



Impact of the COVID-19 Pandemic on Travelling Exhibitions

SURVEY RESULTS

Contents:

Introduction

Section 1: Exhibition borrowing behaviours

Section 2: Travelling exhibition budgets

Section 3: Attitudes towards travelling exhibitions in a post-COVID world

Section 4: Needs of exhibition borrowers for a post-COVID world

Conclusion

Disclaimer

Introduction

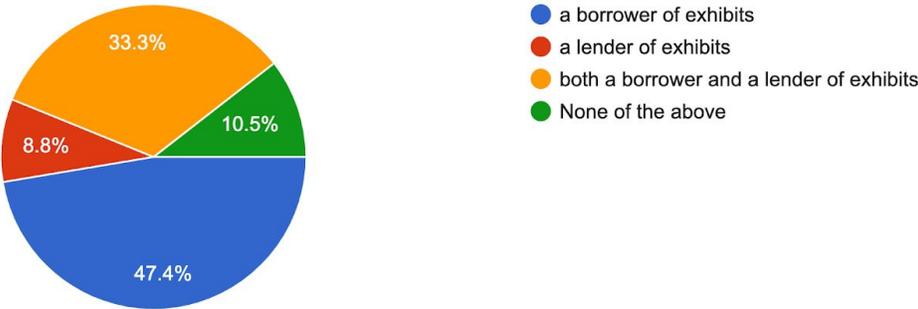
Between September 21st and November 30th of 2020, Culture Trove conducted a voluntary survey to collect information about travelling exhibitions in museums. The goal was to learn how museums were being impacted by the pandemic and how that in turn was affecting decisions around exhibit planning for the next two to three years. COVID-19 has dealt a double blow to travelling exhibition programming, by both limiting the gathering of people in public spaces, and the movement of people both nationally and internationally.

The survey received a total of 57 unique responses. Of those, the majority were from Canadian institutions (91%); (5%) from the US institutions and (4%) from the EU, UK or Australian institutions. Respondents represented a full spectrum of museological institutions, from small historic house museums to mid-sized regional and national museums. Respondents held key roles at their respective museums related to exhibition programming and management.

Section 1: Exhibition borrowing behaviours

Which answer best describes your institution's role regarding exhibits?

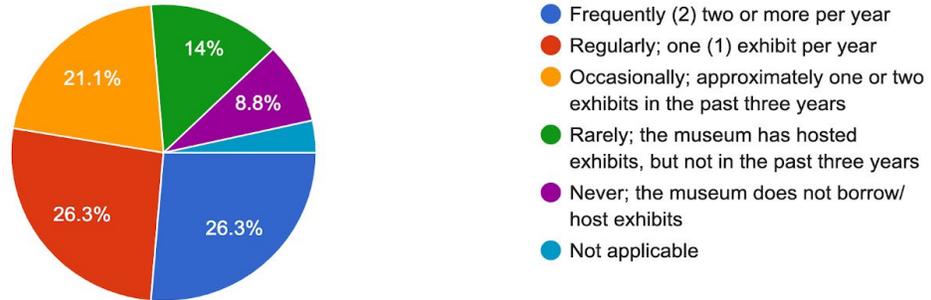
57 responses



Based on the above combined results, 80% of respondents were borrowers of exhibitions.

In the past three years, 2017 to 2019, how often has the organization you represent hosted temporary travelling exhibitions (if applicable)?

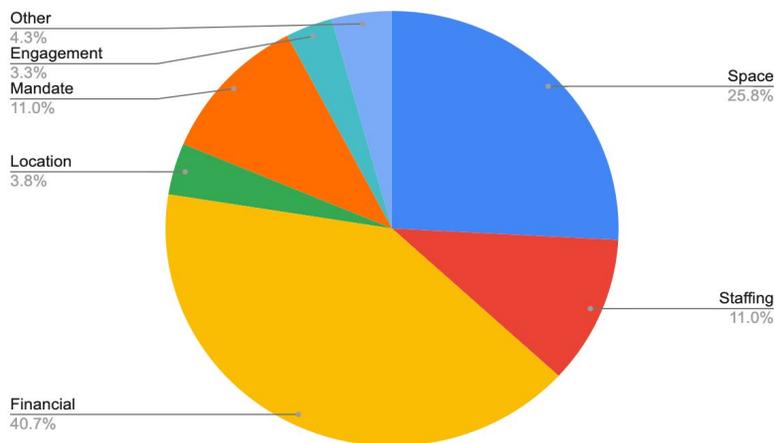
57 responses



Just over half of the respondents (54%) described their institutions as either **regular** or **frequent** borrowers.

However, 22% answered that their institutions rarely or never borrow exhibits. Of these respondents, two follow up questions were asked. Firstly, what factors (prior to the pandemic) prevented them from making use of travelling exhibitions? Respondents could select as many as were applicable to their situation. The leading factor was financial (insufficient budget), and lack of space was the second most common factor. Reasons such as lack of climate controls within their facility; renovations that interfered with the ability to host exhibits; and proximity to other museums hosting exhibitions with a similar mandate and/or audience were some of the

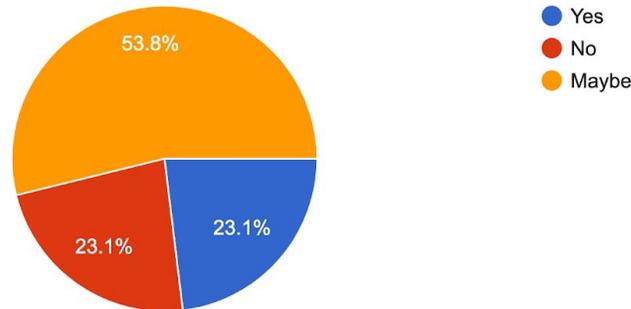
reasons that fell under the category of "other".



The second question posed to those respondents that answered to "rarely" or "never" borrowing exhibits was whether any necessary changes would be made to enable the borrowing of exhibits in the next five years.

Does your institution intend to make any necessary changes that would enable the borrowing of exhibits in the next five years?

13 responses

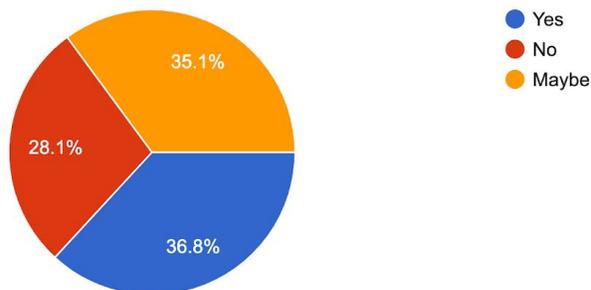


Just under a quarter of those (23%) felt they would definitely make changes, while over half (54%) were at least considering changes to better enable the hosting of travelling exhibitions within the next five years. This implies that a significant number of those who do not regularly host exhibitions still regard them as important; and, that hosting travelling exhibitions is a capability their institution should consider working towards.

With regards to behaviours about exhibitions, did respondents consider this moment as an opportunity to develop an exhibition?

Would your institution consider developing a travelling exhibit to lend out in the next five years?

57 responses

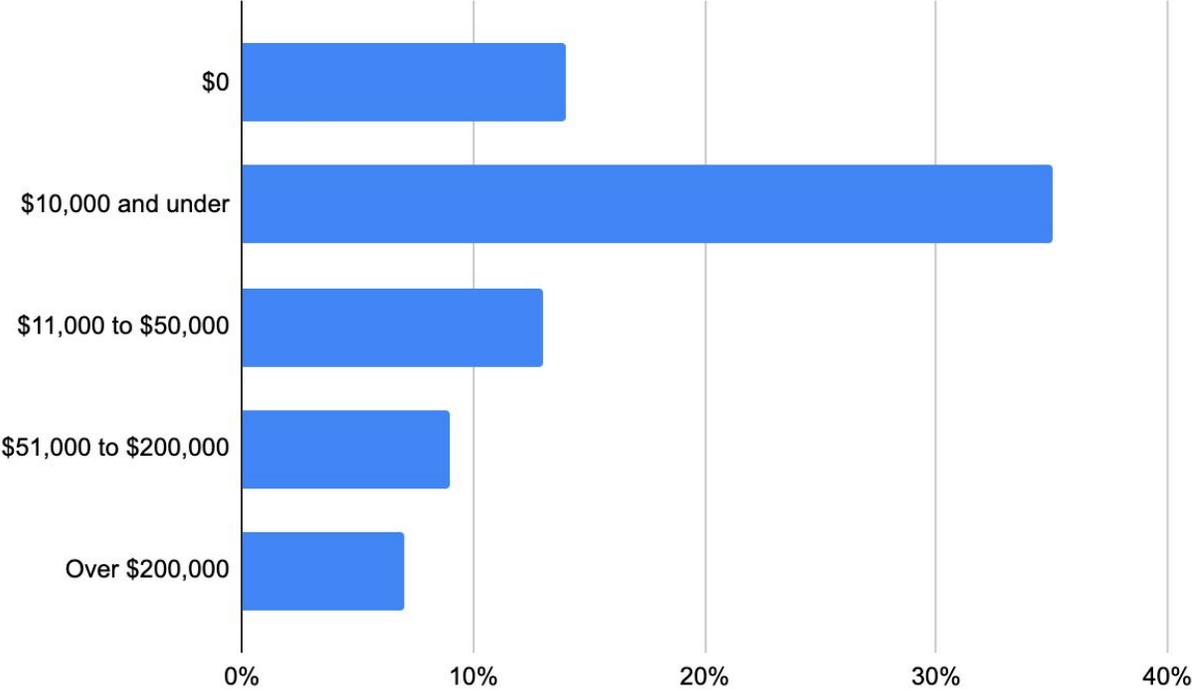


Approximately a third were actively considering it, another third were not. The remaining third were undecided with regards to developing new exhibitions.

Section 2: Exhibition budgets

Financial barriers are the top reason why museums struggle to maintain a robust schedule of exhibitions at the best of times. We gave all respondents the opportunity to tell us: “what was the total budget your institution allocated for travelling exhibitions pre-COVID?” (i.e. for 2018-2019):

Out of 57 respondents, 46 chose to answer this question. Of those approximately 50% had modest budgets of CDN\$10,000 (US\$7,848) or less, prior to the pandemic. Approximately 30% of those surveyed answered that their institution spent more than CDN \$10,000 annually on travelling exhibitions. Of the budget amounts disclosed, the average was CDN\$59 748 (US\$46 890), while the median was CDN\$7000 (US\$5493).



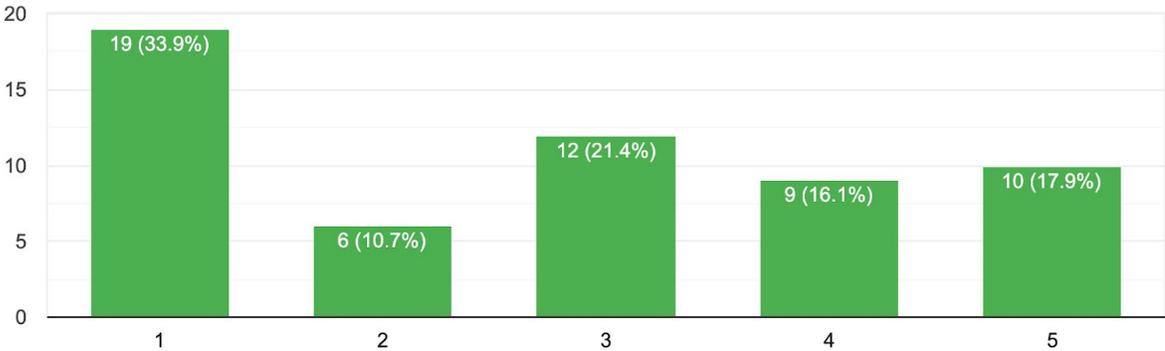
When asked if their institution would be reducing its budget for 2021, the answer was almost uniformly “yes”. Nearly all survey respondents were anticipating a **decrease in available funds for 2021**. Most answered that they expected reductions of between 25-50%. A few respondents said they were planning for reductions of as much as 75 to 80% in 2021.

With uncertainty about how the economy will recover, and to what extent tourism will make a return to pre-pandemic levels, it is difficult to know for how long budget reductions might persist. For now, most museums are assuming a reduction in the use of travelling exhibits for the near term due to a drop in funds available.

While it could be said that travelling exhibits may be a viable way of offering new content in a cost effective way during the pandemic, a chief problem is that museums have had to severely curtail the number of visitors allowed to come through the doors in the interest of public safety. When visitation numbers must remain at only 15 to 25% of their normal levels, the cost of renting a high profile travelling exhibition is not economically feasible. This is reflected in the response to the question: “how likely is your Museum to rely on renting travelling exhibits to operate more effectively during the pandemic?”, using a scale of 1 to 5, with 1 being “not likely at all” and 5 being “very likely”.

How likely is your Museum to rely on renting travelling exhibits to operate more effectively during the pandemic?

56 responses

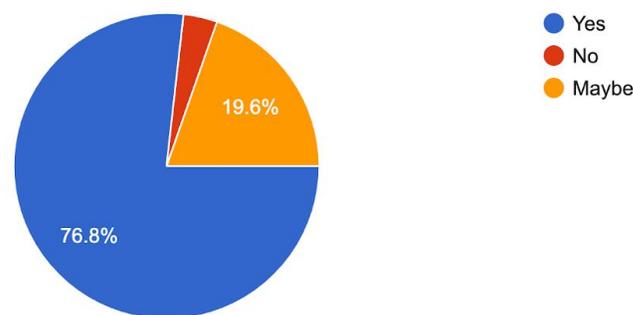


Approximately 45% of respondents are **unlikely or very unlikely to make use of travelling exhibits to operate more effectively during the pandemic**. 21% are neutral, and 34% are likely or very likely to make use of exhibitions. The latter group are those museums who were **already hosting an exhibit** when the pandemic began. Some negotiated a longer loan period in order to increase the opportunity for the public to view the exhibit while it was already onsite.

It is probably safe to say that **2021 will be a “quieter” year for exhibition bookings and exchanges** though most (86%) answered that they expected to be open in 2021 assuming it was safe to do so. While hosting an exhibit may not be an immediate priority, hosting a travelling exhibition within the next three years (2021 to 2023) is nevertheless something the majority of museums say they are still planning for.

Upon reopening, does your Museum intend to host at least one temporary travelling exhibition within the next three years (2021 to 2023)?

56 responses



Most respondents (77%) stated they did intend to borrow at least one exhibition in the next three years (2021 to 2023) and an additional 20% answered that they would “maybe” host an exhibit during that time period.

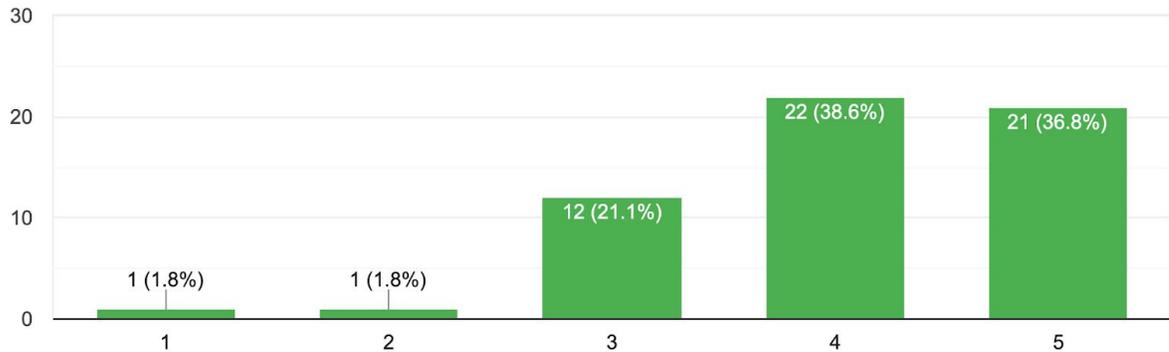
Based on the response to related questions, pent up demand could translate to an uptick in travelling exhibition rentals for 2022 and 2023. With several viable vaccines being deployed worldwide, a return to more normal activity levels may happen sooner than later should those vaccination programs prove to be widely effective, helping to loosen restrictions around public gatherings and travel.

Section 3: Attitudes towards travelling exhibitions in a post-COVID world

The majority of respondents believe that travelling exhibitions are a reliable way to bring people through the doors, and encourage repeat visitation. Again, using a scale of 1 to 5, with 1 being “not important at all” and 5 being “very important” it was found that over half those asked believed exhibits were important or very important in bringing audiences back:

How important do you think travelling exhibitions are for Museums to encourage audiences to return, once it is safe for them to reopen?

57 responses



48 of the 57 respondents cited reasons why they would book travelling exhibitions during the next three years. The top reason was **“to encourage repeat visitation”** (79%). The next most likely reason was to **“reach new audiences”**, and the third reason was to **take pressure off the curatorial staff** to create new exhibit content from scratch.

Of those 15 respondents who said they would NOT be hosting exhibitions within the next three years, the main reason was due to **limited budget**. The other main factor was a decision to **focus on creating in-house exhibits**. Overall **uncertainty** was also a factor, since the potential for unexpected closures could make travelling exhibitions a challenge to schedule.

Section 4: Needs of exhibition borrowers in a post-COVID world

Given that a significant number of respondents **do** plan to continue hosting travelling exhibitions, it was asked what they were now looking for in an exhibit.

A notable shift is the demand away from exhibitions that are “hands-on” towards those that are **touchless**. Interactives are still critically important, but they must not be onerous to clean and maintain. Modifications to reduce handling of interactive elements will be paramount if an exhibit is to remain a viable traveller in a post-COVID market.

Approximately 45% of respondents said they would be seeking out “touchless” exhibit options.

There are a few other criteria that are just as critical, or even more critical to borrowers, however. **Ease of installation** (53%) and **flexible scheduling** (47%) were also rated as very important to respondents. Unexpected closures and reduced staff make these two criteria more important factors in the selection of travelling exhibitions.

The most desirable criteria for an exhibition was that it features a **topic with very broad appeal** (75%). Exhibits with targeted or niche appeal (30%) are of interest only if they are expected to attract a new audience, building upon the museum's core audience.

Conclusion

Travelling exhibitions are of undisputed value whenever museums are looking to increase visitation. While the pandemic continues to limit the gathering of people in public spaces however, museums have been forced to minimize crowds and cannot as easily justify travelling exhibitions in the near term while restrictions threaten to remain in place.

Prior to the pandemic, the main barrier to hosting travelling exhibitions was financial. Given the impact of the pandemic on the economy, that financial barrier will widen for more museums, exacerbating their ability to utilize travelling exhibitions, particularly if government funding, memberships and charitable donations decline.

Demand for exhibitions may increase in 2022 and 2023, as vaccine programs become established and travel restrictions loosen. Museums will then look to encourage visitors to return in larger numbers when it's safe to do so, and travelling exhibits will form a key part of their strategy in bringing people back. As economies recover, furthermore, governments may be looking to reinvest in cultural organizations which in turn help to stimulate economic activity such as tourism. Support of travelling exhibitions would be a highly visible way to both promote museums and tourism.

Yet things are not likely to return to a form of normal that was familiar before the pandemic. The impacts of COVID19 will leave a lasting mark, and a resurgence of the virus may remain a concern. As a result, travelling exhibitions will need to meet specific criteria:

- an emphasis on touchless interactives will replace the former demand for hands-on activities;
- exhibitions that are easy to install and maintain;

- exhibit topics that have broad appeal, to engage the widest possible audience and bring about positive, enthusiastic responses;
- affordable, since budgets will be reduced, and may not return to pre-pandemic levels for at least the next year or two.

The above information will hopefully offer some insight to enable borrowers and suppliers of travelling exhibitions to assist in their planning for the months ahead. Nearly every facet of society has experienced some negative impacts that have curtailed activities once taken for granted. Yet out of crisis we are bound to see innovation and adaptations that lead to overall improvement. Travelling exhibitions will no doubt emerge differently in a post-COVID world.

Disclaimer

This report including the underlying data from the survey was gathered, analysed and interpreted by Culture Trove Inc.. This was a voluntary survey, without traceability or accountability for the accuracy of statements from participating individuals, nor verification of their profession. Any identifying attributes of the respondents (name of museum, etc.) shall remain private under the management of Culture Trove Inc.. The results are a partial view yet capture a perspective of the current state of travelling exhibition activity in the museum sector.