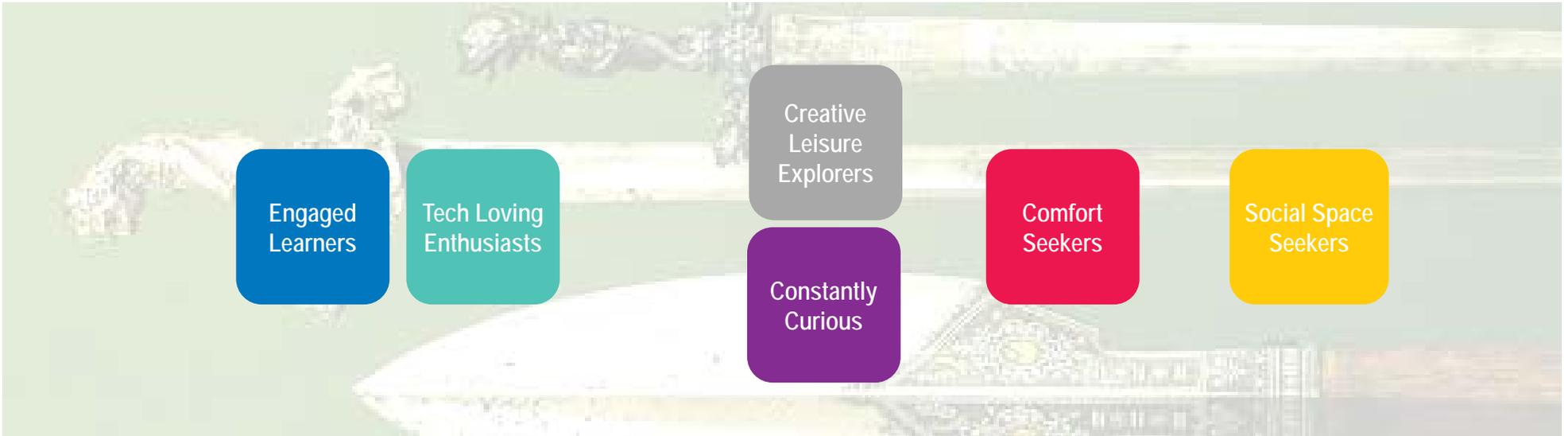


Part Two: Potential market size

A number of different dimensions pull our segments apart and help us to understand what is important to them

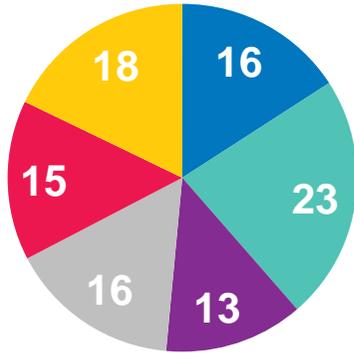


Interest in arms & armour varies by segment

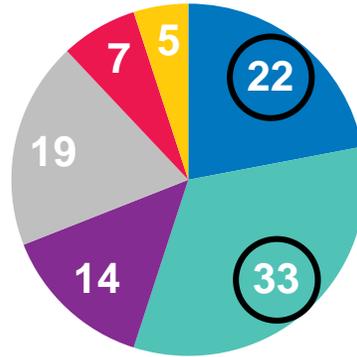


Royal Armouries particularly attracts Engaged Learners, Creative Leisure Explorers and Tech Loving Enthusiasts – but variations by site

Segment size in the market



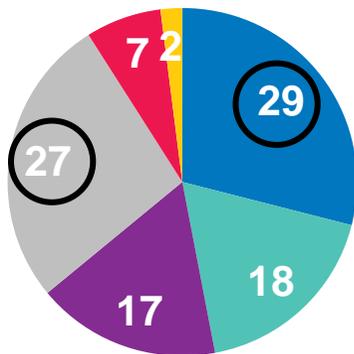
Segment size amongst visitors to any Royal Armouries site



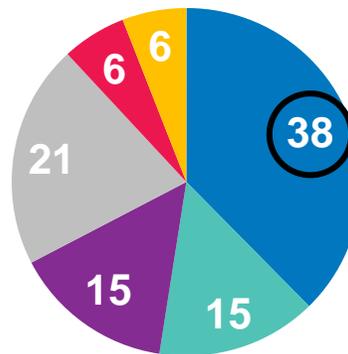
- Engaged Learners
- Tech Loving Enthusiasts
- Constantly Curious
- Creative Leisure Explorers
- Comfort Seekers
- Social Space Seekers



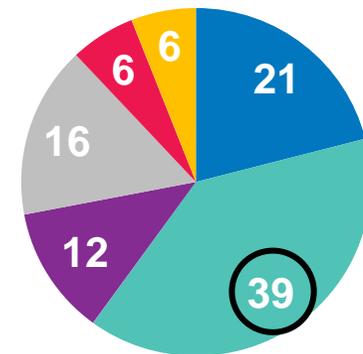
LEEDS



FORT NELSON



WHITE TOWER



Engaged Learners (1)

Segment
size:
16%

Engagement with Royal Armouries



High awareness, previous and future visits, affinity and interest in RA topics

Attractiveness/ value



High visit frequency and secondary spend. Would consider membership and many are interested in volunteering. They also donate and may consider legacies.

What is important to them

Engaged Learners constantly look for new experiences and events/ exhibitions to go to (e.g. cultural festivals, historic re-enactments), planning their trips and researching the topic in advance of their visit.

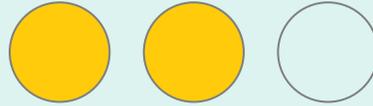
They don't feel fulfilled by a day out unless they have learnt something, so they read commentary and join additional events/ tours. They appreciate facts over stories, and a peaceful environment to learn in, away from too many children.

Military history, arms and armour are of particular interest to this segment, around half of whom have a specialist knowledge of RA themes.

How can we cater for their needs?

- Focus on facts
- Offer plenty of adult learning opportunities, including special events and exhibitions
- Focus on the collection - preserving and refreshing
- Provide additional content through the RA website

Engagement with Royal Armouries



Low awareness, but high visits to White Tower and high intention to visit and affinity

Attractiveness/ value



Large segment, moderate visits, moderate spend

What is important to them

Positive in their outlook on life, Tech Loving Enthusiasts are keen to embrace new experiences and then subsequently share them with friends on social media.

They are interested in both culture and leisure, balancing visits to museums and historic properties with trips to animal attractions, theme parks, outdoor cinema and comedy nights.

They like to take part in practical activities and are keen to have fun, as well as to learn something new.

Keeping up with new technology is important to this segment, and they enjoy playing computer games, so digital engagement on site is likely to appeal.

How can we cater for their needs?

- Interactive exhibits that promote fun and learning, e.g. learning through computer games.
- Offer free Wifi to encourage free marketing via social media.
- Almost a third have children, so provide exhibits that engage both adults and children.

Engagement with Royal Armouries		High awareness, visits, intention to visit and affinity
Attractiveness/ value		Moderate-high visits, moderate-high spend

What is important to them

Creative Leisure Explorers are enthusiastic attraction visitors, who enjoy visiting museums and historic monuments and are particularly interested in the history of royalty and other key characters from the past.

Family is central to their lives, so they plan visits with other family members in mind, balancing fun and learning.

They love new experiences and practical activities/ events, such as sensory experiences, family workshops and live presentations.

They are active on social media and share their attraction experiences with friends.

How can we cater for their needs?

- Offer free Wifi to encourage free marketing via social media.
- Making families feel welcome is key to attracting this segment, so provide exhibits that engage both adults and children, as well as special events for families/ children.
- Promote Royal Armouries as a platform for teaching important lessons from past wars.