CULTURE CONNECT

CULTURAL DIALOGUE SURVEY

MAY 2023

THE FUTURE OF TOURING EXHIBITIONS

In collaboration with teo

All about touring exhibitions

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EXECUTIVE SUMMARY

For the second iteration of Culture Connect's *Cultural Dialogue Survey* series, Culture Connect is delighted to have collaborated again with Teo, the Touring Exhibitions Organisation. The global touring exhibitions community was once again invited to answer our *Cultural Dialogue Survey 2023: The Future of Touring Exhibitions*. The survey ran from 12 December 2022 to 10 March 2023. The result of this global consultation is a snapshot of initial directions about what the future might look like, taken 2 years after the unprecedented global pause that the COVID-19 pandemic represented. It also shows longer term trends, as we were able to compare also to the results of the first iteration of our survey we conducted in 2021, enabling us to better understand the impact the pandemic has had on an industry heavily relying on the mobility of people and objects.

KEY TRENDS

Trend 1 A dynamic and optimistic touring community despite the 'great COVID pause'
Trend 2 A touring sector that confirms its durable international outlook
Trend 3 A decline of the power of the object?
Trend 4 A focus on trust and tested practices

KEY FINDINGS

- 116 responses gathered from 31 countries across all continents
- For both hiring and sending touring exhibitions, the current level of activity in 2023 is higher than what was anticipated in 2021
- 74% of respondents still think touring exhibitions are an effective tool for ongoing cultural exchanges across borders despite growing geopolitical tensions
- 78% of respondents engage with two or more types of touring exhibitions
- 59% of respondents declare the enriched immersive in-gallery experience or immersive in-gallery experience will be the type of exhibitions most in demand in the future
- The top 3 benefits of touring exhibitions in 2023 are the "diversification of audiences", "increased revenue", and "production of fresh content with fewer resources"
- The top 3 challenges anticipated for touring exhibitions are "funding / cost", "concerns about environmental and societal sustainability", and "concerns about geopolitical instability"
- The top 3 most important deciding factors for choosing a touring exhibition have become the "anticipated popularity of the topic", "cost", and equally "access to exceptional objects/collection" and "access to exceptional experience"
- While environmental concerns can be seen as a top challenge, the industry is split when it comes to addressing the climate emergency. 45% of respondents declare collections and displays should continue to tour at the same scale while 40% declare collections and displays should be reduced significantly in volume to address the climate emergency

INTRODUCTION

INTRODUCTION

The first iteration of Culture Connect's Cultural Dialogue Survey series was undertaken in 2021 in collaboration with Teo, the Touring Exhibitions Organisation. The result of that global consultation was a snapshot of initial directions about what the future might look like, taken 10 months into the COVID-19 pandemic. Two years on, have these trends been confirmed or are we seeing a different touring exhibition landscape emerging? What has been the real impact of the pandemic and how is the contemporary context of increased geopolitical uncertainty and growing climate emergency playing out?

These are the questions we had in mind when launching this new edition of the Cultural Dialogue Survey on the future of touring exhibitions. As anticipated in 2021, touring exhibitions have continued despite the challenges of lockdowns, travel bans and growing environmental concerns. But, two years on, we were keen to go back to those who work on touring exhibitions day-in and day-out to better understand how the pandemic but also the contemporary crises we have been experiencing since 2021 have really impacted the sector, and what new practices and trends are likely to shape touring exhibitions moving forward.

We are delighted to have received responses from across the globe — having this time all continents represented — and a profile of respondents similar to those of 2021 allowing for more accurate comparison between the two surveys. It is also important to note that the responses have been generously given by practitioners in the sector at a time when many teams are working with reduced staff as a consequence of the staff cuts generated by the pandemic. We are therefore very grateful to all who responded to this online survey. Their responses have enabled us to establish this new snapshot of where the touring exhibitions sector stands after the pandemic and where it is heading towards. We hope the analysis of these responses in the report below will provide interesting food for thought for those working on touring exhibitions and will trigger constructive strategic conversations as everyone plans for tomorrow.

Anaïs Aguerre
Founder & Managing Director

Otone Doi
Research & Operations Manager

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METHODOLOGY & RESPONDENTS

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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, are anticipating the future of this cultural activity, especially in light of mounting geopolitical instability and the climate crisis, and to compare how touring exhibitions have been affected since the last survey, which sought to understand the inherent challenges and changes brought about by the COVID-19 pandemic.

Format

The survey consisted of 20 questions and was available via a Google form between 12 December 2022 and 10 March 2023. The survey link was circulated by Culture Connect and Teo. It was an initiative open to all professionals involved in the hosting, touring, production and promotion of cultural exhibitions worldwide at museums, galleries, science centres, exhibition 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 in the future by contacting info@culture-connect.net.

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).

Regional analysis may therefore be affected due to differences in not only the visibility of the touring exhibitions market and reach of the networks but also differences in general attitudes towards and perceptions of answering surveys in non-Western countries. Likewise, another limitation is the survey's circulation in English, which may have discouraged responses from certain regions.

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PROFILES OF RESPONDENTS

Overall, the profile of respondents to this year's survey is fairly equivalent to that of the 2021 respondents allowing for more accurate comparison when looking at 2021 and 2023 results.

Respondents working in museums represent again more than half of the respondents and the majority of respondents are decision-makers with 34% directors or heads of departments and 18% Director and/or CEO.

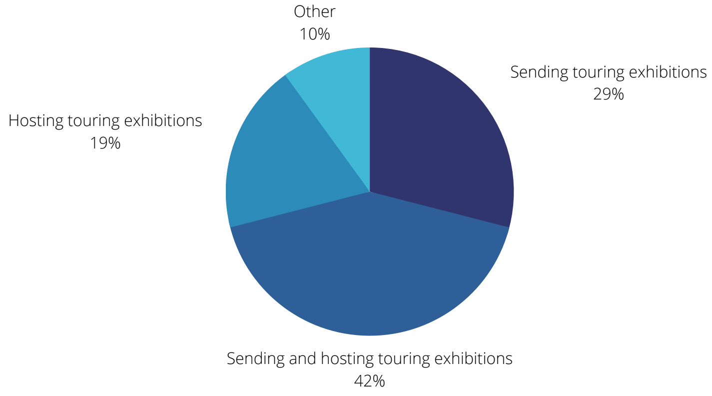
We note, however, that we have this time responses from all continents providing a truly international spectrum of perspectives. We also have a slightly greater representation of people directly involved in hosting and sending touring exhibitions (only 10% selected 'other' compared to 13% in the 2021 survey) and less respondents involved in both sending and hosting than in 2021 (42% vs 54% in 2021).

Cultural Dialogue Survey: The Future of Touring Exhibitions received a total of 116 responses from across the globe. This is slightly less than the first edition which received 136 responses and may be a sign of a survey fatigue and/or the intensity of work in teams which often have experienced downsizing.

Broadly speaking, we have a slightly larger representation of people working directly on sending and hosting of touring exhibitions than in 2021 with only 10% who selected 'other' compared to 13% in 2021. Among the 10% of respondents who didn't select sending or hosting, we find 41.5% were consultants. Like in 2021, the greatest share of respondents is working in institutions that host and send touring exhibitions; however, there are fewer institutions engaged in both sending & hosting (42% compared to 54% in 2021). There were more respondents who work in institutions that only send touring exhibitions (29%) rather than only host touring exhibitions (19%).

Fig. 1 | Profile of the respondents

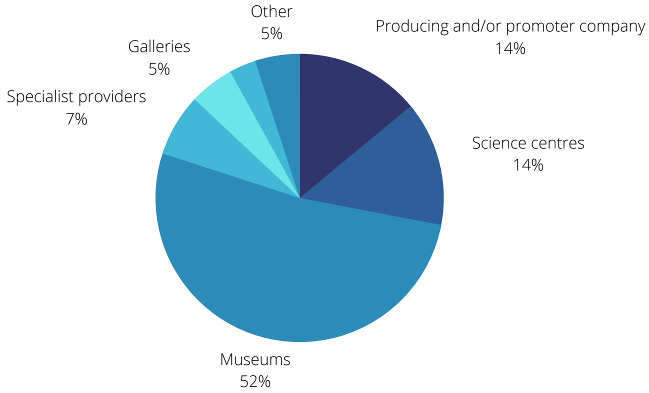
Q1. Broadly speaking, what is your organisation involved in?



Like in 2021, the **majority of respondents work in museums (52%)**, followed by science centres (14%) and production and/or promotion companies (14%). There were notably no responses from those who work in libraries, archives, gardens, zoos, and other outdoor spaces.

Fig. 2 | Profile of the respondents

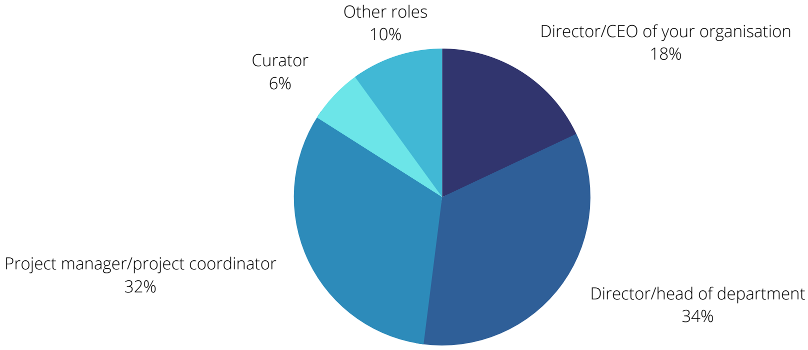
Q4. What type of organisation do you work in?



Similar to 2021, in terms of positions, **the majority of respondents are decision-makers** with 34% directors or heads of departments and 18% Director and/or CEO of their organisations, as well as 32% project managers/project coordinators.[1]

Fig. 3 | Positions of the respondents

Q5. What is your job title at your organisation?

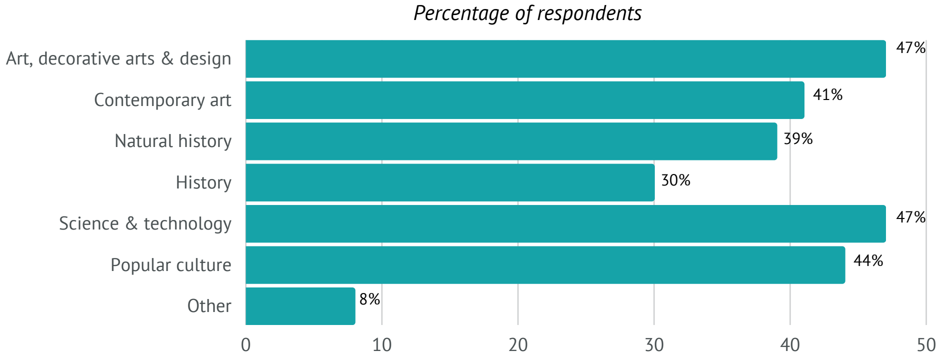


When considering the types of exhibitions [see Fig. 4 on the next page], we have a very broad representation across exhibition types. It must be noted, however, that there was a slight increase compared to the last survey of respondents who engage with two or more types of exhibitions (an increase to 78% from 75%). Like in 2021, exhibitions on art, decorative arts and design and exhibitions on science and technology appear to be equally the most popular type among respondents, followed by exhibitions on popular culture.

[1] In 2021, 42% were directors/heads of departments, 15% were directors/CEOs of their organisations, 21% were project managers/project coordinators, 7% were curators, 1% were designers, and 14% had other roles, including consultants.

Fig. 4 | Types of exhibitions

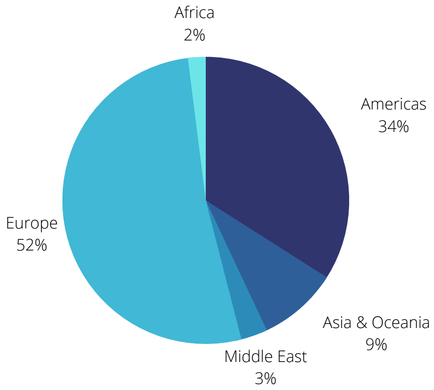
Q2. What type of touring exhibitions do you engage with?



Survey respondents were spread out across 31 countries. Unlike in 2021, it received responses from all continents providing a truly international spectrum of perspectives. The majority of respondents worked, however, for organisations based in Europe (52%), followed by the Americas (34%), Asia & Oceania (9%), the Middle East (3%), and Africa (2%), with the following countries most represented: United States of America, followed by France, the United Kingdom, Spain, and Canada. Similarly, in 2021, 54% were based in Europe, 31% in the Americas, 12% in Asia & Oceania, and 3% in the Middle East, with the following countries most represented: United States of America, followed by the United Kingdom, France, Canada, and Australia.

Fig. 5 | Geographic breakdown of the respondents

Q3. What country is your organisation based in?



Details of the countries

Australia | Bangladesh | Belgium | Brazil | Canada | China | Denmark | Ecuador | Finland | France | Germany | Italy | Japan | Mexico | Monaco | New Zealand | Norway | Philippines | Poland | Romania | Saudi Arabia | Singapore | South Korea | Spain | Sudan | Switzerland | Turkey | United Kingdom | United States of America | Venezuela | Zambia

KEY TRENDS

A DYNAMIC AND OPTIMISTIC TOURING COMMUNITY DESPITE THE 'GREAT COVID PAUSE'

A dynamic activity level

A post-pandemic level of touring activity that does not seem to have suffered from the 'great COVID pause' and that is even more dynamic than anticipated in 2021.

In 2021, participants were asked how frequently their organisations hired and/or sent touring exhibitions before the COVID-19 pandemic and how frequently their organisations planned to hire and/or send touring exhibitions in the future. The graphs below compare the results from the anticipated future in 2021 with the current level of activity in 2023.

Fig. 6 | Current frequency of hiring touring exhibitions (2023) vs anticipated hiring (2021)

Q6. On average, how frequently does your organisation hire and/or send touring exhibitions?

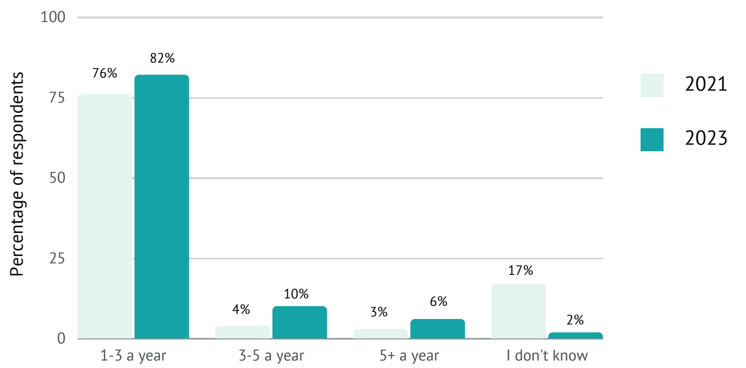
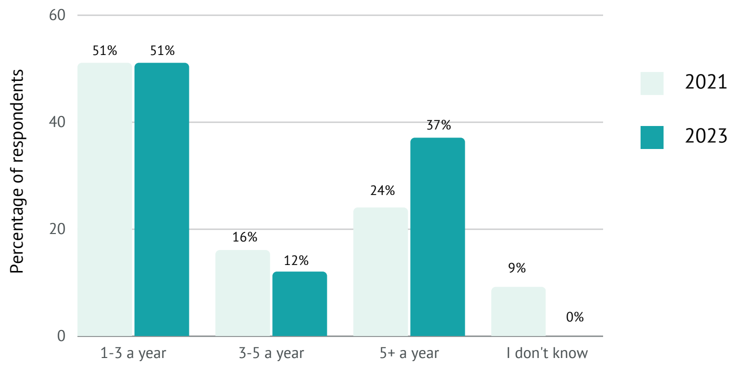


Fig. 7 | Current frequency of sending touring exhibitions (2023) vs anticipated sending (2021)

Q6. On average, how frequently does your organisation hire and/or send touring exhibitions?



Overall, when looking at the frequency of hiring a touring exhibition, the level of activity corresponds largely to what was anticipated by the touring exhibition community in our previous report, 10 months into the pandemic. As anticipated in 2021, players involved in hiring are doing this mostly between 1-3 exhibitions per year (82% of the respondents in 2023 are hiring annually between 1-3 exhibitions vs. 76% of the respondents who anticipated this level of activity post pandemic in 2021). When comparing to pre-pandemic levels declared in the 2021 survey, we even note a higher proportion of respondents hiring between 3-5 exhibitions per year (10% in 2023 vs. anticipated 4% in 2021) and over 5 exhibitions per year (6% in 2023 vs. 3% in 2021).

In terms of sending, we see a similar pattern of activity level as anticipated in 2021 with notably 49% of the respondents involved in sending exhibitions declaring in 2023 sending between 1-3 exhibitions per year (in 2021, 51% anticipated this level of activity post-pandemic). When comparing the anticipation in 2021 and the actual reality in 2023, the proportion remains high for those touring more than 5 exhibitions per year with 37% of the respondents declaring touring more than 5 exhibitions per year (24% in 2021 anticipated this level of sending activity post-pandemic).

An optimistic and confident touring exhibition community

A touring exhibition community which remains optimistic as it anticipates either maintaining or reaching higher levels of activity for both touring and sending in the future.

> *There will be a bright future of touring exhibitions.*

> *I think there may be a growing need for touring exhibitions which will have to be balanced with environmental footprints and also be complimentary to the growing need for local context.*

Fig. 8 | Anticipated frequency of hiring touring exhibitions (2021) vs anticipated hiring (2023)

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

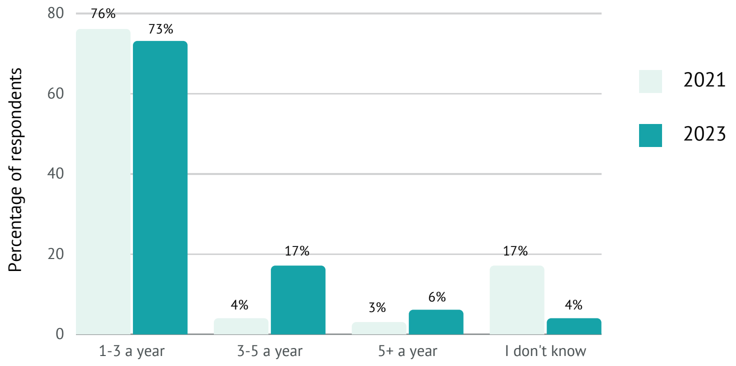
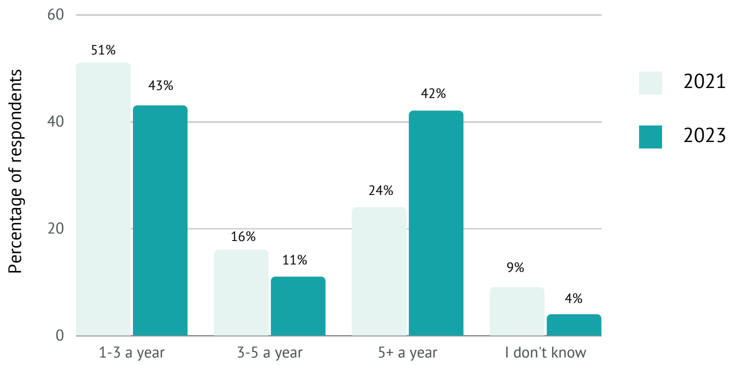


Fig. 9 | Anticipated frequency of sending touring exhibitions (2021) vs anticipated sending (2023)

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



Unsurprisingly, respondents in 2023 are much more confident than in 2021 about determining their anticipated level of activity with only 4% of the respondents involved with hiring saying they don't know at what frequency they will hire exhibitions compared to 17% in 2021 and 4% compared to 9% in 2021 for those involved in sending touring exhibitions [see Figs. 8-9].

Fig. 10 | Current frequency of hiring touring exhibitions (2023) vs anticipated hiring (2023)
Q6. On average, how frequently does your organisation hire and/or send touring exhibitions?
Q7. In the future, how frequently does your organisation plan to hire and/or send touring exhibitions?

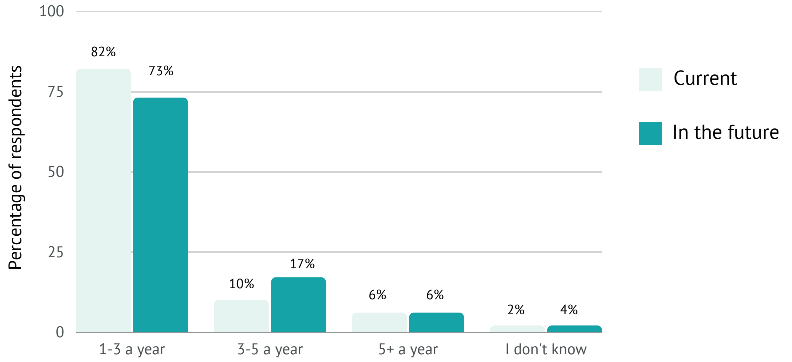
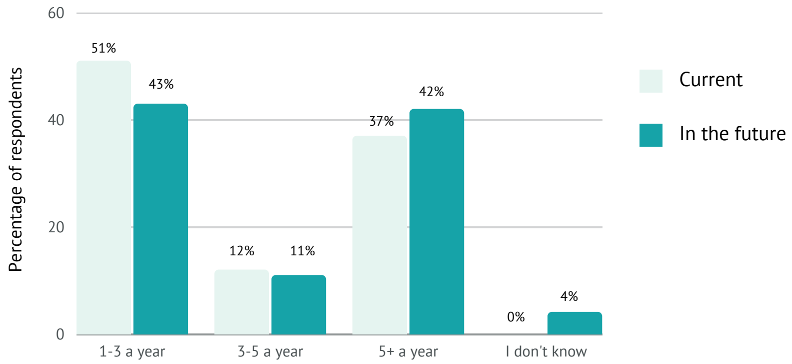


Fig. 11 | Current frequency of sending touring exhibitions (2023) vs anticipated sending (2023)
Q6. On average, how frequently does your organisation hire and/or send touring exhibitions?
Q7. In the future, how frequently does your organisation plan to hire and/or send touring exhibitions?



When considering the ‘hiring’ activity, we note that the majority of people involved in hiring exhibitions are anticipating they will maintain their level of activity or hire more exhibitions in the future with, notably, 17% of the respondents considering hiring between 3-5 exhibitions per year in the future compared to 10% declaring they are currently hiring between 3-5 exhibitions per year [see Fig 10].

Likewise, when considering the ‘sending’ activity, we note also a certain degree of optimism. Overall, the majority of the respondents involved in the ‘sending’ activity are, indeed, anticipating they will maintain their level of activity or improve it, with notably 42% of the respondents anticipating they will send over 5 exhibitions per year compared to only 37% declaring they are currently sending exhibitions at this frequency [see Fig 11].

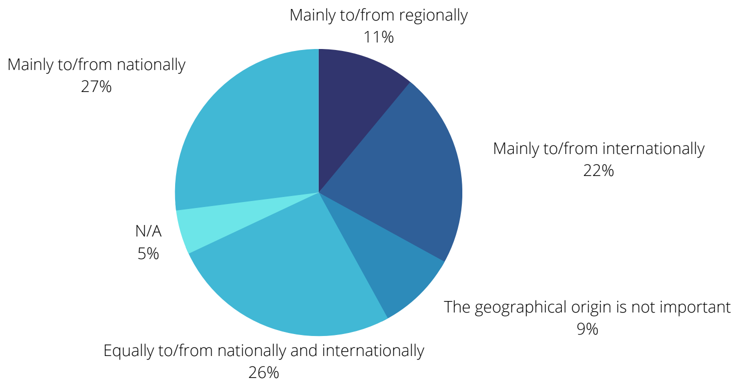
A TOURING SECTOR THAT CONFIRMS ITS DURABLE INTERNATIONAL OUTLOOK

Geographical reach of touring exhibitions

The geographical dimension of the touring activity seems to matter more to the sector than when we conducted the survey in 2021. However, international remains a key dimension with 22% of the respondents operating mainly to / from an international level and 26% saying they work equally to / from national and international levels compared to respectively 20% and 14% in 2021.

Fig. 12 | Geographical reach of touring exhibitions

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



The geographical dimension of the touring activity seems to matter more to the sector than when we conducted the survey in 2021. It is interesting, indeed, to note that since our last survey the number of respondents for whom the geographical origin or destination was not important has dropped from 17% in 2021 to 9% in 2023. This is probably explained by the sense of growing financial and geopolitical risks that the industry is facing.

The national level remains a very important geographical reach for touring activity with the same proportion of respondents in 2021 and 2023 (27%) saying they mainly work nationally. However, when considering people answering that they work equally to/from nationally and internationally (26% in 2023 vs. 14% in 2021) and those saying they work mainly internationally (22% in 2023 vs. 20% in 2021) the share of international activity has picked up confirming that touring remains a strongly international activity for museums and cultural organisations involved. The regional level – defined in our survey questionnaire as Asia, Africa, Americas, Europe, Oceania – has increased, representing the main geographical level for 11% of the respondents in 2023 vs. 8% in 2021. It would be interesting to observe in the coming years if the proportion of regional activity increases as a result of calls to reduce air freights and increase geopolitical concerns or if this is just a blip.

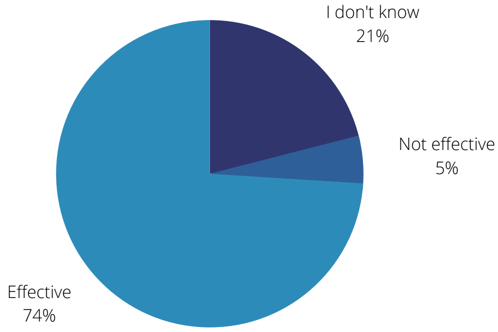
A strong awareness of the broader geopolitical context

Touring exhibitions are also largely considered in a broader international context where they are seen as contributing to the circulation of objects and ideas across borders, as a tool for ongoing cultural exchanges across borders and for which one of the key sectorial challenges is 'concerns about geopolitical stability'.

Moreover, it is interesting to note that among the benefits of touring exhibitions, 'widened access to international cultural heritage' as well as the 'ability to harness soft power' are cited more often than in 2021 as very important expected benefits. The international dimension of touring exhibitions is also perceived through the benefits of touring exhibitions, which are thought to play a role in the broader geopolitical context in which they operate. This sense of the bigger geopolitical context is also stressed by the respondents who cite 'concerns about geopolitical instability' as one of the top challenges facing the sector [see Fig. 20].

Fig. 13 | Touring & cultural exchanges

Q19. At a time when geopolitical tensions are growing across the world, do you think touring exhibitions are an effective tool for ongoing cultural exchanges across borders?



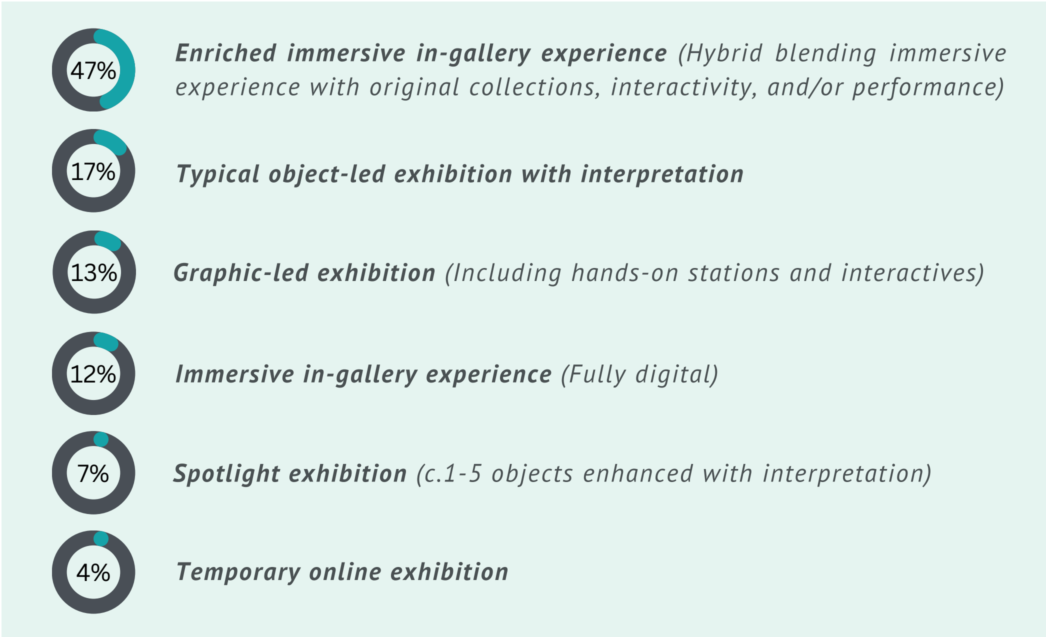
Touring exhibitions are also considered by the large majority of the respondents (74%) as able to be a tool for ongoing cultural exchanges across borders. Although this assertion seems slightly less strong than in 2021 where 83% declared touring exhibitions can be a tool for ongoing cultural exchanges across borders and only 10% were unsure compared to 21% in 2023, it must be noted that those saying they don't believe touring exhibitions can be such a tool has diminished (7% in 2021 vs. 5% in 2023).

> *Touring exhibitions will continue to serve as great ambassadors of cultural exchanges, advocating positive values, and supports continued, opening dialogues between countries, its people and its traditions.*

A DECLINE OF THE POWER OF THE OBJECT?

Fig. 14 | Type of exhibition most in demand

Q10. In your view, which types of touring exhibitions will be most in demand in the future?



When asked about the type of exhibitions they anticipate being most in demand in the future, the sector seems to be clearly identifying the immersive dimension as a key factor for exhibition demand: 47% of the respondents are saying that enriched immersive gallery experience will be the most in-demand type of exhibition in the future and another 12% think that the fully immersive in-gallery experience will be the most in-demand type of exhibition in the future.

This is an interesting trend especially when considered in parallel with the decrease of appetite for object-led exhibitions or spotlight exhibitions focusing on one star object. Indeed, we note a significant drop in the anticipated appetite for typically object-led exhibitions as only 17% of the respondents in the 2023 survey compared to 33% in the 2021 survey think this will be the type of exhibition most in demand in the future.

Moreover, we see a fall of the spotlight exhibition as the most in-demand type of exhibition in the future with only 7% of the respondents choosing this type of exhibition compared to 15% in the 2021 survey. This is reinforced by the fact that 35% of the respondents think that typical object-led exhibitions and spotlight exhibitions will be least in demand in the future. So, although temporary online exhibitions we saw emerging during the lockdowns are clearly not seen as a future form for exhibitions, it is interesting to note the power of the object itself seems to have weakened and a degree of immersive elements is expected to be added to these museum collections on tour.

It is interesting to also note that 'access to exceptional objects/collection' was the top factor for choosing a touring exhibition over an in-house one in 2021 but it is now down to the third most important deciding factor in equal measure with 'access to exceptional experience' [see Fig. 17]. Whereas 'access to new scientific expertise' was with 'access to exceptional objects/collection' and 'cost' in the top three of the most important factors to decide on a touring exhibition in 2021, this is now down to seventh position. This and the drop of the 'access to exceptional objects' as the top decision factor reinforce this perception that the power of the object — once the cornerstone of touring activity — seems to be challenged today and with less aura than before.

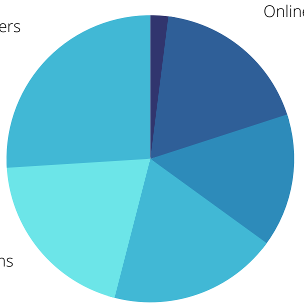
> *New platforms may be developed that may offer new opportunities for exhibition without having to bring actual objects to different destinations.*

A FOCUS ON TRUST AND TESTED PRACTICES

A sector where personal contact and human connections are key

Fig. 15 | Source & Promotion

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



A quarter of the respondents source their exhibitions directly from the exhibition producers. This is pretty much in line with the result of our previous survey (26% of the respondents in 2023 vs. 24% in 2021). This highlights the importance of direct one to one connections. Like in 2021, this is followed by peer recommendations (20% of the respondents) stressing again the importance of personal contacts that support the touring exhibition market. This pattern can be found across all regions where the majority of respondents source and/or promote touring exhibitions directly through exhibition producers, peer recommendations, or in-person events, as opposed to online platforms and networks and online events. Online channels remain nonetheless well used complementary resources, maintaining the same level as in 2021, with 18% of the respondents sourcing or promoting via online platforms and 15% via online market place events.

A consistent approach to collaborative models

We note a constant in the preferred collaboration models with the top three remaining the same as in 2021: namely, adaptable transactional model (top 1), co-production model (top 2) and turnkey transactional model (top 3).

When considering the type of collaborative models, we note the preferred models are unchanged from the 2021 survey results, with 'adaptable transactional model' (top 1); 'co-production model' (top 2) and 'turnkey transactional model' (top 3). The experience of the pandemic has not therefore modified the go-to type of collaboration model that the sector favours.

Fig. 16 | Collaborative models

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

TOP 5 RANKING

1. ***Adaptable transactional model*** *(Hiring a touring exhibition that can be significantly tailored to the venue)*
2. ***Co-production model*** *(Co-creating a touring exhibition with co-hosts)*
3. ***Turnkey transactional model*** *(Hiring a touring exhibition off-the-shelf)*
4. ***We need all the models***
5. ***Digital file license model*** *(Graphics and replicas produced by the host)*

It is interesting however to note some variance in certain regions. In North America for instance, the ‘turnkey transactional model’ is the top 1 choice before the ‘adaptable transactional model’ (top 2) and the ‘co-production model’ (top 3), whereas in Asia/Oceania, the ‘co-production model’ is the top 1 choice followed by the ‘adaptable transactional model’ (top 2) and the ‘turnkey transactional model’ (top 3). In the Middle East, the top three models are equally favoured.

The need to secure popular appeal and great experiences that will translate into financial successes

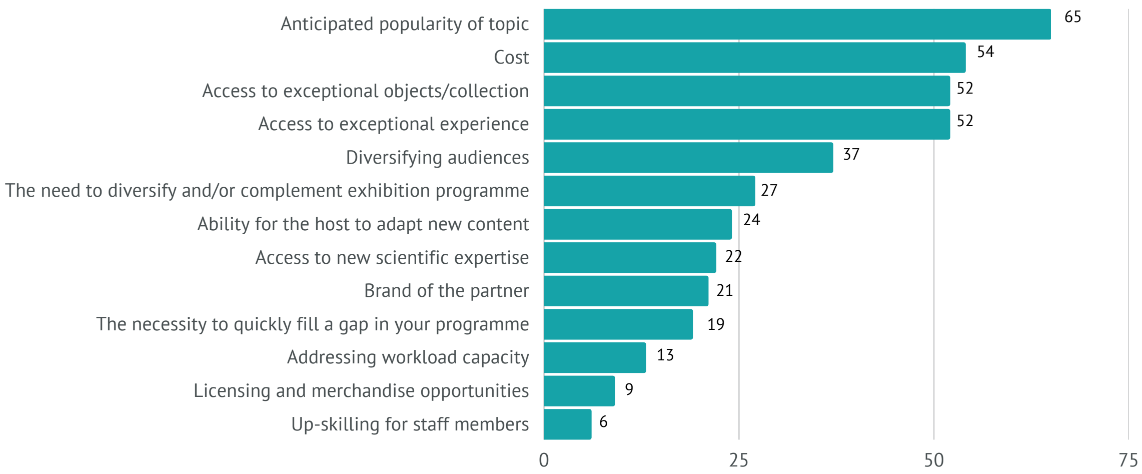
Overall, the sector seems more concerned with the financial successes of the exhibitions than in the previous survey. Ensuring popularity and reducing cost are playing important roles in the decision to opt for a touring exhibition over an in-house one. Likewise, the top 2 benefit expected for a touring exhibition is 'increased revenue' (top 2 benefit in 2023 compared to top 5 in 2021).

> *For our museum, hiring in exhibitions has protected us from fluctuating costs we experience when producing our own exhibitions (material and freight costs particularly).*

Fig. 17 | Most important deciding factors

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

Number of responses



When considering the deciding factors for choosing a touring exhibition over an in-house exhibition, it is interesting to note that the main drivers are related to the anticipated success of the exhibitions with 'anticipated popularity of the topic', the 'cost' and in an equal proportion 'access to exceptional experience' and 'access to exceptional objects/collection' in the third position. This seems to be in line with the financial hardship that the museum, and more broadly the cultural sector, is facing since COVID. As a result, organisations want to minimise their financial risks and maximise the chance of popular success to maximise their income from ticket sales.

Fig. 18 | Benefits of touring exhibitions

Q13. Overall, what do you think are the benefits of touring exhibitions?

Number of responses

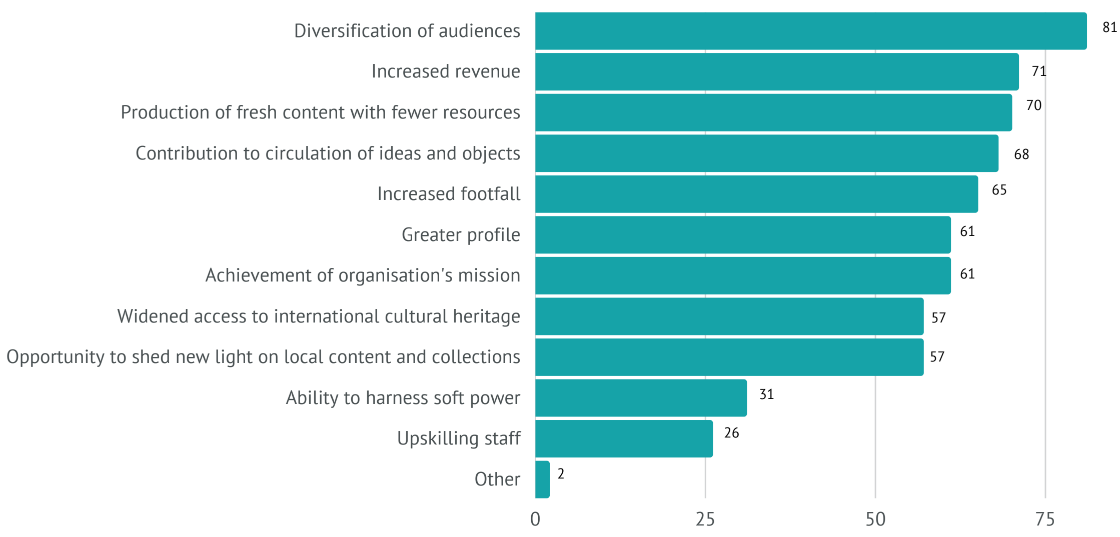


Fig. 19 | Top 5 benefits of touring exhibitions
Q13. Overall, what do you think are the benefits of touring exhibitions?

TOP 5 RANKING	*In 2021 (Pre-COVID)*	*In 2021 (Since COVID)*	*In 2023*
1	Diversification of audiences	Ability to produce fresh content with fewer resources	Diversification of audiences
2	Increased footfall	Diversification of audiences	Increased revenue
3	Circulation of ideas and objects	Widened access to international cultural heritage	Ability to produce fresh content with fewer resources
4	Widened access to international cultural heritage	Circulation of ideas and objects	Circulation of ideas and objects
5	Increased revenue | Ability to produce fresh content with fewer resources	Increased revenue | Opportunity to shed new light on local content and collections	Increased footfall

The results from the survey on the perceived benefits of touring exhibitions reinforce the results noted earlier on the deciding factors for choosing touring exhibitions: that touring exhibitions need to be financially viable and bring additional income. The expected benefits of touring exhibitions have indeed slightly evolved since our last survey. In 2023, the top 3 benefits of touring exhibition are ‘diversification of audiences’ (top 1), ‘increased revenue’ (top 2) and ‘production of fresh content with fewer resources’ (top 3). In comparison, the top three benefits from touring exhibitions were in 2021: ‘production of fresh content with fewer resources’ (top 1); ‘diversification of audiences’ (top 2) and ‘widened access to international cultural heritage’ (top 3).

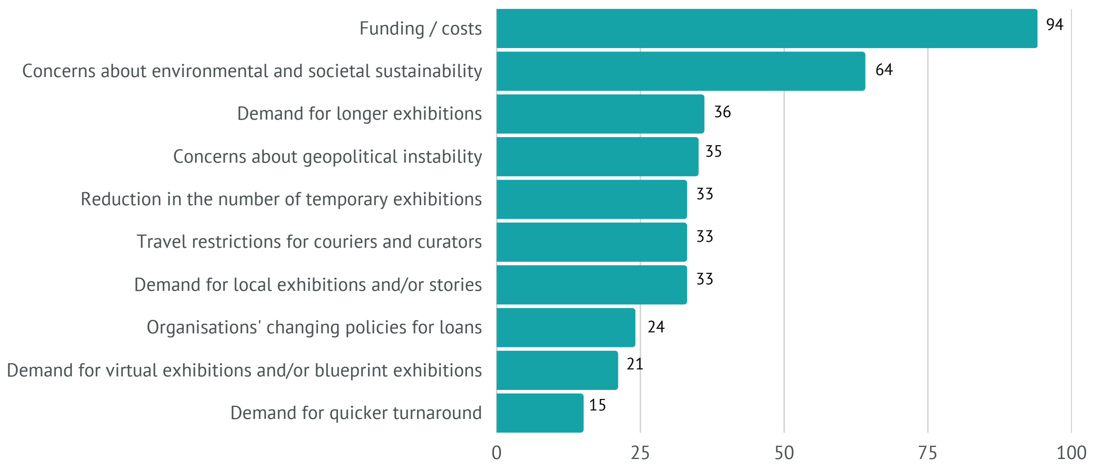
With museums being back to fully opening at pre-pandemic levels, it is interesting to note that respondents in 2023 cite the same top benefit of touring exhibitions (diversification of audiences) as in 2021 looking back at benefits pre-COVID. However, the continued effect of the pandemic may perhaps be seen in the continued slide of the importance of increased footfall as a benefit and the continued importance of the ability to produce fresh content with fewer resources.

A sector challenged by financial and environmental sustainability

A sector concerned with financial viability, geopolitical instability and aware of the challenges related to environmental sustainability but divided in terms of ways to address it.

Fig. 20 | Main challenges to touring exhibitions

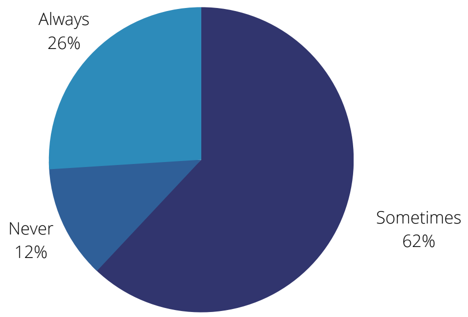
Q14. What do you think are the three main challenges that touring exhibitions will face in the future?
Number of responses



The first two top challenges remain the same as in 2021: ‘Funding / Cost’ (top 1) and ‘concerns about environmental and societal sustainability’ (top 2). However, the third preoccupation has changed. As expected, ‘travel restrictions for couriers and curators’ are less of a challenge for the sector than in 2021. The third biggest challenge people involved in the touring exhibition sector cite is ‘concerns about geopolitical instability’.

Fig. 21 | Environmental concerns

Q15. Do environmental concerns impact your work in the touring exhibitions industry?



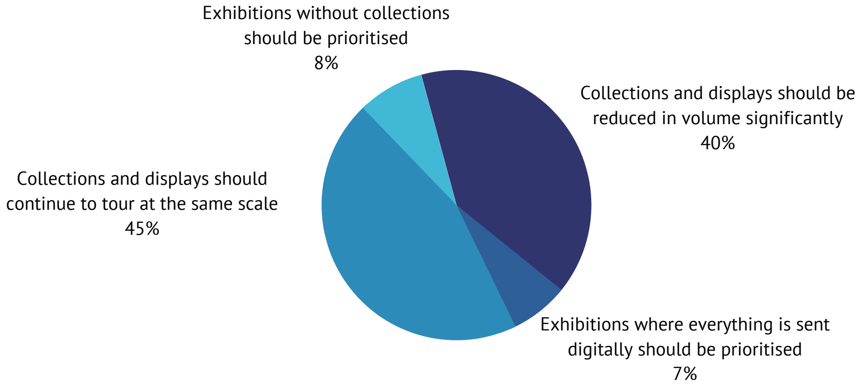
Survival of the planet depends on the greening of energy, transportation, and production. Moving toward these solutions will lower the impact of traveling exhibits, allowing the practice to continue into the future. And yet, our survival may require more drastic changes to the way we do things, which could have various consequences. If, for example, it takes more than a few decades to reach carbon-free air travel, people may be forced to fly less. This might increase the value and need for traveling exhibits to share cultural experiences across distances.

To explore further the concerns about environmental sustainability, we asked people if environmental concerns impacted their touring exhibition work. It seems that although 'concerns about environmental and societal sustainability' is considered by the respondents as the top 2 main challenge facing the industry, it does not yet impact the sector in a systematic manner. Indeed, 12% of the respondents said that it never impacts their work while the large majority (62%) said it does but only sometimes. It would be interesting to explore this trend in a few years to see if the proportion of 26% who are today saying that environmental concerns are always impacting their touring exhibition work grows in the face of the climate emergency.

A number of respondents have highlighted what they see as best practices they either do or have observed. Among these remote installation and virtual couriering have been cited frequently as a solution with a number of respondents highlighting that they have developed tools and policies to support this change introduced during the pandemic. A longer exhibition run and fewer objects per exhibition are also noted as a possible solution alongside the production of graphic elements based on digital files but produced locally. Recycling is also cited by many as good practice in connection with the materials for the design of the exhibitions as well as the recycling of crates after a tour. Working more regionally is also considered as a potential solution.

Fig. 22 | Climate emergency

Q17. In light of the climate emergency, do you feel collections and displays should be reduced in volume for touring or even not toured in the future?



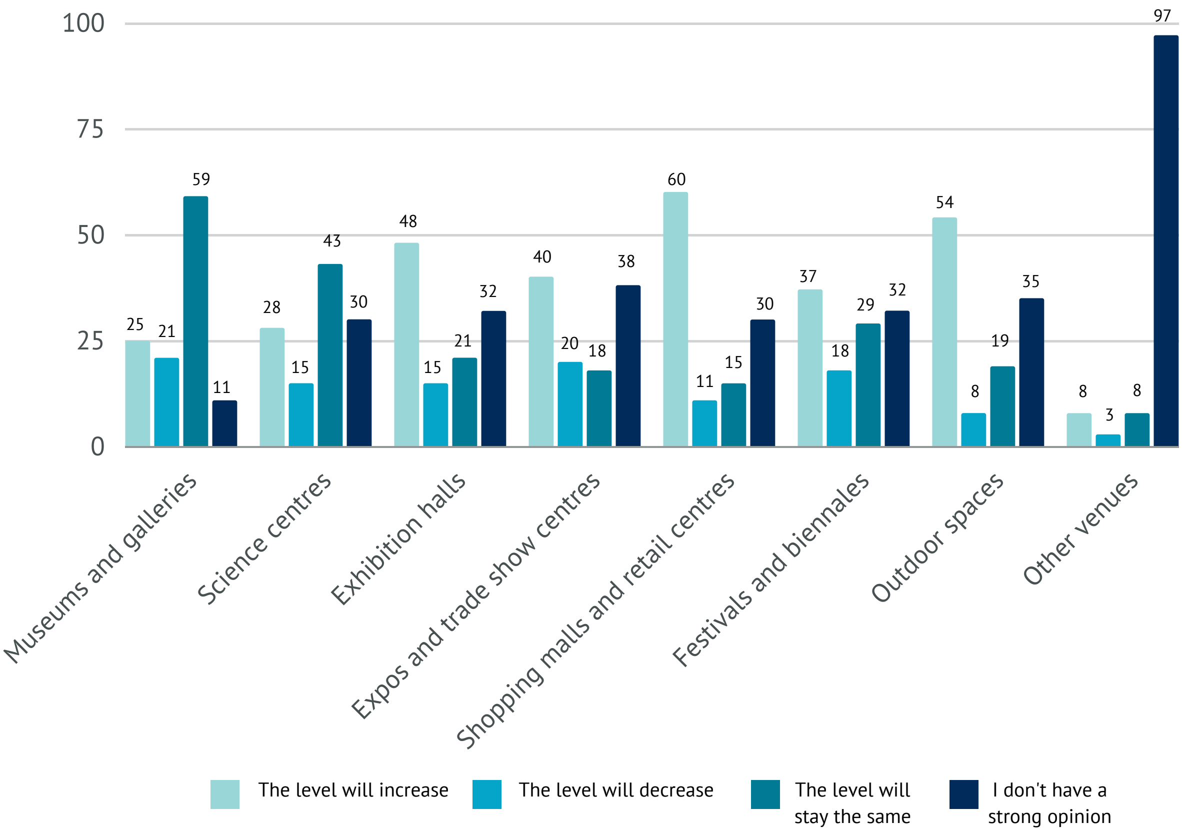
When asked directly about the climate emergency, it is interesting to note that the sector although concerned about the environment is still split in the way to address it in their own practice of touring. 45% of the respondents think that collections and displays should continue to tour at the same scale as today whereas 40% say collections and displays for touring should be reduced significantly in volume to address the climate emergency. Radical measures are more timidly opted for, with 8% of the respondents saying 'exhibitions without collections should be prioritised' and 7% saying that 'exhibitions where everything is sent digitally should be prioritised'.

The development of new hosting venues?

Museums and science centres are considered as the constant for venue type for touring exhibitions and shopping/retail centres, exhibition halls, festivals/bienniales as well as outdoor spaces are the unorthodox winners in terms of growth.

Fig. 23 | Evolution of the type of venues

Q18. In the future, in which type of venue do you feel we will see a growing presence of touring exhibitions?
Number of respondents



Like in 2021, museums and galleries still appear as the regular and constant venues for touring. Science centres are also anticipated to remain at the same level putting them in a better position than in 2021 where people anticipated a decrease of these type of venues, possibly due to high concerns at the time about interactives not being adapted to new sanitary rules. With these rules being relaxed in most countries, they seem to be seen as another important pillar of types of venues for touring exhibitions. Outdoor spaces are also still seen as a venue type that will increase but the biggest growth in 2023 is anticipated for shopping malls and retail centres. This is in line with the approach of the retail industry to emphasise experience and storytelling to their customers' experience. Exhibition halls are also considered as a growing venue type for touring as well as festivals and biennales. It must be noted that this last category was considered by most respondents of the 2021 survey as a venue type that will decrease.

CONCLUSION

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Overall, the touring exhibition community remains optimistic and more confident in its ability to predict the future than in 2021 with a continuing interest in international work, despite growing concerns regarding geopolitical instability. It is clear that there is a continuing need for those who hire and those who send touring exhibitions to remain connected to one another and transparent in their practices. There are also obvious areas of growth around extending the touring exhibition community network of trusted collaborators to new geographies such as Asia and the Middle East to be able to work together even when the geopolitical backdrop is volatile and complex. Moreover, there is room to extend this network to new types of venues (shopping malls & retail centres, exhibition halls, biennales & fairs, outdoor spaces) providing another tangible avenue to further grow and develop touring as well as collaborations. Despite the 'great COVID pause' and ongoing financial concerns, the majority of respondents are active and optimistic. They still engage with two or more types of touring exhibitions and expect to continue to grow the number of hiring exhibitions in the future. The adaptability of touring exhibitions is, as ever, a strength of the touring exhibition model, and the community's desire to harness touring exhibitions that are relevant and engaging to attract a diverse audience is evident.

Alongside this anticipated growth of hiring touring exhibitions, it may be interesting to cast a closer look at understanding the notable concern among the community for sustainability, perhaps through an in-focus survey on how the community is reacting to the climate emergency and how this will affect touring exhibition practices in the future.

What is certain is the continued conviction within the touring exhibition community that despite the challenges ahead the sector will find ways to adapt and adjust. Touring exhibitions seem indeed here to stay and to provide an important channel through which cultural exchanges and circulation of ideas across the world can effectively happen regardless of the obstacles.

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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).

The *Cultural Dialogue Survey* series 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:

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About Teo

Created for hosts, producers and specialist providers 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. If you would like to get in touch or follow our work, you can find us at the following:

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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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