



National Touring Survey Report



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INTRODUCTION

Recently NETS Australia conducted a survey of touring venues across the country to determine our level of effectiveness, quantify the profile of touring that currently exists and to highlight areas for future growth or improvement. The study collected responses from 95 public galleries, university and community art galleries across Australia in 2013.

Our key findings describe a valued and unique service. They also illustrate demand for the work we do and show that there is scope to improve upon the level of public engagement resources attached to exhibitions developed and presented. Collectively we have long envisaged being able to tour artists, educators, audience engagement specialists and curators, as part of the package.

Our survey results support this vision, both in the development phase and presentation period of our travelling shows. In particular this need is highlighted in responses from less resourced galleries and smaller communities.

Michael Rolfe
CEO Museums & Galleries NSW
Chair NETS Australia



National Touring Survey Report



OVERVIEW

The National Touring Survey is the result of a partnership between the National Exhibitions Touring Support (NETS) Australia agencies to gather data that can clearly articulate the benefits, difficulties and costs associated with exhibition touring in Australia. No similar data currently exists.

NETS Australia is the national network committed to the delivery of best practice touring exhibitions of contemporary visual culture to remote and metropolitan communities throughout Australia. The network is comprised of Museums & Galleries NSW, Artback NT: Arts Development and Touring, Museum and Gallery Services, QLD, Country Arts SA, Contemporary Art Spaces Tasmania (CAST), NETS Victoria and Art on the Move. The survey and report were prepared by Museums & Galleries NSW in consultation with the other NETS agencies.

The data presented allows NETS Australia to identify areas where improvements to our programs are necessary but also assists us to demonstrate the importance of touring to public galleries and their audiences, in particular those in regional areas, and the need for sustainable future funding.

“ I WOULD ADVOCATE FOR A STRONG NATIONAL TOURING NETWORK ENCOMPASSING NATIONAL, STATE AND REGIONAL TOURING AGENCIES AND GALLERIES ”

METHODOLOGY

A standard survey comprising of multiple choice, closed and open response fields was distributed to small and medium sized public galleries and craft and design centres Australia wide. Public galleries include regional galleries, university art galleries and community art galleries. Each NETS partner was responsible for selecting the target group appropriate to their state and territory. The national and state collecting institutions were excluded from the sample.

The survey was distributed by email as a PDF as well as a hyperlink through the online survey tool SurveyMonkey and was conducted over 3 weeks in January-February 2013.

Due to low sample sizes, data from the Northern Territory has not been included in state by state breakdowns, however is included in results where national averages are calculated. No responses were received from the ACT.



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KEY FINDINGS

HIGH DEMAND FOR TOURING EXHIBITIONS. ALMOST ONE QUARTER OF ALL EXHIBITIONS PRESENTED IN AUSTRALIA BY PUBLIC GALLERIES ARE INCOMING TOURING EXHIBITIONS

- 24% of all exhibitions presented by public galleries are produced and managed by other galleries, cultural institutions or touring agencies
- Four states (NSW, TAS, NT and WA) increased their uptake of touring exhibitions in 2012
- 65% of respondents created exhibitions for tour, in addition to hosting incoming touring exhibitions.

“ AS A LARGE CULTURAL INSTITUTION WITH VERY FEW STAFF AND LIMITED RESOURCES, INCOMING TOURING EXHIBITIONS ARE ESSENTIAL TO OUR OPERATION.”

LARGE AND INCREASING AUDIENCES TO TOURING EXHIBITIONS

- Visitation to touring exhibitions represent nearly half of all gallery audiences (47%)
- Visitation to touring exhibitions has grown proportionally by 8% from 2011 to 2012 despite an overall downturn in attendance figures.

TOURING EXHIBITIONS IMPROVE ACCESS TO CONTEMPORARY VISUAL ARTS/CRAFT

- 94% of touring exhibitions presented in the last 12 months were of contemporary visual arts and craft
- 91% of galleries believe that touring exhibitions allow them to balance their artistic program.

TOURING EXHIBITIONS PROVIDE VALUABLE OPPORTUNITIES AND PARTNERSHIPS

- 87% of respondents feel that touring exhibitions offer access to opportunities that are beyond their resources
- 80% of respondents agree that the creation and hosting of touring exhibitions offer significant professional networking opportunities.





INCREASED FUNDING AND SUPPORT IS REQUIRED TO ENSURE EXCELLENCE IN TOURING PRODUCT SUPPLIED. DEMAND NEEDS TO BE MET WITH QUALITY EXHIBITIONS

- 51% of respondents who created touring exhibitions in 2011 and 2012 did not receive funding from any source to develop or tour their exhibitions
- Of those that did receive funding support, Visions of Australia is the primary source with 48% obtaining grants through Visions or the Contemporary Touring Initiative
- 81% of respondents disagree that too many resources are allocated to the creation of touring exhibitions.

“ LOCAL GOVERNMENTS ARE SUFFERING AND BUDGETS ARE BEING MASSACRED. THERE IS ENORMOUS NEED FOR VISIONS AND OTHER SUPPORT TO PROVIDE AFFORDABLE EXHIBITIONS.”

TOURING EXHIBITIONS ARE FACING RISING COSTS BUT THERE IS A CONTINUED RECOGNITION OF THEIR VALUE

- 42% of respondents have been prevented from hosting a touring exhibition because the exhibition loan fee was unaffordable
- The average maximum spend on an exhibition loan fee in 2012 was \$5,289 – 44% indicating this was higher than they had spent in 2011. However, in recognising the value of touring exhibitions, respondents were prepared to spend \$6,185 in the future.



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GALLERY DEMOGRAPHICS

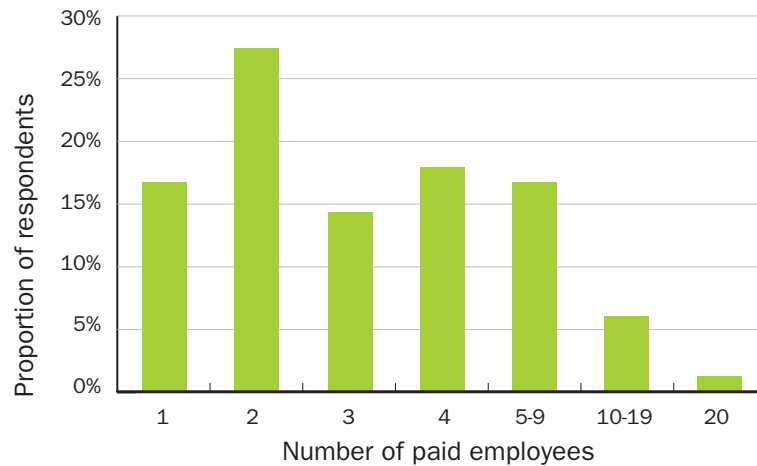
- 81% of respondents were from regional areas across 7 states and territories. No responses were received from the ACT.

	All	NSW	NT	QLD	SA	TAS	VIC	WA
Metropolitan	19%	11%	0%	10%	0%	50%	21%	54%
Regional	81%	89%	100%	90%	100%	50%	79%	46%
Total	95	28	1	29	6	4	14	13

“FOR US, TOURING EXHIBITIONS ARE THE LIFEBLOOD OF THE GALLERY. THEY ALLOW US TO OFFER VERY HIGH QUALITY VISUAL ART TO REGIONAL AUDIENCES AND TOURISTS.”

- 74% of respondents receive their core funding from local government, and 11% from state funding
- On average, galleries employed 3.8 fulltime or equivalent staff and utilised 38 volunteers

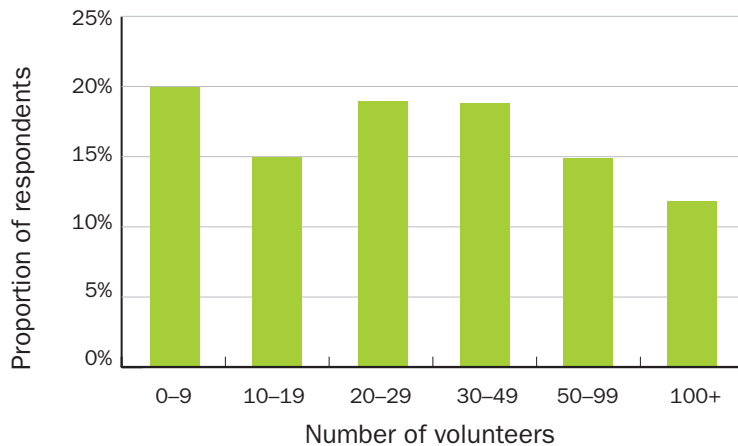
PAID EMPLOYEES





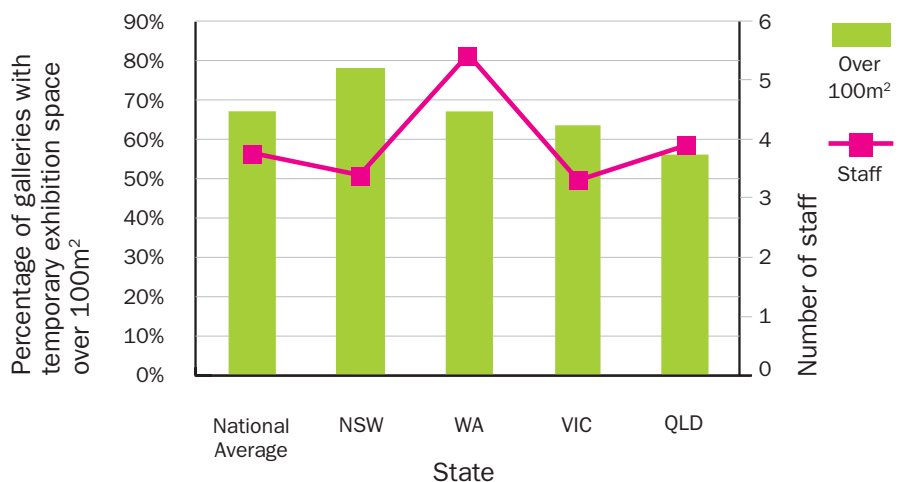
“GIVEN THAT TOURING EXHIBITIONS FORM AN INTEGRAL PART OF OUR ANNUAL PROGRAM, THEY INTRODUCE KEY COMPONENTS TO OUR AUDIENCES AND EXTEND THEIR EXPERIENCES AND AWARENESS OF ARTS PRACTICE. IDEALLY TOURS PROVIDE KEY OPPORTUNITIES, PUBLIC PROGRAMS AND EDUCATIONAL COMPONENTS THAT WE ARE UNABLE TO DEVELOP AND PROVIDE DUE TO VERY LIMITED RESOURCES AND BUDGETS.”

VOLUNTEERS



- 67% of all galleries surveyed have temporary exhibition spaces of larger than 100m² operating with a full time equivalent staff of 3.8.

GALLERY SIZE vs NUMBER OF STAFF – 4 STATE BREAKDOWN



Please note: SA, TAS and NT data is inconclusive due to low sample sizes.

- Significant disparities in staffing levels versus larger gallery size was noted across the country, with NSW in particular operating on fewer staff with generally larger exhibition spaces and QLD and WA experiencing comparatively higher staffing levels for smaller temporary exhibition spaces.





EXHIBITION ACTIVITY

HIGH DEMAND FOR TOURING EXHIBITIONS. ALMOST ONE QUARTER OF ALL EXHIBITIONS PRESENTED IN AUSTRALIA BY PUBLIC GALLERIES ARE INCOMING TOURING EXHIBITIONS

- On average, galleries presented over 17 exhibitions annually. This figure dropped ever so slightly from 17.2 in 2011 to 17.1 in 2012
- Galleries in NSW far exceeded the national average by presenting over 22 exhibitions in 2011 and 20 exhibitions in 2012. This represents a 30% and 21% increase in activity over the national average respectively.

Exhibition Activity 2011

Average	National Average	NSW	QLD	TAS	NT	SA	VIC	WA
Total exhibitions presented	17.2	22.3	16.5	14.7	4.0	12.7	16.1	12.3
Total self generated exhibitions	10.8	15.5	9.3	8.7	3.0	7.0	11.3	5.9
Total incoming touring exhibitions	4.1	4.8	3.7	4.0	1.0	4.7	4.0	3.4
Total exhibitions you created this year that toured to another venue	0.6	0.7	0.6	1.2	0.0	0.0	0.7	0.5
Exhibitions curated using your own collection	2.4	3.3	1.7	1.5	0.0	0.3	4.0	1.1
Exhibitions curated directly with professional contemporary artists	4.8	6.0	3.8	6.2	0.0	4.7	5.0	4.6

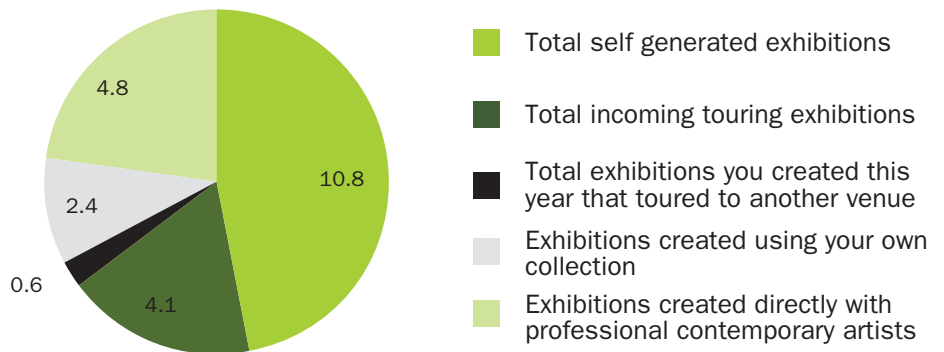
Exhibition Activity 2012

Average	National Average	NSW	QLD	TAS	NT	SA	VIC	WA
Total exhibitions presented	17.1	20.7	16.9	14.0	8.0	13.0	16.1	13.6
Total self generated exhibitions	11.0	14.5	10.2	8.3	6.0	8.7	11.6	6.0
Total incoming touring exhibitions	4.1	5.0	3.5	5.8	2.0	4.0	3.4	4.4
Total exhibitions you created this year that toured to another venue	0.6	0.7	0.7	0.8	0.0	0.0	0.8	0.3
Exhibitions curated using your own collection	2.3	3.0	1.5	1.3	0.0	0.3	4.5	0.9
Exhibitions curated directly with professional contemporary artists	5.3	5.6	5.0	7.8	0.0	6.0	4.8	5.2

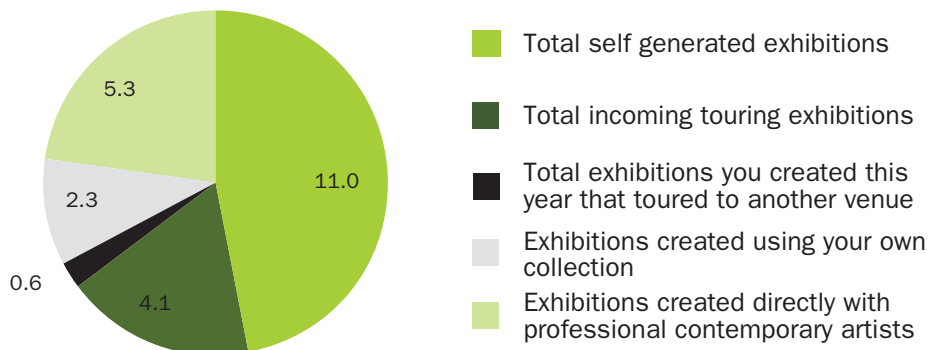




EXHIBITION ACTIVITY 2011



EXHIBITION ACTIVITY 2012

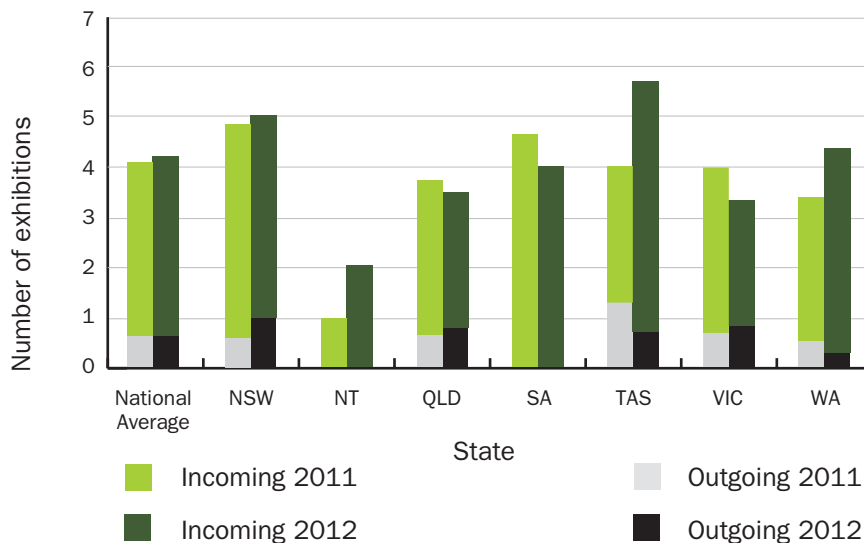


- On average, galleries nationwide hosted over 4 touring incoming exhibitions a year, 4.8 in 2011 and 4.1 in 2012. This decline is in line with the consistent decreases noted across all comparative annual figures
- Four states NSW, TAS, NT and WA increased their uptake of touring exhibitions in 2012, demonstrating strong demand for touring exhibition product
- 65% of respondents created exhibitions for tour
- TAS and VIC continued to create more exhibitions for tour than other states and the national average, though TAS output fell in 2012. NSW remained a consistent producer and QLD increased their output in 2012
- QLD and VIC increased their output of outgoing touring exhibitions in 2012.





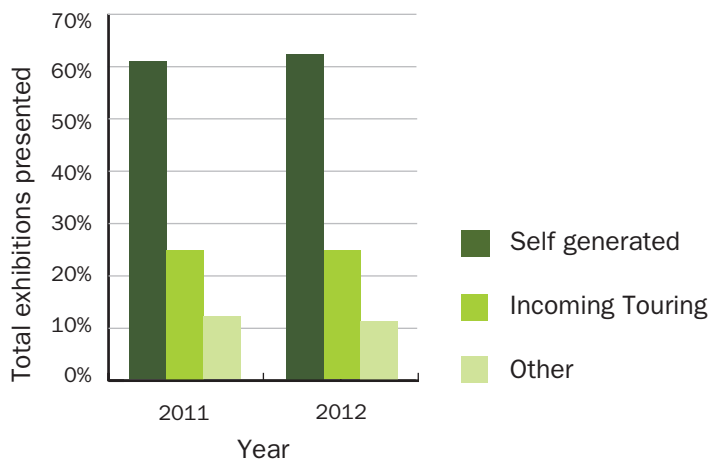
TOURING EXHIBITIONS HOSTED vs CREATED 2011 AND 2012



“TOURING EXHIBITIONS ARE A VITAL COMPONENT TO GLADSTONE’S PROGRAM OF EXHIBITIONS AND EVENTS. THEY OFFER OPPORTUNITIES TO SHOW DIVERSE, INNOVATIVE, INSPIRATIONAL IDEAS THAT WOULD NOT OTHERWISE BE AVAILABLE TO THE CENTRAL QUEENSLAND COMMUNITIES.”

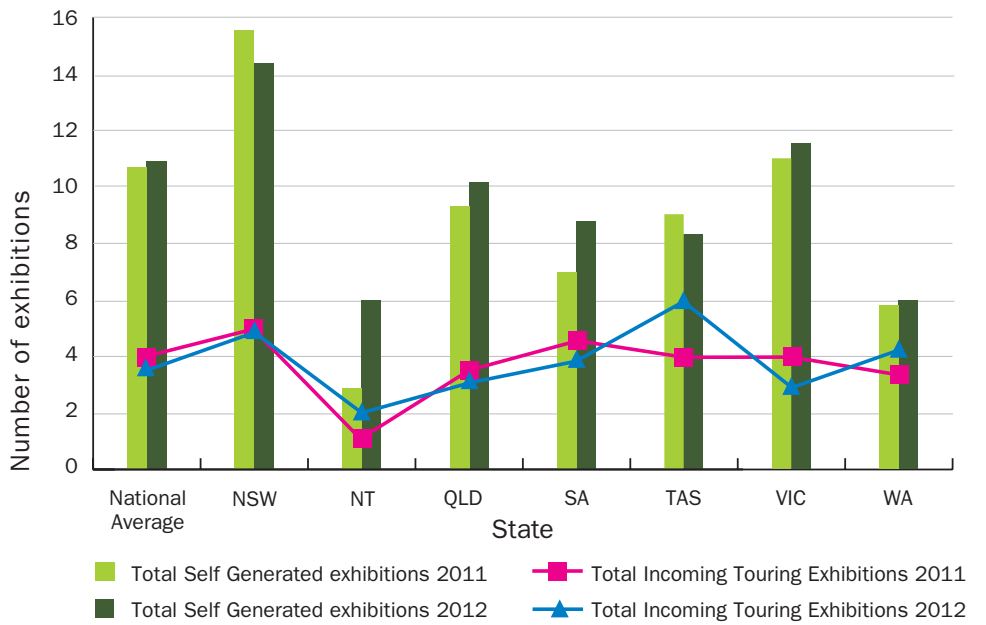
- The number of self generated exhibitions grew slightly across the board from 2011 to 2012 with significant growth experienced in QLD, SA and VIC. WA also experienced growth as did NT, however considering the low sample size this result is inconclusive.

PROPORTION OF EXHIBITIONS PRESENTED 2011 AND 2012





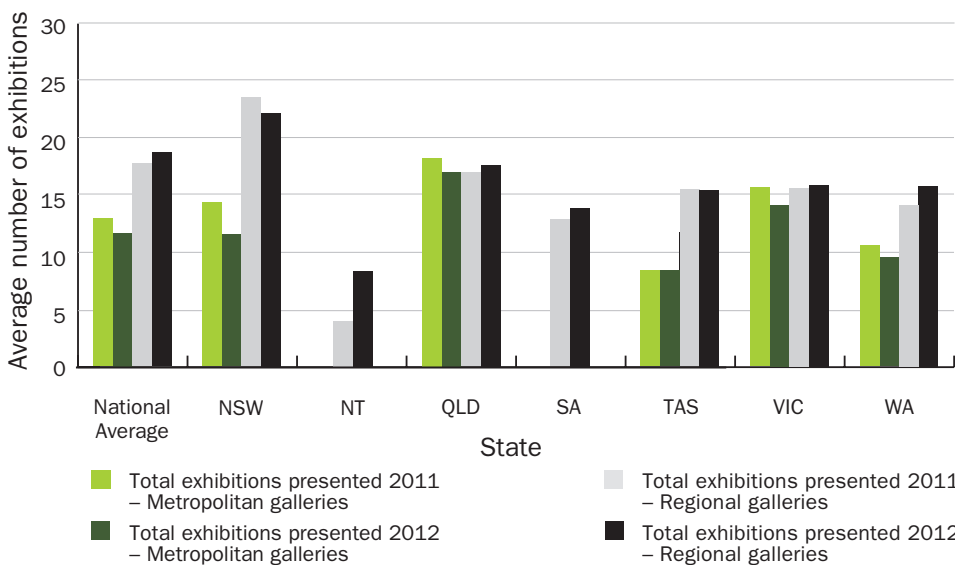
SELF GENERATED EXHIBITIONS vs INCOMING TOURING EXHIBITIONS 2011 AND 2012



Regionally based galleries present up to 54% (or 6.5) more exhibitions a year than their metropolitan counterparts yet have slightly higher staffing levels (3.9 regional to 3.6 metro).

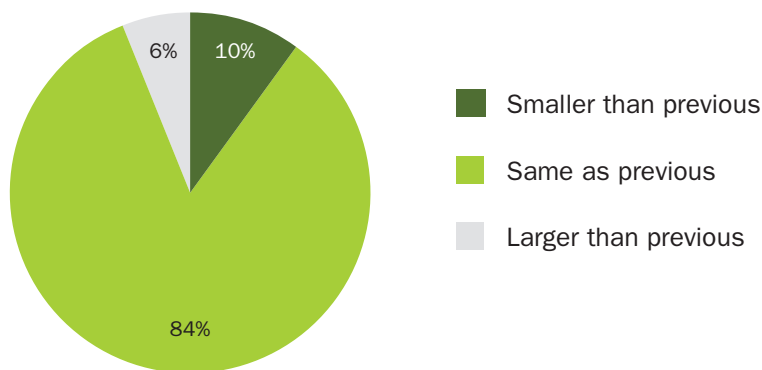


TOTAL EXHIBITIONS PRESENTED – METROPOLITAN vs REGIONAL BASED GALLERIES



“NETS AND OTHER TOURING ORGANISATIONS PROVIDE A HIGHLY PROFESSIONAL AND COMPREHENSIVE EXHIBITION SERVICE FOR SMALLER GALLERIES.”

ACTUAL vs IDEAL TOURING EXHIBITION SIZE



■ 84% of respondents were satisfied with the size of touring exhibitions they were hosting



ATTENDANCE

LARGE AND INCREASING AUDIENCES TO TOURING EXHIBITIONS

- Almost 2 million people visited the respondent galleries in 2011, however a downturn was recorded in 2012 and attendances reached short of 1.8 million in the 2012 calendar year.

Total attendance Australia wide:

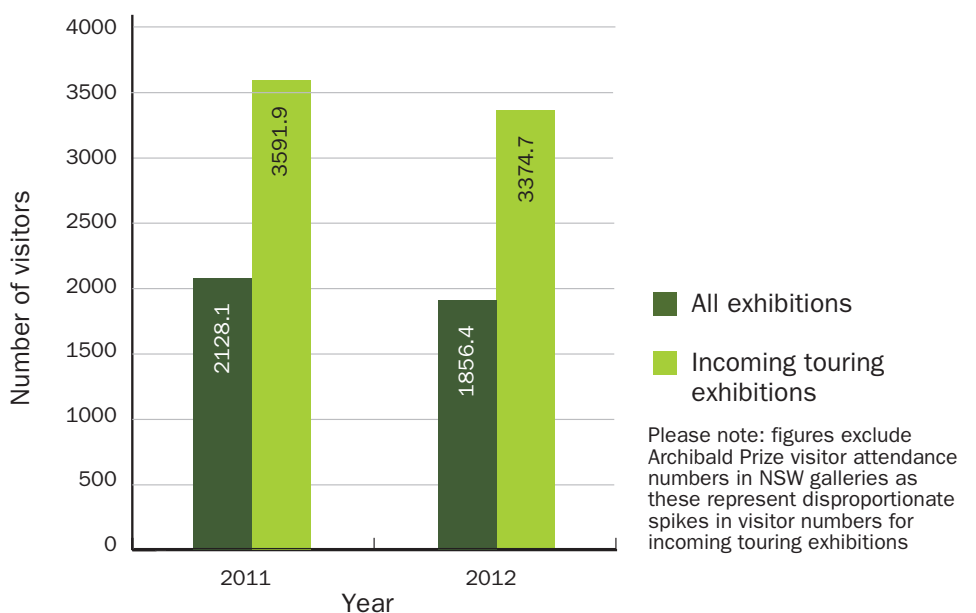
2011	2012
1,993,465	1,783,819

- Audiences to touring exhibitions represent a significant proportion of the total visitor attendance:

47% of total visitors in 2011
55% of total visitors in 2012

- Despite a downturn in general attendances from 2011 to 2012, audiences to touring exhibitions grew as a proportion of total visitor numbers by 7.7% from 2011 to 2012.

AVERAGE NUMBER OF VISITORS TO AVERAGE NUMBER OF TOURING EXHIBITION VISITORS 2011 AND 2012





MEDIA

TOURING EXHIBITIONS IMPROVE ACCESS TO CONTEMPORARY VISUAL ARTS/CRAFT

- 94% of touring exhibitions hosted over the last 12 months were of contemporary visual arts and craft
- When comparing the number and frequency of types of touring exhibitions hosted, photography is the favoured media, followed by painting and mixed media. Mixed media exhibitions had the largest spread across frequency, with 3% of respondents hosting 6 or more mixed media exhibitions in their yearly program.

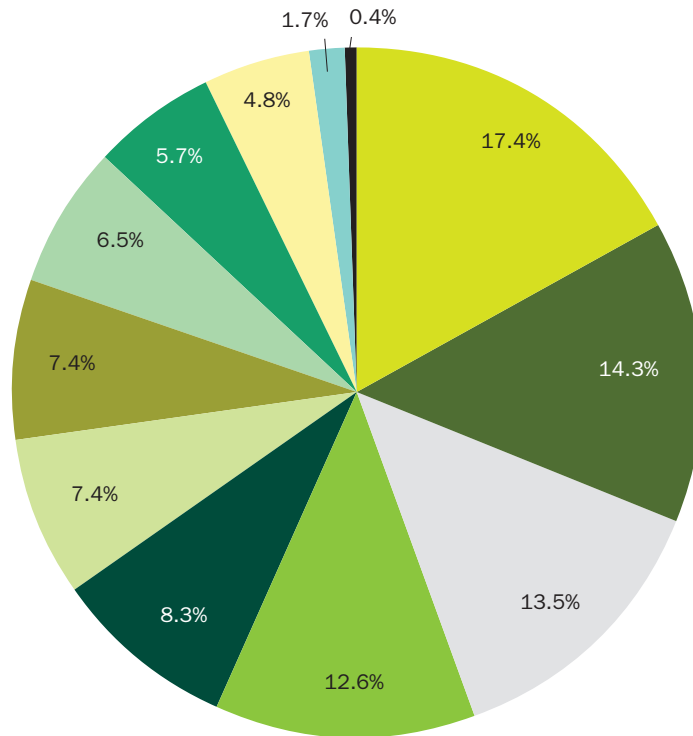
Touring Exhibition Media	1 or 2	3 or 4	5 or 6	6+	Total Responses
Photography	85%	15%			40
Painting	76%	24%			33
Mixed media (exhibitions with works across media where not one single art form dominates)	84%	10%	3%	3%	31
Craft (glass, ceramics, jewellery, textiles etc.)	83%	14%		3%	29
Sculpture/Installation	95%	5%			19
Drawing	100%				17
Printmaking	94%			6%	17
Moving image/film/video	100%				15
Natural or social history material and objects	92%	8%			13
Experimental or interdisciplinary art	91%	9%			11
Performance	75%			25%	4
Other (Fashion)	100%				1





PREFERRED MEDIA FOR TOURING EXHIBITIONS

“ REGIONAL GALLERIES ARE INCREASINGLY UNDER PRESSURE TO DELIVER EXHIBITIONS SOURCED FROM INTERNATIONAL COLLECTIONS. SIGNIFICANT FUNDING AND INFRASTRUCTURE IS REQUIRED TO DELIVER THESE MAJOR PROJECTS.”



- Photography
- Painting
- Mixed media
- Craft (glass, ceramics, jewellery, textiles etc)
- Sculpture/installation
- Drawing
- Printmaking
- Moving image/film/video
- Natural or social history material and objects
- Experimental or interdisciplinary art
- Performance
- Other (fashion)





TOURING BENEFITS

TOURING EXHIBITIONS PROVIDE VALUABLE OPPORTUNITIES AND PARTNERSHIPS

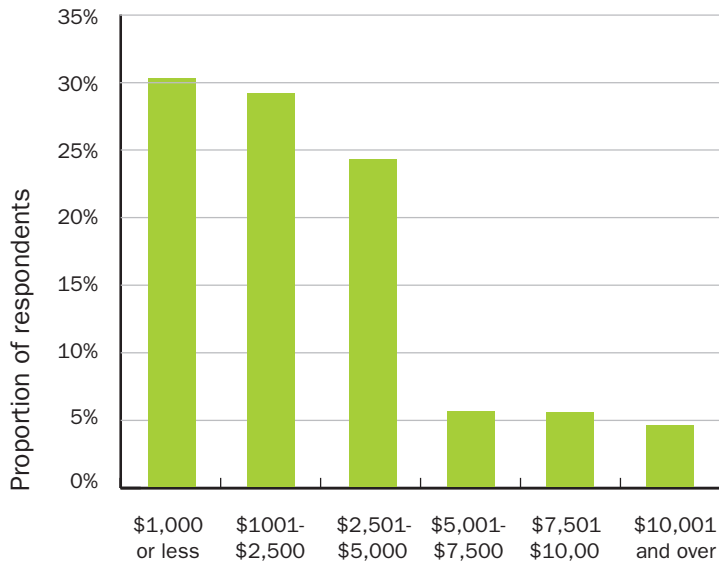
- When asked to respond to a series of questions regarding the benefits of touring exhibitions the majority of galleries showed overwhelming support in favour of touring exhibitions and the opportunities they bring. Significantly, 91% of galleries believe touring exhibitions allow them to balance their artistic program and 87% feel touring exhibitions offer access to opportunities that are beyond their resources
- 76% of respondents agreed that hosting incoming touring exhibitions allow for the cost effective delivery of exhibitions, despite paying an average maximum loan fee of \$5,288.90 and 53% of respondents investing up to an additional \$5,000 in related costs of hosting the touring exhibition.

	Proportion who Agree	Score 1 (Strongly Disagree) to 5 (Strongly Agree)
Hosting an incoming touring exhibition offsets the workload associated with in-house exhibition production	77.1%	4.0
Touring exhibitions are an integral part of my program	70.0%	3.9
Incoming touring exhibitions allow me to balance my artistic program	91.4%	4.3
Too many resources are allocated to the creation of touring exhibitions	18.8%	2.6
Hosting touring exhibitions provides access to opportunities that are beyond my resources	87.1%	4.2
Incoming touring exhibitions allow for cost effective delivery of exhibitions	75.7%	4.0
Incoming touring exhibitions and the associated support offer good skills transfer opportunities	72.9%	3.8
The creation and hosting of touring exhibitions offer significant professional networking opportunities	80.0%	4.0





AVERAGE SPEND ON INCOMING TOURING EXHIBITIONS, IN ADDITION TO EXHIBITION FEES



TOUR FUNDING

FUNDING AND SUPPORT IS REQUIRED TO ENSURE EXCELLENCE IN TOURING PRODUCT SUPPLIED. DEMAND NEEDS TO BE MET WITH QUALITY EXHIBITIONS

- The majority (51%) of respondents who created touring exhibitions in 2011 and 2012 did not receive funding from any external source to develop or tour their exhibitions
- Of the 49% of respondents that received external funding to develop or tour exhibitions, almost all received funding through the Visions of Australia or Contemporary Touring Initiative programs (48%)
- Other funding bodies included state based arts agencies or private philanthropic organisations.



TOURING COSTS

TOURING EXHIBITIONS ARE FACING RISING COSTS BUT THERE IS A CONTINUED RECOGNITION OF THEIR VALUE

- 42% of respondents say they have been prevented from hosting a touring exhibition because the exhibition loan fee was unaffordable
- 54% of galleries spent between \$2,501-\$5,000 on an exhibition fee to host a touring exhibition, however, the average maximum spend on an exhibition loan fee in 2012 was \$5,288.90 – 44% indicating this was higher than they had spent in 2011. However, in recognising rising costs, respondents were prepared to spend \$6,184.68 in the future
- In addition to the exhibition loan fees, 53% of respondents spent between an extra of \$1,001–\$5,000 on expenses related to hosting a touring exhibition. Within this additional spending range, a significant proportion (30%) spent \$1,000 or less, and comparatively, only 17% spent over \$5,001.



National Touring Survey Report



ACKNOWLEDGEMENTS

The following National Exhibitions Touring Support (NETS) Australia agencies are assisted by the Australian Government through the Australia Council, its arts funding and advisory body.



Australian Government



Museums & Galleries NSW, Artback NT: Arts Development and Touring, Museum and Gallery Services QLD, Contemporary Art Spaces Tasmania (CAST), NETS Victoria and Art On The Move.



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Museums & Galleries NSW
43-51 Cowper Wharf Road
Woolloomooloo NSW 2011
02 9358 1760
www.mgnsw.org.au
info@mgnsw.org.au



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