondents

Q3. What country is your organisation based in?



Finally, the respondents are coming from 30 countries across the globe. From Armenia to Japan, France to Australia, Mexico to Saudi Arabia, United States to China, they are **spread over nearly all continents** with the noticeable exception of Africa and a dominance of Europe (54%) and the Americas (31%) reflecting to a degree the current landscape of the touring exhibitions business.

Details of the countries

Armenia | Australia | Austria | Bangladesh | Belgium | Canada | China | Denmark | Estonia | France | Germany | Greece | Italy | Japan | Saudi Arabia | Luxembourg | Mexico | The Netherlands | Oman | Peru | Poland | Portugal | Qatar | Russia | Spain | Switzerland | Thailand | Turkey | United Kingdom | United States of America

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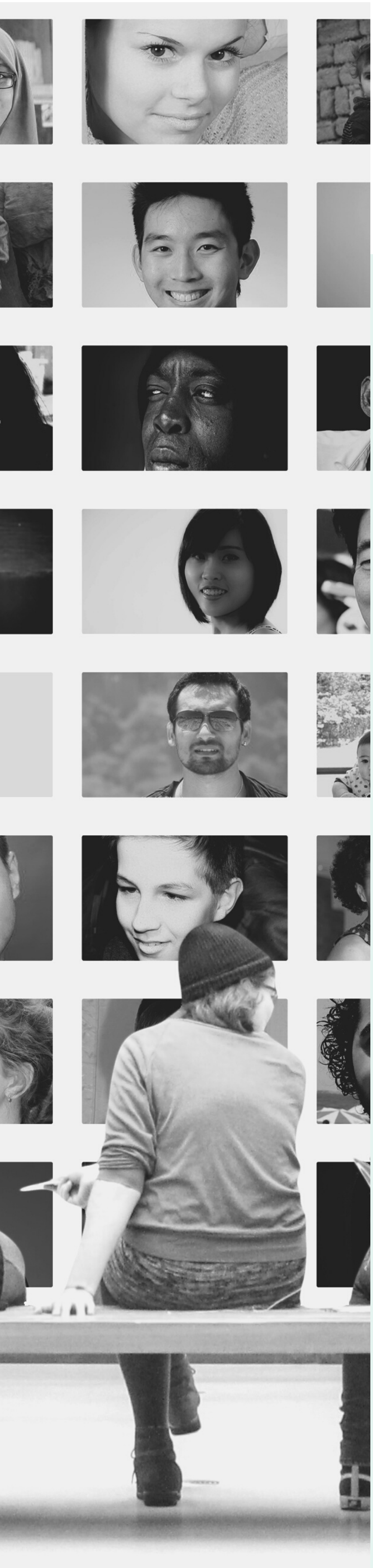


KEY TRENDS

A TOURING COMMUNITY THAT OVERALL REMAINS CONFIDENT

Level of activity

Fig. 5 | Level of touring activity pre-COVID

Q6. On average, how frequently did your organisation hire and/or send touring exhibitions before the COVID-19 pandemic?

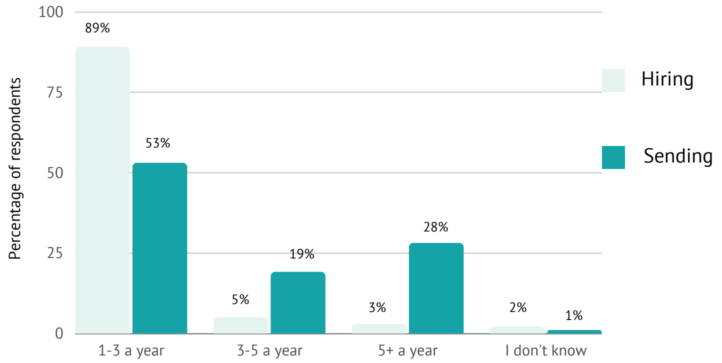
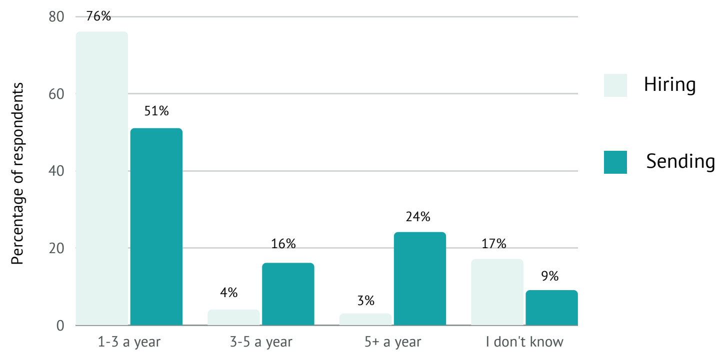


Fig. 6 | Level of touring activity anticipated in the future

Q7. In the future, how frequently does your organisation plan to hire and/or send touring exhibitions?



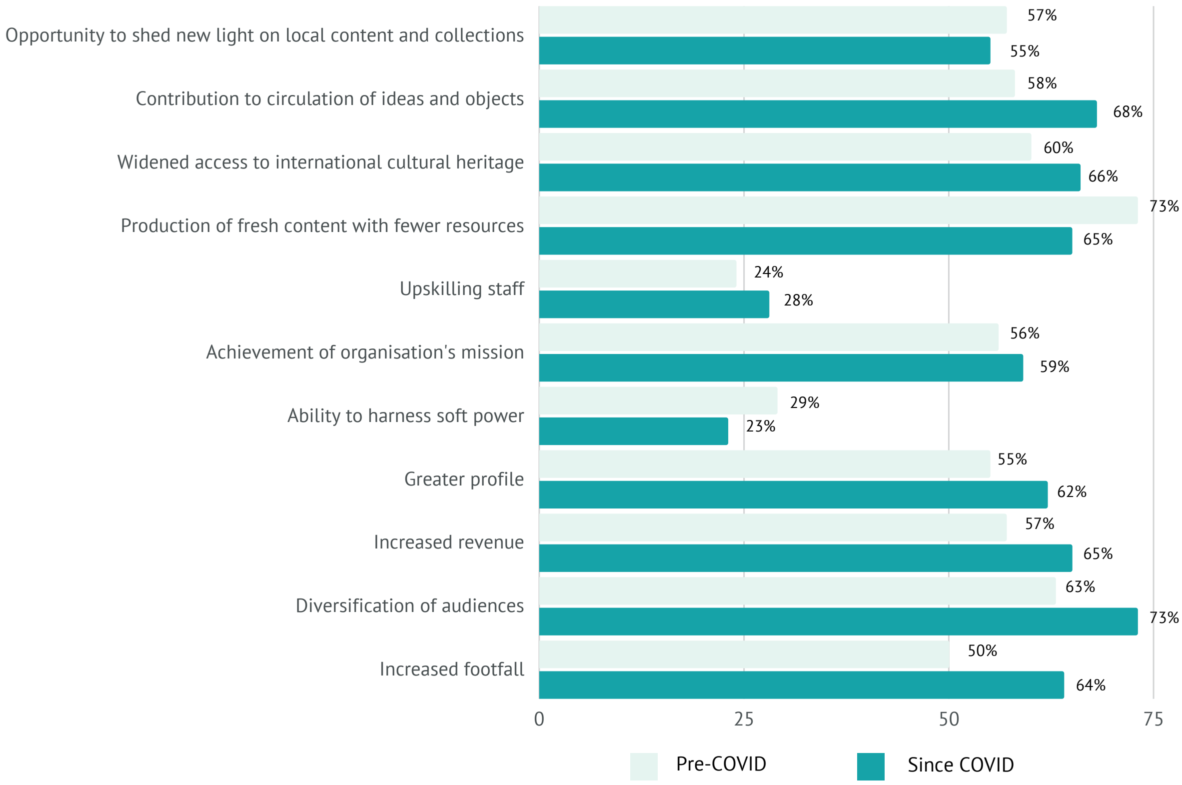
When questioned about the level of activity measured by the frequency of exhibitions being sent and hired, it is remarkable to note that **members of the touring exhibition community showed confidence in the future as they anticipated, overall, a fairly similar level of activity compared to their pre-COVID level**.

Indeed, despite a growth of the feeling of uncertainty regarding exhibitions being sent and hired (2% of “don’t know” vs 17% when it comes to hiring in the future, and 1% vs 9% when it comes to sending), the profile of frequency remained identical with the biggest share of the activity around “1 – 3 exhibitions a year” and a similar disconnect between a larger number of exhibitions being sent than hired.[2] Moreover, when comparing the frequency of hiring exhibitions pre-COVID and in the future, 77% of the respondents anticipated the same level of activity. Likewise, 66% of the respondents when considering sending exhibitions anticipated the same frequency pre-COVID and in the future.

[2] This disconnect might be partly explained by the over-representation of Europe and the Americas.

Expected benefits

Fig. 7 | Evolution of the expected benefits of touring exhibitions
Q13. Overall, what do you think are the benefits of touring exhibitions?
Percentage of respondents



Despite the COVID crisis, touring exhibitions are still expected to provide multiple benefits and seem to be addressing two main issues that museums are facing more acutely since COVID: namely, funding cuts and the need to diversify audiences.

Respondents were asked what they thought were the benefits of touring exhibitions pre- and since COVID-19. Overall, there were no major differences in the perceived benefits of touring. Despite the crisis, touring exhibitions are still expected to provide multiple benefits with an average of 5.9 perceived benefits per respondent pre-COVID and 5.2 since COVID. There are however two noticeable changes since COVID: a significant increase in the perception of the benefit of touring exhibitions as a means of “production of fresh content with fewer resources” (73% vs 65%) and a clear decrease in the perceived benefit of touring in terms of “increased footfall” (50% vs 64%).

Expected benefits (continued)

Overall, the perceived benefits from touring exhibitions seem to be addressing two of the most pressing issues facing museums in the wake of the COVID crisis: namely, funding cuts and the need to diversify their audiences. As mentioned, 73% of the respondents considered the main benefit of touring exhibitions was to "produce fresh content with fewer resources". The second most cited benefit since COVID is diversification of audiences, with 63% of the respondents perceiving this as a benefit of touring.

This must be read in connection with the responses left by 55% of the respondents on how they thought touring exhibitions could help museums become more inclusive. The majority of these respondents (77%) left a positive reaction, commenting most on the content of touring exhibitions – in particular, how touring exhibitions could diversify narratives and bring a multiplicity of perspectives and viewpoints from outside the institution. They also commented on how touring exhibitions could enable museums to be more inclusive by working with communities and therefore gain more experience and expertise. Similarly, they noted that touring exhibitions could enable museums to address local issues in a timely fashion and fill gaps in collections in order to speak on current challenges. The need for touring exhibitions to be accessible for disabled visitors and for inclusivity to become part of the process of planning a touring exhibition were also highlighted.

Q18. How do you think touring exhibitions could help museums become more inclusive?

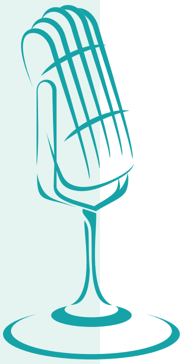
"Diversity of offering and new ways of interpreting using co-production and co-curating with diverse and emerging communities"

"By producing content that considers and represents multiple perspectives - it takes a concerted effort in the exhibit development process to ensure all stakeholders on a specific topic are being consulted and considered."

"Variety of museum content will always be important for diversifying the public's knowledge on certain topics. The idea of a "special and limited-time" traveling exhibit gets people interested in a topic they may not have considered studying on their own. Simply creating an exhibit brings a level of excitement to the topic at hand."

"Giving people outside of capital cities and the origin country to see original artwork and objects - a chance for more socioeconomic inclusivity. Can also allow a venue to diversify their programme by bringing in inclusive exhibitions on diverse topics."

"Help facilitate exchange of ideas, understanding of different audiences and cultural needs and priorities"



Overall perception of the future

When asked to share further comments on the future of touring exhibitions, the majority of the comments were positive.

To conclude the survey, respondents were invited to share any further comments they had on how they foresaw the future of touring exhibitions. 31% of the respondents left a response. The majority of these responses were positive[3]:

Q19. Do you have any further comments on how you foresee the future of touring exhibitions?

"[...] touring exhibitions will remain active and essential to the industry. They enable a diversity of offer and product and promote cultural exchange and collaboration"

"I am excited by the new opportunities of the current crisis post pandemic."

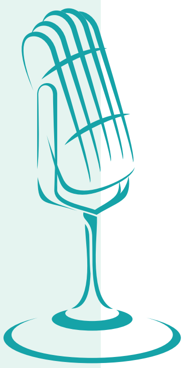
"I have experienced demand for touring exhibitions since Covid"

"I believe the touring exhibitions will be more important in the future"

"Collections based exhibitions cannot replace ticketed [...] touring shows bringing unique objects, subject matter and experiences"

"Touring exhibitions will be of increasing importance for Museums and exhibition venues in order to optimize the resources when developing temporary exhibitions/events and to get visibility internationally."

"I have a feeling the future will be more sustainable and merge experiences on site and online more effectively. This in turn, might actually be good news for smaller venues which might become attractive partners for larger institutions"



"Museums will continue to seek unique experiences for their visitors. These will come from outside the museum"

"I believe they will continue to be important to keep museums relevant for their visitors (offering something new at a reasonable cost compared to incurring huge capital costs to develop internal content/exhibits)"

[3] The analysis of this question (Q19) shows that 52% of the messages were positive, 31% were neutral and 17% were negative.

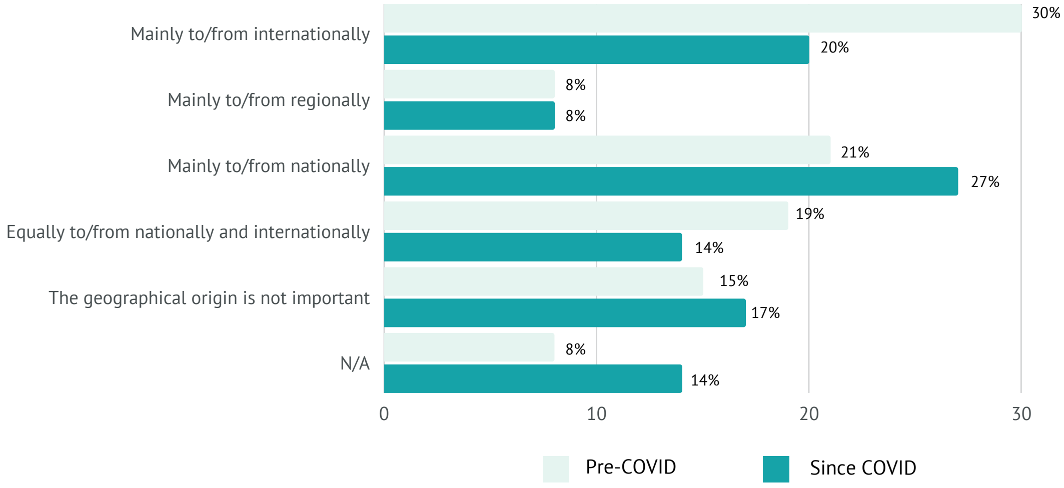
AN ACTIVITY THAT RETAINS AN INTERNATIONAL OUTLOOK

Geographic reach

Fig. 8 | Evolution of the geographic reach of touring

Q8. Are you mainly sourcing or sending your touring exhibitions nationally, regionally, or internationally?

Percentage of respondents



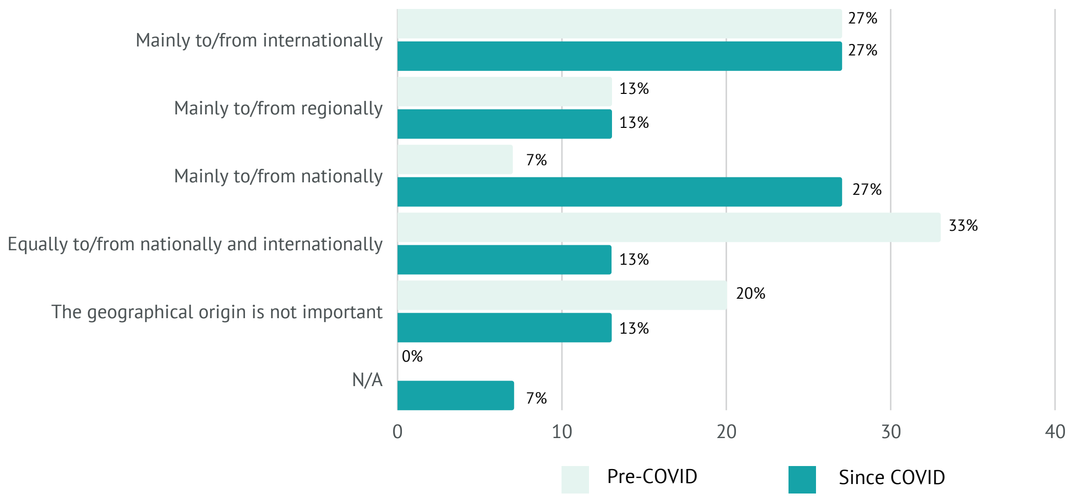
Although we note an anticipated greater focus on "National" for sourcing/sending touring exhibitions, "International" remains the second main geographical origin for sourcing/sending touring exhibitions since COVID while an increase number of people stated that the geographical origin was not important.

We note an anticipated greater focus on "national". 27% of the respondents cited national as their first geographical origin when sourcing/sending touring exhibitions since COVID, making it the first choice for qualifying the origin for sourcing or sending exhibitions. However, it must be noted that "sourcing or sending mainly internationally" remained the first choice for 20% of the respondents, making it the second choice overall for the origin for sourcing or sending exhibitions. Moreover, 17% of the respondents declared that, since COVID, the geographical origin was not important when sourcing or sending an exhibition compared to 15% pre-COVID, and 14% declared they were equally sourcing and sending to/from nationally and internationally. Additionally, 52% of the respondents did not change their answer pre- and since-COVID.

Geographic reach (continued)

Fig. 9 | Evolution of the geographic reach of touring (Asia-Oceania)

Q8. Are you mainly sourcing or sending your touring exhibitions nationally, regionally, or internationally? Percentage of respondents



At a regional level, the most noticeable change between pre- and since COVID is in Asia-Oceania, where only 29% of the respondents did not change their answer pre- and since COVID with national sourcing/sending catching up with international sourcing/sending of touring exhibitions.

Finally, contrary to what could have been expected, we do not see stronger regional reach emerging. The regional dimension (understood as sending/sourcing to/from your continent) was only considered by 8% of the respondents as the main geographic reach for their touring activity. This is equivalent to the level pre-COVID (see Fig. 8).

International benefits

The analysis of the perceived benefits from touring exhibitions highlights that the **international benefits in terms of widening access to international cultural heritage and the circulation of ideas and objects** remain in the top 5 benefits of touring exhibitions as per the table below. Moreover, **more people perceived the benefits of touring in terms of its ability to harness soft power since COVID** (29% of the respondents since COVID compared to 23% pre-COVID).

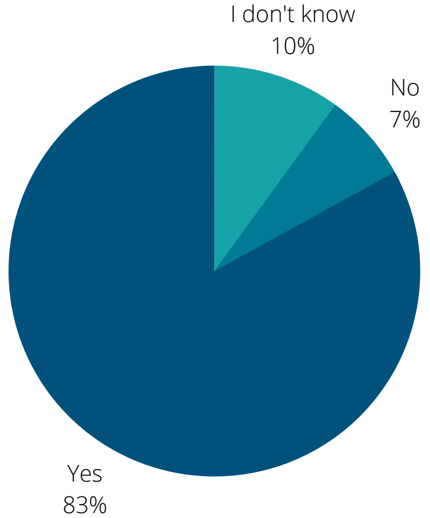
International benefits (continued)

Top 5 Benefits of Touring Exhibitions	
Pre-COVID	**Since COVID**
1. Diversification of audiences	1. Ability to produce fresh content with fewer resources
2. Increased footfall	2. Diversification of audiences
3. Circulation of ideas and objects	**3. Widened access to international cultural heritage**
4. Widened access to international cultural heritage	**4. Circulation of ideas and objects**
5. Increased revenue | Ability to produce fresh content with fewer resources [4]	5. Increased revenue | Opportunity to shed new light on local content and collections [4]

A tool for ongoing cultural exchanges across borders

Fig. 10 | Touring & Cultural Exchanges

Q17. At a time when travelling across borders is becoming more restricted, do you think touring exhibitions can be a tool for ongoing cultural exchanges across borders?



A large majority of respondents (83%) thought that touring exhibitions could be a tool for ongoing cultural exchanges across borders, at a time when travelling across borders is becoming more restricted.

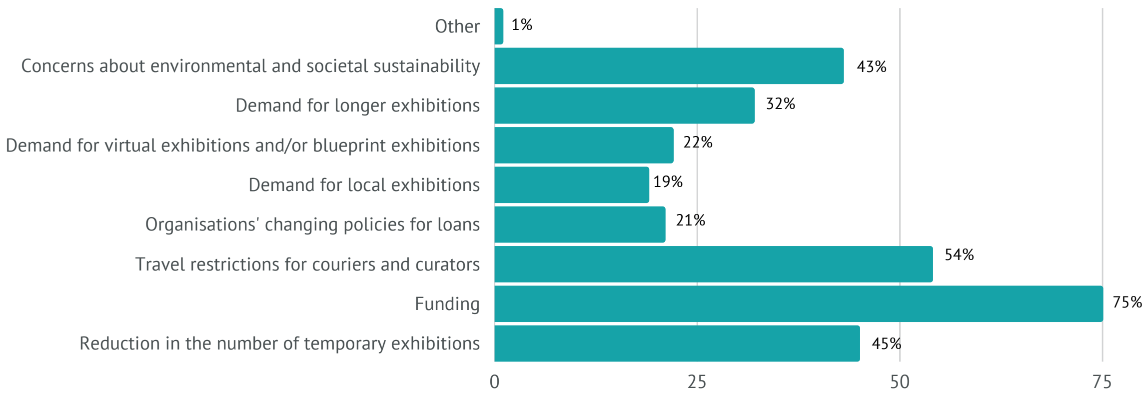
[4] Tied.

IN THE FACE OF NEW CHALLENGES, THE TIMID EMERGENCE OF NEW PRACTICES

Challenges

Fig. 11 | Main anticipated challenges for the future of touring exhibitions

Q14. What do you think are the main challenges that touring exhibitions will face in the future? Percentage of respondents



Not surprisingly the main anticipated challenge relates to funding with 75% of the respondents considering it as one of the top challenges for the future of touring exhibitions, followed by travel restrictions for couriers and curators (54%) and a reduction in the number of temporary exhibitions (45%).

Respondents were invited to select among 9 choices what they considered as the most important challenges for the future of touring exhibitions. It is worth noting that only 1% selected other challenges, which suggests that the eight challenges listed in the question covered the challenges anticipated by the global museum touring community.

Although the touring community expressed confidence in maintaining a fairly similar level of touring activity pre- and since COVID (see analysis of questions 6 and 7 on page 11), the reduction in the number of temporary exhibitions (45% of the respondents) and the demand for longer exhibitions (32% of the respondents) suggest concerns regarding the overall demand for touring exhibitions in the long term.

It is also worth noting that the fourth most cited challenge relates to “concerns about environmental and societal sustainability” with 43% of the respondents citing this as one of the top 3 challenges facing touring exhibitions in the future. This is particularly true in Europe where 48% of the regional respondents cited this as one of the top 3 challenges for the future of touring exhibitions. This concern is reflected in respondents' comments[5].

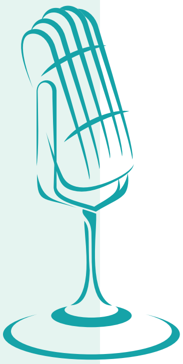
[5] Selection of quotes from Q15 and Q19.

Challenges (continued)

"For those of us who have highly immersive and interactive exhibits, we are now more mindful of how 'cleanable' our components are."

"I think more of a blended model, where people supply their own objects within a flexible framework that is provided by tourers. Climate impacts are going to need to be properly addressed."

"[...] the rise in roles for Sustainability Manager/Officer/Lead etc to oversee all aspects of museum practise. In the exhibitions and museums my company creates, we are always sustainability reporting, ever more working with local suppliers (especially fantastic in countries or areas where museology and related works do not have such long-established roots) and exploring innovative ways to ensure interactive experiences with minimal or no physical contact required."



"Blending permanent and temporary exhibitions online and on site; starting work on sustainable, re-usable exhibition modules and formats; shared online content on topic while showing different object at different venues."

Finally, contrary to what could have been anticipated, the demand for local content and the changes in the loans policies are the least cited challenges.

Innovative solutions

Respondents were invited to share what innovative solutions they had either experimented with or seen that have started to address these challenges. **48% [6] of the respondents answered with examples or opinions.**

These solutions relate mainly to innovative use of digital, in terms of content but also in ways of working – in particular with the development of virtual couriers (24% of the examples of innovative solutions cited by the respondents). Changes around format of content are also starting to emerge.

[6] This is the result of the analysis of Q15.

Innovative solutions (continued)

Here are a few examples cited.

"I started working with projects that included fewer works but with a strong content and idea"

""Blueprint" exhibitions"

"Virtual couriers; longer exhibition runs; digital facsimiles/substitutes for unavailable loans"

"Using illustrations as a carbon-light way to develop an exhbition"

"Mixing experiences with objects of interest. Audiences will want both."

"An increase in profile of digital exhibitions online and in physical spaces where social distancing is a priority."

"co-comissioning, new forms of co-production internationally"

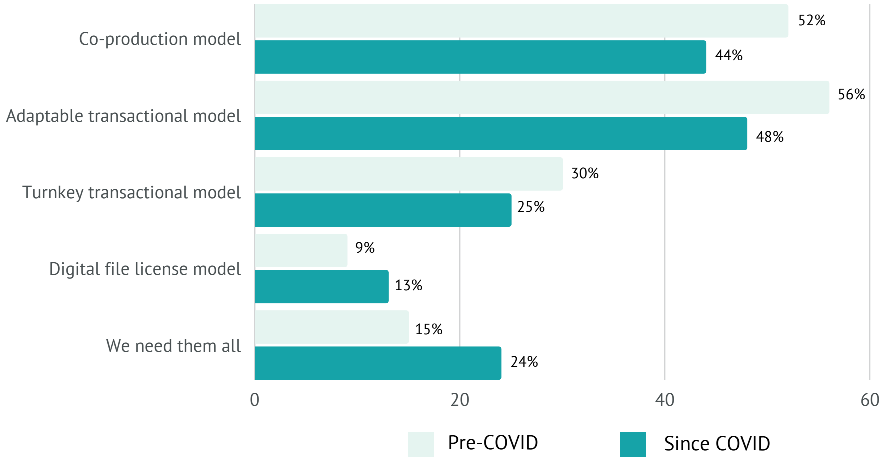
"Shared digital files for local graphics printing production"

"[...] We should be open to considering where couriers are really necessary in the future. It has the positive impact of lowering costs for venues and frees up the time of our essential staff who make these trips. Not least of all, it is a small thing we can do to lessen the carbon footprint of this travel-heavy work."

Collaboration models

Fig. 12 | Evolution of the collaborative models

Q9. In your view, what is the collaborative model your organisation favours for touring exhibitions?
Percentage of respondents



The adaptable transactional model and the co-production remain the dominant collaboration models but a greater flexibility on the model options is expected since COVID.

Respondents were given the choice between the co-production model (co-creating an exhibition with co-hosts), the adaptable transactional model (hiring a touring exhibition that can be tailored to the venue), the turnkey transactional model (hiring a touring exhibition off-the-shelf), the digital file license model (graphics and replicas produced by the host), and an option to select needing them all. Pre-COVID-19, the majority responded that they favoured the adaptable transactional model, closely followed by the co-production model.

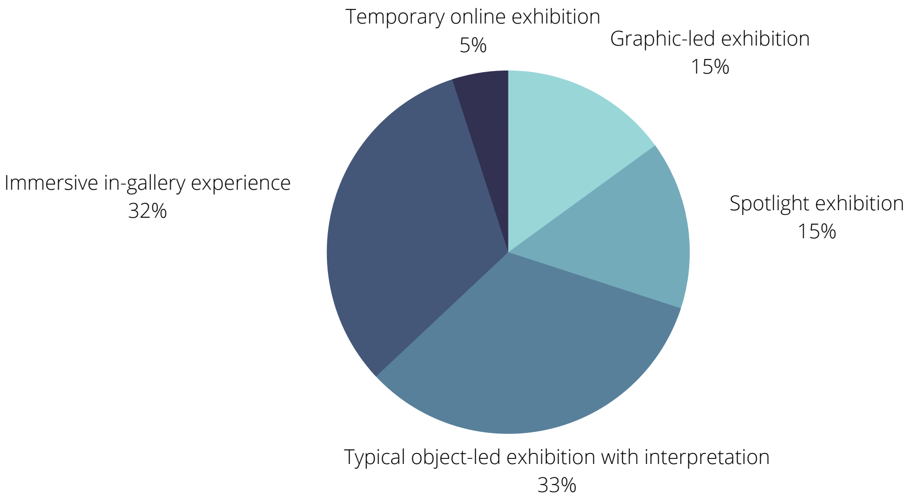
Since COVID, the adaptable transactional model and the co-production model remain the dominant form of collaboration for touring exhibitions. We note, however, the desire for more flexibility since the pandemic. Indeed, 24% of the respondents said that all models of touring exhibitions are needed since COVID, in comparison to only 15% pre-COVID. Finally, although it remains the least favoured pre- and since COVID-19, the digital file license model has experienced an increase in preference since COVID-19 with 13% of the respondents favouring this model compared with only 9% pre-COVID.

These trends don't appear to be correlated to geography. However, it must be noted that when looking at those working exclusively on hiring touring exhibitions, co-production (14% of the respondents who work exclusively on hiring exhibitions) was surpassed by the turnkey transactional model (33% of the respondents who worked exclusively on hiring exhibitions).

Types of exhibitions in demand

Fig. 13 | Types of exhibitions most in demand in the future

Q10. In your view, which types of exhibitions will be most in demand in the future?
(Please rank with 1 being least in demand and 5 being most in demand)
[Note: The graph only reflects the responses rated 5]



Although 'traditional' forms of touring exhibitions – namely, the typical object-led exhibitions and the immersive in-gallery experience – are considered as the two most in-demand exhibition types, the object-light exhibitions are nonetheless anticipated to represent the greater share of the touring demand in the future.

Respondents were asked to rank the types of touring exhibitions that they thought would be most in demand in the future. 5 types of touring exhibitions were given: the typical object-led exhibition with interpretation; the graphic-led exhibition (including hands-on stations and interactives); the spotlight exhibition (c.1-5 objects enhanced with interpretation); the immersive in-gallery experience (fully digital); and the temporary online exhibition.

By a narrow margin, the survey showed that respondents thought the typical object-led exhibition with interpretation (33% of the respondents) would be most in demand for future touring exhibitions, closely followed by the immersive in-gallery experience (32% of the respondents). However, the object-light exhibitions (the combination of the spotlight exhibitions, the graphic-led exhibitions and the online exhibitions) represented 35% of the share of the type of exhibition most in demand in the future.

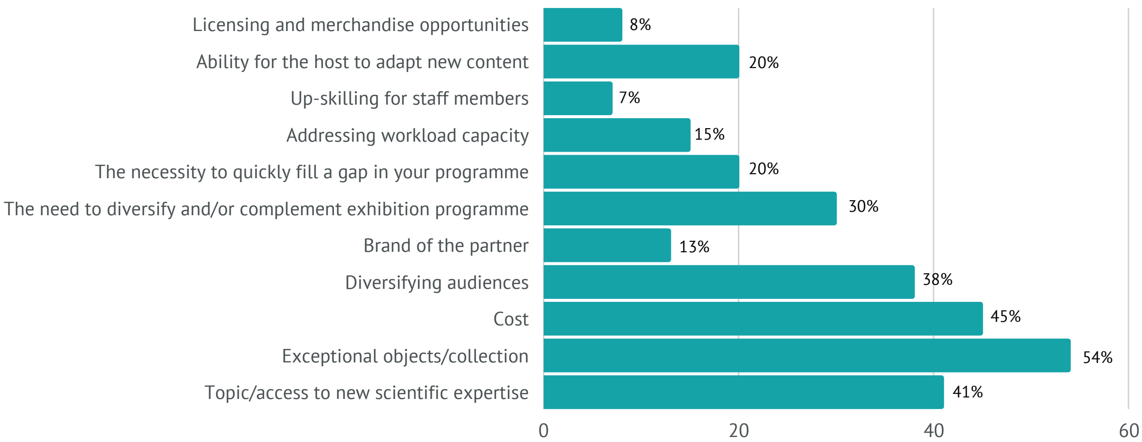
Types of exhibitions in demand (continued)

When looking through the geographic lenses, some regional specificities are emerging. In Europe, the "temporary online exhibition" represented a significantly greater proportion of the anticipated most in-demand type of exhibition in the future. Overall, it appears that the touring community in Europe is anticipating that object-light exhibitions will be driving the touring exhibition activity in the future, with 62% of the regional respondents seeing online exhibitions, graphic-led exhibitions and spotlight exhibitions as the most in-demand exhibition types in the future. In the Americas, the traditional object-led and immersive in-gallery experience dominated the share of the most in-demand exhibitions in the future, while the "immersive in-gallery experience" represented a key driver of the touring demand in Asia-Oceania and the Middle East.

Deciding factors for choosing a touring exhibition over an in-house exhibition

Fig. 14 | Deciding factors

Q11. In your experience, what are the deciding factors for choosing a touring exhibition over an in-house exhibition? Percentage of respondents



According to the respondents, touring exhibitions will be favoured over in-house exhibitions primarily because they provide access to exceptional content (object – 54% and expertise – 41%), are more cost-effective (45%) and enable audience diversification (38%).

Touring exhibitions are favoured over in-house exhibitions mainly when they can be seen as providing access to extraordinary content driven by exceptional objects (as stated by 54% of the respondents) or new scientific expertise (as stated by 41% of the respondents).

Deciding factors for choosing a touring exhibition over an in-house exhibition (continued)

The second most cited factor was the cost. 45% of the respondents believe that touring exhibitions will be favoured over in-house exhibitions due to cost considerations. Overall, the survey highlights the perception of touring exhibitions as being able to be more cost effective. This trend is confirmed by the responses to the expected benefits of touring exhibitions. According to 73% of the respondents the main benefit of touring exhibitions since COVID was to “produce fresh content with fewer resources” (see analysis of question 13 on page 12). Similarly, 20% of the respondents saw the necessity to quickly fill a gap in one’s exhibition programme as a reason for choosing a touring exhibition over an in-house one and 15% thought that choosing a touring exhibition over an in-house exhibition would be a response to address workload capacity.

The third most cited reason was the ability of touring exhibitions to diversify audiences (as stated by 38% of the respondents). Moreover, 30% thought that touring exhibitions address the need to diversify and/or complement exhibition programmes.

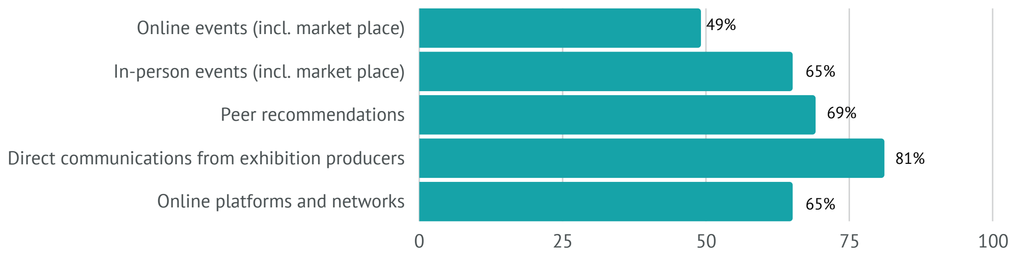
These general observations did not appear correlated to geography. However, it must be noted that in Asia-Oceania and the Middle East cost considerations were the first deciding factors before exceptional objects.

Sourcing and promoting touring exhibitions

Fig. 15 | Source & promotions

Q12. Where do you usually source and/or promote touring exhibitions?

Percentage of respondents

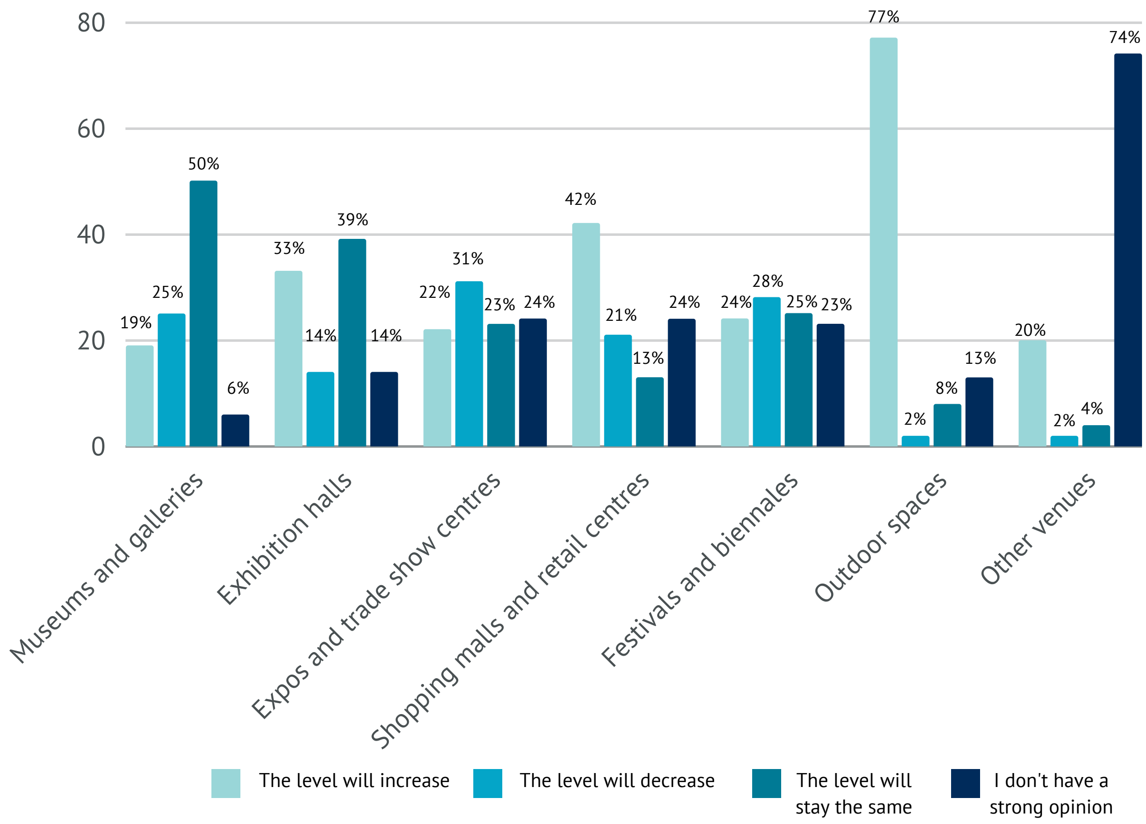


The main source and/or promotion channel is direct communications from exhibition producers (cited by 81% of the respondents), followed by peer recommendations (69%) and equally in-person and online platforms & networks (65% for each).

Venues hosting touring exhibitions

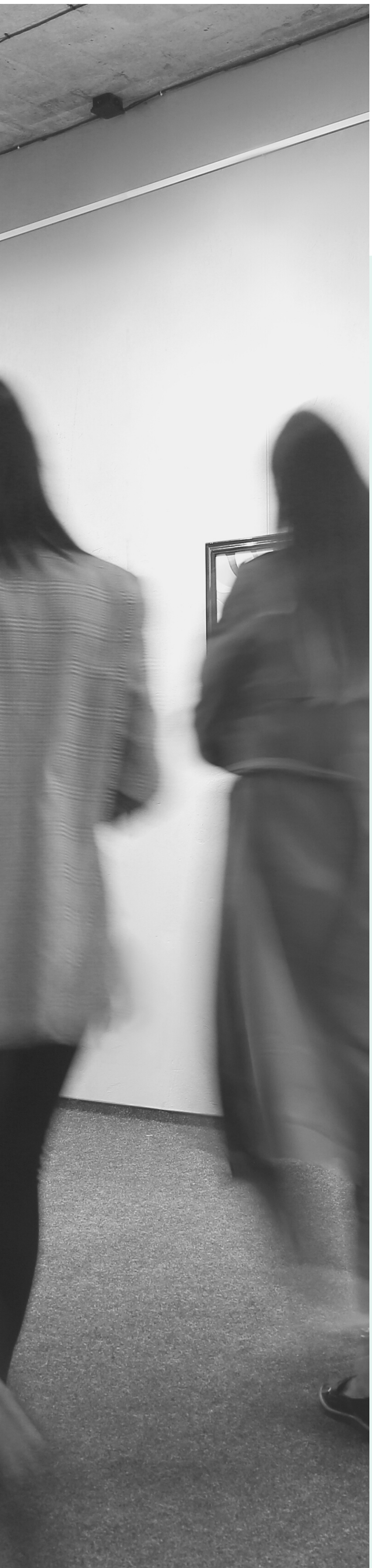
Fig. 16 | Evolution of the type of venues

Q16. In the future, in which type of venue do you feel we will see a growing presence of touring exhibitions? Percentage of respondents



Although the majority of the respondents see no change in the presence of touring exhibitions in museums and galleries and exhibition halls, some new unconventional spaces are emerging: namely, outdoor spaces and shopping malls.

The survey also asked about types of venues that could see a growing presence of touring exhibitions. The majority of respondents saw no change in the presence of touring exhibitions in museums and galleries and exhibition halls, but thought that touring exhibitions' presence would decrease in expos and trade show centres as well as festivals and biennales. On the other hand, the majority of respondents predicted a growing presence in shopping malls and retail centres (42%) and a striking majority in outdoor spaces (77%).



CONCLUSION

CONCLUSION

In conclusion, what transpires from the results of this survey and this first snapshot taken 10 months into the pandemic is a touring exhibition community that, first and foremost, remains overall confident.

This optimism is not, however, a blind optimism. The challenges ahead are clearly acknowledged: in particular, funding cuts, reduced exhibition programmes and ongoing travel restrictions are seen as major roadblocks to overcome in the near future. But this optimism lies, it seems, in the strong belief that touring exhibitions can effectively contribute to ongoing cultural dialogues across borders and to the diversification of audiences at a time when international exchanges are put into question. It also lies in the perception that touring exhibitions can provide an effective way of creating fresh content with fewer resources.

Resilience is the other dimension that emerges from this research. **The touring exhibitions community does not seem to be calling for a drastic transformation but has demonstrated that rethinking, reimagining and recalibrating will be necessary to shape the future of the sector.** A future that has started to call for more options when it comes to collaboration models, an increased appeal for object-light exhibitions and more sustainable practices, a bit of thinking outside the box when it comes to hosting venues with an anticipated increase of unconventional places such as outdoor spaces and shopping malls, and innovative practices such as virtual couriering and blueprint exhibitions.

Lastly, some respondents stressed the desire to bridge the gap between the global and the local. Suggestions evolved around the notion that, while importing content and concept from abroad, you could involve local talents (e.g. local artists and technicians) to respond to it. Although this wasn't a major trend in the survey, we are very interested in exploring this further given the new horizon of opportunities it opens for collaborating internationally enabling richer and multi-layered connections and, possibly, offering solutions to make the touring practice more sustainable. Our experience at Culture Connect during this past year has started to show us that one of the key challenges for the cultural sector moving forward will be to find the right balance between these two dimensions – global and local – to invent a sustainable path that ensures the ongoing circulation of ideas across borders, a vital engine of creativity and the development of culture across space and time.

The coming months remain uncertain, and as we acknowledge the challenges faced and solutions sought by individuals and organisations, it is crucial to maintain a wider understanding of the touring exhibitions community's opinions as drivers of and for the sector. We therefore intend to revisit these trends, after a year of travel restrictions being lifted, to continue to map the flexibility of thought that this pandemic has required, and to provide an opportunity to listen, share, and shape the future together.

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Created for hosts, producers and suppliers of international touring exhibitions, Teo is a one stop living resource that offers museums, science centres, galleries, libraries, cultural venues and partner specialists a comprehensive entry point into the world of touring.

This report was carried out by Culture Connect under the supervision of Anaïs Aguerre (Founder & Managing Director) with the participation of Otone Doi (Research & Operations Manager), as part of the *Cultural Dialogue Survey* series which intends to explore the appetite for cultural dialogue and how we can harness the power of culture in working together to create a more dynamic, empathetic, and sustainable future.

About Culture Connect

Culture Connect is a consultancy specialising in unlocking the collaborative and international potential of the cultural sector. If you would like to get in touch or follow our work, you can find us at the following:

https://www.culture-connect.net

info@culture-connect.net

@cultureconnectintl

HOW DO YOU FORESEE THE FUTURE OF TOURING EXHIBITIONS?

YOUR VOICE MATTERS

Missed the survey? Developed more thoughts while reading this report? Let's keep talking. Raise our question above with your colleagues and create a space for discussion today. Let us know how your conversations go!

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@Culture Connect Ltd
Company Registration No: 10813813. Registered Office: 71-75 Shelton Street, Covent Garden, London, WC2H 9JQ, United Kingdom