



# WHAT ARE THE SIMILARITIES AND DIFFERENCES BETWEEN THE UK AND THE USA DOMESTIC TOURING MARKETS?

**ICOM UK Travel Bursary Report**

**American Alliance of Museums Annual Meeting, Washington DC,  
26th-29th May 2016**

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**What are the similarities and differences between the UK and the USA domestic touring markets? What can UK organisations learn from the approach taken in the USA?**

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# 1 Research Aims

An ICOM UK travel bursary enabled me to attend the American Alliance of Museums (AAM) Annual Meeting in Washington DC, from 26th to 29th May 2016, with the purpose of researching the domestic touring exhibitions market in the USA.

For a more general report on the AAM Annual Meeting and top tips for international delegates see Dana Andrew's June 2016 report for [ICOM UK](#).



My research focus was established following the publication of the Arts Council England (ACE) funded research I undertook for the Touring Exhibitions Group (TEG), in April 2016: [Economics of Touring Exhibitions Survey Report: An Analysis of Touring Exhibitions Practice in the UK](#). This report provides interpreted data concerning current UK domestic touring exhibitions practice, and revealed that most commonly UK to UK venue touring operates on a partial cost recovery, rather than for profit, basis.

**However, if the following [recommendations](#) are used to inform an organisation's touring exhibitions strategy, full cost recovery, or even profit may be possible:**

1. Understand the full costs of originating and touring the exhibition.
2. Work in partnership with one or more venues to develop and tour the exhibition.
3. Exhibit the exhibition before it tours.
4. Approach fundraising creatively.
5. Be aware of sector trends and good practice.
6. Understand the touring marketplace.
7. Operate sustainably to reduce waste, unnecessary transportation and expenditure.
8. Clearly identify the exhibition's target audience.
9. Evaluate and review your touring strategy.

My aim in Washington was to explore the similarities and differences between the UK and the USA domestic touring markets, and to reflect on what - if anything - UK organisations might learn from the approach taken in the USA. It was possible to gain an excellent insight into touring practice in the USA at the AAM Annual Meeting, as the event - attracting over 6,000 delegates - is used by organisations as one of the key platforms in the museum calendar for brokering touring partnerships and exhibition hires.

## 2 Preparation

In the month leading up to the meeting, I took advantage of AAM's online community forum to post a notice of my research interests, and where possible arrange meetings with colleagues who were willing to speak about their touring programmes. There was a discussion thread dedicated to the Annual Meeting that made this easier; it wasn't necessary to be an AAM member to post a query. I made six contacts at organisations that included the New York Public Library, the American Museum of Natural History and the Science Museum of Minnesota. The most fruitful to my planning was connecting with Antonio Rodriguez - the now Chairman of ICOM ICEE - with whom I Skyped in advance of the meeting. He, together with some of the other contacts, highlighted two key touring exhibitions events at the Annual Meeting, for which it was necessary to book:

- **Informal Learning Experiences' Traveling Exhibitions Forum - a privately organised and sponsored off-shoot to the main Annual Meeting**
- **Traveling Exhibits Network (TEN) Breakfast - an AAM Professional network, which is membership-based, but welcomes non-members to their Annual Meeting event.**

Each of these events took place over breakfast, commencing, respectively, at 7.30am on the Thursday and Friday of the Annual Meeting; it would have been easy to miss them as a first-time attendee.

## 3 The American Alliance of Museums Annual Meeting

The Annual Meeting was held at the Washington Convention Center, a vast and sprawling, but comfortable, venue, which provided a refreshing buffer against the intense heat outside. The range and diversity of sessions, and the distance between rooms, meant it was essential to plan each day in advance. It took me some hours to grasp that the term 'general session' indicated there was a 'keynote' paper being delivered. None of the sessions were touring focused, so I elected to attend those that explored fundraising and sector trends. Each I joined provided an interesting insight into the landscape in which organisations in the USA are operating their touring programmes.

There was a lot of discussion about financial stability and income diversification, in which the role of board members or trustees factored highly, as well as workforce diversification, particularly increasing the number of women in directorial roles. The latter topic was addressed by AAM President and CEO Laura Lott, in an impassioned and inspiring address. I gained a further insight into the American museum landscape from *Trendswatch 2016* - an annual publication from the AAM's Center for the Future of Museums - available in the AAM bookstore. It considers the 'what next' of the museum world and I would highly recommend it. In the introduction Elizabeth Merritt, AAM Vice President, Strategic Foresight & Founding Director, outlines that "The topics that emerged from my scanning the last year ... all revolve in some way around identity. What defines who I am? How does society impose identity on me (or you), and who controls how that identity is portrayed? <sup>1</sup>..." . It was clear to me that there are many similarities between the issues UK and USA museums are facing - more than I anticipated - albeit against different and shifting political landscapes.

Between sessions I spent the majority of my time in the AAM Expo, where there was a large section dedicated to 'Traveling Exhibits'. It hosted 42 stands promoting touring exhibitions and related services, the largest being the MRA Mobile Experiential - an 'On-Lot' trailer - showing an interactive Rock and Roll exhibition.

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<sup>1</sup> [www.aam-us.org/resources/center-for-the-future-of-museums/projects-and-reports/trendswatch](http://www.aam-us.org/resources/center-for-the-future-of-museums/projects-and-reports/trendswatch)

The only stand promoting touring exhibitions not located in the dedicated Expo section was that of the Smithsonian's SITES (Smithsonian Institute Traveling Exhibition Service) department, which was in the general/un-themed area of the Expo. The reasons for this were not clear; perhaps they are such an institution within the USA touring scene they don't require the same signposting. The 'Traveling Exhibits' section of the Expo represented the equivalent of TEG's annual Marketplace<sup>2</sup> event, integrated into the MA Conference Exhibition, making it a very easy way for organisations in the USA to shop for exhibitions and partners.

***The Informal Learning Experiences (ILE) Traveling Exhibitions Forum*** was as interesting and useful to my research as the Expo. The format of the event, which is run/replicated at many of the major museum conferences in the USA (e.g. the ASTC conference) to promote touring exhibitions, opportunities and services, is very clear, focused and business-like. An email is released a number of weeks prior to the event, to those on the ILE database, inviting recipients to book a place on the speaker list. Places are allocated on a first-come, first-served basis. Each presenter is allowed three minutes to introduce their offer to the audience. The timing is strict and ruthless, creating an air of excitement and energy. In the space of an hour we heard from 37 presenters. More were scheduled to speak, had time allowed before the session finished. Presenters' contact details were circulated on a spreadsheet for follow-up.

In Washington the event attracted a broad range of speakers; many large American museums, for example The Field Museum, Cincinnati Museum Center and the Science Museum of Minnesota, a range of national and international commercial exhibition developers including Imagine Exhibitions, Minotaur Mazes, Meet Vincent Van Gogh Exhibition and Exhibitsrex, as well as some smaller organisations such as the New York Public Library for the Performing Arts, the National Guitar Museum and the Jewish Museum of Maryland. SITES and the National Archives Traveling Exhibit Service - two subsidised programmes - spoke towards the end of the event. The range of service providers included transport specialists The Shipping Monster, Turnkey Education, who develop classroom content to support exhibitions, and Flying Fish Exhibits, who provide a design and production service for exhibitions, as well as promoting and managing a portfolio of touring exhibitions. Two UK museums presented - the Royal Geographic Society and the Natural History Museum - and representatives from a number of other UK national museums were in the audience. It was clear that those in attendance were regulars to the event, and that it is a key networking platform for organisations that tour and hire exhibitions. ILE is central to touring exhibitions activity in the USA - in the manner that TEG aims to be in the UK. As well as organising the forums, like TEG, ILE is a membership organisation and manages a database of exhibitions available to hire<sup>3</sup>. Their literature at the meeting noted that there are currently approximately 450 exhibitions on their database.

The second touring exhibition event it was recommended I attend - the ***Traveling Exhibits Network (TEN) Breakfast*** - was a little disappointing. Although it was possible to undertake some networking, this was limited by the sit-down format. The agenda was unfocussed, comprising a rambling discussion of the group's future purpose and focus. Perhaps as an AAM non-member, I was too much of an outsider to feel involved. Many of the people in attendance were also at the previous day's ILE breakfast.

As an international delegate, I was invited to a number of networking sessions in the International Lounge. These proved to be a great opportunity to meet with a range of ICOM members from all over the world, and touch base with UK-based colleagues also at the conference.

I would recommend that anyone interested in touring exhibitions, attending a future AAM Annual Meeting, should subscribe to the ILE mailing list and go to their forum, and allow sufficient time to explore the Expo, even if this means missing some sessions; the stand-holders had much more time to speak outside the break periods.

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<sup>2</sup> [www.teg.org.uk/index.php?id='3,5&style=print](http://www.teg.org.uk/index.php?id='3,5&style=print)

<sup>3</sup> [www.informallearning.com](http://www.informallearning.com)

## 4 Touring exhibition semantics

A brief aside about terminology; I noted during my time at the Annual Meeting that, in an international context, it is necessary to recognise the different terms being used to refer to touring exhibitions, and the range of spellings, to be sure of finding the full range of information about them, most particularly online. In the USA, touring exhibitions are most commonly referred to as 'traveling exhibits' or 'traveling exhibitions', whereas 'touring' or 'travelling exhibitions' are more usual in the UK. For example, I found I was better able to engage in Twitter conversations, once I was using the right terms for the USA audience.

## 5 Who are the touring exhibition providers in the USA?

**The snapshot of touring providers that the AAM Annual Meeting provided through ILE and TEN breakfasts, and the Expo, suggests the following trends:**

1. Commercial touring exhibition enterprises in the USA command a larger market share than they do in the UK, providing exhibitions - often interactive - that relate to popular culture subjects, including pop stars and celebrities, and blockbuster subjects such as dinosaurs. At the ILE breakfast 22 of the 46 presenters scheduled to speak represented commercial companies developing and touring exhibitions. Within the commercial provider market, there are companies working on a broad range of scales, from the very small to large multinational companies.
2. The science center and children's museum networks in the USA develop and tour a significant number of exhibitions. This is not replicated in UK touring practice because there are significantly fewer of these types of organisation. These types of exhibition do not tend to be object based, so may be considered more straightforward to travel and install.
3. A significant number of science and natural history museums promoted touring exhibitions at the AAM Annual Meeting, particularly large city-based museums. If the Expo is representative of the types of organisation developing exhibitions, they, together with commercial providers, science centers and children's museums are the most significant providers in the USA market.
4. If art galleries and art museums in the USA are engaging in the development of touring and partnership exhibitions, they do not promote their exhibitions or look for partners at the AAM Expo or related events, to the same extent that science centers, children's museums and large social and natural history museums do. Those promoting exhibitions of art tended to be small public or commercial organisations, such as Landau Traveling Exhibitions<sup>4</sup>. This trend was mirrored in TEG's research in the UK, which showed that art exhibitions travelling between organisations are less frequently openly promoted, and are developed/brokered on the basis of existing relationships.
5. A range of subsidised/low cost/free touring exhibitions are available from nationally funded organisations such as SITES<sup>5</sup>, and regional programmes such as the Mid-American Arts Alliance - a non-profit regional arts organisation which supplies more than 450 performances, exhibitions and professional development activities annually. Mid-American Arts Alliance<sup>6</sup> is able to run its programme through collaboration with other organisations, for example the National Endowment for the Humanities. They produce exhibitions on a range of scales, enabling smaller museums to borrow. Content may also be available digitally, to enable the widest possible access. Their programmes are most similar to those run by Hayward Touring<sup>7</sup> in the UK, although they are more expansive, as they are not purely arts-based.

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<sup>4</sup> <http://a-r-t.com/>

<sup>5</sup> [www.sites.si.edu](http://www.sites.si.edu)

<sup>6</sup> [www.maaa.org](http://www.maaa.org)

<sup>7</sup> [www.southbankcentre.co.uk/about/touring-programme/hayward-touring](http://www.southbankcentre.co.uk/about/touring-programme/hayward-touring)

6. A considerable number of touring exhibition agents/brokers were represented in the Expo and ILE breakfast, such as GuestCurator<sup>8</sup> and Flying Fish Exhibits<sup>9</sup>. They and other organisations promote exhibitions on behalf of museums and galleries. Organisations on a broad range of scales are using their services, in some instances to promote and travel exhibitions internationally, as well as nationally.

## 6 Are the same economic and production models for touring employed in the USA, as have been identified in UK domestic touring?

**My research into UK touring practice revealed that organisations are using one of three economic models to tour exhibitions:**

- Partial cost recovery
- Full cost recovery
- For profit

**In combination with one of six exhibition production models:**

- Single venue development
- Reactive partnership
- Lead venue(s) partnership
- Equal partnership
- Strategic partnership
- Commercial partnership

Conversations with a range of touring providers at the Annual Meeting revealed that - as is the case in the UK - some organisations, most particularly commercial tourers, are making a profit, but in the main public organisations operate their programmes on a partial or full cost recovery basis. Those museums that are recovering all of their costs tend to be larger organisations, which attract sponsorship and support for the development of their exhibitions. As is often the case in the UK, those involved in touring in the USA can find the lack of openness about fees challenging.

To encourage open discussion, I agreed to keep the identities of all those I interviewed anonymous. Interviewee 1, from a large science museum, described how: "The increase in commercial exhibition creators, over the last ten years, has made the traveling exhibitions business less transparent. Five years ago people stopped including pricing in their marketing. It is a more competitive world. When you take exhibitions to less well capitalised museums they want you to do more; they need help. Being driven by economics creates an obligation to choose popular topics for exhibitions. There is a movement within museums who produce traveling exhibitions, to encourage those hiring to look within the field i.e. exhibitions produced by museums, rather than commercial operators".

Interviewee 2, from a small museum, outlined that: "Our traveling exhibitions are non-profit in a sense, they bring in a small income stream, but do not cover all their costs. We would love to do more but are restricted by time and funding. I am interested in bringing content to different audiences and venues".

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<sup>8</sup> [www.guestcurator.com](http://www.guestcurator.com)

<sup>9</sup> <http://flyingfishexhibits.com/>



Interviewee 3, from a mid-scale science organisation, stated that: “Budgets have been reduced, and although we are still promoting our traveling exhibitions no new exhibits have been developed in recent years. We need to develop new content to be competitive, but there is perceived to be a financial risk in their development”.

As is the case in the UK, the touring marketplace in the USA is diverse. It ranges from highly subsidised, free or low-cost exhibitions made available by SITES, or organisations such as the Mid-American Arts Alliance, to programmes such as that run by the Museum of Science and Industry in Chicago, which through effective use of hire fees and philanthropic donations, does not invest any of its own funds in exhibition development (their Robot Revolution exhibition is supported by Google), together with the commercial providers.

The similarities in the economic and production models used for touring exhibitions in the USA and the UK was striking, and suggested that TEG’s touring model definitions and recommendations for practice can be applied and be useful beyond the UK. This view was echoed by Antonio Rodriguez, ICEE Chairman, who, in conversation, suggested that organisations in the USA could benefit from applying TEG’s analytical framework to their work.

## 7 What can UK organisations learn from the domestic touring scene in the USA?

**For me, the key takeaways from the AAM Annual Meeting, from which I believe the UK touring sector could learn and develop their touring strategies, principally concerned how often, how, where and when touring and partnership opportunities are promoted:**

1. The ‘Traveling Exhibits’ section of the AAM Expo made a big impression, and caused me to question whether it might be possible to expand the UK touring market and encourage UK museums to partner and hire exhibitions, if promotion of exhibitions and partnership opportunities was integrated into key calendar events, such as the Museums & Heritage Show, AIM and/or MA conferences. Would this help embed touring and partnership exhibition development as mainstream temporary exhibition activity?
2. The way exhibitions, partnerships and services are promoted at ILE forums - held at all major museum conferences - causes me to ask: should TEG be coordinating networking events that use this format for UK organisations, more frequently than at our annual Marketplace? Would this encourage greater touring activity? Can we - like ILE - look to sponsors to cover the cost of organising and delivering such events?
3. The scale of the touring exhibitions market in the USA, and the normality of charging for exhibition entry, supports a larger commercial touring exhibitions market, which is generating profit. This encouraged me to question the need/importance of interrogating commercial touring models in greater depth in TEG’s future research. This proved hard when limited to UK examples, when undertaking the Economics of Touring Exhibitions research, but by employing USA examples as well, it may be possible to look at the structure of commercial programmes in greater depth. This information could be used to ask whether it is possible for UK organisations engaging in touring to employ some of the strategies of commercial tourers, to increase their financial success, if generating profit is their primary or an important motivation for touring exhibitions.
4. The Mid American Arts Alliance has a large impact in the USA, proving affordable access to exhibitions to small-scale organisations of a range of types - not only art exhibitions. Could this example be followed in the UK? Is there room for this type of service? Would this help enable small museums to maximise their temporary exhibition budgets, or show temporary exhibitions, where time and funding do not currently allow?
5. The number of touring consultancies in the USA caused me to ask whether UK organisations could gain specialist expertise, have greater touring capacity and maximise the reach of their exhibitions, if more were to work with touring promoters/consultants.

## 8 Conclusions

There are a greater number of similarities between the UK and the USA touring exhibition markets than I had imagined; where there are differences, they tend to relate to the much larger scale of the market in the USA, and the existence of organisation types that are not as well represented in the UK.

I believe that the UK can learn from the approach that the USA takes to promoting partnerships and exhibition hire, and with TEG will look at how this learning can be used.



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