

Part Two: Specification

**Market Research Framework**

**2021 - 2024**

**Contract Reference:** **RBGKEW/882**

 (This document is for information)

 **Market Research Framework 2021 – 2024 Overview**

**Project Summary**

1. **Summary of requirements**

Royal Botanic Gardens, Kew (RBG Kew) carries out a range of market research projects across various audience groups, products and services. This can vary from research among members, donors, paying visitors, prospective visitors/customers and broader environmentally engaged audiences. We have several research requirements which include, but are not limited to: visitor experience surveys for exhibitions and events; market demand and feasibility research; research of digital products such as podcasts or kew.org products; brand tracking; membership research; research to understand commercial opportunities such as pricing; audience development research and ad-hoc visitor surveys specific to a particular part of the experience such as signage, or use of leaflets. We use a combination of quantitative and qualitative methods.

The research helps inform our product development, commercial planning, audience development and understanding of wider market trends and perceptions. Within visitor marketing, specifically, RBG, Kew runs a calendar of visitor events and exhibitions designed to provide new reasons for visitors – both member and day paying visitors – to visit Kew Gardens or Wakehurst for the first time and to return throughout the year. A large part of the programme is also designed to help visitors understand more about Kew’s science and horticultural work. They are mostly, but not always, targeted at our London and South East audience but also attract large numbers of domestic and international tourists, particularly over the summer.

The purpose of the Market Research Frameworkis to build beneficial longer-term relationships with a set of high quality, agile, cost-effective suppliers who will understand the Kew brand in depth.

The purpose of this Specification is to set up a framework agreement (roster) of suitably skilled and qualified research suppliers to deliver a range of visitor, member and prospective audience research services to support Kew’s marketing and communications, public programme, digital and visitor experience, and commercial activity for the coming 3 years (2021 – 2024) with the option of extending for a further 1 year.

We will appoint up to 4 suppliers to the framework through this tender process. Appendix 1 details how we will appoint suppliers for the individual research projects.

Though each research project will require a bespoke research approach, based on our previous projects it is likely they will be best served by market demand studies; proposition development research, audience research, commercial modelling, exit/intercept and online surveys and in-depth qualitative research.

We are looking for suppliers with experience in; customer experience research; brand research; pricing analysis and/or product development and market testing research within cultural attractions, leisure, tourism, hospitality or retail sectors. Suppliers must be proficient in both online and onsite intercept surveys and have the ability to collect qualitative and quantitative data and process large volumes of data. This Supplier would work closely with the Marketing team, the Programming team, Membership & Foundation and at times the Digital Experience, Interpretation and Visitor Operations teams.

Over this next 3 years we estimate that we could have around 6-10 separate research projects per year deriving from the Kew Gardens Programming calendar and our strategic plans for the brand, although at this stage there is no commitment to any project. The research we require will be on a project-by-project base and generally each project will be budgeted somewhere in the range of £8,000 to £20,000 to ensure we make optimal use of our research budget, although at times there may be exceptions where we need a larger piece of work.

Continuous tracking of visitor experience is measured elsewhere, already covered by our Visitor Insights Programme and ALVA (Association of Leading Visitor Attractions).

The selected Supplier will have access to previous research carried out by Kew and/or annual exit survey data to provide benchmarks for evaluation.

* 1. **Visitor Programming calendar**

The seasonal visitor programming calendar will inform a lot of audience and product research we require. This programme is a diverse and innovative combination of annual and one-off events and festivals.

We cover a huge range of topics around plants and fungi, Kew’s science and horticulture work around the world, country themed celebrations of biodiversity, arts and culture and family programming.

We will not necessarily research every program and some programs will be evaluated on alternate years only – for example, the Orchid festival will not require evaluation in 2021/22 since it was evaluated relatively recently.

Other non-programming research is carried out throughout the year. For example, a research brief on pricing to inform our ticketing strategy will be sent out in the 2021/22 financial year, subject to budget approval. We review our ticket prices annually to ensure they remain competitive and reflective of the perceived value for money of a day out at Kew Gardens/Wakehurst so having an informed view on price elasticity of demand is crucial. This research would be for all ticket types as well as accounting for on/off peak.

**1.3 Target audiences**

Our research generally targets four groups:

* Day paying visitors to Kew Gardens and/or Wakehurst
* Members of either site
* Digital visitors to kew.org or social media followers
* Prospects (in the market for a ‘day out’, are based in London/South east England based, have not been to Kew Gardens/Wakehurst in the last 3 years; and are non-rejecters of Kew Gardens)

In their Technical Response (Part 3) each Supplier will need to demonstrate that they are proficient in sourcing and engaging each of these groups. **It will be particularly important to demonstrate how Prospects will be sourced, as RBG Kew will rely on the successful Suppliers to source these.**

From our continuous visitor experience survey, we have a general response rate of 9 - 13% from online day paying visitors in our weekly email invite. We can provide email addresses of online ticket buyers who have opted in – this figure ranges from 25 email addresses per week in low season to 250 in busy periods. All available sample is currently utilised by our continuous survey but can be allocated to programming specific research where need be. We cannot provide members email addresses. It may be possible to invite them to complete surveys via our internal email Database. We also have email databases for online shop customers and general email marketing recipients. The Kew website and social media channels can host survey pop-ups and posts.

When it comes to onsite intercept survey’s we have very high engagement rates since visitors are mostly happy to discuss their experience upon exit. Exact incidence rates cannot be provided as it is very dependent on the survey length and content. We expect our research partner to have ‘Covid-19 proofed’ any onsite research procedures through a detailed risk assessment.

We have a new audience segmentation in progress at the time of writing this document. It is based on UK-wide audience engagement with Royal Botanic Gardens, Kew encompassing both onsite and online behaviour. When the profiles of the segmentation have been created, they will be shared with roster Suppliers and ‘golden questions’ will be provided in 2021 for use in future studies.

The ALVA annual Visitor Attractions List (found here: <https://www.alva.org.uk/details.cfm?p=423>**)** provides some sense of the sites we see as competitors in the *days out* space and how we have grown in popularity in recent years.

 **1.4 Internal stakeholders**

The Kew Gardens Marketing team sits in the Marketing and Commercial Enterprise (MCE) directorate and there will be collaboration with other areas of the directorate such Visitor Programming, Digital Experience and PR.

Across Kew the selected research partner will also work closely with other Directorates, particularly Horticulture, Learning and Operations (HLO), Foundation (for Membership and Fundraising), Wakehurst and Science. From time to time, research may need to be presented to key Steering Groups or Kew’s Executive Board.

**Requirements and Deliverables**

 **2.1 Requirements**

The requirements for the research suppliers are that they should be:

* Experienced in designing research for bespoke projects in a relevant sector: visitor attractions, leisure, hospitality, tourism or retail, working with the client to shape briefs and methodology
* Experienced in running quantitative research projects, collecting and analysing data via online or exit surveys
* Skilful in qualitative research methodologies, both online and face-to-face, such as intercept interviews, focus group moderation and in-depth interviews
* Experience of working with membership organisations, and delivering market research specific to members
* Experienced in sourcing relevant and engaged Prospect panels for interviews
* Proficient in complex research techniques and modelling to fulfil pricing research study
* Able to process large volumes (‘000’s) of case files for robust data and provide thorough data analysis
* Able to deliver concise, but thorough action-orientated insight & reporting
* Provide evidence of full compliance with all data protection regulation through strict policies and procedures
* Experienced in presenting and discussing results to all levels of stakeholders, from senior management to operational teams
* Compliant safeguarding policies and procedures on site that are up to date to reflect Covid-19
* Able to act a strategic research partner to RGB Kew
	1. **Deliverables**

We estimate we will require around 6 to 12 research projects to be delivered – approximately 3 to 5 Festival evaluations and 3 to 7 product/audience/brand research projects, although at this stage there is no commitment to any projects.

In each project, the appointed research supplier will:

* Advise on approach, methodology and sampling
* Compile questionnaires and allow for Kew amends
* Source Prospect panels
* Create any materials required for email surveys including invite text and project schedules
* Undertake the research to the agreed timelines and quota sizes
* Analyse the data
* Produce a report on all metrics in a user-friendly report, such as a PowerPoint document
* Provide an executive summary
* Run a face-to-face presentation of results to key stakeholders on up to 2 occasions
* Benchmark data to appropriate benchmarks e.g. previous study or exit survey data
* Deliver a full set of data tables

**Current Policies and Standards**

 **3.1 Data Protection & IT Policies**

It is crucial that selected suppliers comply with data protection law. Selected suppliers shall show evidence of compliance with GDPR regulations, in line with Kew’s data protection and privacy policies. We require our selected Supplier to uphold the best practice standards of The Market Research Society.

The Supplier Questionnaire must be completed and submitted with your proposal, please see Word document in Appendix.

**3.2 Onsite safeguarding policies & procedures**

By law, Kew’s trustees – anyone working onsite for Kew as an employee or supplier are responsible for ensuring that those benefiting from, or working with Kew, are not harmed in any way through contact with us.  Kew’s safeguarding policy and procedures set out a framework for how safeguarding will be implemented across Kew.

All suppliers need to comply with Kew’s safeguarding policies and procedures to protect children and vulnerable adults, including but not limited to following Kew’s Code of Good Practice, reporting procedures and if required, ensuring that relevant Supplier Personnel undertake training and DBS checks before being permitted access to Kew’s premises. Supplier shall bear the costs of all required DBS checks that Kew, in its sole discretion, determines are necessary (on its own behalf, and on behalf of all Supplier Personnel).

**3.3 Contract**

A three-year ranked framework will be put in place in February 2021. The draft contract terms and conditions applicable to this Tender are detailed in Part 5: Draft Contract Terms and Conditions.

**3.4 Funding**

1. The estimated value of the framework for the three years of research is £600,000 excluding VAT but inclusive of all other costs. Budget of each individual project will be advised at time of briefing. At this stage there is no commitment to the level of spend in this framework as each project is dependent on budget approval.

 **3.5 Payment profile**

Invoices to be submitted to the finance department accountspayable@kew.org, quoting the full purchase order number provided.

 Queries relating to invoices shall be raised with the order originating department(s). A contact name and telephone number shall be supplied on the purchase order. Payment will be made within thirty (30) days of the date of the invoice.