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CULTURAL  
ASSOCIATES  
OXFORD

# Temporary and Touring Exhibitions Practice:

## Economic, Production and Partnership Models



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# Foreword



The Exhibitions Group exists to connect and empower those working in the field of exhibitions to create work that is relevant, sustainable, diverse and accessible.

In recent years, the way exhibitions are developed, experienced and shared has undergone significant change and to better understand this evolving landscape, we have commissioned this report which provides valuable insights into current practice and emerging trends, offering a clear evidence base to support future decision-making across the sector.

While exhibitions remain fundamental to our sector, the research highlights a gap in fully realising their strategic potential. It underscores the need to embed programming strategy at the heart of organisational planning and to better articulate and measure the wider social and economic impact of exhibitions.

The findings of this report will inform all areas of The Exhibitions Group's work, strengthening our ability to support organisations as they adapt and develop their exhibitions practice. They also reinforce the central role exhibitions play within cultural institutions — driving visibility, audiences and income, and delivering significant public benefit. The Exhibitions Group has an important leadership role to play in championing this shift, and we look forward to working collaboratively with partners and support organisations to achieve it.

Our thanks to the team at Cultural Associates Oxford for all their knowledge and support in conducting this important research and creating this compelling report, including: Maurice Davies, Miki Lentin, Rachel Mapplebeck, Lucy Shaw, Paul Smith, Kathleen Soriano and Tamsin Stewart. Finally, our deep gratitude for the continued support of Arts Council England and our members, without whom this work would simply not be possible.

We extend our sincere thanks to everyone who contributed to this research through interviews, roundtables and surveys. Their generosity has ensured the report is both robust and insightful. We hope it proves valuable to all those working in exhibitions and encourage it to be shared widely across organisations and the wider sector.

**The Exhibitions Group**



# Executive Summary



# Executive Summary

This research, commissioned by the Exhibitions Group, supported by Arts Council England (ACE) and undertaken by Cultural Associates Oxford (CAO), provides an analysis of trends in temporary and touring exhibitions. It builds on a sector-wide survey (48 responses), interviews with 22 cultural leaders and three thematic roundtable discussions with 24 expert participants.

## Why this research is important

Temporary exhibitions are fundamental to what museums, galleries and some other cultural organisations do. They are key drivers for audience development, partnerships, research, income generation and institutional profile. However, this research reveals significant gaps in strategic planning, impact evaluation, skills and shared knowledge that limit the potential of this vital work.

## Key Findings

### 1. The Strategy Gap

Exhibitions are often treated as ad hoc programming rather than strategic tools for achieving organisational goals. Almost all organisations cite diversifying and reaching new audiences as a primary motivation for temporary and touring exhibitions, but a striking 69% do not include touring exhibitions activity in their strategic plans.

### 2. The Impact Evaluation Deficit

Despite exhibitions being positioned as core drivers for audience engagement, over 70% of organisations lack adequate research or data to understand the impact their exhibitions are achieving. Most organisations rely solely on footfall data and basic visitor satisfaction surveys. This severely limits organisations' ability to make evidence-based decisions and demonstrate value.

### 3. Barriers to Realising Ambitions for Exhibitions

The research identifies significant barriers preventing organisations from fully realising their temporary and touring exhibition ambitions:

#### Skills and Knowledge Gaps

There are skills gaps in:

- Impact measurement and evaluation
- Navigating the Government Indemnity Scheme (GIS)
- Claiming Museums and Galleries Exhibition Tax Relief (MGETR)
- Post-Brexit transport, logistics and customs
- Partnership brokering and management
- Digital exhibition and experience development

**Financial Constraints** Rising transport and insurance costs, coupled with post-Brexit customs complications, create substantial financial barriers. The low take up of MGETR among smaller institutions is a significant missed opportunity.

**Geographic Inequalities** 35% of respondents highlight concerns caused by their location. Northern Ireland was repeatedly cited as facing particular challenges due to post-Brexit complications, higher insurance and transport costs, terrorism threat assessments affecting GIS access and fewer touring opportunities.

**Government Indemnity Scheme (GIS) Accessibility** Security costs and environmental condition requirements disproportionately affect smaller and less well-resourced institutions, leaving some venues unable to access the scheme independently and reliant on partnerships with larger organisations.

## 4. Economic Models for Exhibitions

London-based and larger museums are more likely to charge for exhibitions, while in Northern Ireland and regionally across the UK institutions predominantly offer free entry to avoid barriers to engagement, though there are many variations. Even ticketed exhibitions rarely cover costs. Features of the ways the sector is currently trying to bridge the gap include:

**Pay-As-You-Can (PAYC)** An emerging trend showing promise for widening access while generating income. However, best practice is not clear.

**Secondary Spend** Some organisations attempt to recoup exhibition costs through shops and cafés, but success is mixed. National museums with large international visitor numbers see

healthier returns, but smaller regional venues often face the dual challenges of limited staffing and a restricted visitor base, making significant exhibitions-related secondary income less achievable.

**Museums and Galleries Exhibition Tax Relief (MGETR)** Some organisations have implemented systems to claim Museums and Galleries Exhibition Tax Relief and report significant income benefits. However, there is low take up among smaller institutions.

## 5. Future Exhibitions Trends: Partnership, Adaptation, and Digital Innovation

**Partnership and Models** There is growth in museum-to-museum partnerships (exemplified by MAGNET, Tate Plus, Hayward Touring and UK national museum programmes).

**Co-Production** Co-production is increasing but brings challenges: funding is typically short-term, sometimes creating “picked up and dropped” relationships that can lead to mistrust, and co-production risks becoming exploitative and tokenistic without dedicated resources for fair payment and sustained relationships.

**Local Adaptation** Rather than pure bought-in formats, there is a trend towards locally adapted touring exhibitions to reflect local content, history and communities.

**Digital Exhibitions and Experiences** Some respondents and interviewees see digital experiences as attracting new, younger audiences who might not otherwise visit museums. There is some evidence of longer dwell times and enhanced accessibility. However, many museums lack infrastructure, digital skills, or technical support. There are also concerns about the energy use of digital formats.

## Opportunities

There are significant opportunities for the sector to develop and realise the full potential of exhibitions.

### Appetite is evident

Organisations want to do more with temporary and touring exhibitions and respondents to this research generally did not find staffing a key constraint to bringing in touring exhibitions, but they need targeted skills development and practical support (see Recommendations 6 and 7).

### Models of excellence are available

From National Museums Liverpool's strategic approach to exhibition programming and impact measurement<sup>1</sup>, to the Museum Exhibit User Experience (MEUX) evaluation toolkit developed by Oxford and Warwick universities<sup>2</sup>, best practice exists and can be adopted across the sector.

### Innovation is happening

From MAGNET's partnership model<sup>3</sup> to Ffotogallery's lean digital touring<sup>4</sup>, and from experimentation with community co-production to PAYC pricing experiments, the sector is testing new approaches.



<sup>1</sup>See Case Study 1. National Museums Liverpool – Strategy, Scale and the Economics of Imagination

<sup>2</sup>See Case Study 2. The Museum Exhibit User Experience (MEUX) toolkit – the development of an exhibition evaluation methodology

<sup>3</sup>See Case Study 3. MAGNET – A Partnership and Production Model for Touring Exhibitions

<sup>4</sup>See Case Study 5. Ffotogallery – Lean Touring and Digital Exchange



# Key Recommendations

## Strategic Planning and Impact

**Recommendation 1: Embed exhibitions in organisational strategy** Organisations should integrate temporary and touring exhibition activity within their strategic plans, clearly articulating how exhibitions advance goals such as audience development, partnership, research and income generation. This will ensure transparency and alignment across staff, boards and stakeholders, and will reposition exhibitions from ad hoc programming to strategic enabling of organisational mission.

**Recommendation 2: Develop sector-wide impact evaluation frameworks** There is a need to develop and use standardised impact evaluation methodologies and toolkits for temporary and touring exhibitions. This should include establishing sector-wide benchmarks for measuring societal, economic and partnership outcomes. This will enable organisations to demonstrate the full value of their exhibitions work and facilitate cross-institutional comparisons.

## Economic Models and Policies

**Recommendation 3: Research and share best practice on approaches to exhibition-related income and ticketing models** There needs to be further research into economic models generally and the relative success of pay-as-you-can (PAYC) models to understand the most effective models in different contexts, particularly for widening access while maintaining financial sustainability. Based on that research there needs to be guidance on best practice.

**Recommendation 4: Strengthen awareness and uptake of Museums and Galleries Exhibition Tax Relief (MGETR)**

To improve uptake of MGETR there is a need to raise awareness and provide practical resources to claim MGETR, particularly for smaller and mid-size institutions. This might include training, encouraging shared specialist roles or consultancy and communicating the income potential of the scheme.

**Recommendation 5: Reform Government Indemnity Scheme (GIS)** The current review of GIS needs to address barriers to access, especially for smaller organisations. There needs to be a more proportionate approach that reduces costs for venues.

## Skills Development and Sector Support

**Recommendation 6: Deliver training and resources** There is a need for training and resources in these priority areas:

- 'Touring 101' – an introductory course for smaller institutions and those new to touring exhibitions, such as The Exhibitions Group's 'Introduction to UK Touring Exhibitions' training
- Impact measurement and evaluation methodologies
- Strategic programming for exhibitions, aligned and incorporated into organisational plans
- Access to finance for exhibitions, with a focus on maximising MGETR
- Transport, logistics and customs in a post-Brexit, sustainable context
- Condition reporting and environmental monitoring
- Navigating the Government Indemnity Scheme
- Partnership brokering and management
- Project management of touring exhibitions
- Digital skills for exhibition development and delivery

The Exhibitions Group provides courses and training in many of these priority areas.

**Recommendation 7: Facilitate regular knowledge exchange** The existing workshops and forums where those involved in temporary exhibitions share challenges, solutions and best practice need to expand and develop. Look at other ways of facilitating networking, learning and peer support e.g. Action Learning Sets or Communities of Practice around key themes. (The Exhibitions Group are developing a Community of Practice, accessed through Linked In and membership.)

## Digital Innovation and Sustainability

**Recommendation 8: Build capability in relation to digital exhibitions and experiences** There is a need to develop skills for creating digital exhibitions and experiences, particularly in smaller and mid-size museums. This might be achieved through training, sharing expertise and case studies.

**Recommendation 9: Develop sustainability guidelines for digital exhibitions** There need to be guidelines on approaches to environmental sustainability for in-gallery digital and touring digital exhibitions.

## Partnership and Co-production

**Recommendation 10: Support equitable co-production best practice** Advocate for funding streams (parallel to National Lottery Heritage Fund provision) that support fair payment, ensure that museum teams provide enough time for relationship-building, facilitate shared decision-making and ensure that community partners receive appropriate training and support throughout the process. Share frameworks for best practice in co-production with communities.

“Organisations should integrate temporary and touring exhibition activity within their strategic plans, clearly articulating how exhibitions advance goals such as audience development, partnership, research and income generation.”



# Key Findings

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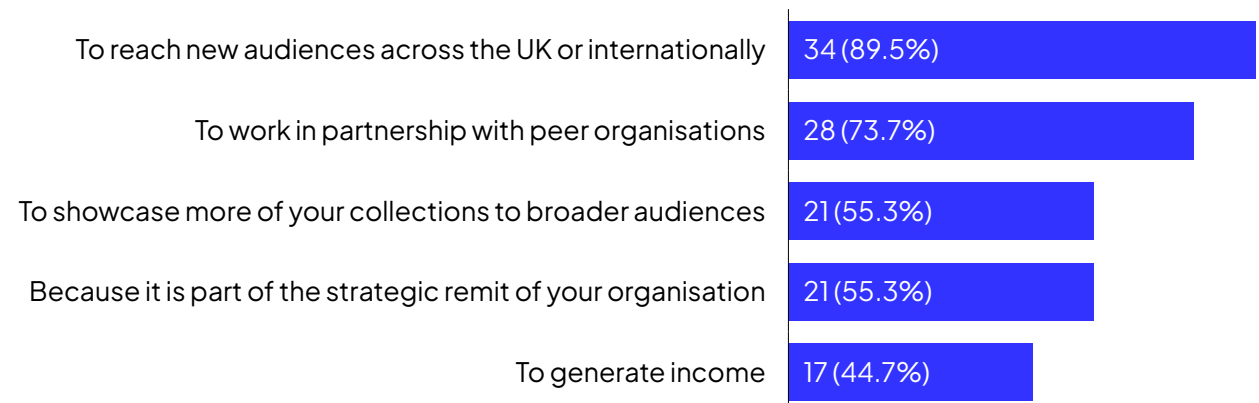
Exhibitions are cited as key to organisations reaching new and diversifying audiences, working in partnership with peer organisations, fulfilling their strategic remit, showcasing collections and generating income. However, the majority of organisations do not include touring exhibitions within their strategic plans.

## 1. Why make exhibitions? The strategy gap

These findings draw on extensive desk research and new research in the form of: an in-depth sector-wide survey (48 responses); interviews with 22 cultural leaders; three thematic roundtable discussions with 24 expert participants.

Increasing and diversifying audiences was cited in the survey, interviews and roundtables as a major reason for hosting temporary and touring exhibitions. The chart below relates to the main motivations for creating touring exhibitions.

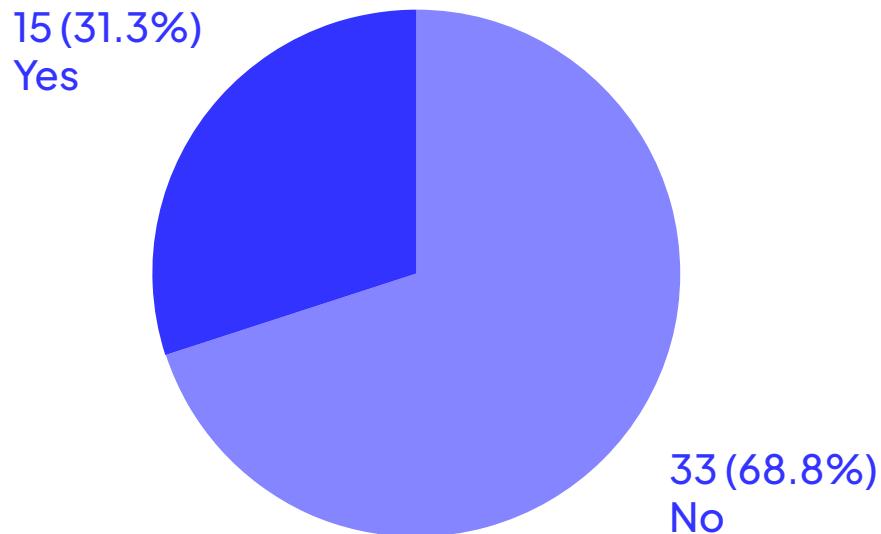
Survey responses to the question “What is the impetus for your organisation to create touring exhibitions for other organisations?” (n = 38)



This is consistent with the international response to the 2025 survey of touring exhibitions by Culture Connect, on behalf of the Touring Exhibitions Organisation, in which a comparable 98% of respondents said that the diversification of audiences was the prime motivation in hosting touring exhibitions.<sup>5</sup>

76% of institutions reported that they required core income to balance the costs of implementing exhibitions programmes, so it was surprising that 69% (33/48) of organisations did not include hosting exhibitions within their strategy, suggesting that the activity is ad hoc rather than strategic ([Recommendation 1](#)).

Survey responses to the question “Is it part of your organisation’s strategy to bring in pre-existing touring exhibitions?” (n = 48)



For the 31% of organisations who include touring exhibitions in their strategy, the clear priority is attracting visitors rather than income generation. The more detailed reasons provided by respondents included:

*Providing new reasons to visit for the first time and to make return visits*

*Diversifying audiences, raising our profile, being different*

*Engaging different audiences, profile raising/ showcasing national & international artists, partnership working, income generation [&] showcasing a variety of different media*

It is worth noting the many long-standing national touring and partnership exhibitions programmed by the national museums, as well as other sector organisations and collections dedicated to touring.

### Observations

Exhibitions are fundamental to what museums, galleries and many other cultural organisations do. They are often key drivers for profile, audiences, partnerships, research and income. However, though exhibitions are central to organisations fulfilling their remit, they are largely not included in organisational strategy. If they are included, it is primarily for audience development only. This is a disconnect to address – a strategy gap for exhibitions.

Exhibitions are seen as a core driver for attracting new visitors and diversifying audiences. However, evaluating the societal or economic impact of exhibitions is weak and inadequate, both within organisations and across the sector. This means the wider benefits of exhibitions are not being effectively captured and capitalised on.

## 2. Measuring the impact of exhibitions – economic and societal

Around 90% of organisations considered reaching new and more diverse audiences as a principal driver for creating temporary and touring exhibitions, so it is surprising that 71% of respondents to the survey reported that they did not have research or data to evidence whether this approach was working in terms of either economic or societal impact. One organisation reported that their evidence of impact relied on “gut instinct”.

Few organisations evaluated their exhibitions with sufficient rigour to understand whether they had been successful in their aims, with a majority reporting that they only collected footfall data, supplemented by qualitative visitor satisfaction surveys. A respondent observed “nobody has [adequate] impact data and measurement.”

The subsequent interviews confirmed the pattern that emerged from the survey: few interviewees reported rigorous impact evaluation in relation to either audiences or economic impact.

In practical terms, impact evaluation has not moved forward much since the SWMLAC 2004 report *Museum Impact Assessment: A practical guide*,<sup>6</sup> nor has that report been widely adopted, and there

is certainly a lack of consistency across the sector (despite centralised reporting systems for Arts Council England National Portfolio Organisations). This makes it impossible in most cases to compare between individual exhibitions and between exhibitions in different museums. This is not a new problem, and the lack of effective evaluation practice in museums, including the implementation of change as a consequence of it, was highlighted as long ago as 2014 by Davies & Heath<sup>7</sup> who observed that:

*Museums need to develop an evaluation and audience research framework and formally allocate responsibilities for its implementation. Mechanisms need to be in place to preserve and disseminate knowledge across successive projects. It would be beneficial to identify overarching research questions that can inform individual pieces of evaluation; this would enable the creation of a data corpus and analytic framework to support the development of a collection of comparable insights, findings and recommendations. Where possible, it would be worthwhile collaborating with other institutions to build a common framework and to enable cross-institutional learning. And finally, and critically, each museum should build in time and resources to allow remedial change to be undertaken in the light of results from evaluation.*

Although other countries such as Finland<sup>8</sup> have made progress, in the UK the measurement of audience impact in either societal or economic

<sup>6</sup><https://collectionstrust.org.uk/wp-content/uploads/2017/02/South-West-Museums-Libraries-and-Archives-Council-Museum-impact-assessment-A-practical-guide-Aug-2004.pdf>

<sup>7</sup>Davies & Heath 2014. *Cultural Trends*, <http://dx.doi.org/10.1080/09548963.2014.862002>

<sup>8</sup>See Case Study 4. Museotilasto – A Long-term Data Collection Model for the Finnish Heritage Agency

terms is generally weak, exposing a critical gap between audience-led strategic goals and subsequent evaluation. This underlines a need for strategic leadership in this area coupled with greater awareness and training across the sector ([Recommendation 2](#)).

### Measuring impact is piecemeal

There was widespread acknowledgement amongst participants that the measurement of impact is currently fragmented and insufficient across the sector. Most commonly, impact is assessed via visitor numbers and budgetary outcomes, with some qualitative measures (e.g. visitor books and surveys) also implemented.

There is, however, a desire to assess different types of impact more rigorously – societal, economic, wellbeing, skills development and partnership growth aspects were all cited – but most institutions lack the resources, tools or consistent practices required. Collaborative evaluation, participatory methods and investment in data collection are seen as key steps, but these are rarely realised. The increase in multi-site and multi-institution projects also creates difficulties for unified impact assessment; venues collect data but the insight and analysis is not informing strategy and adaptation, leading to inconsistent reporting and missed opportunities to make the case for exhibitions.

Institutions also highlighted the desirability of sustained programming (year-on-year) and the collection of longitudinal data to show ongoing impact, as opposed to episodic, one-off measurements, but funding and resource constraints often undermine this goal.

Measuring soft power, long-term collaboration outcomes and changes in representation are other major gaps. There is a lack of sector-wide strategies and benchmarks, and many practitioners feel that their evaluation processes do not feed effectively into broader advocacy, policy or sector development. Similarly, the contribution of exhibitions to broader cultural, psychological, and community benefits are often poorly captured in current methods but are recognised as important by practitioners. <sup>16</sup>

Nevertheless, some good practice is evident and many of the requisite tools are in place, though often inaccessible in practical terms to non-specialists. Perhaps unsurprisingly, expertise in this area is concentrated in universities (including Leeds, Manchester and Oxford), the national museums and some agencies and charities (such as Art Fund). National Museums Liverpool have used economic impact studies<sup>9</sup> for a decade to estimate contributions to the regional economy, starting with their Making a Difference report.<sup>10</sup> In addition, the universities of Oxford and Warwick have together developed User Experience (UX) techniques for detailed exhibition evaluation and cross-comparison, separating pragmatic ('what did you learn') from hedonic ('how did you feel') outcomes.<sup>11</sup> The Association of Independent Museums (AIM) has produced an Economic Impact Toolkit for museums looking to estimate the economic impact they have on their local economy.<sup>12</sup>

### Understanding of the impact of exhibitions on attendance is surprisingly thin.

It is, of course, well known that some high-profile temporary exhibitions ('blockbusters') have produced dramatic surges in visitation. Fashion exhibitions in France, for example, have drawn exceptionally large audiences: a 2017 Dior retrospective

<sup>9</sup> See Case Study 1. National Museums Liverpool – Strategy, Scale and the Economics of Imagination for how exhibitions can be both cultural and economic engines when guided by strategy.

<sup>10</sup> <https://museumsandheritage.com/advisor/posts/national-museums-liverpool-contribute-53m-local-economy>

<sup>11</sup> King et al. 2025. Curator: the Museum Journal, <https://doi.org/10.1111/cura.12637>. King et al. 2023. Visitor Studies, <https://doi.org/10.1080/10645578.2022.2129944>

<sup>12</sup> <https://aim-museums.co.uk/wp-content/uploads/2024/11/AIM-Economic-Impact-Toolkit-2024.pdf>

<sup>13</sup> [https://www.lemonde.fr/en/culture/article/2025/04/12/fashion-exhibitions-step-out-of-dedicated-museums\\_6740138\\_30.html](https://www.lemonde.fr/en/culture/article/2025/04/12/fashion-exhibitions-step-out-of-dedicated-museums_6740138_30.html)

<sup>14</sup> <https://www.ft.com/content/d0e858fa-b793-4b6e-afe9-62f5eb2d2231>

at the Musée des Arts Décoratifs attracted more than 700,000 visitors,<sup>13</sup> and the 2024–25 On Top of the Pyramid: The Civilization of Ancient Egypt exhibition in Shanghai generated such demand that the museum remained open for 168 consecutive hours on the final weekend, with tickets fully sold out.<sup>14</sup> The Art Newspaper has noted that, for some institutions, external or travelling exhibitions now draw more visitors than the core museum site, indicating that the ‘temporary offer’ can be more salient than the permanent collection in driving attendance. “Maybe all it takes to get a struggling museum back on its feet is a well-planned, well-executed and truly artful immersive exhibition.”<sup>15</sup>

Despite the correlation between temporary exhibitions and footfall, surprisingly few studies have sought to test or demonstrate causation with any measure of statistical confidence, or with the granularity needed to isolate different components of attendance, particularly in smaller museums. One attempt at doing this was a quantitative study of exhibitions in art galleries in Austria, Germany and Switzerland. This showed that simply increasing the count of exhibitions can actually depress visitor numbers in the short term, but that investing in fewer, better designed exhibitions significantly increased visitor numbers; the data suggested that attendance at a well-resourced exhibition can be over 60% higher than at a less well-resourced one. An extrapolation of this study would suggest that not every temporary exhibition will drive footfall, and that museums should focus on carefully designed, well-resourced temporary exhibitions that do have this potential.<sup>16</sup>

The British Museum has monitored the link to audience diversity as part of its long-running visitor research and evaluation project, which shows that ticketed special exhibitions attract audiences that are “significantly different” from those who visit permanent galleries, with distinct motivations and behaviour patterns.

Visitors to temporary exhibitions in the Sainsbury Exhibition Gallery typically spend 70–90 minutes in an exhibition, carefully following the narrative and engaging with interpretative material, implying a high level of commitment and perceived value.<sup>17</sup> This difference in audience profile is critical: temporary exhibitions are not just increasing volume, but also segment reach – an aspect of temporary exhibitions that was articulated by many of the participants in the survey, interviews and roundtables.

Taking a different tack, a 2024 study of temporary exhibitions and events programmes in Slovakia analysed visitor numbers and revenues in relation to exhibitions and programmed events associated with them. This found that temporary exhibitions correlate with higher attendance, but weakly, and that events programming related to those exhibitions explains footfall and revenue much more powerfully than a simple count of exhibitions. Overall, there was a relatively weak correlation between the total number of exhibitions and visitor numbers, but a much stronger relationship between visitor numbers and the number of programmed events associated with a given exhibition, suggesting that museums might focus on a smaller number of high-quality exhibitions linked to rich events programmes.<sup>18</sup>

## Observations

The current ability of cultural organisations and the sector to adequately measure and evaluate the impact of exhibitions is undoubtedly hampering the ability to demonstrate the value and importance of this work for people and places. However, good practice and models for impact evaluation are there, and ripe for adoption and roll out. This offers a leadership opportunity to upskill and galvanise the sector. It will take time, but imagine the strength of a cultural sector which can robustly evidence the impact of its core work.

<sup>13</sup> <https://www.theartnewspaper.com/2025/04/01/the-worlds-most-visited-museums-2024->

<sup>14</sup> Muchitsch 2023. Museum Growth Hacking: Impact of Art Exhibitions, Museum Acquisitions and Art Market Sales. Hamburg : Cuvillier Verlag, 237 pp.

<sup>15</sup> <https://www.britishmuseum.org/research/projects/visitor-research-and-evaluation>

<sup>16</sup> Pančíková et al. 2025. Journal of Infrastructure, Policy and Development. <https://doi.org/10.24294/jipd9626>.

There are significant barriers to realising temporary and touring exhibitions. Organisations are constrained by a lack of the specific knowledge and skills needed, as well as costs. Opinion was divided on whether geographic location impacted access to temporary or touring exhibitions.

### 3. Barriers to temporary and touring exhibitions – skills, costs and cultural cold spots

A wide range of barriers was identified by participants, many of which were location or institution specific. The survey indicated that most organisations (72%; 33/46) have the capacity to bring in temporary exhibitions. Although it's worth noting that a third of survey respondents mentioned staffing constraints in free responses across the survey, while other touring programmes currently being evaluated, such as Going Places and Magnet, are observing capacity as an issue. However, in this research staffing is generally not cited as the bottleneck for bringing in touring exhibitions (anecdotal evidence suggests inhouse resource to develop temporary exhibitions is more challenging). Respondents to this survey suggest that in most cases the key binding constraints are skills and costs.

#### Skills and knowledge gaps

An exploration of skills gaps highlighted a number of areas, in addition to impact evaluation, where training and the provision of toolkits would be beneficial ([Recommendation 6](#)):

- [Touring 101 – The Exhibitions Group's 'Introduction to UK Touring Exhibitions' training](#)
- Impact measurement and evaluation for

- temporary and touring exhibitions
- Finance and fundraising for temporary and touring exhibitions, including Museums and Galleries Exhibition Tax Relief (MGETR)
- Transport, logistics and customs (in a post-Brexit world)
- Condition reporting and environmental monitoring
- Navigating the Government Indemnity Scheme (GIS)
- Partnership brokering and management
- Project management of touring exhibitions

#### Museums and Galleries Exhibitions Tax Relief (MGETR)

A specific priority area for training is addressing the low uptake of the MGETR scheme, particularly amongst smaller and some mid-size institutions.<sup>19</sup> Where museums have put systems in place to capture the requisite data, there are significant income benefits in making full use of the scheme, particularly since the scheme will continue in the long term ([Recommendation 4](#)).

#### Government Indemnity Scheme

Several interviewees referred to the constraints of the Government Indemnity Scheme (GIS). GIS is valued for enabling loans and exhibition access but has become harder to navigate due to security and environmental condition requirements and costs disproportionately affecting smaller and less technologically equipped institutions. Venues

<sup>19</sup> See Resources section

in Northern Ireland face higher costs and difficulties securing indemnity, with terrorism threat cited as an additional complexity in one roundtable. This reduces their ability to participate in larger exhibitions. Some smaller museums rely on partnerships with larger venues to access this insurance, revealing inequities in organisational accessibility and sustainability under current GIS terms.

Calls were made for more flexible GIS provisions to support sustainability and broader participation. Advocacy for the revision of GIS has been discussed in the context of sustainability, but more equitable access to the scheme is equally needed. For this reason, the current Arts Council England review of the scheme<sup>20</sup> is welcome, and organisations should be encouraged to feed into the review ([Recommendation 5](#)).

## Costs

Many institutions share common problems in relation to increased transport costs and changes to customs arrangements following Brexit. A regular, perhaps annual, session (in addition to subject-specific seminars) would assist in the sharing of solutions to common problems ([Recommendation 7](#)).

Inevitably, general funding levels act as a barrier. Resources within institutions are stretched, creating a reluctance to take on new or unknown projects, even when there is an interest and willingness.

## Cultural cold spots

Arts Council England's evidence review in 2018 for its 10-year strategy noted that there is a risk of cultural cold spots developing in parts of the country that already have least access

to arts and culture, and observed the linkages to geography and deprivation.<sup>21</sup> A House of Commons inquiry on funding and support for the arts outside London recorded concerns that cuts to local authorities hit hardest in the places where the cultural offer was already weak, risking the emergence of cultural cold spots, and explicitly noted that these are often areas with wider socio-economic disadvantage and dependence on public funding.<sup>22</sup>

One survey question explored whether the geographic location of an organisation affected access to temporary and touring exhibitions, or to engagement with audiences. The question drew a mixed and complex response. A majority of respondents (65%, 28/43) said that these aspects did not affect their organisation, but of the 35% (15/43) that replied the opposite, a wide range of barriers was evident, most of which were geographically specific. These included:

*“When we see the funding provided to London Nationals it is difficult to compete and provide northern English opportunities to audiences. It is part of our planning to grow awareness of our organisation’s potential and find our niche”*

*“Far from London but not far enough”*

*“Brexit has caused issues with transporting art from GB and IRL and has also contributed to increased shipping costs”*

*“Some funding sources still focus more on London-based venues”*

Northern Ireland was repeatedly mentioned as an area with economic and cultural cold spots, resulting from post-Brexit complications, higher insurance and transport costs and a lower

<sup>20</sup> <https://www.artscouncil.org.uk/supporting-arts-museums-and-libraries/supporting-collections-and-cultural-property/government-indemnity/government-indemnity-redesign>

<sup>21</sup> [https://www.artscouncil.org.uk/sites/default/files/download-file/ACE\\_10YSEvidence%20Review\\_July18.pdf](https://www.artscouncil.org.uk/sites/default/files/download-file/ACE_10YSEvidence%20Review_July18.pdf)

<sup>22</sup> <https://publications.parliament.uk/pa/cm201617/cmselect/cmcomeds/114/114.pdf>

number of touring exhibitions available. This creates significant barriers to accessing exhibitions for Northern Ireland residents.

Touring exhibitions were identified in the 2023 Department for Culture, Media and Sport report 'What works to increase equality of access to culture for lower socio-economic groups: Evidence review and scoping research' as one of the tools that can widen access to collections and programmes, but the evidence also suggests they tend to benefit audiences who are already relatively engaged unless they are deliberately planned with lower socio-economic groups and specific places in mind. Taking collections out of traditional venues and into community or non-traditional settings can reduce geographic and cost barriers, but without careful co-creation and investment in outreach, touring activity can reproduce existing inequalities in who participates and who is reached.<sup>23</sup>

Participants in the interviews and roundtables called for more targeted funding and policies to ease disparities, with the acknowledgment that current 'levelling up' initiatives do not fully address these issues at present.

**Environmental sustainability** Attempts to enhance sustainability and mitigate environmental impacts remain persistent challenges in touring exhibitions but have been widely discussed, along with the resources and capacity needed. In general, respondents to this research recognised that the staffing resources are in place, although there is scope for further sharing best practice and the modes of overcoming shared problems.

## Observations

There is appetite for creating temporary and touring exhibitions, but there are significant skills and knowledge gaps in realising these ambitions and meeting the costs. Perhaps encouraging is that the training needs are clear.

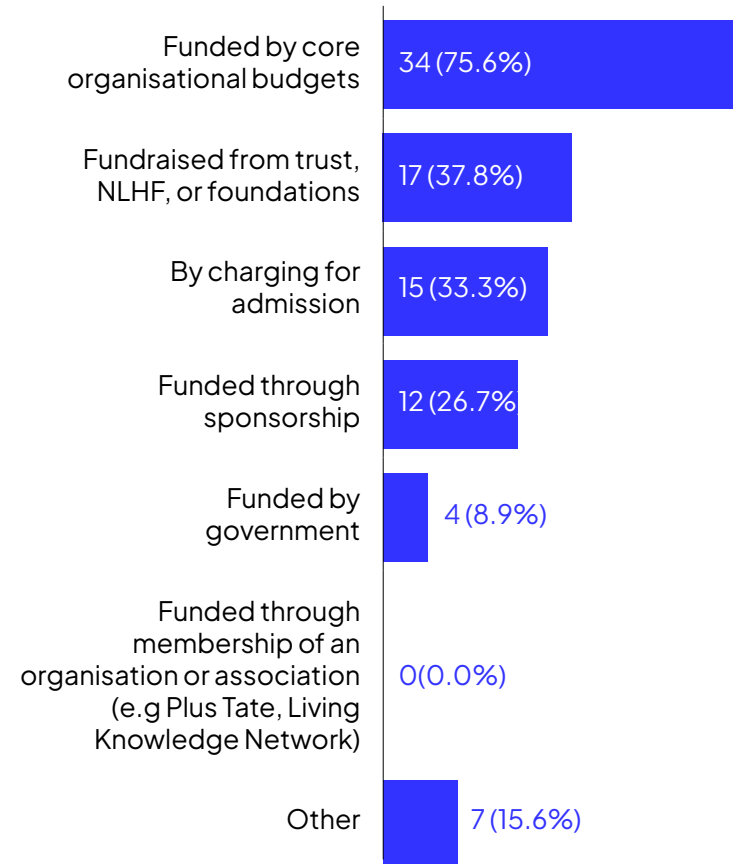
In some organisations effective claiming of MGETR lowers the cost of realising exhibitions at a time when public revenue funding continues to decrease. MGETR could also potentially shape the sector as organisations might strategically increase the number of displays, exhibitions and touring partners to maximise the claim.

Addressing geographic inequalities is highly complex and requires a joined-up approach by government, arms-length bodies, funders and sector-support organisations. It would be useful to explore measures to alleviate some of the multiple challenges impacting the realising of temporary and touring exhibitions in Northern Ireland.

<sup>23</sup> <https://www.gov.uk/government/publications/research-report-what-works-to-increase-equality-of-access-to-culture-for-lower-socio-economic-groups>

Exhibitions are viewed as core activity and so the majority of organisations fund them from their core budgets, with the awareness that exhibitions – even ticketed ones – rarely cover costs. There is evidence of experimentation around pay-as-you-can and inclusive pricing models to help a wider range of audiences to engage. London-based and larger museums mostly charge for exhibitions or use tiered pricing models, whereas regional museums and Northern Ireland institutions largely offer free entry. Exhibitions also help drive visitor numbers and secondary commercial spend, but it's a mixed picture. In the research, institutions reported a wide range of funding models and income sources, but 76% of respondents reported the use of core organisational budgets to fund temporary exhibitions. Touring exhibitions showed an identical funding pattern, again with 76% of organisations using core budgets to support costs.

## 4. Economic models for exhibitions – funding, ticketing and income



Survey responses to the question “How do you finance temporary exhibitions that you bring to your organisation?”  
(n = 45)

### Charging models

Survey responses show that London-based and larger museums are more likely to charge for exhibitions or use tiered pricing models, whereas regional museums and Northern Ireland institutions predominantly offer free entry, though there are variations.

Derby Museums’ approach illustrates a regional model; entry to the three museums is free and they do not generally charge for exhibitions, but when they do have ticketed exhibitions have adopted realistic or more affordable pricing and concessions. Similarly, Northern Ireland museums typically avoid charging to avoid barriers to engagement, especially for experimental art, showing a conscious diversity in approach.

Council politics can influence charging policies, as noted by a contributor from the West Midlands, who noted that charging for exhibitions would not be supported politically, reflecting wider external pressures. The Baltic Centre for Contemporary Art in Gateshead has never charged for exhibitions, it instead encourages voluntary donations, inviting visitors to pay what they can, highlighting an audience-relationship strategy rather than strict transactional payment model.

### The emergence of pay-as-you-can

Several institutions noted testing pay-as-you-can (PAYC) models for funding exhibitions. The

PAYC approach has been trialled with specific exhibitions such as the British Library's Beyond the Bassline, documenting "the 500-year musical journey of African and Caribbean people in Britain," with satellite exhibitions in 31 partner libraries in 73 locations within the Living Knowledge Network. In total, the programme engaged nearly 800,000 people between April and August 2024, and reached more diverse audiences, with 42% from a global majority.<sup>24</sup> However, it is not clear whether financial barriers were the primary reason for previous non-attendance of these groups, and whether PAYC can be scaled effectively.

Given that this is a relatively new phenomenon, the roundtables explored whether the approach was working, variations in the model and aspects of best practice. As one contributor noted "this is quite new so not necessarily extensively researched" and clear patterns and outcomes are yet to emerge ([Recommendation 3](#)).

### Recouping costs through secondary spend

Several interviewees noted that exhibitions could perhaps cover their costs from increased secondary spend in shops and cafes and from events and publications, but it is not clear that this is a realistic financial model.

National museums and others with large international visitor bases (such as National Maritime Museum Cornwall) do see sustainable secondary spend success, supported by strategic partnerships and merchandising. Other opportunities in generating secondary spend include creating compelling events and high-quality publications that have a long shelf-life, as exemplified by the National Portrait Gallery's approach to exhibition-related books, which are finalised early in the exhibition-planning cycle to maximise impact.

Staff constraints and inadequate lead times for preparing commercial activities are persistent challenges for smaller regional venues, who often also have a restricted visitor base. The Baltic's experience shows that even though their high visitor numbers can lead to increased secondary spend, the profit margins are often not enough to cover core exhibition costs. Secondary income is less reliable and permanent than grants, individual giving, or schemes such as MGETR.

### Observations

Exhibitions are fundamental to what cultural organisations do, so it is unsurprising that the majority of institutions fund exhibitions from their core budgets. The many other ways for generating exhibitions-related revenue – ticketing, donations, secondary spend, funding – mean it's challenging to determine whether exhibitions cover their costs.

London-based and larger organisations often charge for exhibitions, while other smaller organisations around the UK face multiple challenges which restrict commercial exhibitions-related income streams. Charging for exhibition admission depends on people's ability to pay and their embedded perceptions of what should be offered for free – which are constantly changing. Pay-as-you-go and inclusive ticketing is only being piloted in pockets, but participants in the interviews and roundtables thought that there are encouraging signs this approach can generate income while significantly widening access and participation.

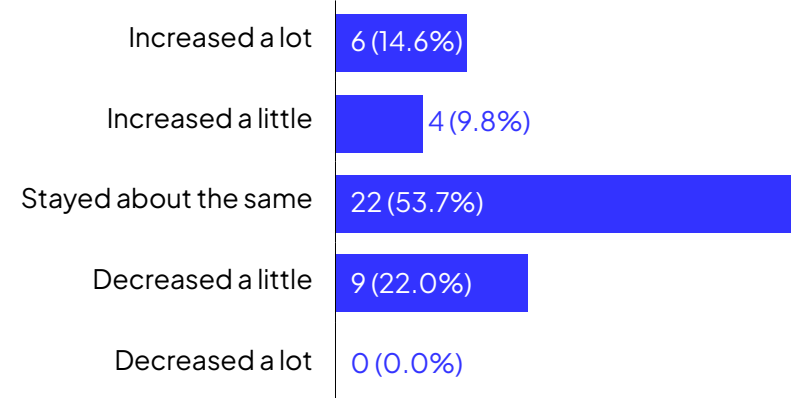
<sup>24</sup><https://www.bl.uk/stories/blogs/posts/beyond-the-bassline-making-an-impact>

After the challenges of Brexit and the pandemic, the last two years have been largely stable for exhibition production and touring activity. Current and future trends include: partnership and co-production – between venues and with communities; adaptation for local audiences and contexts; and digital innovation.

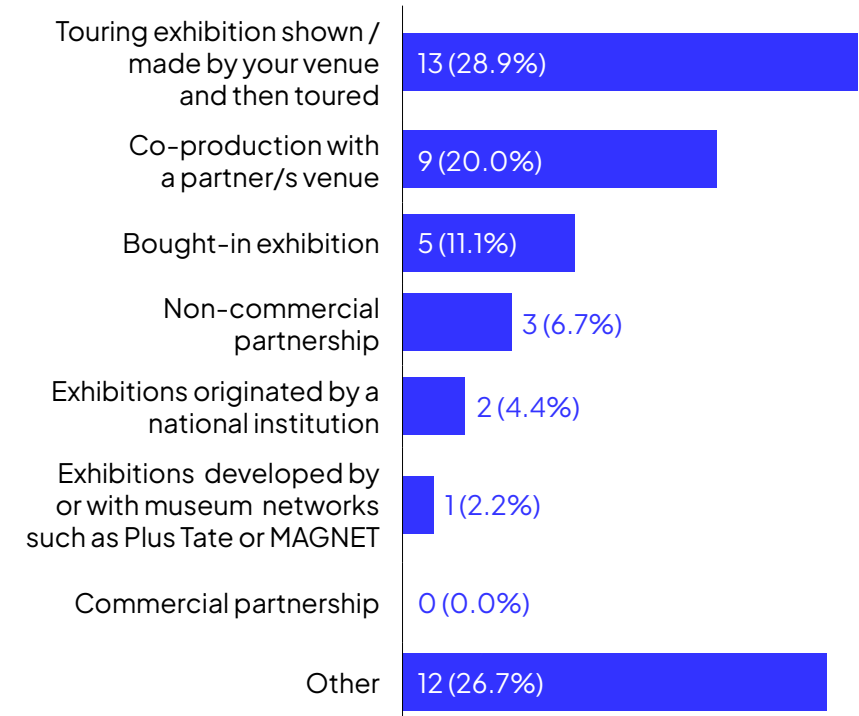
## 5. Future trends in temporary and touring exhibitions

The 2025 international survey of touring exhibitions by Culture Connect, in collaboration with the Touring Exhibitions Organisation, reported buoyancy in activity levels and a post-pandemic bounce back.<sup>25</sup> 81% of organisations reported hosting 1–3 touring exhibitions a year, compared to 89% pre-pandemic, but this reduction was offset by an increase in those hosting over three exhibitions a year, from 8% pre-pandemic to 17% in the 2025 survey. In the survey for this report, the majority of exhibition providers reported broadly similar levels of exhibitions, with 28% (11/39) reporting an increase in their temporary and touring exhibitions and 22% (8/36) reporting a decrease.

In the CAO survey, organisations reported that, at an international level, over the past two years activity had also remained broadly stable, with 54% reporting little change, 24% reporting an increase, and 22% a decrease, with none reporting a large decrease, suggesting that there has been some stabilisation post-pandemic and post-Brexit.



Survey responses to the question “Over the past two years, would you say that the amount of work you do internationally in relation to touring and receiving exhibitions has:” (n = 41)



Survey responses to the question “What kind of model was the touring, temporary, or partnership exhibition?” (n = 45)

The survey for this report differs from the Culture Connect survey in examining both temporary and touring exhibitions, and in being more UK focussed (96%, 46/48). It also divided exhibition types with greater granularity enabling a fuller understanding of UK sector activity. 11% of exhibitions were bought-in, with an additional 29% made by the venue, exhibited and then toured. In total, 27% of exhibitions were produced with non-commercial partners. (No commercial partnerships were reported by respondents.) Taken together, the sample suggests a relatively small market for purely bought-in exhibitions.

A number of trends emerged and were explored in the interviews and roundtables.

### The rise of partnership and co-production – museum-museum and museum-community

Interviewees described both partnership and co-production as a means of enhancing creativity, and also controlling costs and risk. The Museums and Galleries Network for Exhibitions Touring (MAGNET)<sup>26</sup> and the Art Fund's Going Places scheme<sup>27</sup> were cited as particular examples.

For several years, co-production has been recognised as an increasingly important methodology for enhancing creativity and in building ground-up community relationships, rather than older models that focused on collaborations with external curators, artists, local history organisations or other 'experts'. Several institutions have formal frameworks for community input to events, exhibitions, programming, fundraising and expanding their community offering. For example, Hastings Museum and Art Gallery has developed its Community Panel<sup>28</sup> and Birmingham Museum Trust its Citizens' Jury.<sup>29</sup>

Good co-production practices involve genuine allyship with community partners and a conscious decision by institutions to empower communities, develop skills and celebrate knowledge. The need for formal training, guidance, and sector-wide benchmarks for co-production was repeatedly raised, and examples are emerging, for example the Going Places Community Engagement Toolkit.<sup>30</sup>

It was generally recognised that if co-production is rushed or under-resourced there is a risk of community members feeling used or not properly acknowledged for their contributions. The Reframing Picton exhibition<sup>31</sup> at Amgueddfa Cymru was the result of over two years work between the museum and the Sub-Saharan Advisory Panel in Cardiff,<sup>32</sup> highlighting the time-intensive, resource-heavy nature of meaningful co-production.

Examples of impactful co-production from the roundtables included Ditchling Museum's multisensory work developed with disabled and neurodivergent groups<sup>33</sup> as part of the Sensational Museum project<sup>34</sup> and Bristol Museums Arising, for which the museum worked with survivors of sexual abuse and domestic violence.<sup>35</sup> Both of these exhibitions highlighted the need for sensitivity, emotional support and adequate time. Several participants expressed the need for emotional labour and trauma support when co-produced exhibitions engage directly with abuse, marginalization or lived trauma, and that failure to do so may undermine trust and the sustainability of the work.

Museum time frames, funding cycles and processes are generally opaque to outsiders. Inevitably, community groups frequently lack knowledge of how the sector operates, which can leave them open to exploitation, misunderstanding and missed opportunities. In addition, relationships between venues and

<sup>26</sup> See Case Study 3. MAGNET - A Partnership and Production Model for Touring Exhibitions for details of how MAGNET co-develops and tours collections-led exhibitions across England.

<sup>27</sup> <https://www.artfund.org/professional/news-and-insights/going-places-museum-collections-to-tour>

<sup>28</sup> <https://www.hmag.org.uk/community-panel>

<sup>29</sup> <https://www.birminghammuseums.org.uk/about/what-we-do/citizens-jury>

<sup>30</sup> <https://www.artfund.org/professional/news-and-insights/going-places-community-engagement-toolkit>

<sup>31</sup> <https://museum.wales/cardiff/whatson/11568/Reframing-Picton>

<sup>32</sup> <https://www.ssap.org.uk/pages/aims-objectives>

<sup>33</sup> <https://www.ditchlingmuseumartcraft.org.uk/2024/07/17/the-sensational-museum>

<sup>34</sup> <https://sensationalmuseum.org/about/project-origins>

<sup>35</sup> <https://www.bristolmuseums.org.uk/blog/arising/>

community groups are often project-specific and rarely sustained in the longer term. One reason for this is that funding is typically short-term, resulting in relationships that are “picked up and dropped”, which can lead to mistrust between parties and reduce long-term impact.

Transparent and equitable payment, training for negotiation and sector navigation, and institutional willingness to adapt programming for emerging community-led content were all recommended as steps to lowering barriers.

Despite the power and potential of this mode of collaboration, funding models were central concerns, especially the lack of resources to pay community partners and sustain relationships. Some interviewees thought that pressure from funders for co-production and partnerships created a temptation for institutions to use this approach without the necessary experience or resources, leading to potential poor practice. Roundtable participants advocated for more funding streams to support community involvement in arts-focussed co-produced projects, parallel to that provided by the National Lottery Heritage Fund ([Recommendation 10](#)).

### Adaptation for local context and audiences

As museums seek to develop community links and engagement, models of co-production or locally tailored exhibitions that better fit specific audiences and contexts were preferred to achieve deeper engagement and community connection.

The interviews and roundtables highlighted a trend towards adapting touring exhibitions to reflect local content, history and communities, rather than pure bought-in formats. Successful

adaptation was seen in exhibitions where early engagement and relationship-building with partners allowed for collaborative planning and local content integration. Challenges arose when adaptation was an afterthought – leading to tensions around interpretation, accessibility of exhibition materials and unclear decision-making authority.

The MAGNET touring exhibition network<sup>36</sup> and the Art Fund’s Going Places were referenced as examples where local adaptation and embedding of place-related content are being successfully practised,<sup>37 38</sup> although practical and financial challenges remain significant. The financial costs of translation, cultural adaptation and accessibility were cited as significant risks to success, especially for national venues or those reliant on externally developed content.

To reflect local needs, sometimes exhibitions are adapted for e.g. Welsh, English, Japanese, and British Sign Language. This inevitably adds cost and complexity. For these reasons, locally originated exhibitions tended to be more cost-effective for smaller institutions.

Some venues do use bought-in exhibitions, but often adapt or partner with providers to add local elements. For example, the Pirates exhibition partnership with the National Maritime Museum Cornwall blended bought-in content with local curatorial input for greater relevance.

Commercial providers asserted that there is continued demand for bought-in exhibitions that museums can hire to fill programme gaps and obviate staffing shortages, but museums expressed reservations about pure out-of-the-box or bought-in models and said that most are developed or adapted for venues. The view was

<sup>36</sup>Please see Case Study 3. MAGNET - A Partnership and Production Model for Touring Exhibitions for further details.

<sup>37</sup><https://www.museum.manchester.ac.uk/exhibition-archive/wild>

<sup>38</sup><https://rammuseum.org.uk/whats-on/wild>

expressed that logistical challenges and infrastructure mismatch mean out-of-the-box exhibitions suit primarily flat art formats or digital works, limiting broader sector appeal.

As museums and other venues search for ways to broaden engagement and work with communities, multiple participants advocated for research and action to place exhibitions “where people are”. The use of a wide range of spaces, including libraries, community centres and public spaces, was evidenced.

### Digital experiences – differing views and sector divides

The interviews and roundtables surfaced a lively discussion about whether immersive digital experiences in non-museum settings act as a pipeline for museum visits, or whether they divert audiences away from traditional cultural institutions. There was a clear divide between artists/curators and other professionals regarding the demand for and desirability of immersive digital exhibitions.

Individual cases show that digital and immersive exhibitions can attract audiences who might not otherwise visit museums, creating a route into collections for younger, digital-native visitors. For example, the Sainsbury Centre’s recent VR experience exploring Amazonian shamanism brought in a new demographic. In addition, evidence from Oxford University Museum of Natural History indicates digital components at the museum generate the longest dwell time and also provide legacy engagement.

High-quality online exhibitions create both a legacy for physical exhibitions and enhance accessibility by removing barriers based on location. Sector consensus leans toward cultural organisations’ online digital experiences attracting new or

different audiences (including those otherwise unable to attend), but not fully replacing in-person visits.

Artists and digital producers see immersive formats as ways to “capture once, deliver to many” allowing for flexibility in showing works in formats from VR to screens and reaching new audiences, especially younger demographics. However, some museums lack the infrastructure, skills or technical support needed to host complex digital works, which can discourage adoption. Even where demand exists from audiences, internal skills or capacity may be limiting factors. For example, museums sometimes worry about their ability to provide rapid tech support or adapt spaces for installations ([Recommendation 8](#)).

### Digital exhibition innovations for the future – new formats and practices

Participants in the interviews and roundtables thought that innovations to watch include virtual reality (VR), augmented reality (AR), and hybrid physical-digital exhibitions with interactive content and tailored audience journeys. However, it could be argued that in-gallery VR and AR have made little tangible penetration into museums and galleries over the last decade. Participants evidenced that organisations had placed a renewed emphasis on ‘real objects’ post-pandemic, following the digital immersion of the lockdown periods. For this reason, hybrid/blended models seemed more promising to many of the participants than purely digital experiences.

One example of a successful blended model is Kew Gardens’ Of the Oak project produced by Marshmallow Laser Feast in 2025, which blends interactive video, multichannel audio, an online field guide and walking tours to explore the biology and cultural

importance of oak trees.<sup>39</sup> In contrast, Barbican Immersive have been producing out-of-the-box digital touring exhibitions across a variety of arts and science topics, “focused on contemporary culture, emerging technology and digital creativity” and capable of scaling.<sup>40</sup> In some disciplines, such as photography, exhibition formats that allow digital files to be shared with host venues for localised presentations are an emerging trend, and have the advantage of reducing transport costs and potentially carbon footprint.<sup>41</sup> The emergence of AI will undoubtedly change future exhibition practice - both creative production and user experience. Museums and galleries are only just starting to grapple with what this will mean, as the technology is new and patterns of use are currently in flux, and there will be a need for this as a focus of research soon.

### Environmental sustainability and digital formats

The energy use of both new digital formats and ‘old tech’ (e.g. video art) was a pressing concern expressed in the roundtables and poses significant challenges, particularly for large-scale digital exhibitions. The Barbican partnered with Julie’s Bicycle to deliver its Our Time on Earth exhibition in order to understand and reduce the environmental impact of digital exhibitions.<sup>42</sup> There has been focus on the reduction of carbon footprint in relation to touring and best practice guidelines on greener approaches to digital experiences would assist the sector ([Recommendation 9](#)).

### Observations

Many of the future trends for exhibition-making and touring have two elements at their heart. Firstly, how cultural organisations can respond to financial and external challenges with innovations, such as in new models of partnership and co-production for touring exhibitions. But importantly, how the changing needs and behaviours of audiences are driving change in developing exhibitions. This ranges from communities co-creating exhibitions with organisations which reflect their experiences, or connecting with audiences through digital experiences.

Museums and galleries are physical repositories of objects, but exhibitions offer experiences. The future trend for exhibitions as experiences will be key for the continued evolution and relevance of the sector.

“The interviews and roundtables highlighted a trend towards adapting touring exhibitions to reflect local content, history and communities.”

<sup>39</sup><https://marshmallowlaserfeast.com/project/of-the-oak>

<sup>40</sup><https://www.barbican.org.uk/hire/barbican-immersive-exhibitions>

<sup>41</sup> See Case Study 5. Ffotogallery - Lean Touring and Digital Exchange

<sup>42</sup><https://juliesbicycle.com/resource/our-time-on-earth-at-the-barbican>

# Conclusion

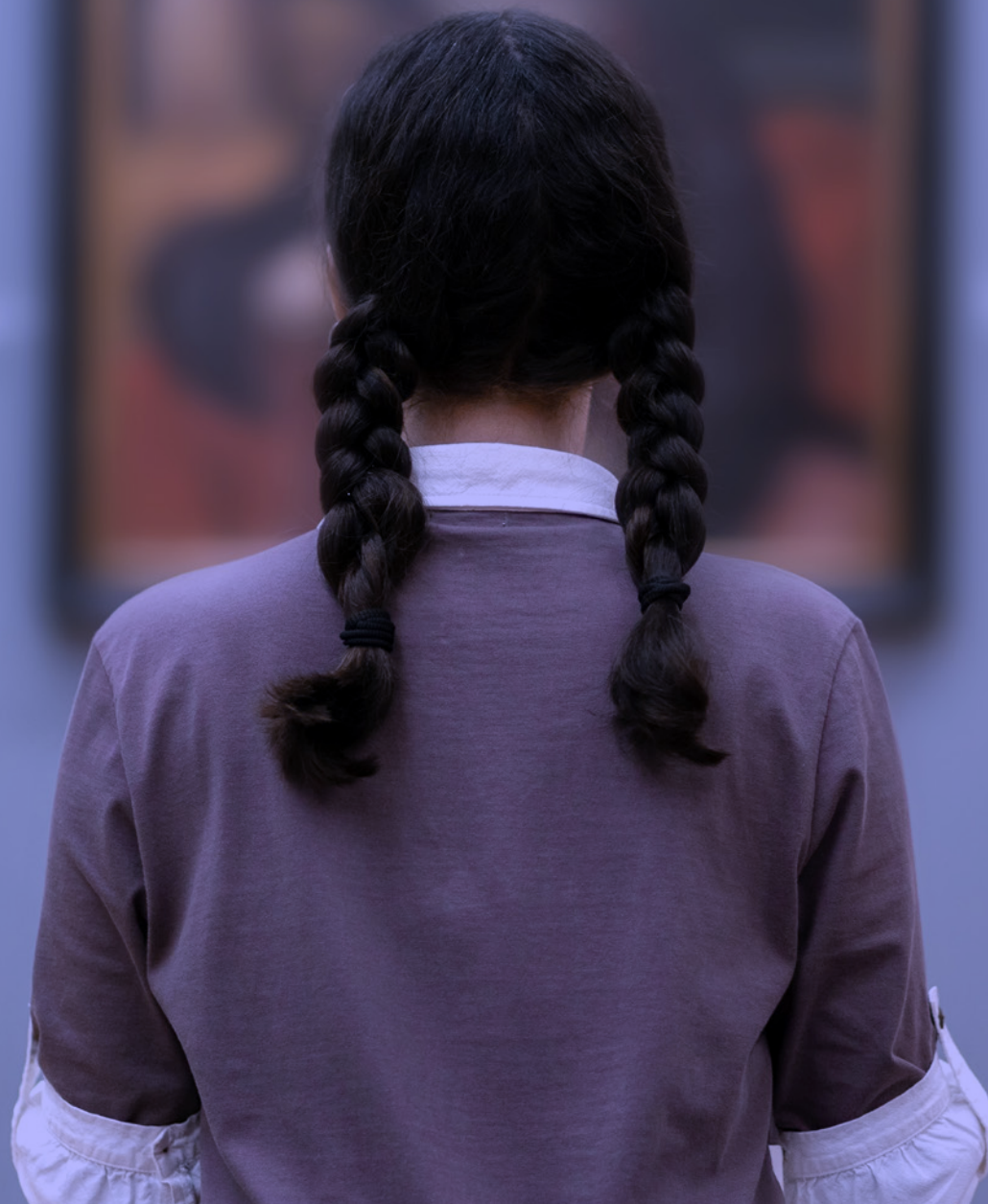
Temporary and touring exhibitions are not peripheral activities, but fundamental to how museums and galleries fulfill their public missions and remits. They attract and diversify audiences, enable partnership working, showcase collections, generate economic and social impact, and drive institutional innovation. Yet the sector's ability to strategically plan, robustly evaluate, adequately resource, and equitably distribute this vital work varies greatly.

This research provides the evidence base for addressing these pressing challenges. With targeted support for skills development, leadership on programming strategy and impact evaluation, advocacy for policy reform, and platforms for knowledge-sharing, the sector can unlock the full potential of temporary and touring exhibitions. This is work that The Exhibitions Group is uniquely placed to lead and co-ordinate. The result would be a more resilient, equitable and impactful sector, capable of demonstrating its value to communities, funders, government and policy makers - ultimately serving the UK public more effectively.

The combined strength of a cultural sector that can robustly evidence the impact of its core work in making and sharing exhibitions, use exhibitions to achieve clear strategic goals, and share learning and resources effectively would be transformative. This report provides the foundation for that transformation.



# Case Studies



# Case Study 1.

## National Museums Liverpool – Strategy, Scale and the Economics of Imagination

National Museums Liverpool (NML) is a family of seven museums and galleries across the Liverpool City Region: a national body located in the North West, serving over three million visitors annually and housing one of the UK's most diverse public collections. From the World Museum to the International Slavery Museum, NML's mission is "to use collections and stories to inspire, challenge and connect people." Its work provides an example of a museum group operating with national purpose but regional roots, and doing so strategically, with an eye firmly on both cultural and economic impact.

NML's exhibition programme pursues three linked objectives:

- Activate collections: bringing unseen or under-used objects into public life
- Grow and diversify audiences: using temporary and touring exhibitions as a vehicle for engagement
- Drive economic and social impact: ensuring museum activity contributes measurably to the regional visitor economy and civic regeneration.

In the decade following Liverpool's 2008 Capital of Culture year, NML faced the challenge of maintaining momentum amid fluctuating public funding. Post-pandemic, with visitor patterns shifting and cost pressures intensifying, NML's leadership sought to reposition temporary and touring exhibitions as core strategic assets, as engines for audience renewal, civic value and sustainable income. As Director Laura Pye described in an interview, "Our exhibitions are how we move. How we make people see what's possible here, in Liverpool, and beyond."

Her team's ambition was to create an integrated programme that would serve both the local (by energising communities and tourism) and the national/international (through touring and partnerships). For NML, exhibitions are not just cultural events but places for testing ideas, broadening audiences and contributing directly to the life and economy of their place.

## Thinking and acting strategically

NML positions exhibitions at the centre of its 10-year strategic plan (2025–2035), which sets out three institutional priorities:

1. To provide memorable experiences
2. To partner and influence
3. To engage and empower.

This clarity allows each exhibition to be conceived not as an isolated ad-hoc project, but as part of the longer-term narrative about what the organisation is trying to achieve. By purposefully placing exhibitions within NML's broader organisational plan, they become a lever for audience development, regional/regeneration strategy and economic contribution. They do this through:

1. Programme Design: Major projects such as China's First Emperor and the Terracotta Warriors (2018), Art of the Terraces (2022), and AI: More Than Human (2023) combine audience insight, collection activation and city storytelling
2. Partnerships: NML collaborates with international museums (notably in China), UK peers and creative industries to co-produce or tour exhibitions. It also works with local universities to assess and evidence impact
3. Innovation and Risk: NML's object-only touring model (sending curated collections and letting host venues install locally) maximises return and reduces resource intensity. New digital and immersive shows (such as Bees) experiment with audience experience and access.

For any museum, this mindset is transferable. Start with strategy, not subject:

1. Embed the exhibition programme in your strategic plan: define how the programme aligns with audience goals and organisational goals (e.g. regional engagement, economic regeneration, partnership growth)
2. Prioritise partner and place-based ambitions: NML links its exhibitions and venues to the city region's visitor economy, regeneration and community narratives. Ask, "how does our programme connect to our town/city/region?" Link your exhibitions or touring offer to a broader place vision or regeneration story
3. Define clear metrics beyond footfall: at NML touring and temporary exhibitions are measured as drivers of social and economic outcomes
4. Leverage scale and multi-site venues where possible: think of 'networked' approaches (with neighbouring sites or institutions) so that the strategy is part of a continuum.

NML's success lies partly in how it has blended public purpose with entrepreneurial thinking. Every major show is supported by a business case and reviewed by a commercial committee, ensuring that creative ambition and financial discipline move in tandem.

Touring plays a crucial part in this ecosystem. International partnerships, particularly with Chinese museums, have allowed NML to generate income while expanding its audience reach. The Art in the Age of Victoria exhibition, for example, toured to China, attracted around 300,000 visitors and generated a £50,000 profit, while a Greeks and Romans exhibition is projected to earn £150,000. These projects fund conservation work and strengthen NML's reserves, enabling future experimentation.

Domestic touring, by contrast, is often mission-driven rather than profit-driven. As Director Laura Pye notes, “There’s little money in UK touring. We do it for audiences, not for balance sheets.” This honesty highlights that strategy means knowing not only where income can be generated, but where public value justifies investment.

## Measuring what matters

Temporary exhibitions and touring programmes can demonstrate value in several areas: contribution to local/regional economy, tourism, regeneration, community well-being. As described earlier, our research shows many museums struggle to capture or articulate these broader impacts. NML’s Special Report: Making a Difference explores its economic and social impact, signalling an institutional commitment to measuring value beyond the gallery walls.<sup>43</sup> NML evaluates exhibitions through three lenses: collections, audiences and finances. Dashboards and real-time data monitor visitor profiles, ticketing and secondary spend, while impact studies assess broader economic contribution.

The headline example remains China’s First Emperor and the Terracotta Warriors (World Museum, 2018). This was a landmark exhibition that attracted over 600,000 visitors and retail sales exceeded £2.2 million. It contributed more than £78 million to the Liverpool City Region’s economy. The city’s international profile as a cultural destination grew sharply: 75% of visitors cited it as their main reason for visiting Liverpool, generating hotel stays and restaurant visits.

Such success was not accidental: it was the product of alignment between strategy, audience insight, economic modelling and civic partnership. The exhibition was part of a wider 2018 cultural

programme, reinforcing Liverpool’s reputation as a major UK cultural centre. But it is important to note that NML recognises this as a “once in a lifetime exhibition”.

## From galleries to city growth

NML has extended this strategic mindset into civic development. The Waterfront Transformation Project integrates the International Slavery Museum and Maritime Museum and is not just an architectural renewal, but an economic and social one. Working with the University of Liverpool, NML is assessing the project’s potential to generate more than £1 billion in long-term social and economic value for the region. Arguably, more modest projects still have potential to anchor wider collaborations with local authorities, universities, tourism boards and community groups if they are positioned as part of a place-based strategy.

## Lessons from NML

NML demonstrates that exhibitions can be both cultural and economic engines when guided by strategy. The key take-away is to think systemically: use exhibitions as levers for wider change, gather proof of their value and weave them into the story of your organisation. In summary:

1. **Start from strategy, not one-off projects:** Before you commission an exhibition, ask: How does this fit our organisational priorities and how will we use it to drive them? What is the intended impact (audience, income, partnerships, reputation)?
2. **Define how each show advances audience, financial and community goals:** Embed economic and social outcomes

<sup>43</sup><https://www.liverpoolmuseums.org.uk/special-report-making-difference>

(e.g. contribution to local tourism spend, employment, community engagement) into your business case for exhibitions

3. **Use your programme as a lever, not just a display:** View your touring/temporary offer as a strategic tool to attract new audiences, generate partnerships, enhance reputation and drive regeneration
4. **Build partnerships with place-makers:** NML's linkage with waterfront regeneration, university research and the city region illustrates how museums can partner with broader agendas to amplify impact
5. **Think holistically about venues and networks:** Consider how you might partner regionally (other galleries, local authorities, visitor economy stakeholders) so that your events or exhibitions gain place/partner momentum. Work with local institutions, universities and businesses to share risk and amplify impact
6. **Touring economics:** UK touring is financially marginal and NML tours domestically for audience and collection reasons, not profit
7. **Document and communicate your story:** NML's publication of forward-looking frameworks and impact reports means the story becomes part of their institutional identity. All museums can build a mechanism to communicate their successes to funders, stakeholders and the public. Make the case for exhibitions' impact and value. Build narrative and simple metrics around how your exhibitions support local/regional economy, community development and learning outcomes. Communicate your 'story' for how your exhibitions do this and can attract visitors to your town or city, elevate your profile
8. **Invest in evidence:** Even simple evaluation tools can help small institutions make persuasive cases for funding
9. **Be pragmatic in assessing impact:** Measuring social impact (belonging, wellbeing) remains complex, you cannot quantify everything. Develop simple metrics (visitor spend, dwell time, repeat visit rate, local business uptake) and narratives around local/regional value. Link with local hospitality and retail. Track local economic effects from overnight stays to secondary spend.

# Case Study 2.

## The Museum Exhibit User Experience (MEUX) Toolkit – the Development of an Exhibition Evaluation Methodology

Studies of museum learning and experience have identified a number of limitations around standard evaluation practices.<sup>44</sup> Many existing evaluation models, while capable of extracting how visitors go about making meaning, do not identify in detail what happens ‘at the exhibit face’, and do not provide results that can be used to facilitate the iterative development of exhibitions or to affect change within institutions.<sup>45</sup> An inter-disciplinary team from Warwick Manufacturing Group (WMG; the engineering department at the University of Warwick) and Oxford University Museum of Natural History (OUMNH) attempted to overcome these limitations by developing a system of quantitative exhibition evaluation based around the principles of User Experience (UX), which is widely employed across manufacturing industries for product evaluation.

The project commenced in 2019 and is ongoing. The Museum Exhibit User Experience (MEUX) toolkit<sup>46,47</sup> enables longitudinal comparisons of different exhibitions and displays through time within a single museum, but the standardised data collection and analysis also permits consistent comparative evaluation from museum to museum. The MEUX toolkit can also provide a process-based, quantifiable and objective methodology for utilising evaluation during the development of new exhibitions and displays, which enables an iterative development process to embed data-driven decision making at its core. The initial work was funded by an Arts and Humanities Research Council Collaborative Doctoral Partnership training award between the universities of Oxford and Warwick. Other costs were met out of the evaluation budgets of individual exhibitions.

<sup>44</sup> Falk, J.H., & Dierking, L.D. 2016. *The Museum Experience Revisited*. Abingdon: Routledge and references therein

<sup>45</sup> Davies, M., & Heath, C. 2013. *Evaluating evaluation: Increasing the impact of summative evaluation in museums and galleries*. visitors.org.uk.

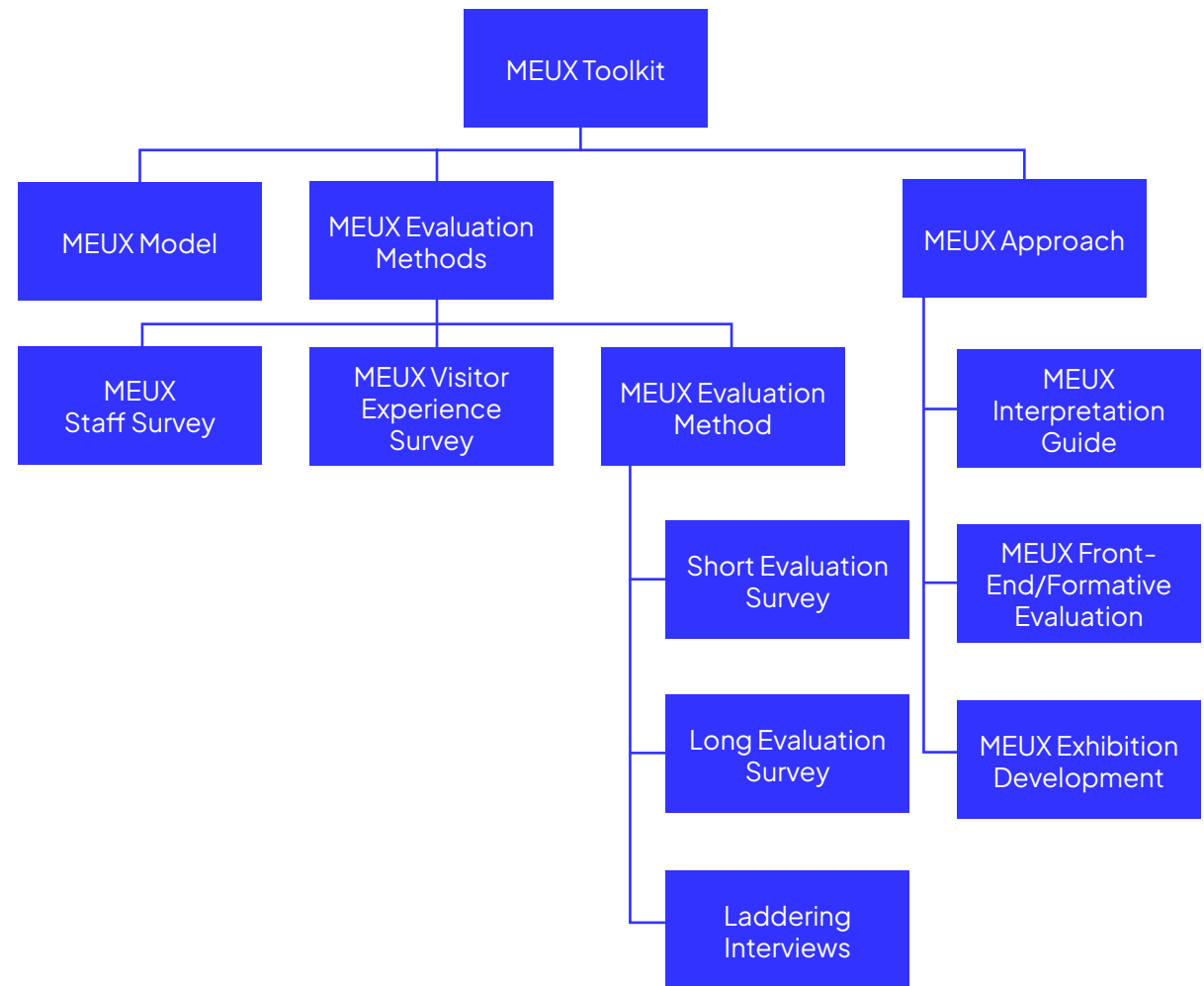
<sup>46</sup> King, E. et al. 2023. *Visitor Studies* 26, 59–81. <https://doi.org/10.1080/10645578.2022.2129944>

<sup>47</sup> King, E. et al. 2025. *Curator: The Museum Journal* 68, 163–200. <https://doi.org/10.1111/cura.12637>

## Approach and methodology

The doctoral researcher who undertook the research for the WMG/OUMNH partnership was Ellie King, who completed her PhD in January 2025. The team for the project combined people with a humanities background with engineers and natural scientists. It evolved into a genuinely transdisciplinary project in which the research questions could not have been generated individually by any of the subject specialists.

The User Experience (UX) methodology is primarily concerned with the emotional and holistic experience created when a user interacts with a product, and has been successfully applied to a range of sectors from smartphones and computers, to cars, education, food, leisure and beauty. The Museum Exhibit User Experience (MEUX) Model is adapted from the UX conceptual model of researcher Marc Hassenzahl,<sup>48</sup> which encapsulates the interaction that occurs between a user and a product. The full MEUX toolkit is illustrated below, although in practical terms the evaluation component comprises just two types of survey (one short and one detailed) and a series of short 'laddering' interviews. The implementation of the evaluation technique is documented in detail by King et al. (2023 and 2025).



<sup>48</sup>Hassenzahl, M. 2003. The Thing and I: understanding the relationship between user and product. In: Blythe, M.A. et al. (eds) Funology: From Usability to Enjoyment. Netherlands: Kluwer.

Across industries, it is very common for there to be a mismatch between designer intent and user experience, and the same is true of museum exhibitions. For example, King et al. (2023) showed that, for a given exhibition, the majority of museum staff thought that the principal reason for visitors viewing the exhibition was for them to learn, whereas visitors were very clearly of the view that the principal motivation was for them to have a nice time with friends and family.

The MEUX Model summarises the interaction that a visitor has with a museum exhibit or exhibition from both the visitor perspective and that of the museum. The technique works by separating pragmatic experiences (concerned with the effectiveness of getting the exhibition messages across to visitors) from hedonic ones (the experience and emotions of the visitor in receiving and engaging with that message) and by differentiating between museum intentions and actual visitor experience. A variety of factors affect how the visitor might perceive the exhibit, including their age, gender, motivation and preferred learning style, and a visitor's experience may or may not match what the museum aimed for.

## Outcomes and impact

As a proof of concept, King et al. (2025) used the MEUX evaluation methodology to comparatively evaluate one temporary exhibition (Meat the Future, on the environmental impact of meat production), a modern permanent display (Out of the Deep) and a traditional permanent display of birds. MEUX was successful in differentiating between visitor learning experience and emotions in relation to the three and in comparing these with the museum's intentions. The work was then extended (King et al. in review) to compare a different temporary exhibition in OUMNH (Connected Planet) with new exhibits in Beamish Living Museum and Bletchley Park. The MEUX evaluation was again successful in differentiating visitor experiences and comparing them with those intended by the museums.

The development of the MEUX evaluation toolkit is now complete and it is being made available for use across the sector,<sup>49</sup> providing a quantitative, repeatable methodology for the evaluation of exhibitions.

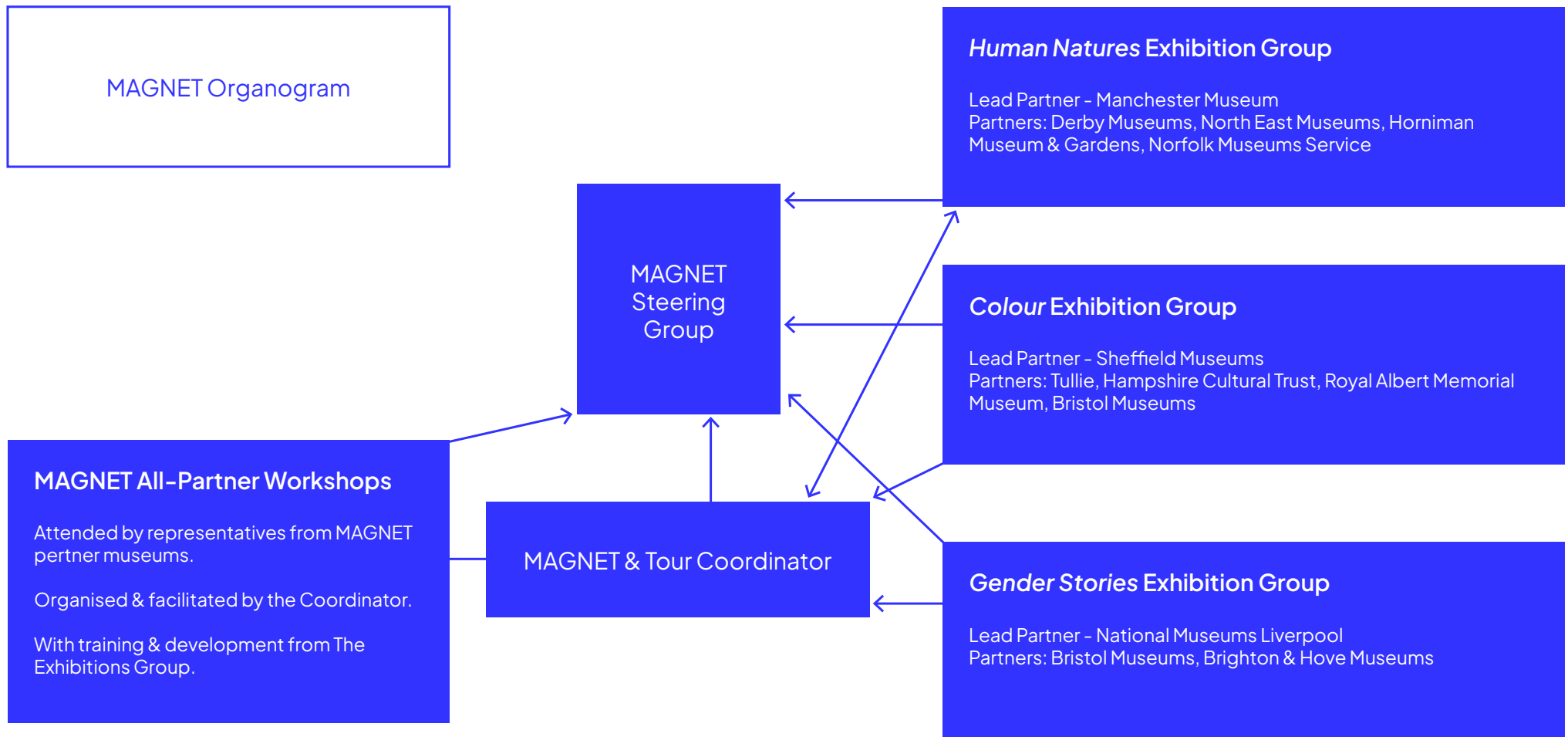
<sup>49</sup> King et al. 2025. Curator: the Museum Journal, <https://doi.org/10.1111/cura.12637>. King et al. 2023. Visitor Studies, <https://doi.org/10.1080/10645578.2022.2129944>

# Case Study 3.

## MAGNET – A Partnership and Production Model for Touring Exhibitions

MAGNET (the Museums and Galleries Network for Exhibition Touring) is a national partnership co-developing and touring collections-led exhibitions across England. It is coordinated by the Horniman Museum and Gardens, with The Exhibitions Group as its professional development partner. The initiative emerged as a strategic response to post-pandemic challenges, including reduced capacity, staff turnover and a shortage of collections-focused touring opportunities. It aims to build resilience and capacity, provide space for experimentation and collaboration, reduce the environmental impact of touring exhibitions, and strengthen sector skills and standardise touring processes across participating institutions. Following a successful pilot (2020–2023) centred on *Hair: Untold Stories*, the current 2023–2028 phase is delivering three touring exhibitions: *Human Natures*; *Colour: Explore a World of Wonder*; and *Gender Stories*.

The organisations involved are Horniman Museum and Gardens (lead), The Exhibitions Group (professional development partner), Brighton and Hove Museums, Bristol Museums, Derby Museums, Hampshire Cultural Trust, Manchester Museum, Norfolk Museums Service, Royal Albert Memorial Museum, Sheffield Museums, Tullie Carlisle, North East Museums, and National Museums Liverpool.



MAGNET's central aim is to demonstrate an equitable and cost-effective model for creating and touring exhibitions by:

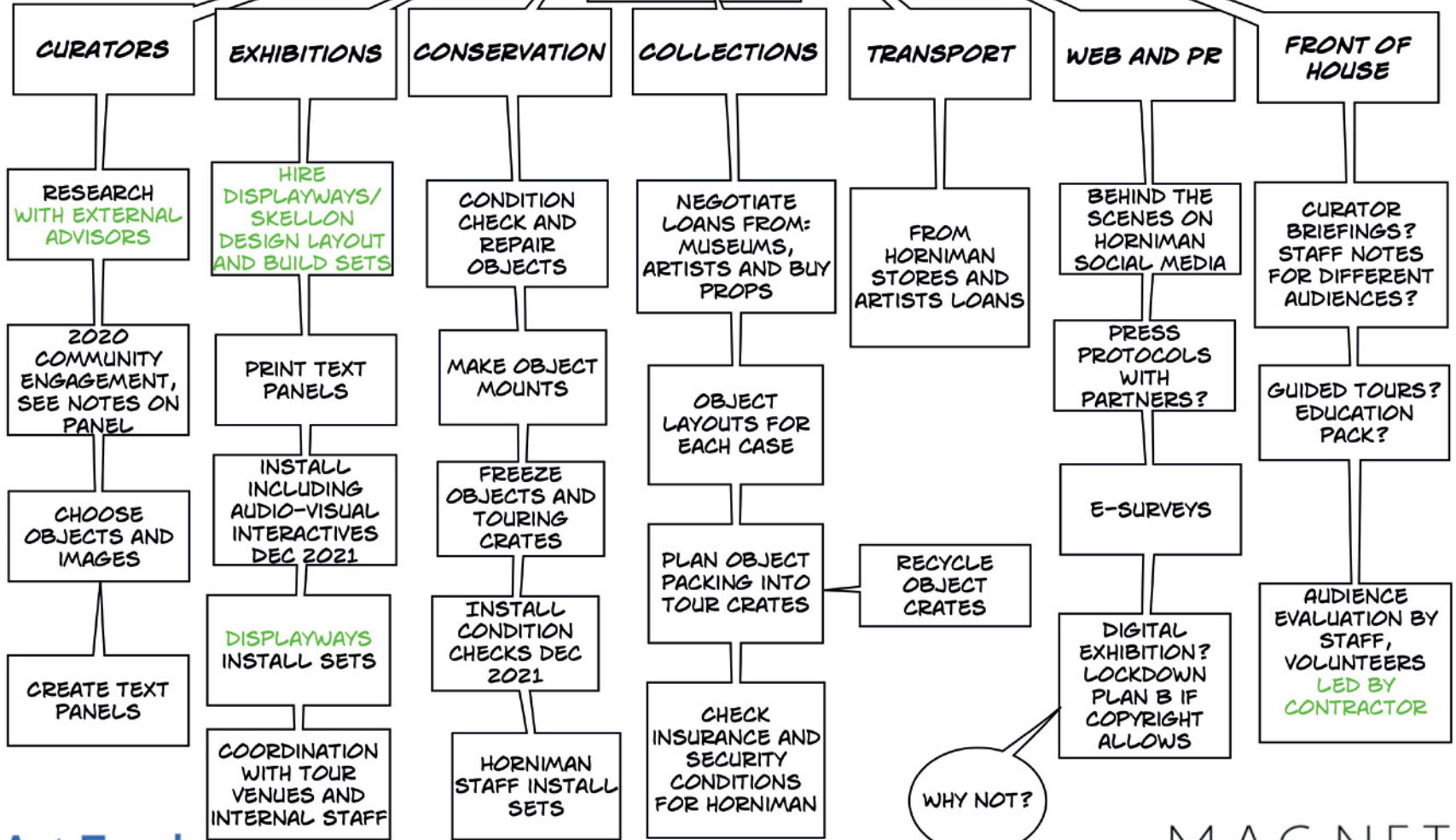
- Pooling collections, skills, and production capacity across institutions
- Reducing duplication typical of single-venue builds
- Strengthening workforce skills and capacity through embedded training and shared practice
- Enhancing audience reach beyond London

1 MAKING OF A TOURING EXHIBITION, DRAFT DISCUSSION DOCUMENT HMAC 31/8/21

ITEMS MARKED IN GREEN USING CONTRACTORS

HAIR EXHIBITION AT HORNIMAN. MOST ROLES BY HORNIMAN TEAM

2020 TO 2021



Art Fund\_

MAGNET  
Museums and Galleries Network for Exhibition Touring

MAGNET bubble diagram of roles and responsibilities within the pilot exhibition development for the internal Horniman Museum and Gardens team.

The pilot exhibition, *Hair: Untold Stories*, was co-curated by the Horniman and Goldsmiths, University of London, with funding from the Art Fund. It opened at the Horniman in December 2021 and toured to Sheffield Museums and Tullie in Carlisle. The exhibition met its aim to attract more adult audiences (an estimated 104,420 people visited the exhibition at the Horniman, around a third of which were new to the museum).<sup>50</sup>

## Production and economic model

For the 2023–2026 MAGNET exhibitions there is central coordination, evaluation and training while venues retain autonomy over pricing, marketing, and local audience strategy. The exhibitions are developed through cross-institution working groups with distributed roles covering administration, curation, design and community engagement. This allocation of responsibilities and partnership agreements avoid duplication and is aligned to each partner’s strengths. *Gender Stories* illustrates distributed leadership in practice, with Liverpool as administrative lead, Bristol as curatorial lead, Brighton & Hove and Bristol leading community engagement and Liverpool overseeing design.

Using mainly partner collections streamlines registrar workload, simplifies discussion around conditions and enables flexible cooperation based on trust and shared planning. “MAGNET shows have very few loans from outside... people have been able to be a bit more flexible,” the coordinator observed.

The 2023–2026 phase is supported by an Arts Council England Touring Projects Grant and Art Fund funding for a full-time coordinator. Through setting up a framework with lead partners Museums and Galleries Exhibition Tax Relief is having a

“dramatic effect on the finances” the coordinator shared. Pricing approaches vary with some venues using free or pay-what-you-can models, others (e.g. Bristol Museums) successfully tested a ticketed launch event.

## Outcomes and impact

A full evaluation of MAGNET is expected in 2026, but initial outcomes and impacts include:

### Audience and cultural outcomes:

- *Hair: Untold Stories* showed strong public engagement, particularly among under-represented audiences, influencing co-production practices for *Colour and Gender Stories*
- Touring exhibitions are widening geographic access and sustaining collections-led narratives

### Operational outcomes:

- The partnership model with shared delivery structures supports staff continuity and resilience
- Standardised touring frameworks and tax-relief models have improved efficiency and cost recovery

### Environmental outcomes:

- All partners are piloting the Gallery Climate Coalition carbon calculator to track exhibition transport, build, and operations, with data gathered used to establish baselines for reducing carbon footprints in future touring activity

### Evaluation – two strands are in place:

- Partnership and process learning to understand equitable working practices and shared delivery models

<sup>50</sup>Hair: Untold Stories exhibition final report

- Audience and contributor impact, using the ACE Impact and Insight Toolkit (Culture Counts) to assess visitor experience, participation, and creative engagement.

**“The Exhibitions Group have been our professional development partner... running lots of training.”<sup>51</sup>**

## Challenges and lessons learned

MAGNET’s success has depended on:

1. Ability to balance non-commercial objectives with venue-specific financial and programming needs
2. Alignment of shared audience aims and ambitions
3. Clear role definitions and shared decision-making structures
4. Alignment of timelines and priorities across partners
5. Commitment to transparency and flexibility.

## Legacy and future development

MAGNET has evolved from a pilot to a touring platform spanning 12 partner institutions. The next phase will test pathways toward financial self-sufficiency, reducing reliance on grant funding. MAGNET hopes to be a replicable model for economically sustainable, co-curated touring grounded in regional collections and equitable partnership practice. MAGNET plans to publish toolkits based on its learnings in 2026.

<sup>51</sup>Stakeholder interview with Dominic Neergheen, Touring Exhibitions Coordinator, MAGNET

# Case Study 4.

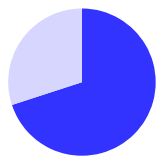
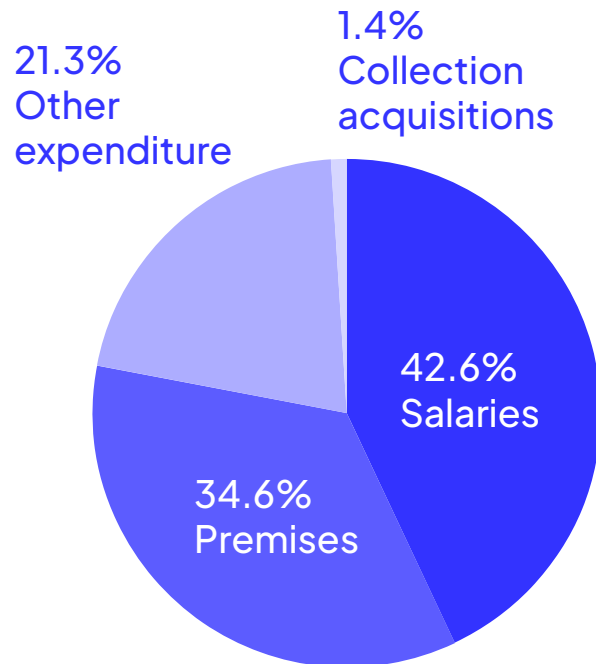
## Museotilasto – A Long-term Data Collection Model from the Finnish Heritage Agency

Since 1975, the Finnish Heritage Agency has undertaken a wide-ranging annual data collection exercise across all ‘professionally managed’ (as opposed to volunteer-run) museums in Finland. The data from 2007 onwards are publicly available through the website Museotilasto (‘Museum statistics’);<sup>52</sup> older data can be accessed via a log-in, and all of the data can be downloaded in Excel and CSV formats for analysis. In addition to the raw data, the Finnish Heritage Agency publishes an annual infographic summary<sup>53</sup> in both Finnish and English (extract below). The Excel and CSV files are only available in Finnish, so we have prepared a translated version of the 2024 dataset, available [\[here\]](#).

<sup>52</sup><https://museotilasto.fi/>

<sup>53</sup>[Finnish museums data 2024.xlsx](#)

## Total expenditure of museums was 331.5 million euros:



**70.3%**  
of museums' costs were met through public funding.



The average costs per museum were **2,224,617** euros.

The 2,835 person-years worked at the museums were distributed as follows:



**74%** permanent, full-time personnel

**15%** fixed-term, full-time personnel



**11%** part-time personnel and workers paid by the hour

On average, museums employed 13.8 permanent employees, 8.6 of whom had museum professional training.

Work contribution of volunteers was **39,052** hours in total. 

**804 new exhibitions were opened in museums**

On average, museums opened 6 new exhibitions.

Public events organised by museums:

- 54,196 guided tours
- 10,130 workshops
- 7,426 other events

**In the museum collections at the end of 2024**

- 4.9 million objects in cultural history collections
- 385,000 works of art
- 15.7 million objects/samples in natural history collections
- 27.7 million photographs
- 119,000 audiovisual objects

The Museotilasto programme covers 153 professional museum services in Finland, managed by the state, municipalities, foundations, associations or by other private operators, operating across 327 museum sites. A highly standardised approach to data collection, both between museums and across years, ensures the maximum utility for analysis. The consistency in the data categories from year to year allows museums to anticipate what data need to be gathered and enables efficient and consistent data collection.

The 102 data categories in the return range across museum type, breakdowns of visits and attendance at exhibitions and other activities, admission charging, collections data, staffing information and finance data. The data collection on exhibitions is broken down into internally produced, collaborative, externally produced and total temporary categories, and information is also collected on touring and externally derived exhibitions.

The comprehensive nature of the data collection allows a very wide range of questions to be answered and visualised. From the 2024 dataset and infographic alone it is possible to ascertain that 804 new exhibitions opened in 2024, with an average of 6 new exhibitions per museum. By adding in the historical datasets it is possible to examine trends over the past decade. Using the years 2014, 2019 and 2024, it is possible to determine that exhibition costs across Finnish museums went up by 26% over the last five years, and 53% across the whole decade, and paid visitors went up by 59% and 98% respectively demonstrating a very strong return on exhibition investment. Similarly, total income for the museums increased by only 5% from 2014 to 2019, but total visits went up 40%. Across 10 years income went up 43% and total visits increased by 55%. In short, it is possible to directly link museum investment to outcomes in a way that is not possible across UK museums.

The public availability of this long-term dataset has also begun to drive research into museum economics. For example, after a pessimistic conclusion to a preliminary 2008 study, Kimmo Levä re-examined exhibition activity in Finnish museums and concluded that it has now “moved into positive financial territory. After subtracting production and marketing costs from ticket revenue, exhibitions showed a combined surplus of €11 million in 2024. Taking a longer-term view, exhibitions have been in the black since 2018 (with the exception of the pandemic), with the surplus growing year by year.”<sup>54</sup> The analysis uses Finnish museum data back to 2000 and would not have been possible without the Museotilasto data collection programme.

## Lessons for other countries

Most national-level museum data sets are scant or not updated very frequently. For example, Germany carries out a much-reduced exercise across 4,000 museums, divided by type, but the categories published on the data dashboard are restricted to the total numbers of visitors and the total number of exhibitions.<sup>55</sup> Moreover, the German dashboard only contains data for 2021 and 2022. In these two years, the total number of exhibitions increased from 4,704 to 6,233, as Covid recovery occurred, with total visits increasing from 38.8m to 81.4m, but a more comprehensive data set would tell a more complete story of the pre-pandemic benchmark and post-pandemic recovery (or not).

In the UK the most comprehensive published annual dataset is probably the survey undertaken by the Association of Leading Visitor Attractions (ALVA), but that is restricted to total visitor numbers and to member organisations. Arts Council England carries out a much more detailed annual data collection exercise with its National Portfolio Organisations (NPOs) and some other

<sup>54</sup><https://www.linkedin.com/pulse/have-museum-exhibitions-become-financially-viable-kimmo-levä-as3wf/>

<sup>55</sup><https://www.destatis.de/EN/Themes/Society-Environment/Education-Research-Culture/Culture/Tables/museums-visits-supporting-institutions.html>

fundings, such as Research England, undertake similar exercises, but the data are not made publicly available.

Production of a comprehensive and publicly available annual data report on UK museums would allow their vital signs to be monitored over extended time periods and, concurrently, would allow for greater accountability and transparency in the use of taxpayer and other funding. It would also have the benefit, and efficiency, of allowing a single data return per museum rather than multiple returns to different funders.

# Case Study 5.

## Ffotogallery - Lean Touring and Digital Exchange

Ffotogallery in Cardiff is dedicated to photographic arts, education and sector development. It runs a year-round programme combining self-produced exhibitions, co-commissions and touring projects. Notable recent examples include *The End of History: British Working Class Photography* (2024) and the *Four Nations Touring Partnership* (2023–2025). Its reach is regional, national, and international, encompassing Wales, the wider UK, and exchanges with partners in India, France, and Latin America. In the *Four Nations Touring Partnership*, led by Impressions Gallery in Bradford, Ffotogallery collaborates with *Belfast Exposed* and *Street Level Photoworks* in Glasgow. Each city commissions and supports two emerging local artists, embedding skills development and local relevance within an international framework.

Operating with a core team of just three staff, the organisation's central aim is to sustain a cost-efficient model for producing and touring photography exhibitions while maintaining its educational and participatory ethos. Ffotogallery seeks to develop low-cost digital and touring approaches that expand reach and reduce physical transport burdens, while continuing to support emerging Welsh photographers and to widen participation.

Ffotogallery's financial model is built on a mosaic of public and charitable support, including Arts Council of Wales National Portfolio funding, project grants from foundations and targeted heritage and digital initiatives funded by the National Lottery Heritage Fund. Small-scale sponsorships and donations supplement these core sources. Ffotogallery has also begun applying retrospectively for Museums and Galleries Exhibition Tax Relief. It faces significant financial constraints and rising operating costs. Inflation, customs complexity, and declining real-terms funding have challenged traditional exhibition touring models.

To contain costs, exhibitions use modular, print-based builds and local fabrication. Digital file sharing between partners further reduces transport, customs and insurance costs. “We’ve pared back to what we can manage: digital files, print builds and shared delivery. It’s not about scaling back ambition, it’s about scaling differently,” explains Siân Addicott, Ffotogallery director.

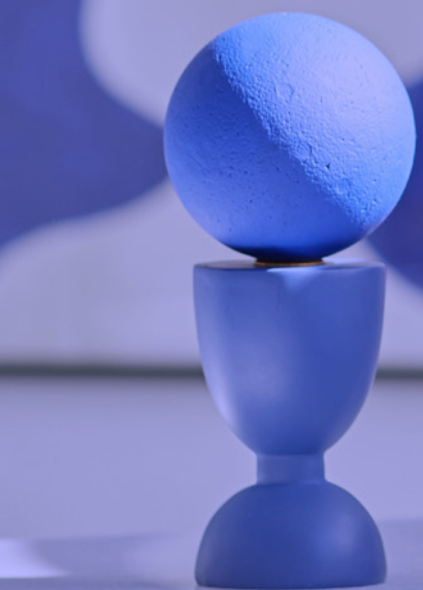
## Challenges and lessons learned

Digital-first approaches, streamlining production methods and partnering with aligned institutions to share curatorial and administrative burdens have enabled Ffotogallery to maintain a year-round programme despite real-term funding cuts of around 30% over the last decade. The four-nation touring model built capacity for Welsh artists to gain national and international exposure.

A key lesson is that when strategically deployed, digital exchange can substitute for, not just supplement, physical touring. Another is that small organisations can thrive through relational networks rather than scale, building resilience through cooperation and trust.

The organisation intends to continue refining its digital touring and co-commissioning models, testing sustainable hosting methods and exploring new retail and print sale opportunities. Its practice exemplifies how small, mission-driven arts organisations can adapt to resource constraints by combining digital innovation, collaborative touring and community participation.

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A man with a beard, wearing a blue t-shirt, is carrying a young child on his shoulders. The child is wearing a bright yellow hoodie and green shorts. They are both looking towards a large, detailed skeleton of a dinosaur, likely a Tyrannosaurus Rex, which is mounted on a wall in a museum. The man is pointing with his right hand towards the skeleton, and the child is also pointing with their right hand. The scene is lit with a soft, blueish light, creating a calm and educational atmosphere.

# Sector Resources

This section provides a curated list of key resources to support organisations in developing, delivering, funding and evaluating temporary and touring exhibitions.

## Tax Relief

### Museums and Galleries Exhibition Tax Relief – GOV.UK

The official government guidance on MGETR, including detailed information on qualifying expenditure, how to make a claim, and the legislative framework. Essential reading for finance teams and senior leadership.

Link: <https://www.gov.uk/guidance/claiming-museums-and-galleries-exhibition-tax-relief-for-corporation-tax>

### Museums and Galleries Exhibition Tax Relief – Arts Council England

Arts Council England's overview of the scheme with links to case studies demonstrating how organisations have successfully claimed relief and the financial benefits achieved

Link: <https://www.artscouncil.org.uk/cultural-tax-reliefs>

### Museum and Galleries Exhibition Tax Relief (MGETR) – Art Fund

A comprehensive guide to understanding and claiming Museum and Galleries Exhibition Tax Relief, including eligibility criteria, how to calculate relief, and practical steps for implementation. This resource is particularly valuable for smaller and mid-size institutions new to claiming MGETR.

Link: <https://www.artfund.org/professional/news-and-insights/museums-and-galleries-exhibition-tax-relief-mgetr-for-touring-exhibitions>

## Government Indemnity Scheme

### Government Indemnity Scheme – Arts Council England

Comprehensive information on the Government Indemnity Scheme (GIS), which provides government compensation in the event of loss or damage to objects on loan to museums and galleries. Includes guidance on eligibility, application processes, security requirements, and current scheme updates including the ongoing review.

Link: <https://www.artscouncil.org.uk/supporting-arts-museums-and-libraries/supporting-collections-and-cultural-property/government-indemnity>

### GIS Application Guidance – Arts Council England

Detailed guidance for organisations applying for government indemnity, including security standards, condition reporting requirements, and environmental monitoring specifications.

Link: <https://www.artscouncil.org.uk/supporting-arts-museums-and-libraries/supporting-collections-and-cultural-property/government-indemnity>

## Impact Measurement and Evaluation

### Economic Impact Toolkit – Association of Independent Museums (AIM)

This toolkit (the 'AIM Economic Impact Toolkit 2024') sets out a straightforward approach to help museums estimate the economic impact they have on their local economy. The Toolkit was originally produced in 2010, refreshed in 2014, and fully updated in 2019.

Link: [AIM-Economic-Impact-Toolkit-2024.pdf](#)

### Culture Counts - Impact and Insight Toolkit

Arts Council England's recommended toolkit for measuring the impact and quality of cultural activities. Provides standardised frameworks for collecting and analysing data on audience experience, creative engagement, and organisational outcomes, enabling cross-sector comparisons.

Link: <https://www.artscouncil.org.uk/impact-and-insight-toolkit>

### Museum Impact Assessment: A Practical Guide - Collections Trust

Though dating from 2004, this guide remains a valuable foundation for understanding museum impact assessment methodologies, offering practical frameworks for measuring economic, social, and educational impacts of museum activities including exhibitions.

Link: <https://collectionstrust.org.uk/wp-content/uploads/2017/02/South-West-Museums-Libraries-and-Archives-Council-Museum-impact-assessment-A-practical-guide-Aug-2004.pdf>

### The Museum Exhibit User Experience (MEUX) Toolkit

A research-based methodology developed by the University of Warwick and Oxford University Museum of Natural History for quantitative, repeatable exhibition evaluation. The MEUX model enables longitudinal comparisons and cross-institutional benchmarking by separating pragmatic learning outcomes from hedonic visitor experiences.

**Contact Oxford University Museum of Natural History for access to the toolkit and guidance on implementation.**

### Measuring Social and Cultural Infrastructure - The British Academy

The Academy commissioned the [Bennett Institute](#) to conduct a major project to better understand how to measure the role

that social and cultural infrastructure plays in the fabric of our societies. A key component of work has been an investigation into how social and cultural infrastructure can be measured, and what a measurement framework could look like.

Link: <https://www.thebritishacademy.ac.uk/publications/measuring-social-and-cultural-infrastructure/>

## Community Co-Production and Engagement

### Going Places Community Engagement Toolkit - Art Fund

A practical toolkit developed through the Art Fund's Going Places programme, providing frameworks, guidance, and case studies for meaningful community engagement in exhibition development. Covers co-production principles, partnership building, and equitable working practices.

Link: <https://www.artfund.org/professional/news-and-insights/going-places-community-engagement-toolkit>

### Community-led Heritage Resources - National Lottery Heritage Fund

Comprehensive resources on community engagement and co-production in heritage projects, including guidance on inclusive practice, payment structures, and sustaining community relationships beyond individual projects.

Link: <https://www.heritagefund.org.uk/our-work/community-heritage>

### Our Museum - Paul Hamlyn Foundation

Documentation and learning from the Our Museum programme, which supported museums to place communities at the heart of

their work. Includes frameworks for community participation, co-curation, and institutional change.

Link: <https://www.phf.org.uk/news-and-publications/our-museum-influence-summary-report>

## Sustainable Exhibition Practice

### Environmental Sustainability Toolkit - The Exhibitions Group

The Exhibitions Group's comprehensive guidance on reducing the environmental impact of temporary and touring exhibitions, covering transport, materials, energy use, and sustainable exhibition design. Includes practical case studies and carbon calculation tools.

Link: <https://theexhibitionsgroup.org.uk/resources/environmental-responsibility/>

### Creative Green Tools - Julie's Bicycle

Free online carbon calculator and certification programme specifically designed for creative industries, including museums and galleries. Helps organisations measure, manage, and reduce the carbon footprint of exhibitions and touring activities.

Link: <https://juliesbicycle.org/take-action/creative-climate-tools/>

### Gallery Climate Coalition

Resources, guidance, and peer networks supporting galleries and museums to reduce their environmental impact, including an exhibitions carbon calculator. Includes specific guidance on sustainable exhibition practices, digital sustainability, and decarbonising touring.

Link: <https://galleryclimatecoalition.org/>

## Partnership and Touring Models

### Exhibition Makers' Toolkit - The Exhibitions Group

A comprehensive online guide to organising and managing touring exhibitions and object loans, with chapters providing professional advice, and with useful templates and informative case studies included.

Link: [The Exhibitions Group - Exhibition Makers' Toolkit](#)

### MAGNET (Museums and Galleries Network for Exhibition Touring)

Information about the MAGNET partnership model for co-developing and touring collections-led exhibitions across England. Includes frameworks for distributed leadership, shared decision-making, and equitable partnership working between institutions.

Link: <https://www.horniman.ac.uk/project/museums-and-galleries-network-for-exhibition-touring/>

### Developing an Economic and Production Strategy for Touring Exhibitions - The Exhibitions Group

The Exhibitions Group's practical toolkit covering business models, production approaches, partnership frameworks, and financial planning for touring exhibitions. Essential guidance for organisations developing their touring strategy.

Link: <https://theexhibitionsgroup.org.uk/resource/economics-of-touring-exhibitions-models-for-practice/>

## Accessibility and Inclusion

### Going Places Community Engagement Toolkit

This toolkit, developed in collaboration with museums and galleries across the UK, offers practical guidance for developing and delivering community engagement activities.

Link: [Going Places Community Engagement Toolkit - Art Fund](#)

### Disability Arts Online

News, resources, and networks supporting disabled artists and improving accessibility in arts and culture, including exhibition design and inclusive curatorial practice.

Link: <https://disabilityarts.online/>

## Digital Exhibition Practice

### Digital Resources - Museum Computer Network

International network providing resources, research, and professional development on digital practice in museums, including digital exhibitions, immersive technologies, and online collections engagement.

Link: <https://mcn.edu/>

### Digital Sustainability Resources - Julie's Bicycle

Guidance on understanding and reducing the environmental impact of digital cultural activities, including digital exhibitions, streaming, and data storage. Addresses the emerging challenge of energy consumption in digital practice.

Link: <https://juliesbicycle.org/take-action/sustainable-screen-hub/digital-tech/>

## Transport, Logistics and Customs

### Collections Trust - Loans and Exhibitions Guidance

Comprehensive resources on managing loans, including condition reporting, environmental monitoring, transport arrangements, and insurance. Covers both domestic and international loans.

Link: <https://collectionstrust.org.uk/spectrum-resources/loans-in/>

## Professional Development and Networks

### The Exhibitions Group - Training and Events

The Exhibitions Group's programme of professional development events, training courses, and networking opportunities specifically for those working in temporary and touring exhibitions. Includes specialist sessions on topics identified in this research as priority areas.

Link: <https://theexhibitionsgroup.org.uk/events/>

### Association of Independent Museums (AIM) - Hallmarks

Quality standards and guidance for independent museums, including resources on exhibitions, audience development, and sustainable practice particularly relevant for smaller institutions.

Link: <https://aim-museums.co.uk/aim-hallmarks/>

### Museums Association - Professional Development

Wide-ranging professional development resources, including guidance on exhibition development, evaluation, partnership working, and ethical practice.

Link: [museumsassociation.org/campaigns/workforce/a-front-of-house-charter-for-change/professional-development/](https://museumsassociation.org/campaigns/workforce/a-front-of-house-charter-for-change/professional-development/)

### UK Registrars Group

A forum for communication and collaboration between registrars, collection managers, exhibition organisers and other museum professionals.

Link: [UK Registrars Group \(UKRG\)](#)

## Funding and Fundraising

### Arts Council England - Project Grants

Information on ACE's project grant programme, which can support touring exhibition development, community engagement, and innovative exhibition practice. Includes guidance on application processes and funding priorities.

Link: <https://www.artscouncil.org.uk/ProjectGrants>

### National Lottery Heritage Fund - Grants

Funding programmes supporting heritage projects including exhibitions, with particular emphasis on community engagement and co-production. Provides dedicated support for participatory practice and fair payment of community contributors.

Link: <https://www.heritagefund.org.uk/funding>

### Art Fund - Museum Funding

Overview of Art Fund's various funding programmes supporting museums and galleries, including acquisition grants, touring exhibitions support, and professional development funding.

Link: <https://www.artfund.org/professional>

## Sector Data and Research

### VisitBritain - Visitor Economy Research

Data and research on cultural tourism and the visitor economy, providing context for understanding the economic impact of exhibitions and cultural attractions.

Link: <https://www.visitbritain.org/visitor-economy-facts>

### DCMS / ACE - Taking Part Survey

The UK's official survey of cultural participation, providing data on museum and gallery attendance, demographic breakdowns, and trends over time. Useful for benchmarking and understanding audience behaviours.

Link: <https://www.gov.uk/government/collections/sat--2>

### Association of Leading Visitor Attractions (ALVA)

Annual visitor figures for major UK attractions, providing benchmarking data for the sector. Useful for understanding visitation trends and the competitive landscape.

Link: <https://www.alva.org.uk/details.cfm?p=609>

# Appendix



# Appendix 1 – Glossary of Terms

There are a range of different types of temporary and touring exhibitions. The following outlines these with brief descriptions :

## Exhibition types

**Temporary exhibition** – a curated exhibition of fixed duration (from weeks to months) often focusing on a theme or artists at a cultural venue, which can be free or paid, ticketed entry.

**Temporary display** – likely smaller in scale and often free presentation of objects, perhaps for a shorter duration and sometimes but not always with less interpretation than an exhibition.

**Touring exhibition** – any exhibition with multiple venues, nationally or internationally.

**Bought-in exhibition** – when a venue hires an existing exhibition from another organisation. These can sometimes be tailored to the local context eg with works from the host venue’s collection eg Historic Royal Palaces ‘Royal Portraits’.

**Originated exhibition** – when a single venue programmes an exhibition and then seeks to find venues to take this to in return for a fee, though sometimes free of charge.

**Jointly organised or partnership exhibition** – when two or more partner venues, either nationally or internationally, collaborate to organise and curate an exhibition together which is then shown at each partner venue, though may be adapted in scale and the number and exact works.

**National touring exhibition** – when a national museum or gallery funded directly by government runs a national programme as part of their remit of sharing their collection across the UK

**Network exhibitions** – when a group of venues collaborates to jointly programme and organise a touring exhibition between its institutions. These may be adapted for the local context of specific organisations by theme, works or co-curation.

**Touring collections** – a collection which exists primarily for the purposes of loans and touring rather than being displayed permanently at a single venue.

## Partnership and Production models

The Exhibitions Group defines a production or partnership models as: ‘The way you manage and attribute responsibility for the development and production of your exhibition’ i.e. who is responsible for doing what, and the management model

**Single venue development** – an organisation develops an exhibition on their own, usually displays it at their own venue first, and then seeks tour venues for the exhibition.

**Reactive partnership** – an organisation develops an exhibition on their own, another venue expresses an interest; the exhibition is adapted to be shown at the other venue.

**Lead organisation partnership** – an organisation leads a partnership with one or more partners to develop an exhibition that all partners exhibit, sharing workload and costs in agreement. The lead organisation may take the lead on all, or only some, parts of the exhibition development and production.

**Equal partnership** – a group of organisations form an equal partnership and share costs and workload, to develop an exhibition that each partner exhibits.

**Co-development (co-production, co-curation, co-design)** – one or more organisations develop an exhibition using the co-production, co-curation or co-design model.

**Strategic partnership** – a national or regional organisation brings a group of venues together – through invitation, application or competition – to develop an exhibition, providing funding or/and project management.

**Commercial partnership** – an organisation works with a commercial exhibition touring company to develop and/or promote and manage an exhibition to tour.

The Exhibitions Group defines **an economic model for touring** simply as: ‘**The way you manage all costs and income connected to your touring project**’ i.e. The costs you allocate to the project and the sources of income you use to cover these costs.

- Fully subsidised
- Partial cost recovery
- Full cost recovery
- For profit

## Public engagement and experience

**Interactivity** – elements that allow visitors to actively engage with exhibits, such as hands-on activities, digital interactives, or participatory experiences.

**Multimedia Exhibit** – using digital technology—such as video, audio, or virtual reality—to enhance interpretation and the visitor experience.

**Virtual Reality (VR) Exhibit** – using immersive VR technology to create interactive, often multi-sensory experiences viewed through a headset.

**Augmented Reality (AR) Exhibit** – an exhibit that overlays digital content onto the real world, viewed through devices like tablets or smartphones.

**Outreach** – activities to engage audiences often directly in communities.

## Exhibition making and curation

**Loan Agreement** – a formal contract outlining the terms under which objects are lent for an exhibition, including insurance, transport, and care requirements.

**Condition Report** – a record of the state of an object before and after exhibition or transport, used to monitor any changes or damage.

**Installation** – the process of setting up an exhibition, including the placement of objects, graphics, interpretation and interactive elements. De-installation is the taking down of the exhibition.

**Co-curation** – developing an exhibition or other aspect of a cultural organisation collaboratively, often involving a mix of community members, organisations or artists.

**Environmental Sustainability** – reducing or minimising the environmental impact of exhibition production, transport, and materials, for temporary and touring exhibitions.

## Audience and evaluation

**Interpretation** – the methods and materials used to communicate the relevant themes and stories of an exhibition to visitors, including labels for works, wall panels, audio guides, and digital content.

**Audience Development** – strategies to broaden and diversify the public audiences for exhibitions, including outreach, marketing, and access initiatives.

**Evaluation** – assessing the effectiveness, impact, and visitor experience of an exhibition, often through surveys, observation, and feedback.

**Participatory Practice** – a range of activities where institutions work directly with audiences, including:

- **Consultation** – where a cultural organisation asks the public for views on their past, current or proposed work to inform its decision-making
- **Collaboration** – the practice of working together, within teams, with external partners or with audiences
- **Co-production** – where a cultural organisation works with the public, often local communities, to design and make elements of the institution's programme or other aspects of the organisation, often without a clear intended outcome at the outset

## Finance and operations

**Sponsorship** - financial or in-kind support from external organisations or companies, often in exchange for benefits such as branding or promotional opportunities.

**Hire Fee** - the charge paid by a venue to host a touring exhibition.

**Economies of Scale** - efficiencies achieved by sharing production and operational costs across multiple venues in a touring exhibition.

# Appendix 2 – Research Methodology Overview

Traditional modes and models of exhibition production are changing, national museum touring programmes are seeing new collaborations, there are innovative nationwide partnerships and, as loan costs have risen, organisations have been reactivating their own collections. The Exhibitions Group commissioned this research from Cultural Associates Oxford to provide an overview of temporary and touring exhibitions across the UK and internationally.

This project examines economic, production, and partnership models, assesses challenges, and identifies innovative practices. The research aims to provide sector-wide support and inform the work of The Exhibitions Group.

## Core Research Aims

1. To help The Exhibitions Group fulfil its mission to advocate for temporary exhibitions and touring, and demonstrate impact
2. To use evidence of past and current practice to look at future trends and sustainable economic models
3. To help The Exhibitions Group inform and support the sector in adapting and transitioning their practice in the future.

## Research Objectives

### Primary

*The primary new research and consultation undertaken for this report was*

1. Sector Overview and Future Trends: Mapping temporary and touring exhibitions activity, identifying emerging trends, and assessing the different types of cultural organisations and models
2. Economic Models and Income Opportunities: Analysing production costs, sustainable financial models and ticketing practices
3. Audiences: Highlighting Priority Places and Levelling Up for Culture Places which have the ambition and cultural capital to develop temporary exhibitions or receive touring exhibitions.

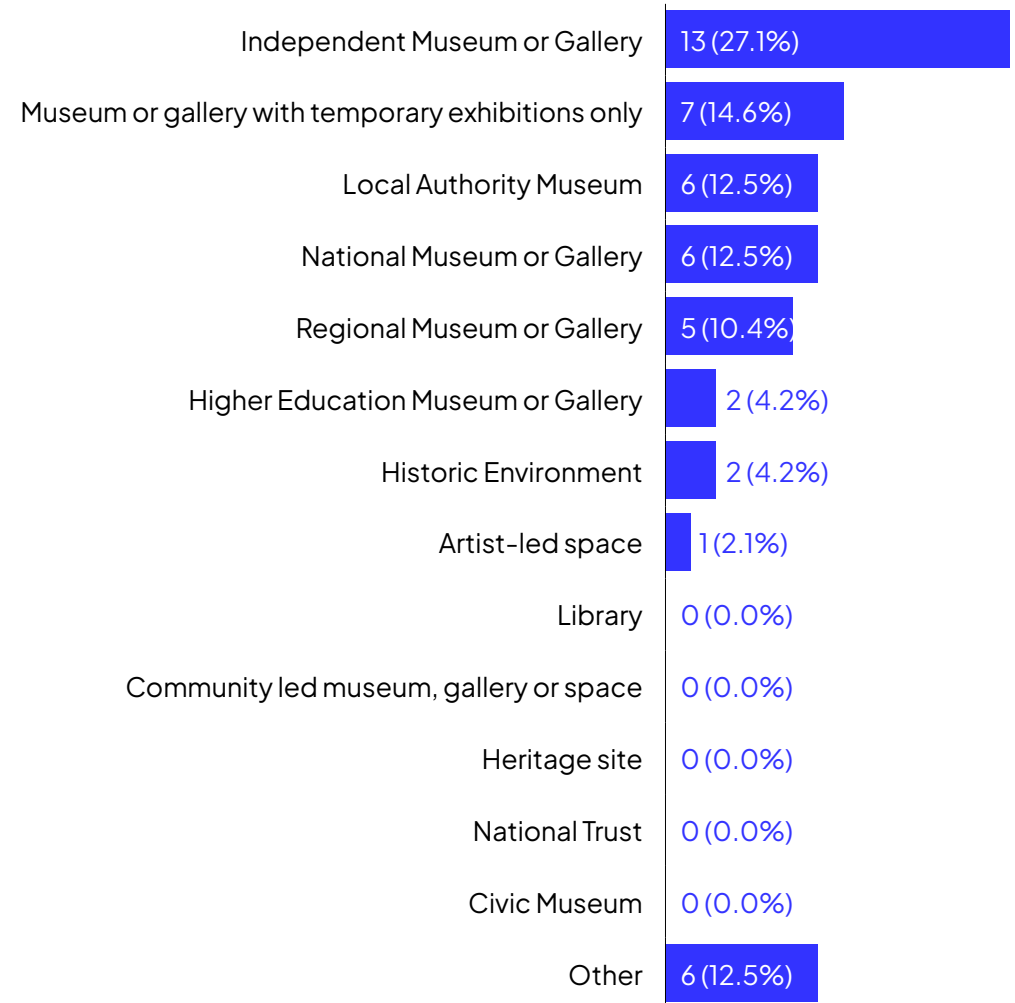
## Secondary

*The following areas were addressed via desk-based research of existing data and documentation*

1. Impact of Challenges: Assessing the effects of reduced funding, Covid-19 and Brexit on exhibitions touring
2. Partnership and Production Models: Examining different partnership and production models
3. Diversity and Inclusion: Benchmarking diversity levels - both in curatorial teams and in audiences - and identifying barriers to participation
4. Audiences: Analysing production models that engage audiences and promote accessibility
5. Environmental Sustainability: Identifying challenges and opportunities in reducing environmental impact
6. Advocacy: Exploring the advocacy potential of exhibitions
7. Training and Support Needs: Assessing skills gaps and recommending training priorities.

The Exhibition Group project brief and initial desktop research were used to identify and frame the principal subject areas for investigation. A three-stage approach was then adopted, commencing with desk-based research, then a sector survey (see appendix 3) to provide detail on the specific research questions, followed by a programme of interviews with individuals representative of temporary and touring exhibition activity (see appendix 4). Finally, a series of roundtable discussions was organised to discuss emerging themes with sector leaders (see appendix 5).

A total of 48 individuals completed the survey on behalf of their organisations, or as individual freelancers. The breakdown of respondents by institution type is given below, and 6 participants (12.5%) described themselves as 'other'. 81% (39) were members of sector bodies, principally The Exhibitions Group (48%, 23).



Survey responses to the question "What kind of organisation are you?" (n = 48)

Almost all of the organisations (98%, 47) participating in the survey had put on temporary or touring exhibitions in the last decade, and all forms of temporary and touring exhibitions were represented, including partnerships (commercial and non-commercial), community co-production, exhibitions originated by national museums, and ones developed by networks such as Plus Tate and MAGNET.

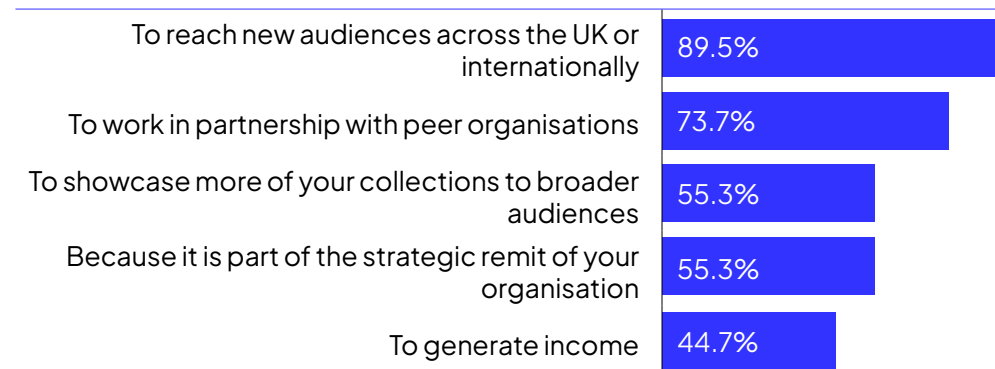
Detailed interviews were then held with 22 individuals with experience of temporary and touring exhibitions across the sector. Themes that emerged from the interviews were then investigated in greater depth at a series of roundtable discussions that addressed three subject areas: economics and financial resilience; partnership and skills; and innovation and impact. In total, 24 individuals participated in the three roundtable discussions.

The survey had a good response, with 48 returns, but one caveat applies to using the data. The responses span very different organisational scales (from large nationals to individual freelancers), generating variability and a few outlier voices. For this reason there is some noise and care should be taken in drawing sector-wide conclusions from the survey data, which were mainly used to surface current issues and to identify research questions.

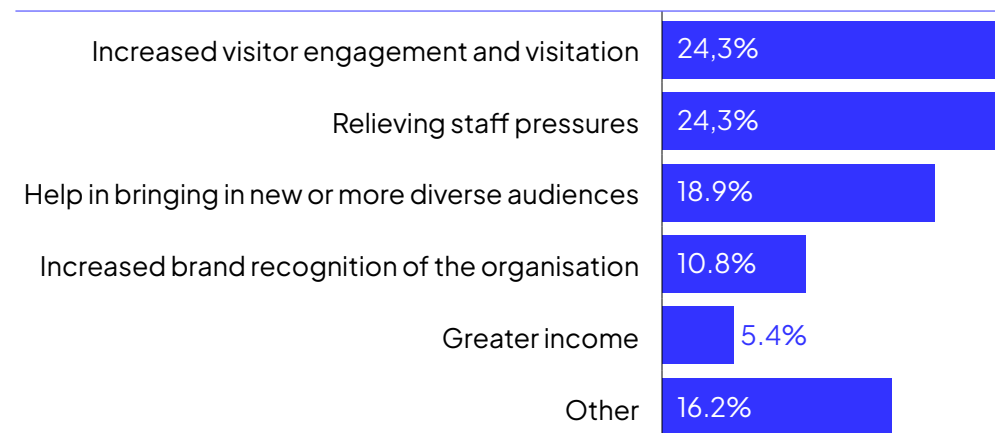
# Temporary and Touring Exhibitions Practice

## Economic, Production and Partnership Models – Survey highlights

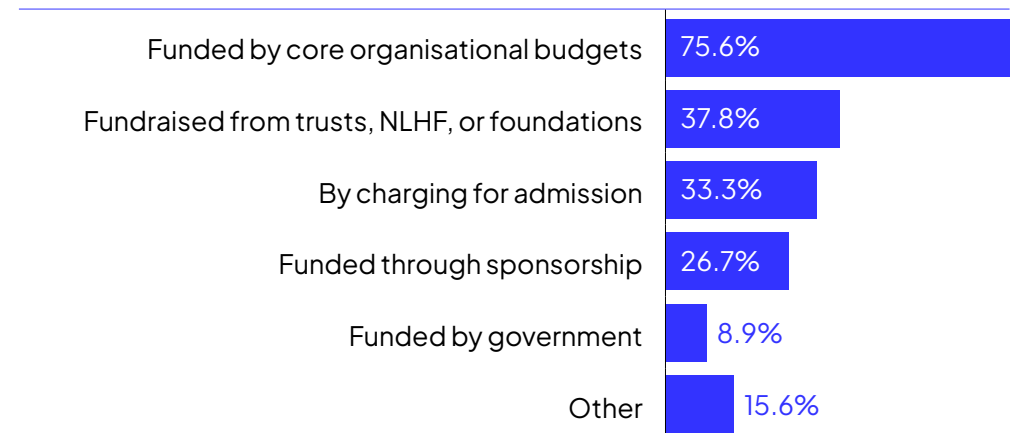
### Motivations for Making Touring Exhibitions



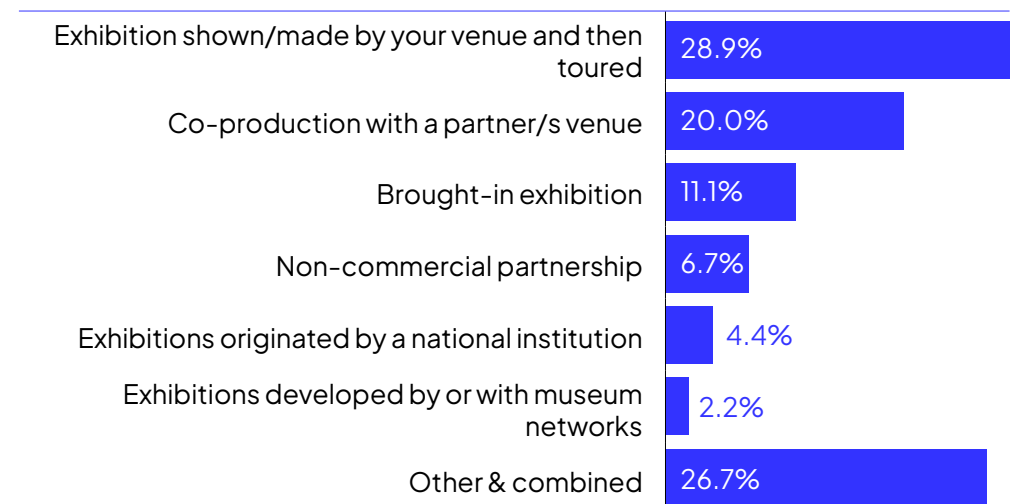
### Key Impacts of Brought-In Exhibitions



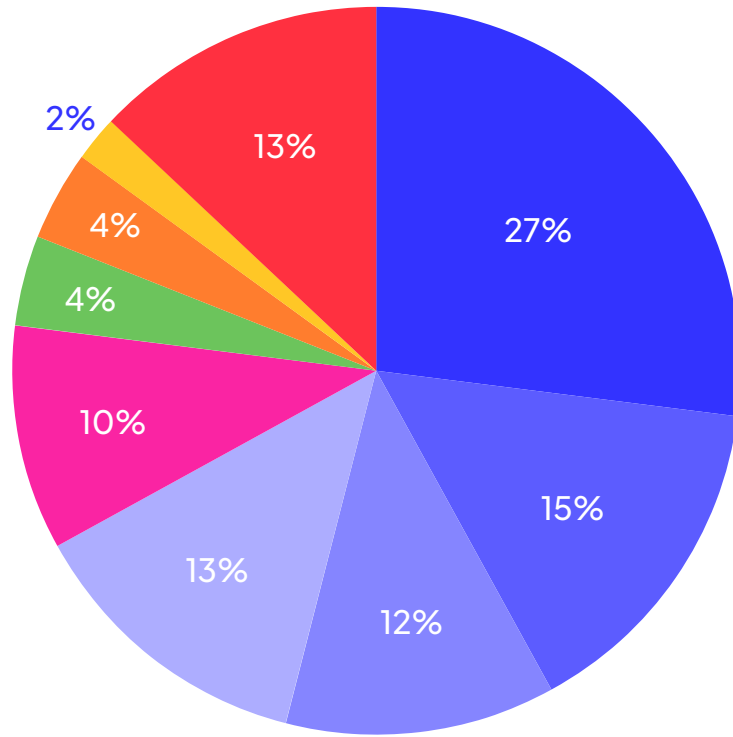
### Temporary Exhibition Funding



### Exhibition Models



# Survey Respondents



- Independent Museum or Gallery
- Museum or gallery with temporary exhibitions only
- Local Authority Museum
- National Museum or Gallery
- Regional Museum or Gallery
- Higher Education Museum or Gallery
- Historic Environment
- Artist-led space
- Other



# Appendix 3 – Sector Survey

The survey was developed following a review and analysis of existing research and studies, which helped identify key gaps to be explored further. The resulting questions were designed to address these gaps and capture sector-wide perspectives.

The survey was live from 16 July to 29 August 2025 and received 48 responses. It was distributed via newsletters and social media through a range of sector networks and organisations, including:

All The Exhibitions Group members, ACE Museum Development Groups, AIM, AN, Art Fund (Going Places), British Art Network, CVAN and YVAN, Dress and Textiles Specialists (Subject Specialist Network), GEM, Geological Curators Group (Subject Specialist Network), Human Remains (Subject Specialist Network), International Exhibition Organisers, MAGNET network, Museums 2030, Museums Galleries Scotland, NMDC, and Plus Tate members.

## Questions

### Section 1 – General Details

*These questions are broad questions about you and your organisation.*

1. Organisation name:
2. Organisation postcode:
3. Name:
4. Job Title:
5. What kind of organisation are you? [options as follows]
  - National Museum or Gallery
  - Regional Museum or Gallery
  - Civic Museum
  - Historic Environment
  - Independent Museum or Gallery
  - National Trust
  - Heritage site
  - Higher Education Museum or Gallery
  - Local Authority Museum
  - Community led museum, gallery or space
  - Museum or gallery with temporary exhibitions only
  - Library
  - Artist-led space
  - Other [free text]
6. How many staff does your organisation employ (to include FTE, PTE, contract / agency etc, but not including volunteers)? [<5, 5-10, 10-30, 30-50, 50+]

7. How many members of your team are dedicated to exhibition making, including temporary exhibitions (i.e. curatorial, registrarial, designers etc)?
8. How many of your team are specifically dedicated to managing and looking after touring exhibitions only?
- How many of this team are inhouse curators?
  - How many are inhouse exhibition team members?
  - How many are freelancers?
9. What is your organisation's annual exhibition budget, if you have one?
- Or is each exhibition funded separately?
  - Does your exhibition budget include staffing costs for exhibitions? [Yes / No]
10. Is your organisation a member of a sector body/ bodies such as The Exhibitions Group? Y/N
- If Yes, which one?

## Section 2 – Temporary & Touring Exhibitions

*These questions are about the temporary and touring exhibitions that your organisation has been involved in as a host venue or as an exhibition producer*

11. In the past decade, has your organisation put on any temporary or touring exhibitions? [Yes/No]
12. Of those exhibitions, how many did you tour? [options 0, 1-5, 5-10, 10+, N/A]
13. In the past decade, how many exhibitions did your organisation make specifically and only for touring?
- How many of your touring exhibitions travelled in the UK?
  - How many of your touring exhibitions travelled beyond the UK?

14. How many temporary, touring or partnership exhibitions did your organisation bring in from other organisations in the last decade?

- Temporary exhibitions - [0, 1-5, 5-10, 10+, N/A]
- Touring exhibitions - [0, 1-5, 5-10, 10+, N/A]
- Partnership exhibitions - [0, 1-5, 5-10, 10+, N/A]

15. What were the three most popular touring, temporary or partnership exhibitions that your organisation put on and how many people attended?

- Temporary exhibitions
- Touring exhibitions
- Partnership exhibitions

16. Which organisations did you work with to bring in a touring, temporary or partnership exhibition/s?

17. What kind of model was the touring, temporary, or partnership exhibition:

- Touring exhibition shown / made by your venue and then toured
- Co-production with a partner/s venue
- Bought-in exhibition
- Commercial partnership
- Non-commercial partnership
- Exhibitions originated by a national institution
- Exhibitions developed by or with museum networks such as Plus Tate or MAGNET
- Other [free text]

18. How many of these exhibitions were brought in from another UK organisation?

19. How many of these exhibitions were exhibitions brought in from an international organisation?

20. How do you finance touring exhibitions that you bring to your organisation? [tick all that apply]

- Funded by core organisational budgets

- Funded by government
- Fundraised from trusts, NLHF, or foundations
- Funded through sponsorship
- Funded through membership of an organisation or association (i.e. Plus Tate, Living Knowledge Network, Other)
- By charging for admission
- Other [free text box]

21. How do you finance temporary exhibitions that you bring to your organisation? [tick all that apply]

- Funded by core organisational budgets
- Funded by government
- Fundraised from trusts, NLHF or foundations
- Funded through sponsorship
- Funded through membership of an organisation or association (i.e. Plus Tate, Living Knowledge Network, Other)
- By charging for admission
- Other [free text box]

22. What is the impetus for your organisation to create touring exhibitions for other organisations?

- Because it is part of the strategic remit of your organisation
- To showcase more of your collections to broader audiences
- To generate income
- To reach new audiences across the UK or internationally
- To work in partnership with peer organisations

23. If your organisation has not brought in a touring exhibition, do you plan to do so in the future? [Yes/No]

24. If so, why?

- To help increase visitor numbers
- To help diversity visitors
- To generate income
- To increase our profile
- To bring in more fundraising

- To work in partnership with other organisations and partner bodies
- Other [free text]

25. Over the past two years, would you say that the amount of work you do internationally in relation to touring and receiving exhibitions has:

- Increased a lot
- Increased a little
- Stayed about the same
- Decreased a little
- Decreased a lot

26. Are there other major factors at play that impact the amount of work your organisation does internationally in relation to touring and temporary exhibitions?

### Section 3 – Benefits of Temporary & Touring Exhibitions

*These questions are about the benefits, impact and resources needed to put on a temporary or touring exhibition*

27. Is it part of your organisation's strategy to bring in pre-existing touring exhibitions? Y/N

- If you answered Yes, what part of your organisation's mission / purpose does it refer to?

28. What do you think have been the key impacts of the touring exhibitions you have brought in?

- Increased visitor engagement and visitation
- Help in bringing in new or more diverse audiences
- Increase in fundraising
- Greater income
- Relieving staff pressures

- Increased brand recognition of the organisation
- Opening of more research opportunities
- Other [free text]

29. Do you have any research or evidence of the impacts from these exhibitions? [Yes/No]

- If Yes, please provide more info such as a link to a research report or contact details for someone who can give us more information

30. Based on the geographic location of your organisation, have you had any issues in accessing temporary or touring exhibitions and access to funding or engagement with audiences? [Yes/No]

- If you answered Yes, please outline those issues here

31. Do you have the resources (i.e. staff capacity) in place to bring in a touring exhibition? [Yes/No]

- If you answered Yes, please say which roles within your organisation manages and administers the touring exhibition
- If you answered No, please choose from the options below who need to be recruited to support a temporary or touring exhibition:
  - Project Manager
  - Curator
  - Communications Officer
  - Loans registrar
  - Fundraiser
  - Exhibition gallery staff - i.e. invigilators / front of house staff
  - Other [free text]
- What training and development would your team need to be able to work on touring exhibitions? [free text]

32. Do you have the resources to develop touring exhibitions for other organisations? Y/N

- If yes, please outline whose role this is and how many people are involved?

33. Has your organisation seen an increase in the demand for your temporary or touring exhibitions to other organisations post-pandemic? [Yes/No]

- If you answered Yes, can you say if this pattern has stabilised, continued to increase or reversed?
- Do you know why?

34. Has your organisation seen a decrease in the demand for your temporary or touring exhibitions to other organisations post-pandemic? [Yes/No]

- If you answered No, can you say if this pattern has stabilised, continued to decrease or reversed?
- Do you know why?

## Section 4 – Support and Advice

*This section looks at support and advice that would be useful to your organisation in the future in regard to touring exhibitions.*

35. What area of support and advice does your organisation need to help bring in touring, temporary and partnership exhibitions in the future?

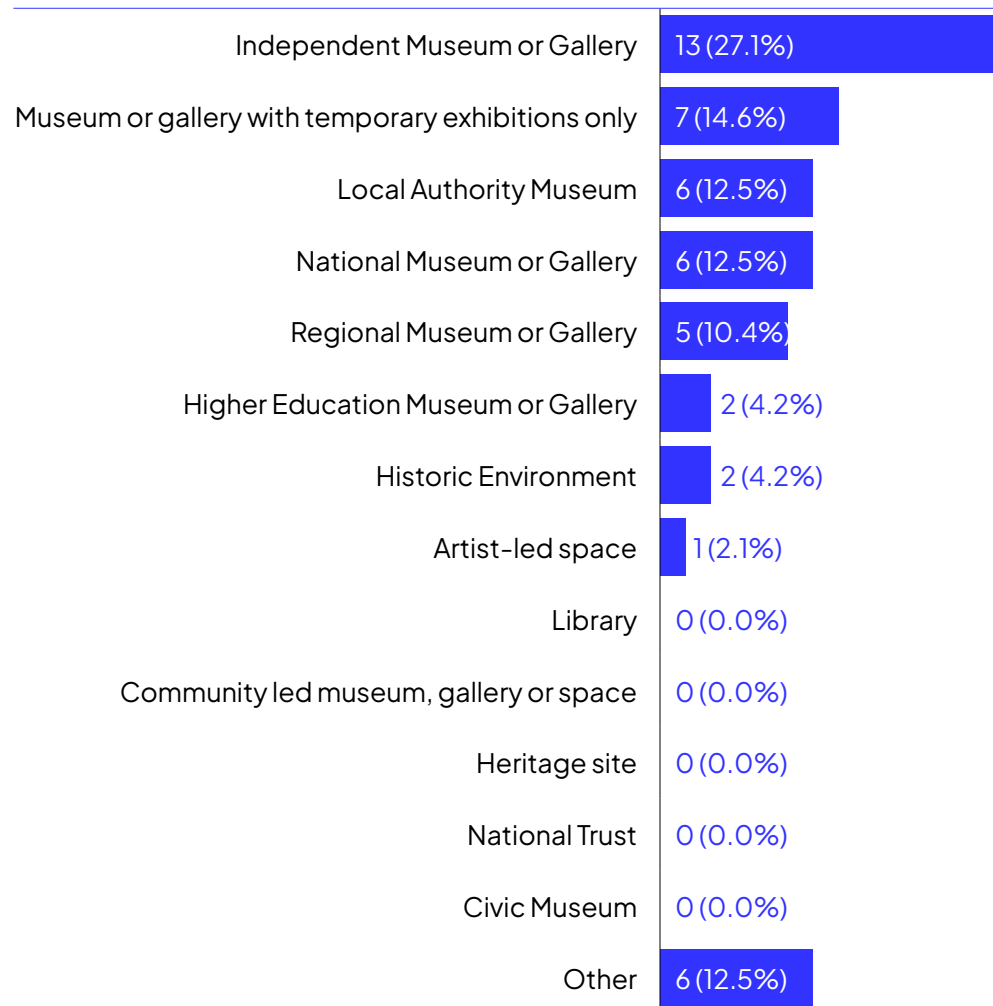
- Access to finance and fundraising
- How to resource (i.e. staff) a touring exhibition
- How to evaluate and measure impact
- Who to work with and where to find partners
- How to get the best from partnerships
- How to make and tour exhibitions sustainably
- Where to start?
- Community partnerships / engagement
- Other [free text]

36. Any further comments – please add them here.

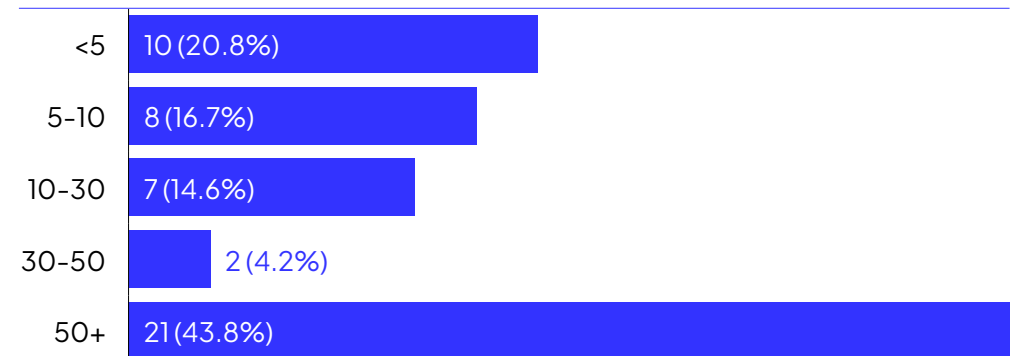
# Survey – Summary of Themes

## Section 1 – General Details

### What kind of organisation are you?



### How many staff does your organisation employ?



### Does your exhibition budget include staffing costs for exhibitions?



### Is your organisation a member of a sector body / bodies such as The Exhibitions Group?

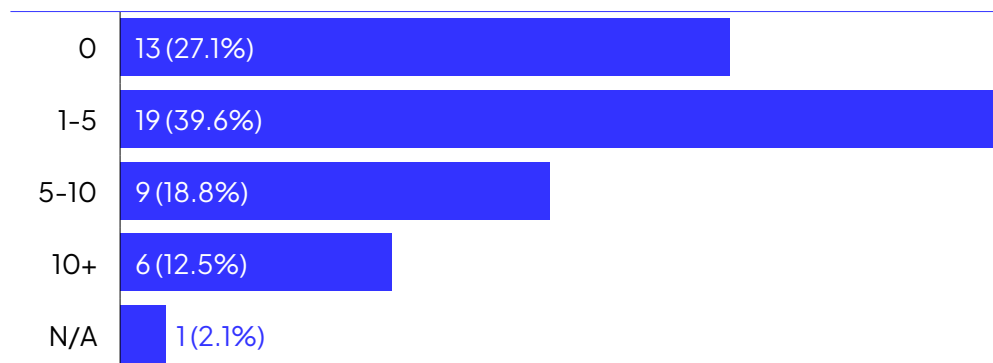


## Section 2 – Temporary & Touring Exhibitions

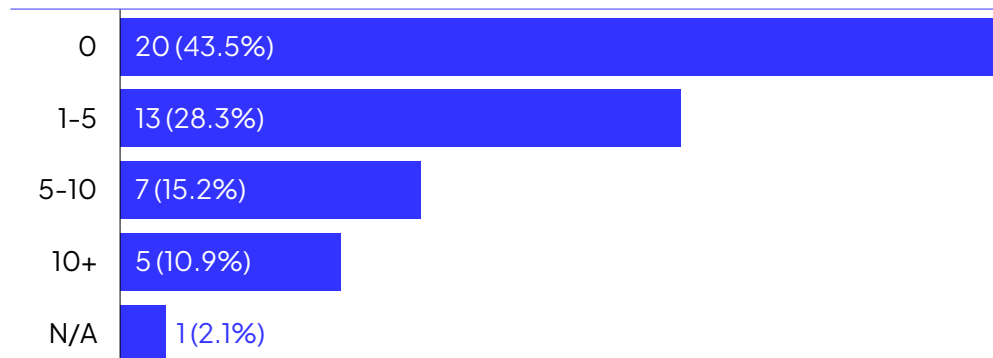
In the past decade, has your organisation put on any temporary or touring exhibitions?



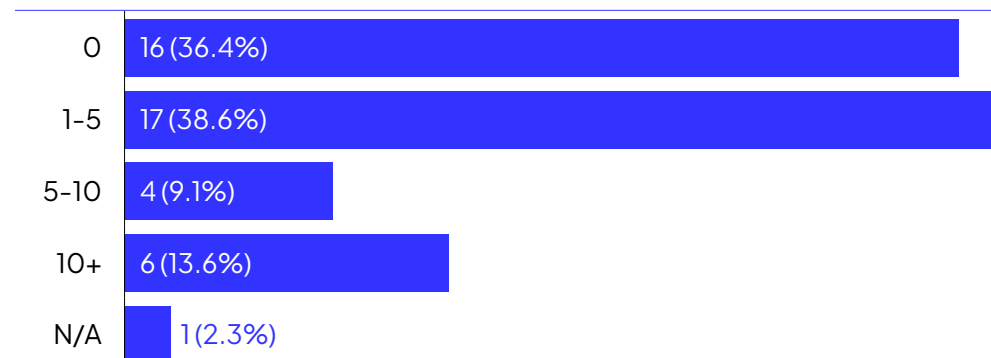
If yes, how many of those exhibitions did you tour?



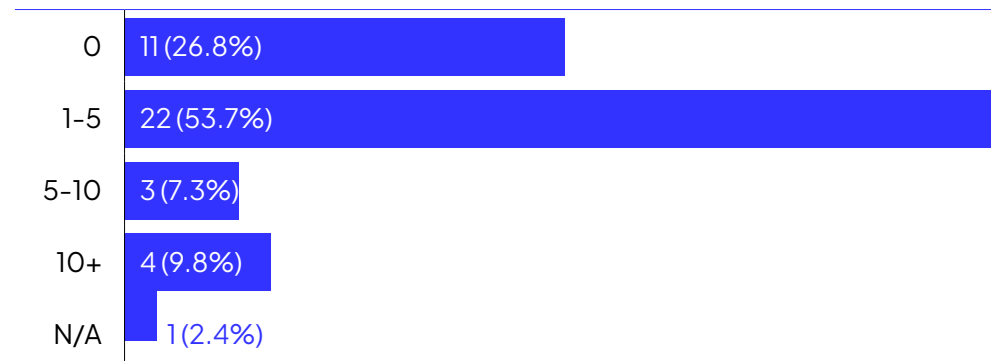
How many temporary exhibitions did your organisation bring in from other organisations in the last decade?



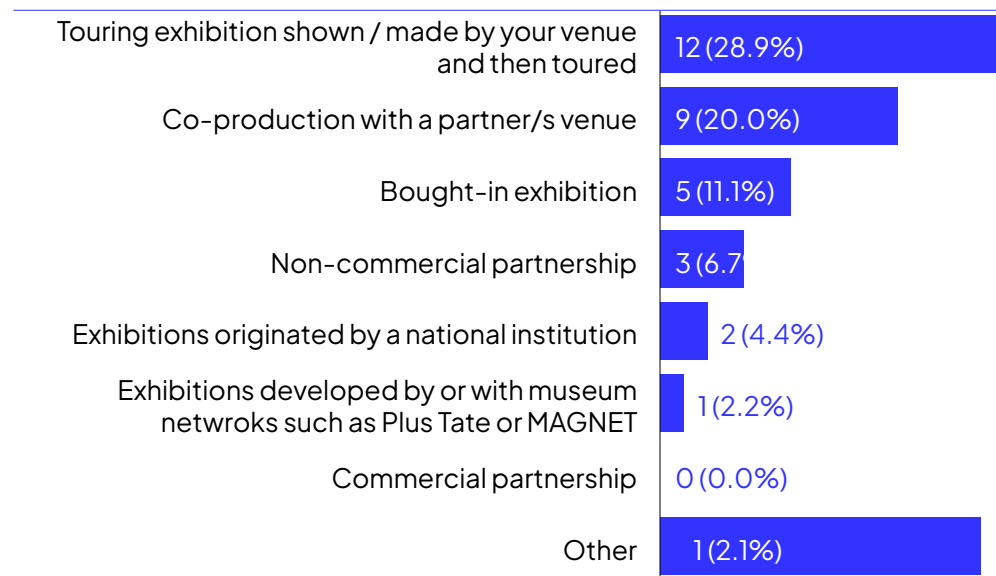
How many touring exhibitions did your organisation bring in from other organisations in the last decade?



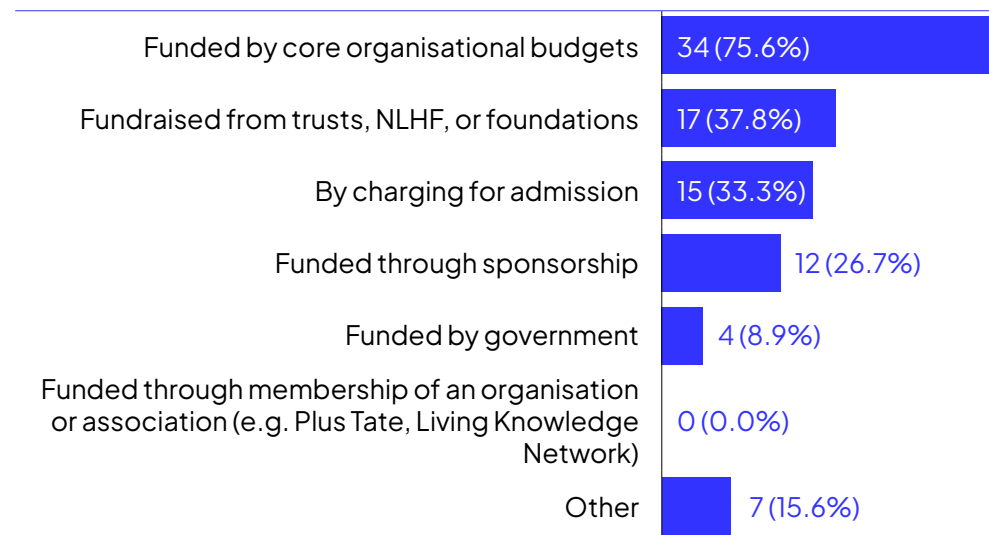
How many partnership exhibitions did your organisation bring in from other organisations in the last decade?



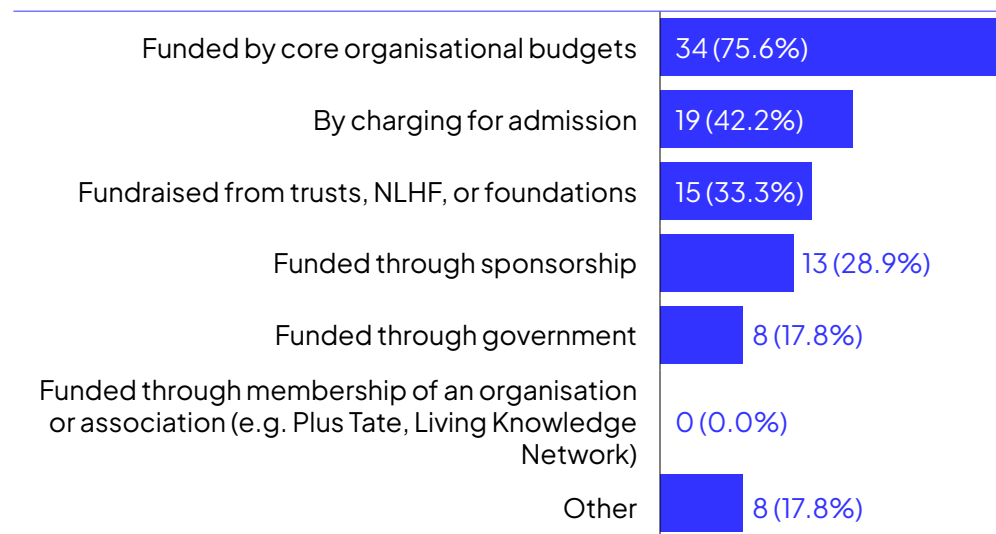
## What kind of model was the touring, temporary, or partnership exhibition?



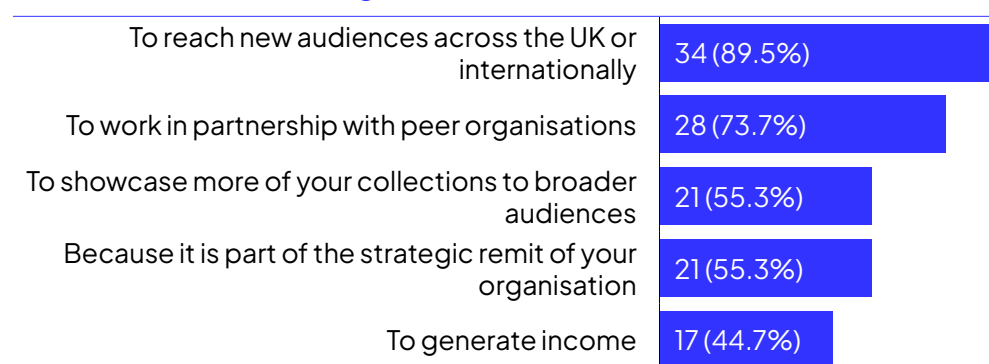
## How do you finance temporary exhibitions that you bring to your organisation?



## How do you finance touring exhibitions that you bring to your organisation?



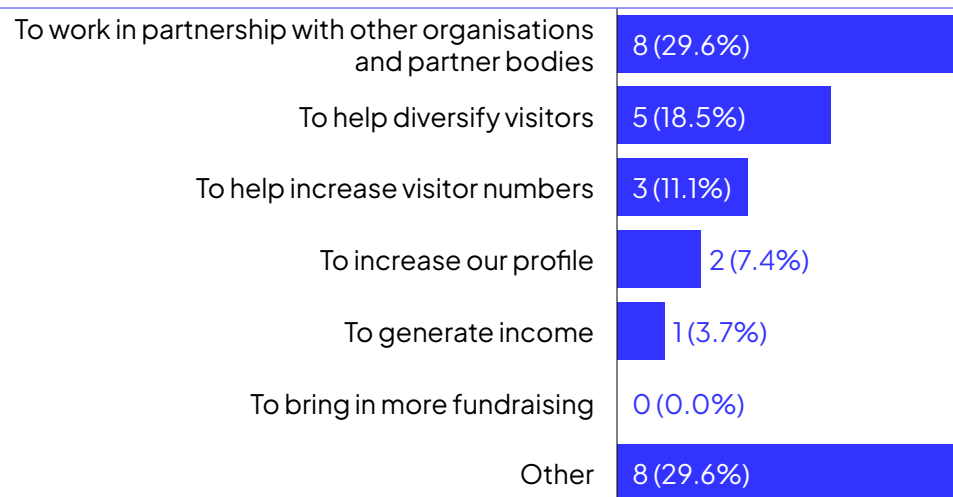
## What is the impetus for your organisation to create touring exhibitions for other organisations?



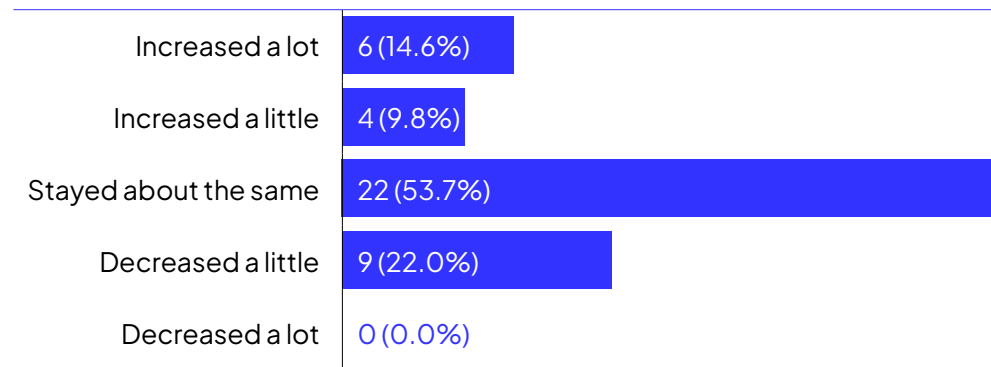
## If your organisation has not brought in a touring exhibition, do you plan to do so in the future?



## If so, why?



Over the past two years, would you say that the amount of work you do internationally in relation to touring and receiving exhibitions has:



Are there other major factors at play that impact the amount of work you do nationally/internationally in relation to touring and temporary exhibitions?

- Staff capacity limitations: small teams struggle with administration, logistics, and planning.
- Financial pressures: insufficient budgets for transport, insurance, security, and production.
- Geographic disadvantage: distance and rurality make touring difficult and expensive.
- Economic climate: reduced visitor spending and local authority cuts constrain ambition.
- Infrastructure gaps: outdated or inadequate spaces limit the ability to host or tour.
- Strategic shifts: organisations reprioritising toward local relevance, reducing outward touring.
- Brexit and insurance challenges: extra cost and complexity reduce feasibility of international work.

## Section 3 – Benefits of Temporary & Touring Exhibitions

Is it part of your organisation's strategy to bring in pre-existing touring exhibitions?



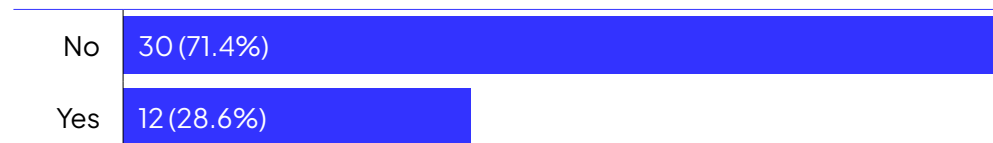
If you answered Yes, what part of your organisation's mission/purpose does it refer to?

- Commitments to audience development, especially underserved groups.
- Education and public engagement aims, with exhibitions as core public-facing tools.
- Collections access and interpretation goals, using exhibitions to showcase underused material.
- Collaboration as core mission, with touring supporting national/international partnership building.
- Economic regeneration or placemaking missions for some venues.

### What do you think have been the key impacts of the touring exhibitions you have bought in?



### Do you have any research or evidence of the impacts from these exhibitions?



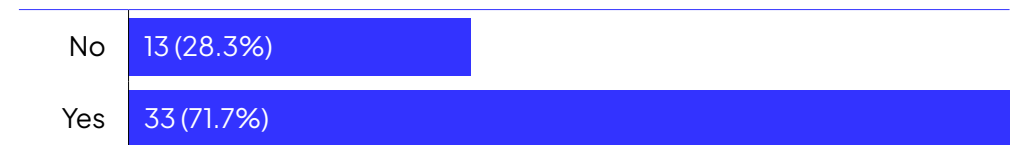
### Based on the geographic location of your organisation, have you had any issues in accessing temporary or touring exhibitions and access to funding or engagement with audiences?



### If you answered Yes, please outline those issues here

- Access barriers for rural audiences: lack of transport, lower local incomes, and fewer cultural opportunities.
- Unequal funding landscape, with organisations outside major cities struggling to compete.
- Difficulty attracting touring exhibitions due to limitations in space, climate control, or staff.
- Capacity issues, especially in small museums, leading to stalled or abandoned touring plans

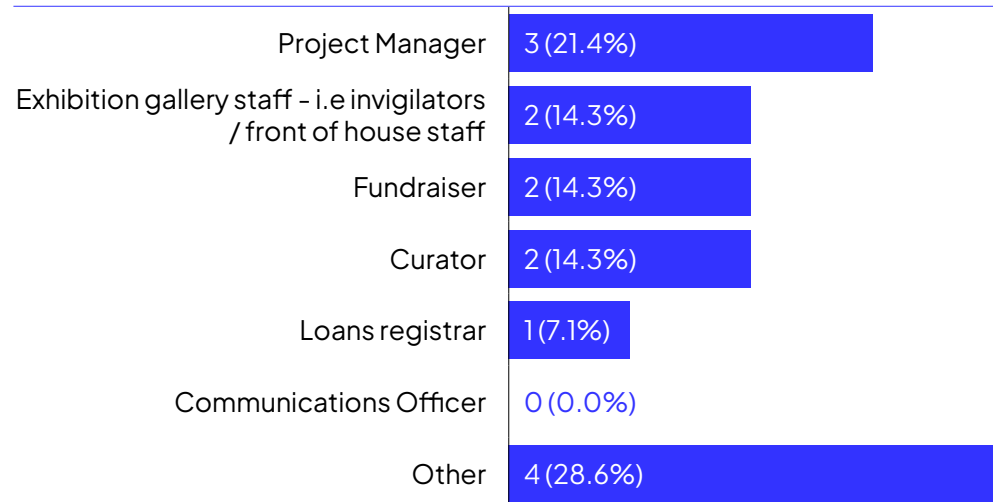
### Do you have the resources (i.e. staff capacity) in place to bring in a touring exhibition?



### If you answered Yes, please say which roles within your organisation manage/administer the touring exhibition

- Touring responsibilities are often spread thinly across several staff.
- In many organisations, touring is added on to already full roles rather than resourced separately.
- Some organisations rely on informal or ad hoc structures rather than dedicated staffing.
- A small number have specialist staff, but this is the exception.

If you answered No, please choose from the options below who need to be recruited to support a temporary or touring exhibition



What training and development would your team need to be able to work on touring exhibitions?

- Project management and logistics, including transport, packing, and compliance.
- Contracting, legal frameworks, and loan agreements; lack of confidence in navigating legal requirements.
- Budgeting and fundraising for touring, especially for smaller organisations.
- Environmental sustainability and greener touring practices.
- Evaluation and impact measurement, where many teams feel under-skilled.
- Technical skills, including installation, object handling, and digital exhibition tools.
- Community engagement and co-production, increasingly central but not fully supported by training.

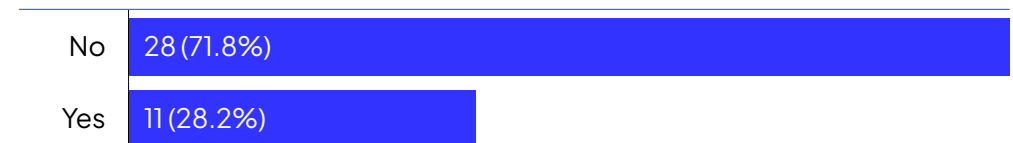
Do you have the resources to develop touring exhibitions for other organisations?



If yes, please outline whose role this is and how many people are involved?

- Touring responsibility is frequently shared between very small teams (often 1–2 people).
- Staff are often multi-hatted, taking on touring alongside curatorial, engagement, operations, or leadership duties.
- Workloads described as unsustainable, with insufficient staff to support ambitions.

Has your organisation seen an increase in the demand for your temporary or touring exhibitions to other organisations post-pandemic?



### Do you know why?

- Appetite for “something different”: audiences seeking fresh experiences after the pandemic.
- Economic pressures leading to either:
  - increased demand for touring (cheaper than producing in-house),
  - decreased demand (because even hosting touring shows is too expensive).
- Reduced risk-taking from organisations due to financial uncertainty.
- Shift in visitor behaviours, with some respondents noting shorter visits or lower dwell times.

### Has your organisation seen a decrease in the demand for your temporary or touring exhibitions to other organisations post-pandemic?

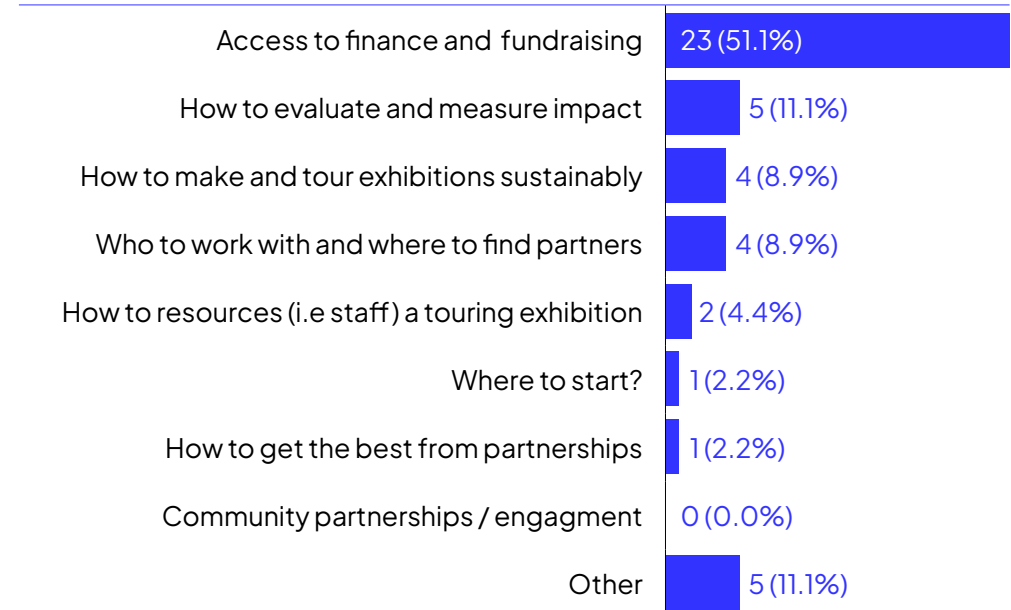


### Do you know why?

- Economic austerity: rising costs reduce ability to host or create exhibitions.
- Competing priorities: staff time diverted to core operations or commercial survival.
- Visitor behaviour changes reducing confidence in investing in new exhibitions.
- Limited internal expertise to support touring exhibitions.

## Section 4 – Support and Advice

### What do you think have been the key impacts of the touring exhibitions you have bought in?



### Any further comments – please add them here

- Concern about lack of support for artists, especially remuneration and participation.
- A sense of being overwhelmed: many small organisations feel unable to engage meaningfully in touring due to limited capacity.
- Desire for clearer national strategy: respondents expressed interest in more coordinated sector support.
- Calls for equitable access: smaller organisations want more opportunities to participate in touring ecosystems.
- Some emphasised hopefulness: co-commissioning, networks, and partnership models seen as promising ways forward.

# Appendix 4 – Interviews

As part of its research and consultation CAO conducted 1-2-1 interviews with 22 cultural leaders, and also led three thematic roundtable discussions with 24 expert participants. The following is a summary of the questions, topics and themes which emerged from this rich and insightful contributions.

## Questions

### Introduction & Background

- Could you start by telling us about your role and organisation?
- What is your knowledge or involvement in temporary or touring exhibitions?

### Sector overview and trends

- What is the main motivation for producing temporary or touring exhibitions? [Prompt: organisational remit; income generation; audience development etc]
- How do you measure the impact of exhibitions? [Prompt: economic, societal, wellbeing]
- Tell us more about your experience or knowledge of international touring exhibitions which originate in the UK. How are they developed, how are partners sought, what is the economic model?
- What shifts and trends have you seen / are happening in making temporary exhibitions and tours? What is driving these changes?

### Economic models and income opportunities

- What innovative or new economic models have you seen emerging?
- How do you raise funds for exhibitions and how has this been changing?
- What ticketing or pricing models have you seen tested, and which are proving successful? [Prompt eg dynamic pricing, pay what you can etc]
- To what extent do you think economic or cultural cold spots create a disparity of opportunity in relation to accessing temporary and touring exhibitions? How could this be addressed?

## Partnership and production models

- How have partnership and production models adapted to recent challenges? [eg rising costs, Brexit, COVID 19, changing visitor behaviours]
- What new, innovative models for partnership and production have you seen which are proving successful?
- Where do you consider best practice to be happening in collaborative working?
- How are temporary and touring exhibitions being realised to adapt to meet local partner venue and audience needs?
- How are artists, curators or international peers influencing practice?
- How is digital and the growing interactive or immersive experiences influencing practice?

## Diversity and inclusion

- In your view, what are the barriers to participation in temporary and touring exhibitions? [Prompt: Location, access, curatorial diversity, relevant subject matter]
- Where are the examples of good practice in workforce diversity?

## Audiences

- What models of exhibition making and touring have involved local communities in their creation most successfully? What were the key factors?
- Are there best practice examples of temporary or touring exhibitions which are fully accessible to audiences with a range of specific access needs?

## Interviewees

Organisation / rationale	Interviewee
ACE	Helen Cooper
MAGNET	Dominic Neergheen
Going Places	Gracie Divall
Ashmolean Museum	Rachel Davies
National Portrait Gallery	Miranda Stacey
National Museums Liverpool	Laura Pye
National Justice Museum	Victoria Reeves
Cornwall Museum and Art Gallery	Bryony Robins and Jonathan Morton
Wessex Museum Partnership	Hannah Baker
Golden Thread Gallery	Sarah McAvera
St Albans Museums	Catherine Newley
Manchester Museum	Esme Ward
ffotogallery	Siân Addicott
CVAN	Paula Orrell
Hayward Touring	Gillian Fox
York Museums Trust	Kathryn Blacker
Consultancy overview	Mike Sarna
Consultancy overview	Rob Gammage
Artist perspective	Adam Sanders
Artist perspective	Ceri Hand
Curator / Artist perspective	Mike Stubbs

# Interviews – summary of themes

## 1. Introduction & Background

### 1.1 Roles and organisational contexts

Across interviews, participants represented a wide range of roles, including: directors of museums, senior curators, partnership leads, programme managers, touring exhibition specialists, producers, consultants, and independent practitioners. Despite differing scales of institution, ranging from large national museums to small rural organisations, several consistent contextual factors appeared:

- Reduced core funding and sustained financial pressure
- Increasing expectations for audience reach, social impact and relevance
- A shift toward mixed portfolios (exhibitions, events, digital, learning, community projects)
- Increased organisational precarity, with stretched teams and increasing reliance on freelancers, volunteers, and partnerships

### 1.2 Experience of temporary and touring exhibitions

Interviewees collectively described extensive experience in producing, hosting, commissioning and touring exhibitions regionally, nationally and internationally. Shared experiences and challenges included:

- Managing complex logistics (transport, loans, insurance and compliance).

- Developing new models of co-production and community involvement.
- Adapting exhibitions to small or non-traditional spaces.
- Touring as a means of audience development, income generation, profile-building, or research dissemination.

## 2. Sector Overview and Trends

### 2.1 Motivations for producing temporary or touring exhibitions

Across the sector, motivations for exhibition making include:

- Audience development: attracting new, younger, local or under-served groups.
- Income generation and financial resilience: particularly among larger venues or those able to charge.
- Collections activation: enabling interpretation of underused collections and supporting institutional research priorities.
- Civic and social purpose: using exhibitions to address contemporary issues, stimulate debate or to strengthen community relationships.
- Organisational visibility and brand building: raising profile locally, nationally or internationally.
- Partnership building: forging networks across regions, nations and disciplines.

### 2.2 Approaches to measuring impact

Impact measurement varies widely by capacity but commonly includes:

- Quantitative data: visitor numbers, demographics, ticket sales and secondary spend.

- Qualitative data: audience comments, interviews, community feedback and case studies.
- Evaluation frameworks: linked to funder requirements, such as social impact, research impact, environmental indicators and equity metrics.
- Partner and workforce development: skills gains, confidence, institutional change.
- Environmental indicators: increasingly required, though still emerging in practice.

A common theme is the absence of robust, consistent evaluation tools, particularly for small organisations.

### 2.3 International touring models

International touring was described as viable only for larger organisations or highly commercial models, with consistent themes:

- High costs, complex compliance, and increased risks post-Brexit.
- Preference for exhibitions that are lightweight, flexible, and modular.
- Reliance on established networks, agents, or promoters to secure overseas venues.
- International tours being most successful when tied to major IP, well-known artists, or strong curatorial narratives.
- For many organisations, international touring is aspirational but inaccessible due to resource constraints.

### 2.4 Shifts and sector-wide trends driving change

Participants noted several structural shifts:

- Later booking cycles and increased uncertainty post-pandemic.
- Greater demand for adaptation of touring shows to local context.
- Rapid growth in immersive and digital formats, though with divided opinions about their sustainability and artistic merit.
- Increasing cost pressures across transport, materials, energy, insurance, and staffing.
- A growing emphasis on social relevance, community voice, decolonisation, and ethical practice.
- Rising expectations for museums to be participatory, transparent, and responsive, not solely custodial.

## 3. Economic Models and Income Opportunities

### 3.1 Emerging and innovative models

Interviewees highlighted experimentation with:

- Co-commissioning and networked development models, sharing risk and cost.
- Flexible, modular touring formats, reducing transport and build costs.
- Membership and loyalty models, including multi-site passes.
- Event-based income, such as private hires, late events, or festivals.
- Commercial sponsorship, although opportunities vary widely by geography.
- Exhibition tax relief, increasingly important for financial viability.
- Public-private partnerships, especially for large-scale immersive projects.

### 3.2 Fundraising approaches

Common approaches to securing funds:

- Trusts and foundations, often essential for free-entry organisations.
- Multi-year funding for partnerships and networks.
- Capitalising on organisational assets: collections, buildings, brand, or expertise.
- Artist- or research-led funding through academic and creative sector grants.
- Crowdfunding and small-scale community fundraising.

Smaller organisations emphasised capacity constraints as a major barrier to fundraising.

### 3.3 Ticketing and pricing models

A wide diversity of models are in use:

- Free admission with donation-based exhibition entry.
- Pay What You Can: seen to broaden access and occasionally outperform fixed pricing.
- Standard paid entry, bundling exhibitions with general admission.
- Premium-priced immersive experiences in some urban centres.
- Family-friendly pricing, including under-18s free, season passes, or flexible entry schemes.

Pricing decisions are strongly shaped by local context, audience expectations, and organisational mission.

### 3.4 Cold spots and disparities

Interviewees noted persistent geographic disparities:

- Rural or economically disadvantaged regions face limited infrastructure, transport barriers, and reduced sponsorship opportunities.
- Touring models often bypass these regions due to cost and capacity constraints.
- Collaborative networks, targeted funding, and flexible loan requirements were seen as key to addressing inequality.

## 4. Partnership and Production Models

### 4.1 Adaptation to recent challenges

Organisations have adapted by:

- Increasing collaboration, both within and across institutions.
- Sharing curatorial, technical, and marketing capacity.
- Developing leaner production methods (vinyl graphics, digital replacements, material reuse).
- Responding to reduced staffing by using freelancers, volunteers, and peer support.
- Reconfiguring touring models to allow local variations and simplified logistics.

### 4.2 Successful partnership and production innovations

Examples of strong practice include:

- Networked exhibitions, where partners co-develop content and share responsibilities.

- Toolkits, mentoring, and shared resources to build sector capacity.
- Exhibition formats designed to change and accumulate content as they travel.
- Partnerships with artists and communities to create place-specific iterations.
- Multi-venue regional consortia enabling risk-sharing and consistent programming.

#### 4.3 Best practice in collaborative working

Common success factors:

- Clear expectation-setting, formal agreements, and transparent decision-making.
- Early identification of partner strengths and capacity.
- Trust-based relationships and open communication.
- Recognition of the emotional labour involved in community-led projects.

#### 4.4 Adapting exhibitions for local context

Adapting for locality was highlighted as both essential and resource-intensive:

- Adding local objects or stories.
- Tailoring interpretation, languages, or access needs.
- Involving community groups to reflect lived experience.
- Modifying layout, scale, or production elements for different venues.
- Developing an exhibition as a conversation between national content and local identity.

#### 4.5 Influence of artists, curators, and peers

Artists and curators influence practice through:

- Driving new forms of storytelling and interpretation.
- Advocating for ethical and inclusive collaboration.
- Introducing experimental or immersive methods.
- Bringing international perspectives into local contexts.
- 

#### 4.6 Digital and immersive trends

Views diverged significantly:

- Some see immersive and digital as audience drivers, offering revenue and reach.
- Others see fatigue, cost barriers, and limited artistic value.
- Digital is more widely adopted for evaluation, access, and research than for exhibition spectacle.
- Hybrid models combining objects with digital interpretation appear promising.

## 5. Diversity and Inclusion

### 5.1 Barriers to participation

Key barriers include:

- Social and economic inequalities: cost of travel, childcare, food, or lost income.
- Limited physical or sensory access in older museum buildings.
- Perceived irrelevance or lack of representation in exhibition narratives.
- Limited curatorial diversity and constrained institutional capacity.

- Emotional or psychological barriers when engaging with museums or sensitive subject matter.

## 5.2 Examples of good practice

Good practice commonly involves:

- Long-form, relationship-based work with communities.
- Co-curation with groups who have lived experience of the themes.
- Support structures for emerging practitioners.
- Flexible partnership arrangements that reduce barriers for contributors.
- Embedding inclusion into mainstream exhibitions rather than siloed spaces.

However, most interviewees noted that the sector remains uneven in workforce diversity.

# 6. Audiences

## 6.1 Community involvement in exhibition creation

Successful models of community-engaged exhibition making share characteristics:

- Early involvement in shaping themes, stories, and interpretive strategies.
- Respect for lived experience, with clear roles and expectations.
- Paid participation or practical support (transport, childcare).
- Iterative processes allowing exhibitions to evolve in response to input.

- Blended approaches that combine professional curation with grassroots creativity.

These models help build trust, cultural confidence, and new audiences.

## 6.2 Accessibility best practice

While capacities vary, common approaches include:

- Multi-sensory interpretation, audio description, and simpler language.
- Flexible exhibition layouts and quiet times.
- Dedicated programmes for SEND groups or vulnerable communities.
- Digital tools to extend access beyond physical galleries.
- Low-barrier pricing or free-access exhibition spaces.

Interviewees emphasised that accessibility is a continuous process, not a fixed benchmark.

# Appendix 5 – Roundtable Discussions

## Methodology and agendas

Groups were organised thematically to align research areas, target relevant participants, and ensure comprehensive coverage of The Exhibitions Group's research objectives. Each group consisted of up to 10 participants, representing a diverse cross-section of roles and perspectives from across the exhibitions sector.



## Roundtable 1: Economic and Operational Resilience

Time	Activity
1200-1205	<b>Arrivals</b>
1205-1207	<b>Welcome and introductions</b>
1207-1215	<p><b>Introduction to the research and key issues to explore today</b></p> <p>Economic and Operational Resilience:</p> <ul style="list-style-type: none"> <li>• Business and operational models</li> <li>• Production costs and funding models</li> <li>• Ticketing practices</li> <li>• Economic cold spots</li> <li>• Impact of Brexit/Covid</li> </ul> <p>A short summary of our emerging findings.</p>
1215-1310	<p><b>Roundtable discussion</b></p> <ul style="list-style-type: none"> <li>• Initial reflections on the research from each participant</li> <li>• Discussion around economic and operational resilience.</li> </ul> <p><b>Questions to consider:</b></p> <ol style="list-style-type: none"> <li>1. The emergence of pay-as-you-can models of income generation for exhibitions has arisen during our research. Is this approach working and is there any consistency of approach between museums? - How prevalent is this model and who is doing it?</li> <li>2. Many museums have noted that temporary exhibition costs are being recouped through secondary spend in shops, cafes etc. Is this a typical trend and how sustainable is it? What opportunities and / or challenges does this raise?</li> <li>3. Our research has shown that there is some dissonance between commercial providers and other interviewees regarding the demand for turnkey exhibitions, and possibly the broader economics of them. What are your thoughts on this?</li> </ol>

	<p>4. We haven't been able to examine as deeply as we had hoped whether economic or cultural cold spots create a disparity of opportunity in relation to accessing temporary and touring exhibitions'. What do you think?</p> <p>5. What are your thoughts on:</p> <ul style="list-style-type: none"> <li>- The Government Indemnity Scheme in relation to exhibitions – what is needed in relation both to economic sustainability and organisational accessibility?</li> <li>- There appears to be low awareness of the government's Museum &amp; Gallery Exhibition Tax Relief scheme, and the significant potential rewards. Is more awareness raising and/or skills training needed, particularly for smaller institutions?</li> </ul>
1310-1315	Closing thoughts

## Roundtable 2: Partnerships and Skills

Time	Activity
1200-1205	<b>Arrivals</b>
1205-1207	<b>Welcome and introductions</b>
1207-1215	<p><b>Introduction to the research and key issues to explore today</b></p> <p>Partnerships and Skills:</p> <ul style="list-style-type: none"> <li>• Accessibility best practice</li> <li>• Barriers to entry</li> <li>• Co-production models community co-creation</li> <li>• Impact measurement</li> </ul> <p>A short summary of our emerging findings.</p>

1215–1310	<p><b>Roundtable discussion</b></p> <ul style="list-style-type: none"> <li>• Initial reflections on the research from each participant</li> <li>• Discussion around partnerships and skills.</li> </ul> <p><b>Questions to consider:</b></p> <ol style="list-style-type: none"> <li>1. Co-production - the increase in co-production as a means of enhancing creativity, building community relationships, and potentially reducing both costs and risk, has come up a lot during our research, with some interesting examples given. What are your thoughts and reflections on this? Are there any examples you would like to share?</li> <li>2. Adaptation for local context/audiences - numerous interviewees noted the need, and increase, in tailoring touring exhibitions with specific local, place-related content (cf. MAGNET and Going Places discussions for example). We are interested in hearing your views on this?</li> <li>3. Measuring impact is piecemeal, why is this and how could the impact of exhibitions - social, economic impact, and in terms of partnerships and skills development, be measured more effectively?</li> <li>4. What else should we be thinking about - particularly in terms of barriers to entry to institutions and individuals making temporary and touring exhibitions?</li> </ol>
1310–1315	Closing thoughts

## Roundtable 3: Sector Innovation and Impact

Time	Activity
1200–1205	<b>Arrivals</b>
1205–1207	<b>Welcome and introductions</b>

1207-1215	<p><b>Introduction to the research and key issues to explore today</b></p> <p>Sector Innovation and Impact:</p> <ul style="list-style-type: none"> <li>• Digital /immersive trends</li> <li>• Advocacy potential</li> <li>• International touring models</li> <li>• Impact measurement</li> </ul> <p>A short summary of our emerging findings.</p>
1215-1310	<p><b>Roundtable discussion</b></p> <ul style="list-style-type: none"> <li>• Initial reflections on the research from each participant</li> <li>• Discussion around economic and operational resilience.</li> </ul> <p><b>Questions to consider:</b></p> <ol style="list-style-type: none"> <li>1. Immersive/digital exhibitions + audience development - differing views have been captured through our research - particularly (and perhaps unsurprisingly), between artists/curators and others about the demand for, and desirability of, immersive digital exhibitions. Are immersive digital experiences potentially attracting new cultural audiences, who might then visit museums and galleries, or are they diverting the pipeline from museums' offer?</li> <li>2. What other 'digital exhibition innovations' should we be thinking about in future? ( eg virtual/augmented reality. Immersive, content/interpretation, end-to-end user journeys)</li> <li>3. Impact evaluation gap - very few respondents have reported the implementation of rigorous impact evaluation in relation to either changes to audience behaviour or local/regional economic impact. Many rely on footfall or qualitative measures. Is a more sophisticated approach needed across the sector, coupled with greater awareness/training? How could this be achieved?</li> </ol>
1310-1315	Closing thoughts

# Attendees

## Roundtable 1 – Mon 22 Sept

Rachael Browning	Art Fund
Catherine Hemelryk	CCA, Derry
Tony Butler	Derby Museums
Matt Lawrence	Royal Museums Greenwich
Stephen Snoddy	Walsall New Art Gallery
Hannah Kershaw	British Library
Sarah Munro	Baltic
Alanna Davidson	NOMAD Exhibitions, and Co-Chair of The Exhibitions Group
Miranda Stacey	National Portrait Gallery, and Co-Chair of The Exhibitions Group

## Roundtable 2 – Wed 24 Sept

O'Molemo Thamae	Freelance activist / digital creator
Helena Stork	World Art Foundations
Laura Bruni	Henry Moore Foundation
Tola Dabiri	Electric Piers
Kate Davies	The Roberts Institute of Art
Katherine Blamire	British Library
Steph Fuller	Ditchling Museum
Ulrike Smalley	Museum Wales, and Trustee of The Exhibitions Group

## Roundtable 3 – Fri 26 Sept

Nell Whitley	Marshmallow Laser Feast
Emma Dexter	British Council
Ruth McKenzie	British Council
Jago Cooper	Sainsbury Centre
Janet Stott	Oxford University Museum of Natural History
Anais Aguerre	Culture Connect
Alice Lobb	Barbican Centre, and Trustee of The Exhibitions Group

# Roundtables – summary of themes

## Economic and Operational Resilience

### The emergence of pay-as-you-can models

Several organisations have experimented with pay-as-you-can (PAYC) approaches, finding that they can increase visitor numbers and broaden audience reach. However, participants questioned whether ticket price is the primary barrier to attendance and noted uncertainty about whether PAYC is scalable or financially sustainable. Approaches differ widely across the UK, with some organisations maintaining free entry to avoid access barriers, and others relying on donations rather than fixed prices. External factors—such as local political contexts—can directly influence decisions around charging.

### Prevalence and uptake of the pay-as-you-can model

PAYC is not yet a sector-wide norm. Larger or metropolitan museums are more likely to use charging or tiered pricing, whereas many regional organisations prioritise free access. Some institutions are experimenting with digital touring models, which reduce transport and insurance costs and minimise the need for charging. Where exhibitions are provided as digital assets, host venues can adapt content flexibly without incurring major financial burdens.

### Recouping costs through secondary spend

Participants reported that secondary spend rarely covers core exhibition costs. While high visitor numbers can boost retail

or café income, this is often insufficient to underwrite major programmes. Many organisations rely on events, publications, endowments, donor circles, and grant support rather than commercial income. Staff resourcing and the long lead-in time required to develop commercial opportunities also limit the reliability of secondary spend.

### Dissonance on turnkey exhibitions and their economics

Commercial providers promote turnkey exhibitions as efficient solutions, but many museums expressed reservations. Turnkey shows are often costly and less adaptable to local communities, limiting their relevance and impact. Some larger venues blend turnkey content with local elements, but most participants favoured co-produced or locally tailored exhibitions that better reflect audience needs. Infrastructure limitations further restrict uptake, as turnkeys often assume standardised spaces.

### Disparity of opportunity in ‘cold spots’

Geographical and economic “cold spots” remain underserved by touring exhibitions due to high transport costs, limited insurance options, and restricted access to national networks. Digital touring and content-sharing models can mitigate these barriers but are not yet widespread. Participants noted that current national funding schemes do not adequately address regional disparities.

### Government Indemnity Scheme: Needs and barriers

The Government Indemnity Scheme (GIS) remains essential but

increasingly difficult for smaller or less-resourced venues to access. Heightened security, environmental, and technological requirements raise costs and create inequitable access. Some organisations rely on partnerships with larger venues to secure indemnity, indicating structural barriers. Participants called for more flexible, scalable GIS provisions supporting sustainability and wider sector participation.

### Museum & Gallery Exhibition Tax Relief: Awareness and capacity

Awareness and uptake of MGETR is uneven. Larger organisations with specialist staff make effective use of the scheme, but many smaller venues lack the capacity or knowledge to apply. Participants suggested training, shared roles, and improved sector-wide communication to increase uptake and strengthen financial resilience.

### Other Themes

- Quality over quantity, with a focus on meaningful visitor experiences and community benefit.
- The importance of endowment or long-term funding models for stability.
- Concern over the disappearance of dedicated touring grants.
- Interest in collaborative touring models that reduce cost and enhance relevance.

## Partnerships and Skills

### Co-production

Co-production is increasingly seen as crucial for creativity, community trust, and improved cultural relevance. The sector is

shifting from expert-led models to community-led practices, with deeper collaboration and shared authority. Effective co-production requires time, resources, clear agreements, and sensitivity, particularly when working with groups with lived experience of trauma or marginalisation. Under-resourcing can lead to poor practice, where communities feel unheard or exploited. Participants highlighted the need for training, sector guidelines, transparent payment structures, and long-term relationship building.

### Adaptation for Local Context / Audiences

Local adaptation of touring exhibitions is both common and essential, particularly in multilingual or culturally diverse contexts. Early engagement with local partners enables more meaningful integration of local stories, objects, and programming. When adaptation is left late, tensions arise around decision-making and accessibility. Costs related to translation, cultural adaptation, and accessible design pose significant challenges. Locally originated exhibitions are often more cost-effective for smaller organisations.

### Measuring Impact is Piecemeal

Impact evaluation across the sector is inconsistent and often minimal. Most organisations rely heavily on visitor numbers and basic financial data, with less attention to qualitative outcomes such as wellbeing, skills development, partnership growth, or long-term social impact. Multi-site exhibitions further complicate data collection and synthesis. Participants expressed strong interest in shared methodologies, participatory evaluation, richer data capture, and sector-wide benchmarks, but current resourcing and skills gaps hinder progress.

## Barriers to Entry

Both organisations and community groups face barriers in initiating or hosting exhibitions. Community partners often lack understanding of sector processes, leading to mismatched expectations and power imbalances. Short-term funding cycles make relationships difficult to sustain and create feelings of being “picked up and dropped.” Institutional capacity constraints limit willingness to take risks or support emerging groups. Participants stressed the value of outreach, diversified venues, transparent payment, training, and embedding staff support to lower barriers and improve equity.

## Other Themes

- Funders’ expectations for co-production, which can encourage over-commitment without adequate skills or resources.
- The emotional labour inherent in work involving trauma or marginalisation.
- Under-recognised soft power benefits of exhibitions.
- Ongoing sustainability challenges in touring exhibitions.
- The importance of early, trust-based collaboration for both co-production and adaptation work.

## Sector Innovation and Impact

### Immersive / Digital Exhibitions + Audience Development

#### Differing Views and Sector Divides

Participants noted a divide between creative practitioners, who

see strong potential in immersive digital formats, and some museum professionals, who worry about technical capacity, infrastructure, and support demands. Digital-first approaches offer flexibility (“capture once, deliver many times”), but resource requirements create barriers for many organisations.

#### Are digital experiences attracting new audiences?

Digital and immersive experiences can attract new or digitally native visitors and generate long dwell times within exhibitions. Online exhibitions can extend reach to geographically remote audiences. However, evidence suggests that digital-only exhibitions attract limited engagement, and visitors still strongly value physical encounters with real objects. Blended physical-digital experiences appear the most promising.

#### Pipeline concerns

Participants debated whether immersive digital experiences act as feeders into museum visiting habits. The emerging consensus is that they expand audiences rather than replace physical visitation, though more research is needed.

## Digital Exhibition Innovations for the Future

### New formats and practices

Emerging directions include VR, AR, hybrid installations, locally tailored digital experiences, and exhibitions delivered via shareable digital files. These formats allow customisation while reducing transport and insurance costs. However, they require skills development, technical infrastructure, and sector-wide standardisation.

## Examples / cases

Participants referenced innovations in both indoor and outdoor immersive installations. Sustainability considerations—especially the energy consumption of digital art—are increasingly shaping exhibition design. Partnerships with environmental organisations are helping to develop greener guidelines and sector standards.

## Impact Evaluation Gap

### Current state and challenges

Impact evaluation is limited across the sector, with most organisations collecting only basic data. Few assess economic impact or societal outcomes. Skills gaps around evaluation, tax relief, digital capture, and analysis further limit sector capacity.

### Sector needs and recommendations

Participants called for:

- Training and shared toolkits for evaluation.
- Collaborative frameworks and academic partnerships.
- Clearer sector-wide standards and benchmarking.
- Improved awareness and uptake of tax relief schemes.

## Other Themes

### Internationalisation and collaboration

Global collaboration is becoming more values-driven and sustainability-focused, with many institutions prioritising trusted partners and regional alignment over long-distance touring.

## Economic models and commercialisation

The sector is adopting a mix of flexible charging models, including PAYC and donations, while navigating declining in-house production capacity and increased outsourcing.

### Environmental sustainability

Energy use and carbon impact—particularly for digital formats—remain major concerns. Organisations are experimenting with lower-energy installations, greener touring models, and renewable-powered displays.



## About The Exhibitions Group

Founded in 1985, The Exhibitions Group is a charity and membership organisation dedicated to the cultural exhibitions sector. Through research, resources, learning and events, online directories and more, we connect and empower everyone in exhibitions to create relevant, sustainable, diverse, and accessible exhibitions.

[www.theexhibitionsgroup.org.uk](http://www.theexhibitionsgroup.org.uk)

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## About Cultural Associates Oxford (CAO)

Cultural Associates Oxford (CAO) is a specialist cultural consultancy dedicated to strengthening museums, heritage organisations and the wider cultural and creative sectors through strategic insight, entrepreneurial thinking and transformational support. We combine deep sector expertise with innovative business practice to help cultural organisations thrive in a rapidly changing landscape.

[www.culturalassociates.co.uk](http://www.culturalassociates.co.uk)



Thank you for reading.