Touring Exhibitions Group

Economics of Touring Exhibitions Survey Report

AN ANALYSIS OF TOURING EXHIBITIONS PRACTICE IN THE UK

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1 Background

In April 2015 the Touring Exhibitions Group (TEG) was awarded £40,000 investment from Arts Council England's Museum Resilience Fund, to support the delivery of a two-year research and training programme, titled Economics of Touring Exhibitions: Models for Practice, exploring the economics of touring exhibitions in the UK today.

TEG asserts that touring exhibitions can ensure the sustainability of access to high quality temporary exhibitions to all. They are a key tool when responding to reduced funding for temporary exhibitions.

TEG's application to Arts Council England (ACE) followed the identification of a pressing need for information and learning resources to assist UK organisations to find and apply appropriate funding models for the delivery of touring exhibitions. This need was recognised through evaluation of the TEG's existing professional development programme, which commenced in 2013, delivering the training seminars 'Beginning to Tour' and the 'Principles of Touring Exhibitions'. The research and training resources developed through the Economics of Touring Exhibitions programme are designed to complement these practical seminars; supporting organisations to develop a strategic framework and sound economic basis for touring.

This report presents and analyses the findings of the research survey conducted by TEG during July and August 2015, undertaken to identify current economic and wider trends in touring practice in the UK today, as a basis for informing the nature and format of the training resources developed for the Economics of Touring Exhibitions programme. The survey focused on touring between UK organisations, as a complement to the work being undertaken by the Working Internationally Regional Project (WIRP) and British Council concerning international touring. These research findings have been used as a basis for identifying a range of economic and production models that can be employed by organisations. The survey has also been used to identify case studies that illustrate the full range of approaches to funding and managing touring exhibitions. The resultant training resources are delivered through a one-day interactive Economics of Touring Exhibitions seminar (see the professional development section of the TEG website for more details) and an online Touring Exhibitions Toolkit (downloadable from the TEG website).

2 Scope and context

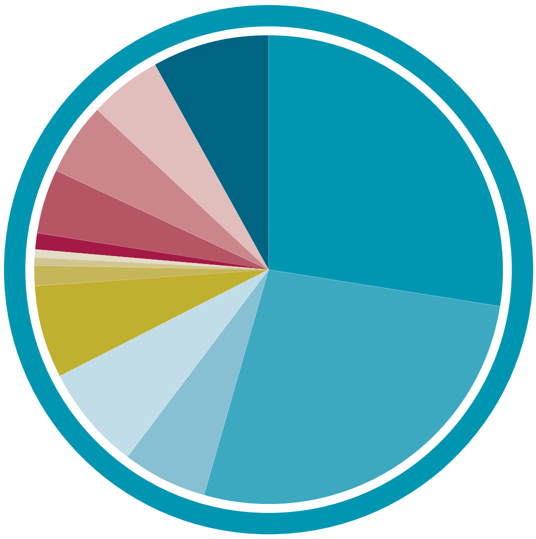
The Economics of Touring Exhibitions survey was available to complete in a digital format from 7 July 2015 - 31 August 2015. Contributions were widely solicited from museums, galleries and cultural organisations across the UK.

TEG sought data from organisations that tour and hire exhibitions, as well as those who are not currently engaged in touring activity. Support to publicise the survey was received from the Museums Association (MA), Association of Independent Museums (AIM), Museum Development Officers (MDOs) in all English regions, Creative Scotland, Arts Council of Wales, Arts Council of Northern Ireland, Sustainable Exhibitions for Museums network, the British Council, Working Internationally Regional Project (WIRP), Museums and Heritage Advisor, as well as members of the TEG committee and a range of other individuals. The survey was promoted through nine museums and heritage JISC lists. The project researcher also targeted and invited specific organisations to complete the survey, in liaison with the MDOs.

A total of 222 survey responses were received, representative of approximately 8% [1] of UK museums and galleries (the Museums Association recognises that there are approx. 2,500 museums and galleries in the UK). 99 respondents are currently engaged in the development of exhibitions to tour, 123 are not. 110 respondents currently hire touring exhibitions, 86 do not (26 respondents declined to respond to this question).

The survey responses represent a broad range of organisational types and scales, as well as the perspective of a number of individuals.

Type of organisation the respondent represents:



Independent museum or gallery	27.5%
Local authority museum or gallery	27%
National museum or gallery	6%
Museum or gallery trust	7%
University museum	6.5%
Library	1.5%
Theatre	0.5%
Cathedral	0.5%
National body	1%
Development organisation	4.5%
Commercial exhibition developer	5%
Individual	5%
Other	8%

[1] *16 responses were from individuals, commercial exhibition developers, libraries, a theatre and cathedral, national bodies and development organisations, so this percentage has been reduced accordingly.*

Average visitor numbers to respondent's venue:

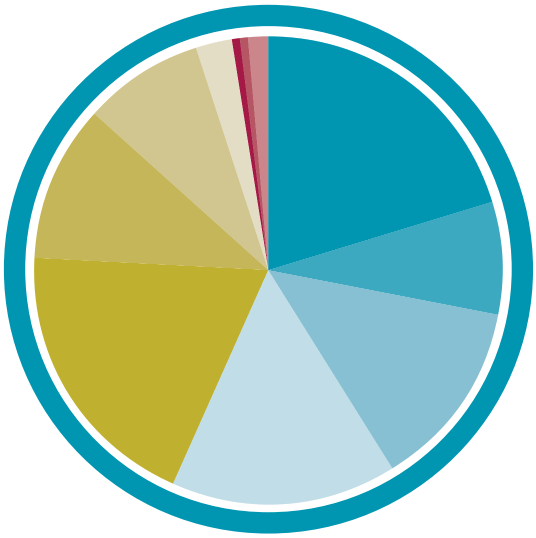
Up to 20,000 visitors per year	20.4%
20,000-50,000 visitors per year	21%
50,000-100,000 visitors per year	14.3%
More than 100,000 visitors per year	25.8%
Not a venue based organisation	18.5%

The survey findings are analysed from four principal perspectives:

- Organisations currently originating touring exhibitions
- Organisations not currently originating touring exhibitions
- Organisations currently hiring touring exhibitions
- Organisations not currently hiring touring exhibitions

The findings have also been analysed by ACE area. Venues in all areas were represented, as well as organisations in Scotland, Wales and N. Ireland.

Location of respondent's organisation:



North	20.3%
Midlands	7.8%
South East	13.2%
South West	15.5%
London	19.2%
Scotland	10.8%
Wales	8.4%
N. Ireland	2.4%
Channel Islands	0.6%
National	0.6%
International	1.2%

All quantitative and qualitative data has been considered in the analysis. The anonymity of all respondents has been preserved. TEG found that guaranteeing anonymity was key to soliciting survey responses, as data concerning exhibition hire fees and costs has systematically been guarded by organisations involved in touring exhibitions. Some organisations still declined to share this data, indicating the level of sensitivity attributed to it.

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A-Z of key findings

- **A** Organisations currently engaged in developing touring exhibitions, and those considering their development in the future, recognise and value the wider benefits of touring - including profile raising and audience development - above the generation of income or off-setting of costs
- **B** Most long-term experience of touring exhibitions is held by national and local authority museums, many of whom have been touring for more than 10 years
- **C** The biggest growth in touring can be seen in independent museums, which have previously had a very small market share, as well as in organisations based in the north of England
- **D** 40% of organisations in their first year of touring are involved in international projects
- **E** The average UK touring exhibition is 200 sq. m.
- **F** The average budget for a UK touring exhibition is £62,500, although many organisations are producing touring exhibitions with budgets of under £5,000; there is great variance
- **G** UK organisations engaged in touring on average generate 1-2 exhibitions per year
- **H** 55% of touring exhibitions attract hire fees of under £3,000
- **I** 32% of touring exhibitions are free i.e. there is no hire fee
- **J** Touring exhibitions are most commonly promoted for hire via targeted marketing emails
- **K** 25% of organisations use 90-100% core funds to develop touring exhibitions
- **L** 46% of organisations cover 50% or more of their touring exhibition costs from external sources (not including hire fees)
- **M** 20% of organisations cover 100% of their touring exhibition costs through external funding sources
- **N** 67% of organisations recoup less than 50% of their touring costs through hire fees
- **O** 51% of organisations are not confident to fundraise to support their touring activity
- **P** No public UK organisations, touring to UK venues, have been found to be making a profit from touring; recovery of some, but not all costs is most common
- **Q** 32% of organisations developed their last touring exhibition in partnership
- **R** 98% of those who have developed a touring exhibition in partnership would recommend partnership working to others
- **S** The principal future ambition for organisations involved in touring is to maintain or grow their current programme; venues are also interested to work in partnership and tour internationally
- **T** To achieve their future tour ambitions, venues believe they need more funding and greater staff capacity
- **U** Lack of funds and lack of staff capacity are the most common reasons cited for not being involved in the development of touring exhibitions
- **V** A significantly greater number of venues hire exhibitions to diversify their programme or bring significant objects to their venue, rather than for purposes of budget relief
- **W** 64% of exhibition hirers find it difficult to hire exhibitions in their price range
- **X** There is a demand for touring exhibitions to suit family audiences and children that is not currently being fulfilled
- **Y** The most common reasons for not hiring touring exhibitions is that they are too expensive
- **Z** The greatest proportion of venues hiring touring exhibitions is in the North (79%); the fewest is in the Midlands (27%)

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Analysed results for organisations currently originating touring exhibitions

99 survey respondents are currently engaged in the development of exhibitions to tour, 123 are not. The following results represent the responses of the 99 participants involved in touring.

Motivations for touring

Respondents rated a range of motivations for originating touring exhibitions, defining them as very important, important or not important.

Rated motivations for touring:

Motivation for touring	Very important	Important	Not important
To increase your organisation's profile	68%	29%	3%
To maximise the reach of your exhibitions	64%	33%	3%
To increase your audience	57%	38%	5%
To diversify or develop the audience that accesses your exhibitions and/or collections	52%	38%	10%
To off-set the cost of producing your in-house temporary exhibitions programme	27%	37%	36%
To generate profit	35%	24.5%	40.5%
To access funding that would not otherwise be available	26%	42%	32%
To work in partnership	53%	43%	4%

Percentage of respondents which give the motivation the respective rating

These results demonstrated that those organisations currently engaged in developing touring exhibitions recognise and value the wider benefits of touring, in many cases above the generation of income.

Most commonly respondents rated increasing the organisation's profile (68% very important/29% important), maximising the reach of exhibitions (64% very important/32% important) and audience development (57% very important/38% important) as very important or important.

Fewer than 5% of respondents defined increasing the organisation's profile, maximising exhibition reach, increasing audiences and working in partnership as unimportant factors in deciding to develop touring exhibitions. In contrast 40.5% of participants rated profit generation as not important and 36% rated off-setting in-house production costs as unimportant.

This result suggests that organisations are looking to touring to help deliver a range of key performance indicators. These may indirectly contribute to the organisation's economic health, but in many cases generating income is not a core motive.

32% of respondents rated accessing funding that would not otherwise be available as not important. This result suggests the potential importance of flagging sources of funding that will specifically support touring, as it is possible they are less well recognised and opportunities are not being maximised.

Other common motivations for touring, detailed in the comments section, included for non-venue based organisations, providing access to their collections - in line with national policy - and for national museums, fulfilling their commitment to share collections. In both cases, touring objects and exhibitions enables the delivery of a funding contingent commitment.

Nature of touring programmes

The survey solicited data from organisations that are new to touring exhibitions - in their first year of involvement - as well as very experienced museums and galleries, some having been involved in touring for over ten years:

Duration of survey respondent's involvement in touring exhibitions:

Less than a year	18.5%
1-2 years	16.5%
3-5 years	15.5%
5-10 years	14.5%
More than 10 years	35%

Segmentation of the data according to the duration of involvement in touring, shows that:

- 30% of those involved in touring for more than ten years are based in London, 42% are local authority run and 27% are national museums; only 4% are independent organisations.

  This contrasts with the data concerning the locations and types of organisation in their first year of touring, which showed that 31% are independent organisations, 6% are national museums, 6% are local authority run and 12% are a museum or gallery trust. A significant number of those in their first year of touring are based in the North ACE area - 44% - indicating a weighting in the growth of touring exhibitions in this area, as venues from the North account for 20% of survey responses.

There is a clear trend indicating growth in touring activity in the independent museum sector, where there has been significantly less activity in the past. This growth may reflect a focus on diversifying income streams and looking to offset the cost of temporary exhibition production. In times of austerity, independent museums and museum trusts potentially have greater flexibility to work in new and different ways. The reduction in local authority museums developing new touring programmes is likely to reflect significant staff and budget reductions.

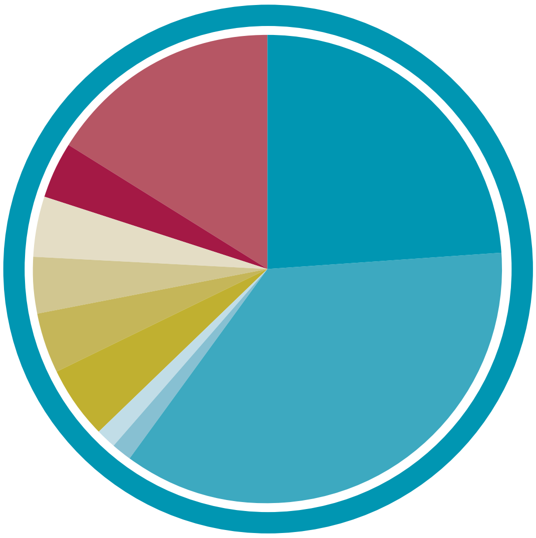
- 40% of those in their first year of touring are involved in international touring projects. 61% of those who had been touring for more than ten years undertake international touring. This suggests that a significant proportion of those new to touring have acknowledged the potential of international collaborations to draw higher fees.
- The average scale of the exhibitions being produced by those in their first year of touring is 225 sq. m. and for those who have been touring for ten years or more the average size is a very similar 230 sq. m.
- Average exhibition budgets for venues who have been involved in touring for more than ten years are £55,000, as compared to an average budget of £70,000 for those who have been touring for less than a year.

On average the greatest proportion of venues are developing 1-2 touring exhibitions per year. The significant exceptions to this are national museums and galleries who are more likely to develop more than 3 a year, or independent curators or organisations, who again might develop 3 or more per year.

Exhibition hire fees and packages

A considerable 32% of respondents do not charge a hire fee for their touring exhibitions. The most commonly cited reasons for this trend are that the total cost of the tour has been met by external funding, or that charging would prevent the target venue type from hosting the exhibition. This trend reflects the focus placed on audience development and diversification, as well as profile raising, all given as very important motivations for touring.

Average cost of hiring an exhibition:



Under £1,000	24%
£1,000-£3,000	36%
£4,000-£5,000	1.5%
£6,000-£7,000	1.5%
£8,000-£10,000	5%
£11,000-£20,000	4%
£21,000-£40,000	4%
£41,000-£50,000	4%
£50,000-£100,000	4%
I would prefer not to answer	16%

24% of participants generate exhibitions that cost less than £1,000 to hire, and 36% have exhibitions with a fee of £1-3,000. Of those that do charge a fee, 79% state that it is flexible, indicating the importance of negotiation, and potential to bring an exhibition into your budget as a hirer, if you can offer other opportunities to the originator, such as audience development and visitor numbers.

Respondents calculate their hire fees using a range of approaches, most commonly on a “cost recovery basis”. In some cases this refers to the recovery of the total cost of developing and touring the exhibition, in others, only the cost of touring, most particularly if the exhibition has been shown at their venue first. Staffing and other on-costs are rarely included in an assessment of the total costs to be recovered.

Other cited approaches to determining the hire fee are:

"To cover a percentage of the exhibition development costs. We then look to share costs with venues e.g. packing, transport, printing, framing".

"Assumed return to cover costs and enter profit".

"Depends on the purpose of the exhibition. If for fundraising, costs are high, others tour at a fee to cover costs only".

"Based on previous exhibitions, current similar exhibitions and the number of weeks".

"To cover costs of one way transport, plus an additional amount to cover cost of replacement interpretation. Suitable for small organisations, which we are aware have small budgets (like ourselves!)".

"Hire fees are pitched against similar fees from other comparable organisations".

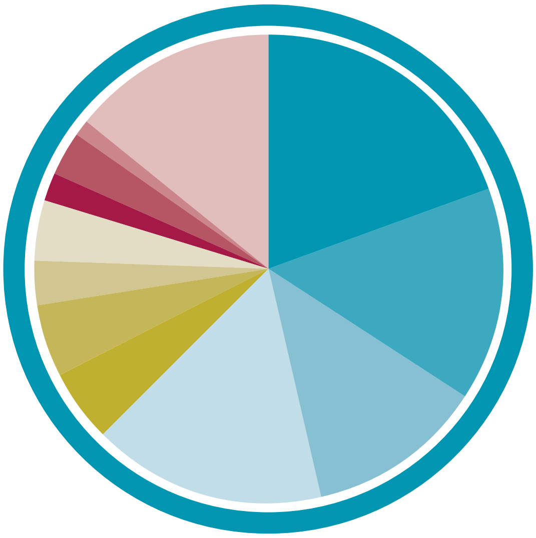
"Pitched to be affordable".

"We try to price competitively".

The organisation's aims influence the hire fee. If ensuring the affordability of the exhibition to the target venues is a key motivator to tour, the cost of hiring the exhibition will not reflect the full costs of its development. If competitors' fees are set at a certain level then a fee might be reduced, effectively subsidising or further subsidising the product, to make it affordable. The organisation's aims and objectives are key to setting the hire fee, rather than an imperative to always cover costs or make profit.

A number of respondents stated that they don't know how hire fees are calculated at their organisation.

Average exhibition size:



10-50 sq. m.	19.5%
51-100 sq. m.	14.5%
101-150 sq. m.	12%
151-200 sq. m.	16%
201-250 sq. m.	5%
251-350 sq. m.	5%
351-450 sq. m.	3%
451-550 sq. m.	4%
551-750 sq. m.	2%
751-1,000 sq. m.	3%
1,000 sq. m. +	1%
Don't know	14%

Relationship between exhibition hire fee and exhibition size:

Hire fee under £1,000	Exhibitions all under 100 sq. m. (with one exception of 250 sq. m.).
Hire fee £2,000 - £3,000	Exhibitions all 100-150 sq. m. (with one exception of 350 sq. m.).
Hire fee £4,000 - £10,000	Five examples ranging in size from 70 sq. m. to 450 sq.m.
Hire fee £11,000 - £15,000	No exhibitions in this category
Hire fee £16,000 - £20,000	Two examples, one 300 sq. m. and one 500 sq. m.
Hire fee £21,000 - £30,000	No exhibitions in this category.
Hire fee £31,000 - £40,000	Two examples, one 167 sq. m. and one 450 sq. m.
Hire fee £41,000 - £70,000	No exhibitions in this category.
Hire fee £70,000 - £100,000	Two examples, one 1,000 sq. m. and the other listed as tailored to suit the venue.

The cross-referencing of the data concerning exhibition size and hire fees, demonstrates that hire fees increase as the scale of the exhibition increases, most particularly in the context of hire fees that are under £1,000 or £2-3,000. When hire fees increase above this value, the exhibitions are likely to be larger, but there is a variation in scale. This variation is likely to reflect the different types of exhibition, 2D or 3D for example, which impact on the costs incurred in their development.

Analysis of the relationship between the exhibition hire fee, and the exhibition and support elements that are included as part of the hire fee:

Hire fee	Up to £1k	£1-3k	£4-10k	£11-20k	£21-40k	£41-100k
Objects	84.6%	95%	80%	100%	100%	100%
Build	23%	55%	60%	0%	50%	25%
Read to print interpretation	53.8%	80%	80%	100%	100%	100%
Hard copy interpretation	76.9%	55%	80%	50%	50%	25%
AV equipment	7.7%	40%	40%	0%	50%	50%
Install support	30.7%	50%	100%	100%	100%	100%
De-install support	23%	30%	100%	100%	100%	75%
Exhibition layout	7.7%	60%	60%	100%	100%	25%
Marketing templates	53.9%	70%	80%	100%	100%	50%
Promotional images	61.5%	85%	100%	100%	100%	75%
Marketing assistance	30.8%	25%	40%	50%	100%	50%
Couriers	15.4%	20%	40%	100%	100%	50%
Inward transport	53.9%	55%	20%	100%	50%	50%
Onward transport	38.5%	15%	40%	50%	50%	25%
Insurance	15.4%	0%	20%	50%	0%	0%
Event development	7.7%	35%	60%	100%	50%	100%
Delivery of events	38.5%	20%	40%	100%	50%	25%
Shop merchandise	46.2%	40%	40%	50%	50%	100%
Free exhibition guide or publication	23%	35%	40%	0%	0%	25%
For-sale exhibition publication	23%	60%	20%	0%	100%	25%
Digital resources	15.4%	20%	100%	50%	50%	50%
Audio guide or App	0%	5%	0%	0%	0%	25%
	% of venues that include the listed elements in their standard touring exhibitions package					

In general the segmentation of data concerning the hire fee and the exhibition elements included within the hire fee demonstrates an increase in the standard elements included as the price increases. Most particularly, those hiring exhibitions costing £10,000 or more will receive support to install or de-install the exhibition, and to design the exhibition layout. An exception to this trend is that hard copy interpretation is less likely to be included, and ready to print interpretation is favoured for higher priced exhibitions. Exhibition guides and/or for-sale publications are not provided as standard with exhibitions and few exhibition developers are providing an audio guide or app.

Other elements included in the hire fee, mentioned in the notes field in response to this question, were educational resources, evaluation tools, object mounts and technical advice.

Exhibition elements most commonly not included in the hire fee, and charged in addition to hiring venues are:

- Onward transport
- Insurance
- Production of marketing materials
- Courier expenses
- Production of interpretation
- Purchase of retail products
- Technician costs

64% of organisations exhibit their touring exhibitions at their venue, before the tour commences, indicating that 36% of museums and galleries are developing exhibitions especially to tour; these organisations are predominantly non-venue based or larger museums and galleries.

Stage at which exhibitions are advertised for hire:

Before they are programmed to gauge interest	17%
As soon as they are programmed	17%
When they are in development	36%
When they are complete	14.5%
We don't need to advertise our exhibitions because they tour to a pre-arranged consortia of venues	7%
Other	8.5%

The majority of organisations are designing exhibitions to tour from the outset, and are advanced in marketing them for hire.

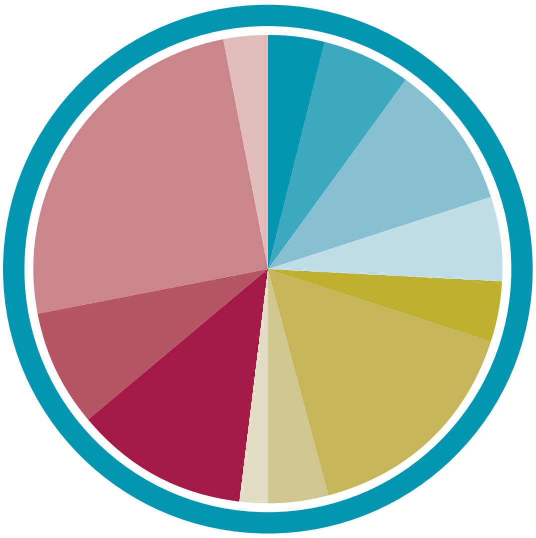
Most venues use a range of methods to advertise the exhibitions they have available to hire. Most commonly exhibitions are promoted online.

Promotional methods	Percentage of respondents that use the method
Your website	47%
Touring Exhibitions Group (TEG) website	50.5%
Another third party website	18%
Targeted marketing via email	62.5%
Targeted marketing via post	13%
Targeted marketing by phone or in person	40%
We don't advertise our exhibitions	11%
Other	16%

Other means of advertising included social media, through Museum Development Officers/Offices, adverts in sector publications, networking and press.

Funding touring programmes

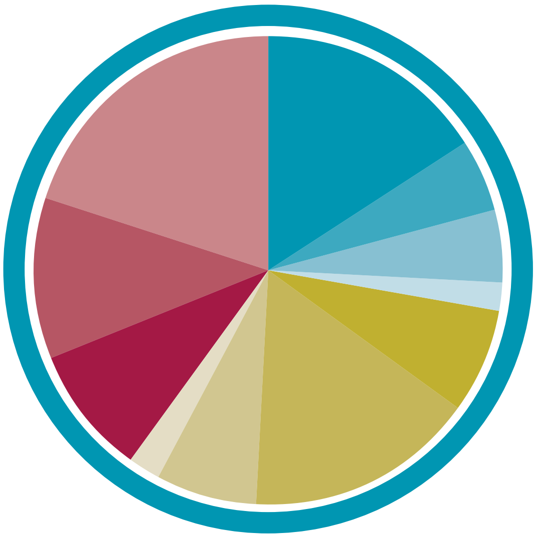
Percentage of the budget that came from core funds for the respondent's most recent touring exhibition:



0% core funds	4%
1-10% core funds	6%
11-20% core funds	10%
21-30% core funds	6%
31-40% core funds	4%
41-50% core funds	16%
51-60% core funds	4%
61-70% core funds	2%
71-80% core funds	12%
81-90% core funds	8%
91-100% core funds	25%
Not known	3%

For a large proportion of venues their touring programme is significantly subsidised by core funds, although others manage to successfully cover some to all of the costs from fundraised income or from the hire fees they charge.

Percentage of the budget that was raised from external sources for the respondent's most recent touring exhibition:



0% raised income	16%
1-10% raised income	5%
11-20% raised income	5%
21-30% raised income	2%
31-40% raised income	7%
41-50% raised income	16%
51-60% raised income	7%
61-70% raised income	2%
71-80% raised income	9%
81-90% raised income	11%
91-100% raised income	20%

20% of venues are successfully covering 100% of the cost of developing their most recent touring exhibition from external sources of income (excluding hire fees). Detailed analysis shows that these tend to be consortia of venues, who have worked in partnership to apply for funding, and deliver a touring programme, meeting audience development or other needs.

49% of those currently touring state that they feel confident applying for external funding; those that do not are likely to constitute the 16% not raising any income to support their touring exhibition, or those realising very small contributions.

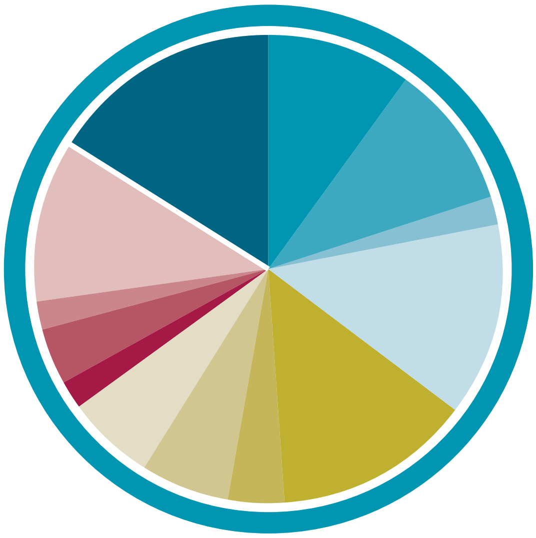
A reliance on core funds and hire fee income, rather than fundraising in some instances, may reflect a traditional expectation that the hire fee should cover the cost of the exhibition; that this is not being achieved is not borne out in the hire fee and costings data.

Percentage of the budget that came from hire fees for the respondent's most recent touring exhibition:

0% hire fee income	25%
1-10% hire fee income	18.5%
11-20% hire fee income	9%
21-30% hire fee income	7%
31-40% hire fee income	4.5%
41-50% hire fee income	4.5%
51-60% hire fee income	0%
61-70% hire fee income	4.5%
71-80% hire fee income	2%
81-90% hire fee income	2%
91-100% hire fee income	23%

For many venues the income generated from hire fees will make a contribution towards the total budget, rather than covering it all. This is particularly the case if the exhibition has been shown at their venue prior to touring. This represents a proportional cost recovery approach; touring the exhibition reduces the overall cost of producing it for their own venue.

Total budget for respondent's most recent touring exhibition:



Under £999	10%
£1,000-£2,999	10%
£3,000-£5,999	2%
£6,000-£9,999	13.5%
£10,000-£14,999	13.5%
£15,000-£19,999	4%
£20,000-£29,999	6%
£30,000-£39,999	6%
£40,000-£49,999	2%
£50,000-£59,999	4%
£60,000-£74,999	2%
£75,000-£99,999	11%
£100,000-£119,999	0%
£120,000-£139,999	0%
£140,000+	16%

Approximately 50% of responding organisations are developing touring exhibitions for a budget of £14,999 or less. This weighting is in line with the significant proportion of touring exhibitions attracting a hire fee of £3,000 or less.

Management of Touring Programmes

64% of touring programmes are managed as part of a staff-member's role. 34% of organisations have a dedicated member of staff and only 1% use an external touring management company to manage their exhibitions. This figure is not affected by the number of exhibitions being developed, but in larger organisations, where multiple exhibitions are being developed and managed concurrently it might be assumed that there are a number of staff members for whom touring exhibition development and management is part of their role. Over half of all those working on touring exhibitions are multi-tasking and combining touring work with other responsibilities.

47% of exhibitions that tour are not planned to, or designed to from their conception, so approximately 50% of staff involved in touring are undertaking to convert or develop existing exhibitions or those whose development has already started, to make them suitable to tour.

Branding of Touring Programmes

Given the importance of increasing an organisation's profile as a motivator for touring, a high proportion of respondents (72%) do not require a hosting venue to use their branding. And 86% allow venues to customise the exhibition, for example editing or augmenting the selection of exhibits.

Touring in partnership

32% of venues developed their last touring exhibition in partnership. On average 36% of those for whom the last exhibition wasn't a partnership, have worked with partners on a previous touring project. 70% of organisations who have been touring for ten years or more have developed a previous exhibition in partnership, whereas only 7% who have been touring for less than a year have developed a project in partnership. This suggests that those being new to touring are more likely to start developing a programme without partners.

Types of partnership:

- Lead venue(s) partnership: 66.5%
- Equal partnership: 35.5%

Two principal approaches to partnership were identified. Lead venue partnership is most commonly chosen. The curatorial elements of this type of project, and the design and marketing, are most commonly shared between partners. In lead venue scenarios, the lead most often takes responsibility for the exhibition budget and core administrative tasks e.g. loan agreements. In equal partnerships, tasks are divided by type and allocated to the most appropriate partner.

Types of partner, other than fellow cultural organisations, are most commonly community groups, national sector bodies, non-sector national organisations and commercial organisations.

In equal partnership scenarios, costs and profit are most commonly described as being shared on a 50/50 basis. In lead venue partnerships, the lead venue appears to bear a more significant proportion of the costs, in some cases without deriving any further financial benefit through income; this alludes to the priority given to sharing collections by larger and national museums and galleries. Partnership working is more likely in situations where 100% of costs are being covered by external funding, reflecting the necessity of partnership working to access this types of funding.

The sharing of workload and costs were given as the principal benefits of partnership, as well as access to expertise, funding that would not otherwise be available, market knowledge and wider audiences:

"The benefits were many, including access to expertise and objects, sharing the workload in parts and at times, opening up additional revenue streams to exhibition development".

"Shared costs, wider audience and experience of working with colleagues".

"Able to access HLF funding".

"Networking and accessing the collections of other venues. Calling on favours in the future".

"AFA know the American market better than us".

"The partnership provided access to objects, knowledge and research. The benefits of working with another museum included a stronger voice with which to raise awareness of the exhibition, to reach audiences and collaborate on marketing, especially social media. In addition, the partnership had provided a strong platform to develop relations with other institutions and organisations in the area".

"It ensured a relevant exhibition for the museum that was receiving the exhibition".

The detailed benefits are interesting in the context of survey responses concerning the resources that those not currently touring, need to tour[2]; 80% of respondents state that they need greater staff capacity and 74% require funding to begin touring. A further important benefit of collaborating is access to collections.

[2] *See section 5 for more detailed information.*

Of those who had worked in partnership to develop a touring exhibition, 98% would recommend this approach to touring to others.

Of those organisations that tour, but have not worked in partnership before, 82% would be interested to in the future.

The perceived barriers to working in partnership are identified as:

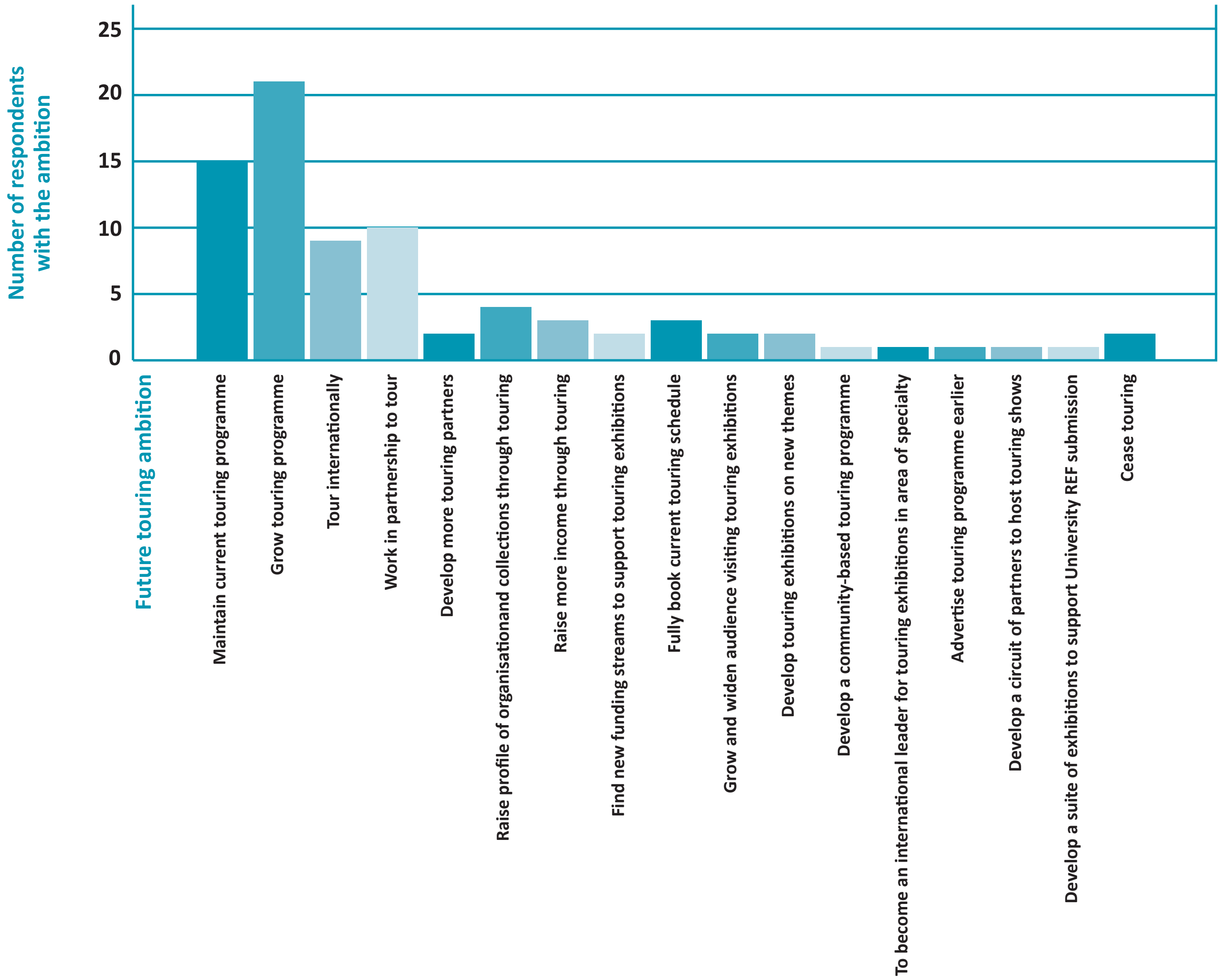
- Requires more time
- Requires more resources/staff capacity
- Need to build relationships
- Challenge of finding a partner(s)
- Fear of conflicting ideas/opinions
- Reputational risk
- Devising the touring schedule
- Agreeing who will launch the exhibition
- Reduced income

The following types of training and information were identified as desirable by those interested to work in partnership in the future:

- Finding/identifying partners
- Information about other organisations interested to work in partnership
- Better view of costs involved/division of costs when working in partnership
- Guidelines/templates for successful partnership
- Project planning
- Seminars bringing together commercial exhibition providers with museum venues
- Case studies

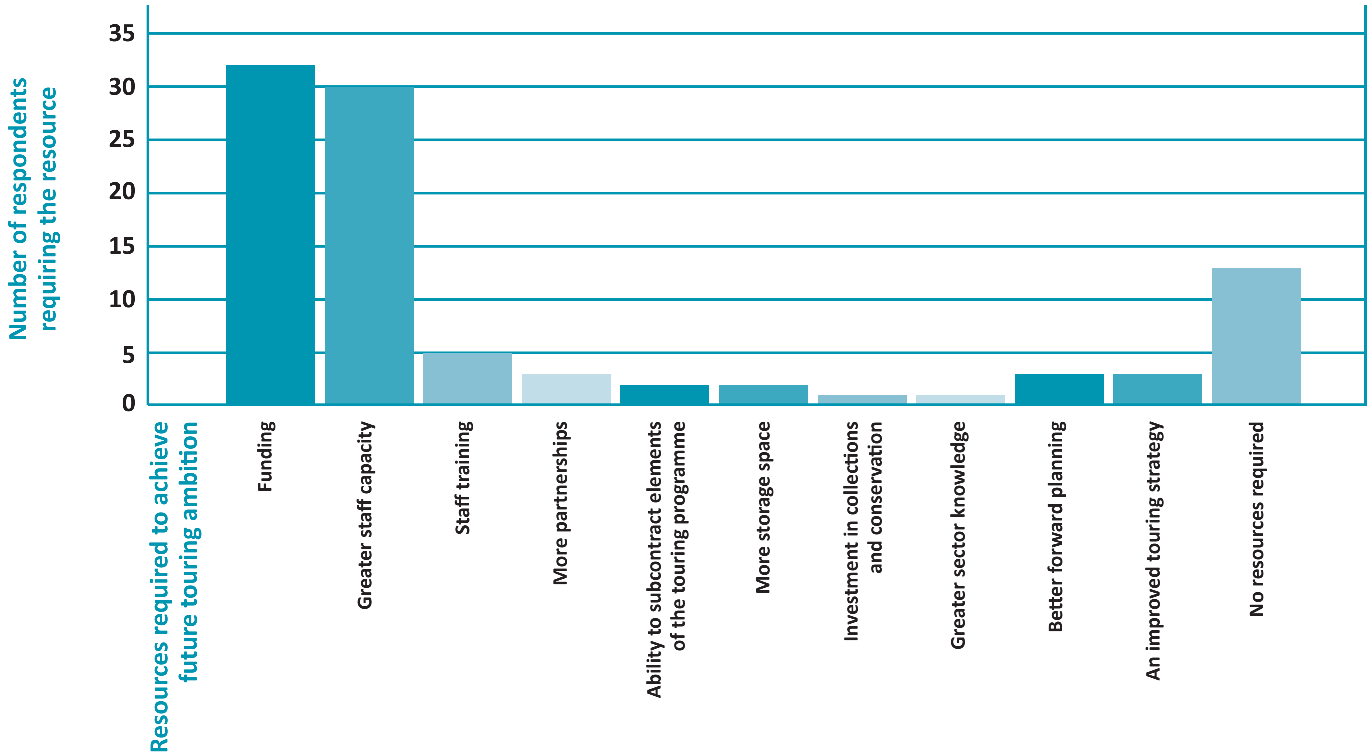
Ambitions for the future of touring

Future ambitions for touring:

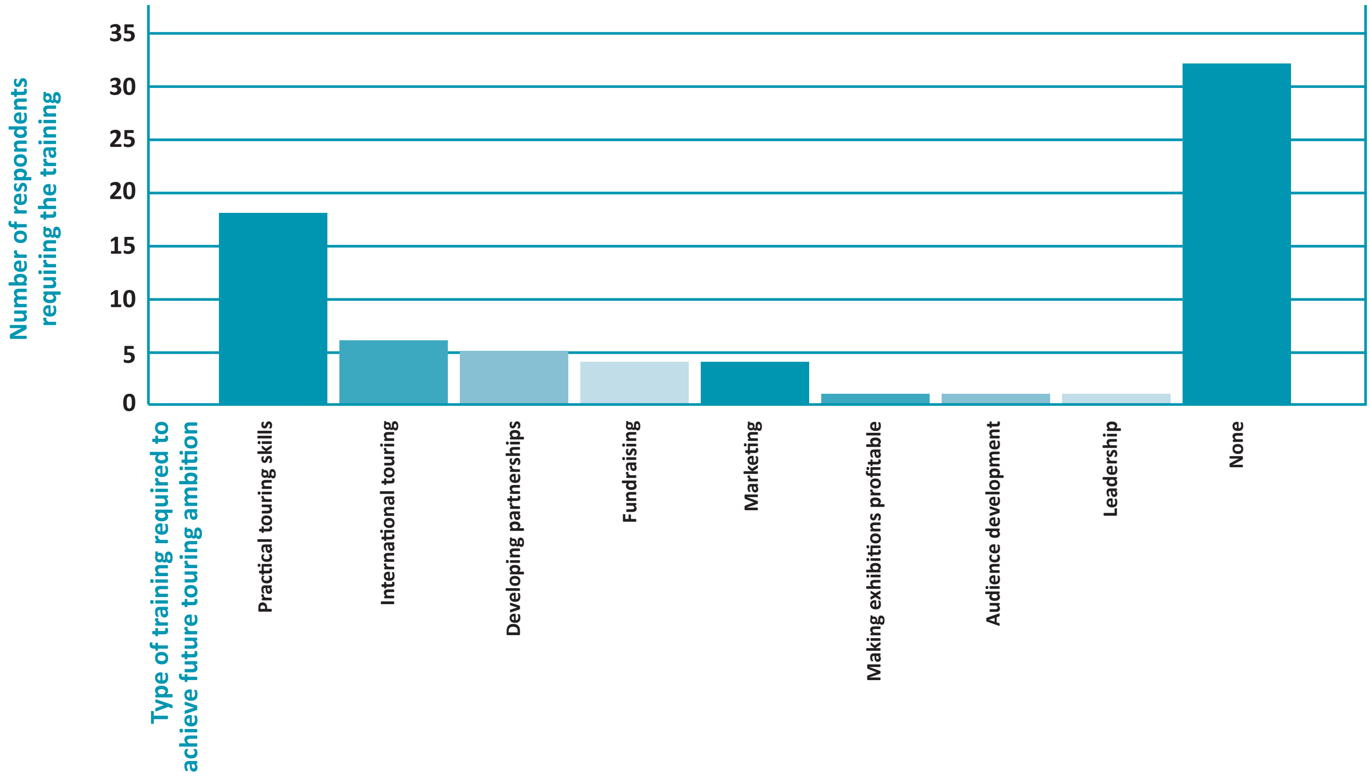


The ambition of the majority of respondents is to maintain or grow their current touring programme going forward. The considerable number of references to maintaining the current programme reflects concern about future funding levels, and potential cuts to staff numbers that might call a programme into question. The organisations keen to grow their programme and touring partnerships in the future demonstrate a belief in the potential for touring. Relatively few answers referred to generating more income through touring, intimating that in many cases organisations are not focused on the potential financial benefits of engaging in touring.

Resources needed to achieve future touring ambitions:



Training needed to achieve future touring ambitions:



5

Analysed results for organisations not currently originating touring exhibitions

60% of respondents who are not currently originating touring exhibitions are interested in doing so in the future.

Rated motivations for developing a touring programme in the future:

Motivation for developing a touring programme in the future	Very important	Important	Not important
To increase your organisation's profile	69%	29.5%	1.5%
To maximise the reach of your exhibitions	67%	33%	0%
To increase your audience	73%	27%	0%
To diversify or develop the audience that accesses your exhibitions and/or collections	55%	42%	3%
To offset the cost of producing your in-house temporary exhibitions programme	37%	29%	34%
To generate profit	29%	37%	34%
To access funding that would not otherwise be available	29.5%	54.5%	16%
To work in partnership	49%	48%	3%

Percentage of respondents which give the motivation the respective rating

Motivations for developing a touring programme in the future to a large extent mirror the motivations given for touring by those already involved in the activity[3]. There is a greater emphasis on the importance of profile raising and audience development, than financial benefits, with 34% of respondents respectively referring to off setting the cost of producton and generatng profit as not important. A larger proportion of organisations - 73% as opposed to 57% - rate increasing audience as very important.

[3] *See section 4 for more details.*

For the 40% of respondents who are not currently touring, and are not interested in doing so in the future, the majority gave capacity and resources as their reason for not doing so currently, most particularly staff resources:

"Unfortunately we do not have time or budget, as we are a very small team."

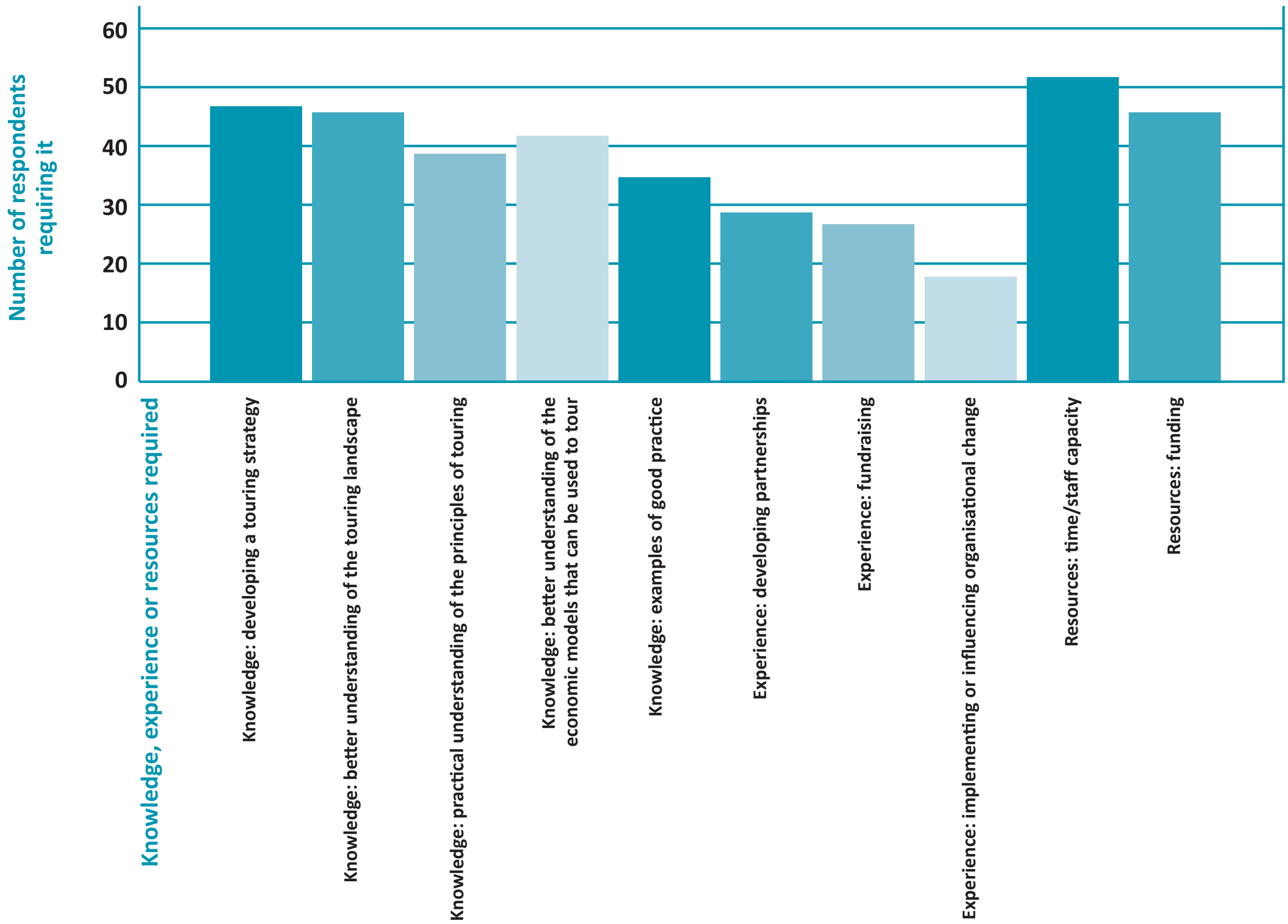
"Don't have staff to manage this and curatorial staff are too overstretched to provide input."

"We do not have the resources or size of collection that would be required."

Only one organisation made reference to the financial viability of touring exhibitions:

"At the moment it is not seen as a viable way to generate income but I would like to challenge this thinking."

Knowledge, experience and resources required for organisations to develop a touring programme in the future:



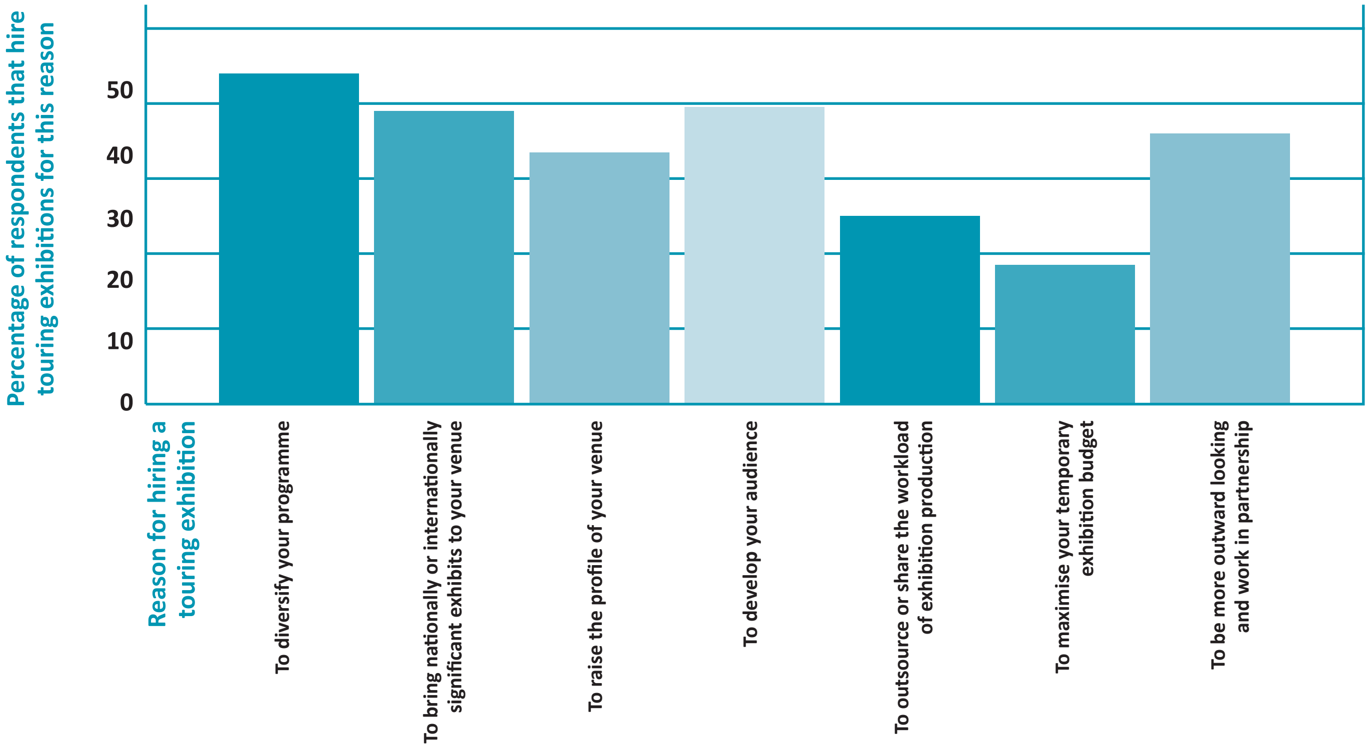
70% of respondents would be interested in participating in the mentoring programme, to assist them to begin to tour.

6 Analysed results for organisations currently hiring touring exhibitions

56% of survey respondents currently hire touring exhibitions, although this figure varies considerably when the data is segmented by ACE area:

ACE area	Percentage of venues that hire exhibitions
South East	55%
Midlands	27%
South West	66%
London	33%
North	79%

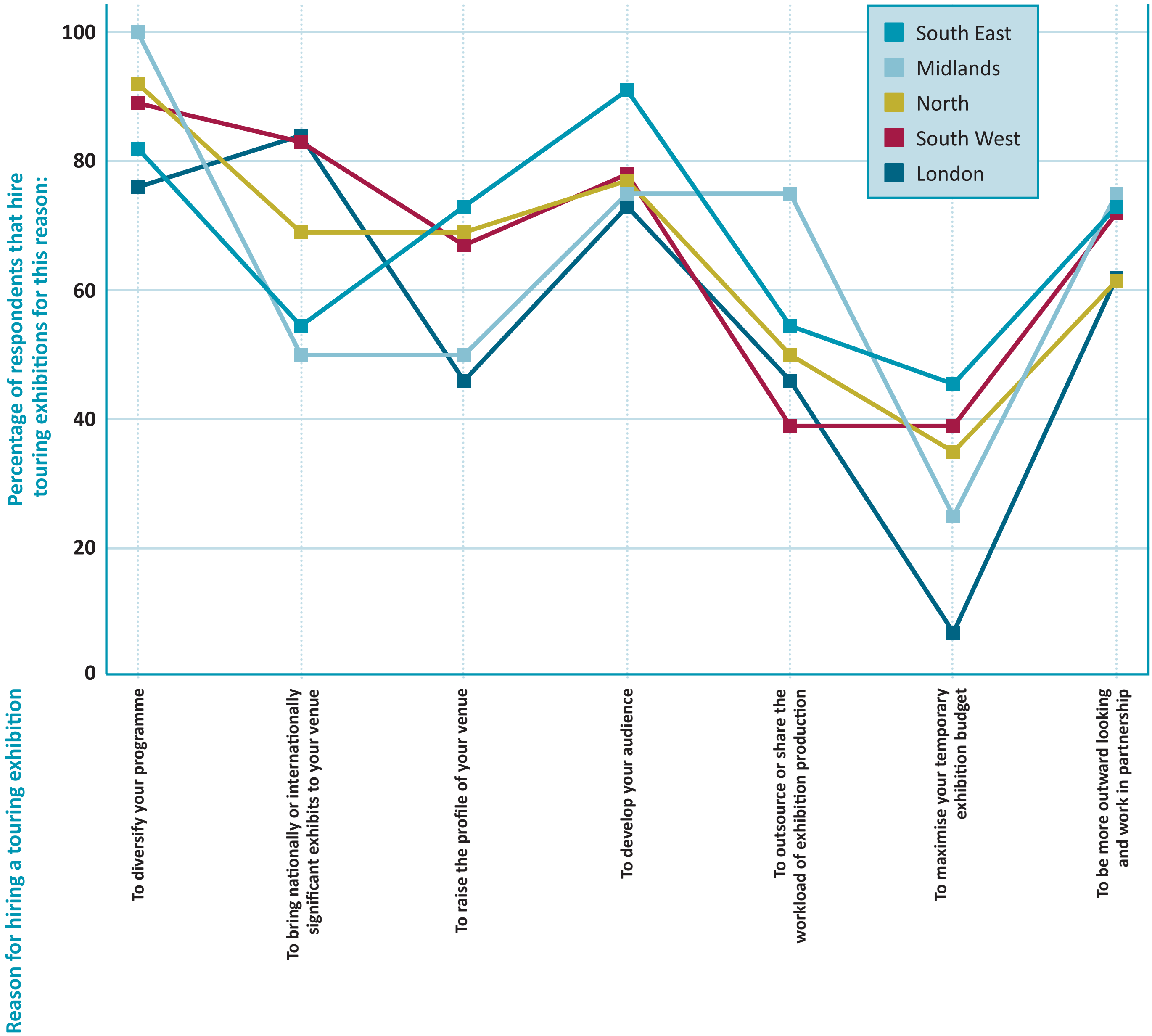
Reasons for hiring touring exhibitions:



Of those organisations that hire touring exhibitions, their motivations are not predominantly financial; 88% stated that they hire exhibitions to diversify their programme and 79% to develop their audience. The high percentage response to many reasons for hiring touring exhibitions suggests that motivations for taking touring shows are multiple and multi-layered. Fewest organisations use touring exhibitions to maximise their temporary exhibitions budget.

Reasons for hiring touring exhibition by ACE area:

Reasons for hiring exhibitions alter from the national picture, in some regions. Segmentation of the data provides a picture of slightly differing priorities by area:



To source touring exhibitions, venues are most commonly using the TEG website and information cascaded by their MDOs. Many also go directly to organisations who are key touring providers, such as Hayward Touring, the Crafts Council and the Design Museum. Word of mouth is important. A significant proportion wait to be approached by exhibition originators, or to be sent information, revealing a more passive relationship than might be expected.

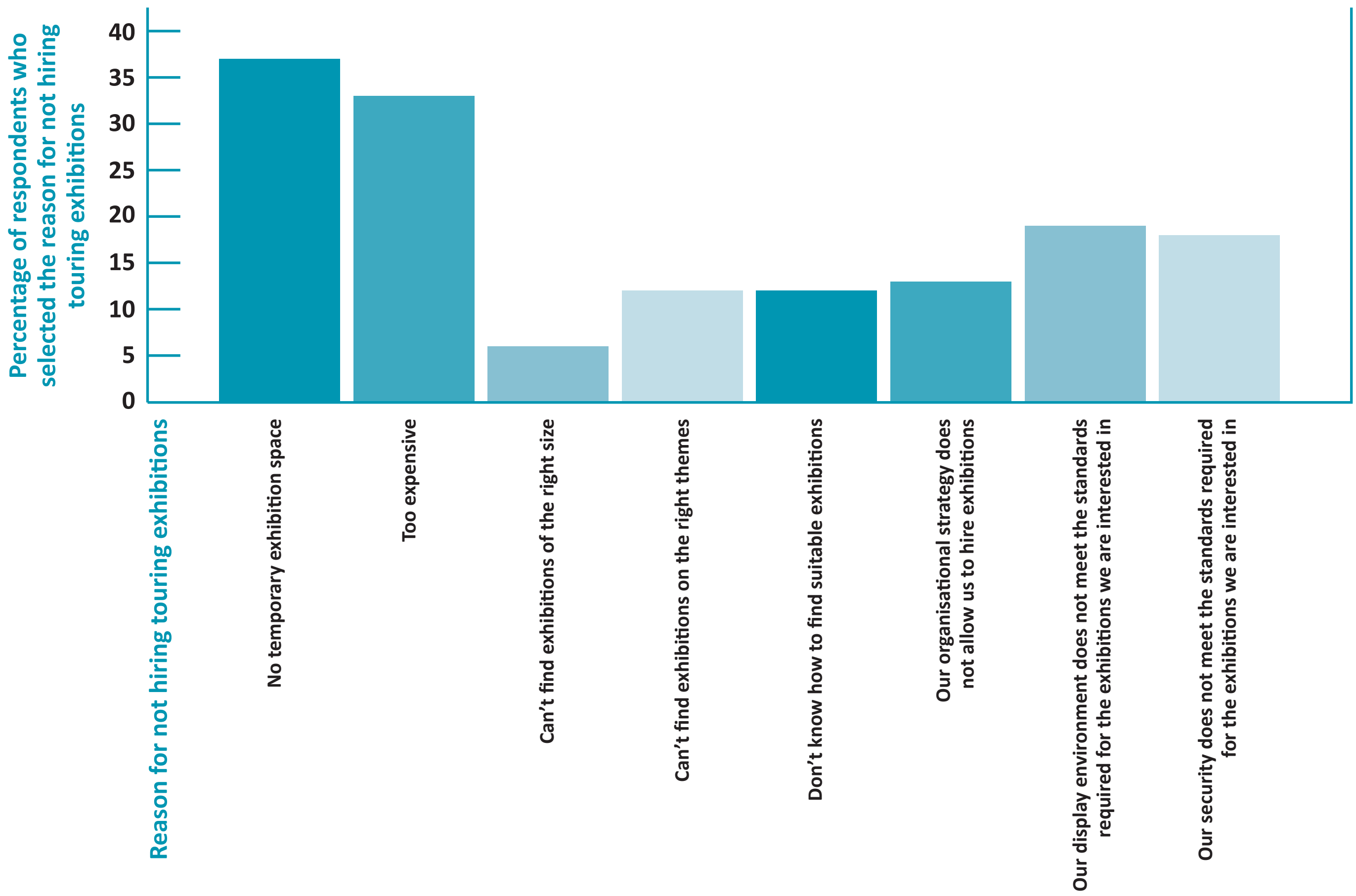
64% of those hiring exhibitions find it difficult to find exhibitions in their price range, but interestingly their average budget in most cases is £1-3,000, so within the scale at which a high proportion of exhibitions are available to hire. A considerable number don't have a budget, so are sourcing free exhibitions.

The most common exhibition themes which venues find it difficult to source when looking for touring exhibitions, are family friendly exhibitions, or those specifically targeted at children.

7 Analysed results for organisations not currently hiring touring exhibitions

44% of organisations who responded to the survey do not currently hire touring exhibitions.

Reasons for not hiring touring exhibitions:



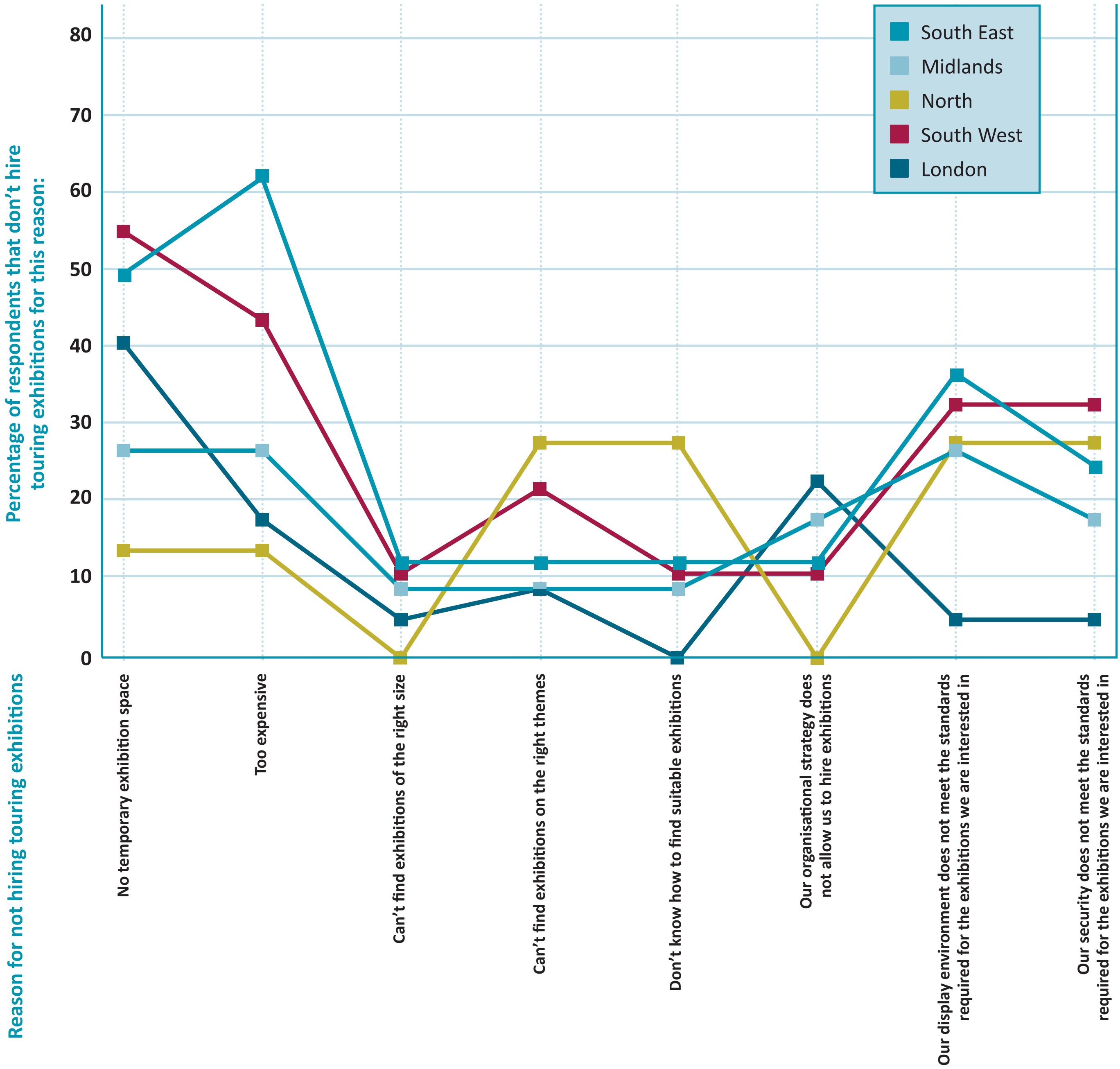
Venues perceiving/finding touring exhibitions are too expensive is the most common reason for not hiring them, after not having a temporary exhibition space.

Other common reasons for not hiring touring exhibitions given in the comments field are:

- A commitment to in-house exhibition production
- A desire to show exhibitions with local connections
- The organisation focuses on commissioning works
- Maximising opportunities to show own collections

Reasons for not hiring exhibitions by ACE area

There is some regional variation between ACE area, in the reasons given for not hiring exhibitions:



Of those organisations not currently hiring, 39% said they would be interested in the future. Of the 18% who declined to answer yes or no to this question, most said "*possibly*"; that it would depend on the cost/income and whether or not they could work in collaboration.

8

Analysis of survey results by English ACE areas

Touring trends in the Midlands area:

- To engage with touring, venues in the Midlands most need training to help them understand the touring sector and to influence change within their organisation
- Levels of experience are at one of two extremes; venues are either very experienced, having engaged in touring for 5-10 years, or inexperienced, having been involved for less than a year
- A higher than average number (71%) of organisations don't exhibit their exhibitions at their venue before touring, suggesting a higher proportion of non-venue based providers
- All venues would like to work in partnership in the future
- The area is not using trusts and foundations to fundraise for touring

Touring trends in the North ACE area:

- There is a higher than average reliance on core funding to support touring activity
- Budgets for touring shows are relatively high, as compared to the national average
- The area has strong ambitions for touring in the future. There are a higher than average number of organisations who have been engaged in the development of touring exhibitions for less than a year, suggestive of growth in touring activity in the area
- A higher than national average number (78%) of venues hire touring exhibitions
- The area hosts a high proportion of university galleries involved in touring exhibitions

Touring trends in the South East ACE area:

- Relative to the scale of the area, few touring exhibition producers responded to the survey, particularly in the East of the region
- Deriving profit from touring activity is a very important motivation for touring (62%); higher than in other ACE areas
- The area has a higher than average percentage of dedicated staff involved in the development of touring exhibitions
- 100% - much higher than in other areas – of touring exhibition developers require venues to use their exhibition branding
- There is currently a low engagement in partnership touring in the South East
- A high percentage of venues fundraise to support touring exhibitions
- The future ambitions of those currently touring in the area are low relative to other areas

Touring trends in the South West area:

- Venues in the area particularly need knowledge, experience and resources to enable them to engage in touring in the future, relative to other areas
- No international touring is reported in the data
- A low proportion of venues use core funds to engage in touring activity; those that are engaged in touring are fundraising to do so
- Budgets for touring activity are very low, relative to the national average
- A higher than average percentage (88%) of venues find it hard to identify exhibitions to hire in their price range, although their budgets are in line with those in other regions. This suggests that they are not accessing the relevant information; TEG has a relatively small number of members in the region

Touring trends in the London area:

- A higher than average - 90% - of venues not currently touring, are interested in developing touring exhibitions in the future, to increase their audience
- A higher than average - 90% - of venues currently touring, do so to raise their organisational profile
- As might be anticipated because of the inclusion of national museum data, a higher than average number of venues - 75% - engage in international touring
- 100% of venues would like to work in partnership in the future
- There is a relatively high reliance on core funding to support touring - an average of 80% - considering the inclusion of data from national museums
- Touring exhibition budgets are high relative to other areas
- A lower than average number of venues hire-in exhibitions

9

About TEG

TEG is the national network for touring exhibitions. It is an independent membership organisation concerned with promoting and supporting touring exhibitions, on behalf of exhibition hirers and originators, as well as delivering research and training. Members include professionals from galleries, museums, libraries, art and science centres, as well as sector service providers. The organisation is run by a volunteer committee drawn from museums and galleries across the UK, supported by a small secretariat. TEG is committed to supporting the exchange of exhibitions as a means of sharing ideas, materials and resources, in the belief that touring extends public awareness, knowledge and enjoyment of historical and contemporary culture.