

Annex A

Specification / Scope of Requirement

1. INTRODUCTION

1.1. BRIEF ISSUE

This brief is issued by the National Museum of the Royal Navy Operations (NMRN Operations) for the provision of Market Research and Audience Development Services to provide insights on; brand impact and awareness, existing and potential market penetration for on and offline audiences, and a strategic segmentation and prioritisation analysis.

1.2. THE NATIONAL MUSEUM OF THE ROYAL NAVY (NMRN) OVERVIEW

The National Museum of the Royal Navy (NMRN) was established in 2009 and is the youngest national museum. It tells the story of the four fighting forces of the British Royal Navy, the Royal Marines, the Fleet Air Arm, the Submarine Service and the Surface Fleet.

Its vision is: *To be the world's most inspiring Naval Museum, Linking Navy to Nation*

Its mission is: *Inspiring enjoyment and engagement with the continuing history and modern role of the Royal Navy and the Royal Navy's impact on shaping both our nation and the modern world.*

The Museum is based across five geographical locations; Portsmouth and Gosport both in Hampshire, Yeovilton in Somerset, Hartlepool in County Durham and Belfast in Northern Ireland. Across these sites NMRN holds the nation's richest and most diverse collection of historic warships including the 'nation's flagship' HMS Victory. Each site is unique, and feature a mixture of ships and museums, details of each site and its corresponding audience are expanded on in section 2.

Nine of the ships in the Museum's care, (HMS Victory, HMS Warrior, HMS Trincomalee, Holland 1, HMS Caroline, HMS M33, RML 497, LCT 7074 and HMS Alliance) are recognised as being of national significance by the National Register of Historic Vessels and are included in the National Historic Fleet. In addition, NMRN holds a significant air craft collection which represents the Fleet Air Arm Story.

NMRN also cares for a collection of over 2.5million items which tell the epic story of the Royal Navy from its origins in 625AD to today, it is the country's most comprehensive collection of Royal Navy heritage, and holds national and international significance.

NMRN is a National Museum with a nationally recognised collection and as such, is a member of the National Museum Directors Council. It is also a Service Museum, and therefore receives its grant in aid support from the Ministry of Defence, via the Royal Navy akin to the National Army Museum and the Royal Air Force Museum. NMRN's level of public funding does not enable it to meet costs sufficiently to offer free visitor access (in line with other national museums) and therefore it is dependent on its commercial revenue streams (in particular its admission fees) and fundraising endeavours to bridge the gap.

The management of the day to day activity of the Museum is delivered by the NMRN Operations Company who are commissioning this work.

1.3. STRATEGIC OBJECTIVES

In 2022 the trustees of the Museum in collaboration with the Executive developed a new strategic plan for NMRN developing beyond the first decade of its life and steering its direction out of the COVID 19 crisis. This plan identifies the following strategic aims:

1. Strategic Aim 1 Audiences

- Strategic Objective 1.1 Grow and diversify our global audiences – nationally, on site and online
- Strategic Objective 1.2 Create innovative and inspirational experiences, services and products
- Strategic Objective 1.3 Build our brand and reputation as the authority on the Royal Navy story

2. Collections

- Strategic Objective 2.1 Sustain and develop our world-class collections and sites
- Strategic Objective 2.2 Explore different Royal Navy story perspectives with our diverse audiences
- Strategic Objective 2.3 Extend access to our collections and sites through digital transformation

3. Sustainability

- Strategic Objective 3.1 Grow our income and financial resilience to secure long-term sustainability
- Strategic Objective 3.2 Reduce our carbon consumption and transform our estate
- Strategic Objective 3.3 Build partnerships and influence

The strategy also recognised that none of this will be achieved without the skills, dedication and hard work of NMRN's people and therefore seeks to:

- Value and empower our people
- Are outward-facing, inclusive and audience-led
- Build a culture of innovation and enterprise
- Be sustainable in all that we do

This strategic plan is delivered through the implementation of a Corporate Plan, directed and delivered by the Executive.

1.4. THE BRIEF

NMRN Operations is looking to procure Market Research and Audience Development Services that supports NMRN's Strategic Aim 1, to grow and diversify our audiences, by better understanding who they are, who they aren't and where our opportunities for growth and development are.

The Museum has undertaken pieces of evaluation work previously but has not undertaken an overarching review of the whole product offer nor addressed the corporate brand proposition. It holds audience segmentation models for each of its sites. These can be made available upon request.

The research will be used to underpin our strategic decision-making including, but not limited to; marketing, programming, capital investment, fundraising, customer experience, digital strategy and brand evolution. It will be used by all aspects of the business and should become a unifying language for teams across departments and disciplines.

NMRN has developed the following six aims for the research which connect with areas of planning and expected outcomes. The research will:

- Provide an understanding of NMRN's corporate brand awareness position, including that of the individual site brands, that will inform the development of a brand evolution strategy
- Identify NMRN's existing market penetration and audience demographic on a site by site basis to inform implementation of commercial, programming, interpretation and marketing strategy and improve audience experiences
- Enable NMRN to understand the potential market opportunity on a corporate and site by site level, to enable priority audiences to be identified and direct activity and investment that can grow and diversify audiences and support revenue generation
- Review digital audience engagement as part of the wider understanding of audience growth and support our strategy development
- Develop a common understanding and language in relation to our audiences to support strategic and tactical planning
- Establish a framework for ongoing monitoring and evaluation of audiences which will enable us to benchmark against our own and sector performance and monitor the evolution of our audiences.

For the purposes of quoting we have broken the desired activity into a series of packages of work, which are outlined below:

- **Package 1** NMRN Brand awareness of NMRN's brand
- **Package 2** Local Site-specific Market and macro environmental study
- **Package 3** Site Specific Micro Environmental Review
- **Package 4** Digital Audiences review
- **Package 5** Audience Segmentation Analysis and Ongoing Review Process
- **Package 6** Audience Prioritisation Strategy
- **Package 7** HMS Victory Brand Impact Study
- **Package 8** NMRNH Hartlepool Proposition Testing

The scope of each package is outlined further in section 3.

2. OUR SITES AND AUDIENCES

2.1. NMRN PORTSMOUTH, GOSPORT AND PORTSMOUTH HISTORIC DOCKYARD OVERVIEW

Portsmouth Historic Dockyard (PHD) is the destination brand attached to NMRN's offer at Portsmouth and Gosport. Geographically, it is located adjacent to His Majesty's Naval Base Portsmouth one of three operating bases in the United Kingdom for the Royal Navy. It is the headquarters for two-thirds of the Royal Navy's surface Fleet and the oldest naval base in services history.

Maintenance and guardianship of the historic PHD estate is managed by our landlords the Portsmouth Naval Base Property Trust who also operate some areas of the site directly. They offer free access to the site through the Heritage Quarter Pass (HQP), and to the attractions in their care which include restaurants, shops and boat building training facilities. They also have a collection of historic vessels which visitors can take a ride on for an additional charge.

The PHD brand however, is marketed and operated jointly by NMRN in partnership with the Mary Rose Trust (MRT), since August 2020 via PHD Operations through a newly introduced joint ticketing offer. This enables visitors to purchase one ticket and visit all attractions on site under their care as well as the free assets offered by the HQP.

PHD is the home to:

- **The Mary Rose Museum – operated by MRT**
The Mary Rose was the flagship of Henry VIII that served in his fleet for 34 years before sinking during the Battle of the Solent in 1545, with the king watching from nearby Southsea Castle. Her remains were raised in 1982, and are now on display along with thousands of the original objects recovered alongside the ship, giving a unique and moving insight into life in Tudor England. She is the only ship of her kind on display anywhere in the world.
- **The National Museum of the Royal Navy – operated by NMRN**
The National Museum of the Royal Navy Portsmouth showcases treasures from the past 350 years and examines the common threads which link the sailor of England's 'Wooden Walls' to the professional crews of today across a series of galleries.
- **HMS Victory – operated by NMRN**
One of the most celebrated warships in Britain's naval history, visitors can see HMS Victory through Vice-Admiral Lord Nelson's eyes as his flagship is presented as she was in her Georgian heyday. Soak up the atmosphere as the ship and her crew get ready for the Battle of Trafalgar, see where sailors and officers ate and slept, and feel the drama and impact of the day that changed history forever.
- **HMS Victory: The Nation's Flag Ship – operated by NMRN**
Discover the extraordinary story of this National Treasure from acorn to Icon. The gallery details the extraordinary story of the oldest naval ship in the world still in commission, and explores her lesser-known history from construction through her illustrious career and meet some of the people who have worked on her.
- **Victory Live: The Big Repair – operated by NMRN**
Get under the skin of HMS Victory and learn about the once-in-a-lifetime project to fight the impact of moisture, fungus and pests that threaten her; meet the incredible teams fighting to protect her and see her as never before by climbing aboard the scaffold that encases her in this unique and ground-breaking experience.

- **HMS Warrior – operated by NMRN**
Climb onboard the largest, fastest and most powerful warship of Queen Victoria's fleet, HMS Warrior and experience life onboard to reflect the crews experience of a Victorian battleship in 1860.
- **HMS M.33 – operated by NMRN**
Descend into the bottom of the dock and step aboard HMS M.33, the only British warship from the First World War that is open to the public. Immerse yourself in the stunning battle experience, hear the stories of the men who served on board and the bloody history of the Gallipoli Campaign which brings HMS M.33's remarkable history to life.
- **Commando Experience at Action Stations – operated by NMRN**
Puts visitors at the heart of the Royal Navy's elite amphibious force, with a series of Royal Marines Commando-style physical challenges for visitors. Visitors can scramble up a climbing wall, have a go at the Ocean Warrior assault course or book a private party in the laser quest facility. This site is expected to become the permanent home of the Royal Marines Museum as part of NMRN's capital development plans.
- **Boathouse 4 – operated by Portsmouth Naval Base Property Trust**
Boathouse 4 was built in 1939 in response to the need for a rapid rearmament programme prior to the start of World War II. This vast building, incorporating its own dock and locks, is typical of 1930s military industrial architecture and houses boat building courses and training centre.

In addition, there is a **Harbour Tours** and **Water Bus service** (operated by a third party on behalf of PHD Operations) which provides visitors with the opportunity to get on the water and also to reach Gosport where they can visit:

- **The Royal Navy Submarine Museum and HMS Alliance - operated by NMRN**
Discover HMS Alliance, the only remaining Second World War era submarine. Explore the decks and narrow corridors, look through the original periscope and hear the stories of those who served onboard.
- **Explosion Museum of Naval Firepower – operated by NMRN**
Uncover the incredible stories of designers, makers, and seaman who worked on armaments over the centuries and listen to first-hand accounts of the munition workers who dealt with dangerous materials. Also, home to new permanent gallery; The Night Hunters: The Royal Navy's Coastal Forces at War. Discover the high-risk, high-octane operations of the coastal forces in both world wars.

Visitor to the site are presented with three paid ticket options:

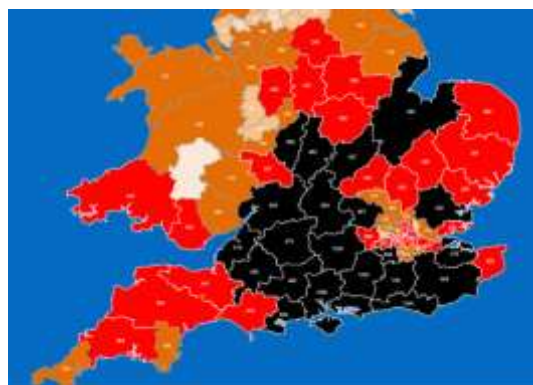
- **One Attraction Ticket**
Currently priced at £24 (adult) whether bought onsite or online this ticket provides single use access to one of the attractions on site. It is our second most popular ticket and is bought largely through walk up sales. Uptake for the ticket is largely for visits to HMS Victory (including Victory Live and Victory Gallery), Mary Rose and the Submarine Museum.
- **Three Attraction Ticket**
Our least popular ticket, this is priced at £34 online and £39 (adult) on site. It gives visitors access to three attractions and can be used as many times as they like over a 12 month period from the date of the first visit. It is mostly used on HMS Victory, Mary Rose, HMS Warrior and the Submarine Museum.
- **Ultimate Explorer**
Our best value and most popular ticket it is priced at £39 online and £44(adult) for a walk up. It provides unlimited access to all attractions for a 12 month period and is the only ticket which provides access to the Harbour Tours offer.

2.1.1 PRE COVID PHD AUDIENCES

In 2020 as part of a wider business case in response to the Coronavirus Pandemic, NMRN created a Market Analysis for all of its sites, which provided an overview of NMRN audiences at its sites, an extract of this is detailed below. MRT has also collected data on its audiences which is also outlined below.

All data relating to PHD is taken from a combination of NMRN data and MRT data as they were operating separately until August 2020.

Postcode mapping taken from a sample set of data from NMRN (Left) CRM database shows a strong representation of visitors originating from the south of the UK but also a good presence from the larger cities in the midlands. Visitors taper off further up north. Some of the top areas in which visitors originate from include Portsmouth, Southampton and Guilford, all within an hour away suggesting a high proportion of day tips. MRT data (right) echoes similar trends.



Together we define our target market as being the south coast diamond as illustrated left with an important secondary market of London, which remains in easy commutable reach of the Portsmouth and Gosport sites.

Research undertaken by the Audience Agency summarises the largest segments of the arts and culture participation market in the South East as being made up of the following:



Commuterland Culture Buffs (22%) –Affluent suburban and greenbelt consumers of culture as part of their social lives. Market size c1.6m.



Dormitory Dependable (21%) – Regular but not frequent cultural attenders living in city suburbs or small towns. Market size c1.5mK.

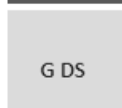


Trips and Treats (15%) –Suburban Households, often with children whose cultural activities are usually part of a day out or treat. Market size c1.1m.

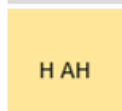
Mapped against the Mosaic classifications these equate to the following three being the most prominent:



B Prestige Positions (14%) - Established families in large detached homes living upmarket lifestyles. Market size c1m.













G Domestic Success (13%) - Thriving families who are busy bringing up children and following careers. Market size c972K.

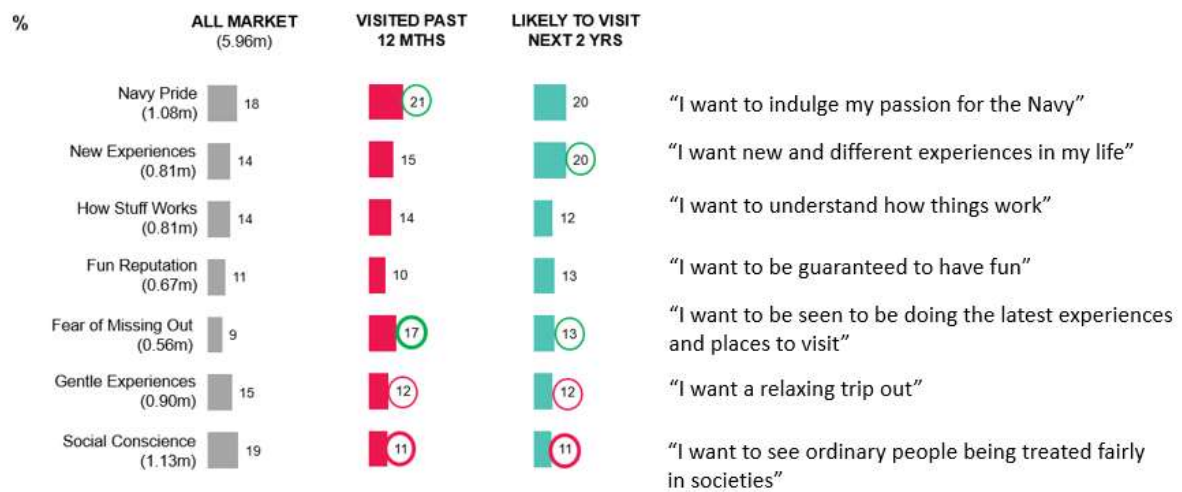


H Aspiring Homemakers (11%) – Younger households settling down in housing priced within their means. Market size c822K.

Specific research by the Audience Agency on PHD audience segments is outlined in the table below. This table also provides data on the representation of those segments in Portsmouth:

Segment name	PHD		Portsmouth
	Count	%	
 Metroculturals - Prosperous, liberal, urbanites interested in a very wide cultural spectrum	402	2%	1%
 Commuterland Culturebuffs - Affluent and professional consumers of culture	1,027	5%	3%
 Experience Seekers - Highly active, diverse, social and ambitious, engaging with arts on a regular basis	4,265	23%	23%
 Dormitory Dependables - Suburban and small towns interest in heritage activities and mainstream arts	1,300	7%	4%
 Trips & Treats - Mainstream arts and popular culture influenced by children, family and friends	6,182	33%	29%
 Home & Heritage - Rural areas and small town, day-time activities and historical events	2,294	12%	9%
 Up Our Street - Modest in habits and means, popular arts, entertainment and museums	1,467	8%	11%
 Facebook Families - Younger suburban and semi-urban, live music, eating out and pantomime	1,052	6%	9%
 Kaleidoscope Creativity - Mixed age, low level engagement, free local events, outdoor arts and festivals	473	3%	6%
 Heydays - Older, less engaged, crafts, knitting, painting, sheltered housing, church group or community library	320	2%	4%
Unclassified	235	-	2,568
Base	18,782		171,009

NMRN research with BDRC segmented the audience into seven groups as outlined below.



NMRN and MRT marketing strategy currently seeks to increase its audiences with a specific focus on Trips and Treats, Dormitory Dependable and Experience Seekers from the Audience Agency model. Further Audience Development activity for the site is planned in the 2021/22 financial year the outcomes of which would be shared with the appointed agency.

2.1.2. POST COVID AUDIENCES

When reviewing postcode data of audiences that have visited PHD since COVID we can see the following:

PHD– Summer 2021



PHD Summer 2022



In line with eased restrictions and changes in market opportunity, we have seen audiences visit from across the country.

2.1.3. VISITOR NUMBERS

The introduction of a new business model in 2020, saw PHD operations pursue a yield strategy over volume. Historically we had sought to deliver high volume through extreme discounting. It was felt that a more robust approach would see us protect our yield through tactical promotions, and driving the larger percentage of tickets through our own channel, ensuring better gift aid performance and improved data capture and retargeting activity.

With this in mind we have seen a drop off in the volumes of visits that PHD received and makes pre-covid operating data unhelpful to review.

Visitor footfall for the period since August 2020 is as follows:

Year	Total Visits (including returners and frees)	Paying Visits
August 2020 – March 2021 inc closure over November 2020 and Jan – March 2021	55,342	40,366
April 2021 – March 2022 inc closure April 2021 – May 2021	345,527	205,819
April 2022 to October 2022	397,708	191,702

Pre- Pandemic figures are not listed because of the significant shift in the pricing and operational model.

2.2. FLEET AIR ARM MUSEUM OVERVIEW

The Fleet Air Arm Museum (FAAM) is based in Yeovilton, Somerset. Geographically, it is located adjacent to the Royal Naval Air Station Yeovilton one of two active Fleet Air Arm bases.

The Museum is made up of four exhibition halls and holds over ninety aircraft as well as more than 2 million records and 30 thousand artefacts. It is Europe's largest naval aviation Museum. It also has an airfield viewing area, offering visitors views of modern service personnel take off and landing at the site and providing an important link to the modern service story.

Highlights from the site include:

- **Concorde 002**
Find out the fascinating story behind this prototype as it was tested and developed to shape the 16 Concorde that went into service for Air France and British Airways On board the world-famous Concorde 002 you can marvel at this amazing feat of modern technology, discover how it reached incredible speeds in excess of 1,300 mph and changed the world of commercial aviation forever.
- **Saved! 100 years of Search and Rescue**
You will uncover the astonishing 100-year history of this service from the people who shaped it to the actual aircraft they use and even get the chance to walk through a Search and Rescue Sea King helicopter!
- **Pioneers to Professionals: Women of the Royal Navy**
Discover the awe-inspiring story behind the pioneering women who laid the foundations for the Women's Royal Navy Service and shaped it into what it is today.
- **Aircraft Carrier Experience – Airfield at Sea**
Be transported onto the flight deck of a working Aircraft Carrier and see naval aircraft in their natural home, the aircraft carrier. Discover the evolution of Aircraft Carriers from the dawn of naval air warfare to the everchanging modern world and the hurdles needed to overcome. You will witness the dangers of aircraft taking off and landing on a moving runway at sea, how crews overcome these challenges and how the highly skilled men and women of an aircraft carrier operate a city at sea.
- **40th Anniversary Falklands Conflict exhibition**
See the Falklands war through the eyes of a Royal Navy Petty Officer who served during the war.

Visitors to the site are presented with one paid ticket option priced at a £15 online and £19 walk up on site (adult). This is a full year ticket and can be redeemed multiple times across 12 months.

2.2.1 PRE COVID FAAM AUDIENCES

Reviewing sample data from NMRN CRM database shows a far wider and denser spread of visitors to



FAAM. FAAM’s reach is still heavily in the south but moving to larger visitor quantities in the midlands. Visitor percentage from Bath, Taunton and Southampton are consistently high with these areas being within approx. 1.5 hours’ drive away.

This be accounted for based on the South West’s strong Domestic Tourism offer, with visits from across the UK coming into the region for short break and staycations.

These make a large proportion of FAAM visits and account for a low returner rate (6%).

Taking a sample of data from the period of April 2019 – October 2019 shows that adult tickets make up 41% of the customer type, followed by 24% being family tickets and 22% senior tickets.

Research undertaken by the Audience Agency summarises the largest segments of the arts and culture participation market in the South West as being made up of the following:



Trips and Treats (21%) –Suburban Households, often with children whose cultural activities are usually part of a day out or treat. Market size c979K.



Dormitory Dependables (18%) – Regular but not frequent cultural attenders living in city suburbs or small towns. Market size c839K.

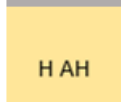


Home and Heritage (17%) – Conservative and mature households who have a love of the traditional. Market size c792K

The most prominent Mosaic classifications are:



C Country Living (14%) – Well-off owners in rural locations enjoying the benefits of country life. Market size c652K.

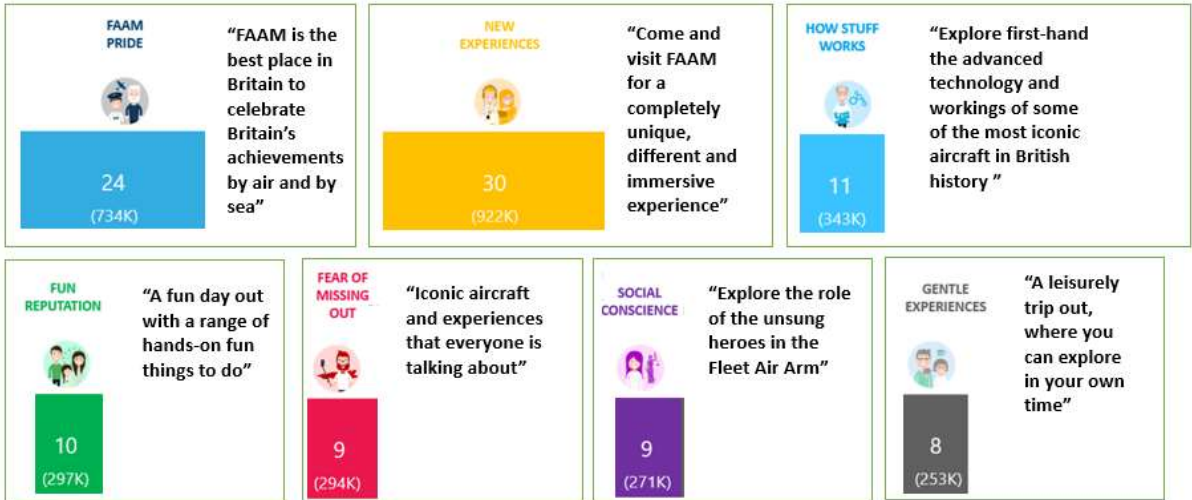


H Aspiring Homemakers (12%) – Younger households settling down in housing priced within their means. Market size c559K.



D Rural Reality (11%) – Householders living in inexpensive homes in village communities. Market size c513K.

NMRN research with BDRC segmented the audience into seven groups as outlined below.



2.4 POST COVID AUDIENCES

When reviewing postcode data of audiences that have visited FAAM since COVID we can see the following:

FAAM Summer 2021



FAAM Summer 2022



In line with eased restrictions and changes in market opportunity, we have seen audiences visit from across the country but with a strong pick up across the South and midlands.

2.2.3. VISITOR NUMBERS

Visitor footfall for the period since 2019 is as follows:

Year	Total Visits (including returners and frees)	Paying Visits
2019 -2020 inc closure March 2020	83,132	71,799
August 2020 – March 2021 inc closure over November 2020 and Jan – March 2021	16,638	15,377
April 2021 – March 2022 inc closure April 2021 – May 2021	57,692	53,651
April 2022 to October 2022	49,944	45,209

2.3. NATIONAL MUSEUM OF THE ROYAL NAVY HARTEPOOL OVERVIEW

The National Museum of the Royal Navy Hartlepool (NMRNH) is based in Hartlepool in County Durham. A seaside and port town it has a long history of Royal Navy recruitment and ship building.

The Museum is made up of a series of spaces around a recreated 18th century seaport with HMS Trincomalee a Royal Navy Frigate and Britain's oldest floating warship at the centre of the quay.

Highlights from the site include:

- **HMS Trincomalee**
Climb aboard the last remaining Royal Navy ship to be built in India, HMS Trincomalee. Docked in Hartlepool, you will discover the rich history of this extraordinary ship and experience the hierarchy of life at sea from the captain's cabin to the crew's mess deck.
- **HMS Trincomalee Exhibition**
Located on the historic quayside, the HMS Trincomalee Exhibition is home to the story of HMS Trincomalee, from her build in India to her restoration in Hartlepool, as well as the famous figurehead which was mounted on the ship for 150 years!
- **Fighting Ships**
See the secrets of war unfold before you in the moving and stirring story of HMS Prosperity. Move through the exhibition as each part of the ship is brought to life and the stories of those who served onboard are revealed. Narrated by a young member of the ship's crew, the dramatic reconstruction of what happened is unleashed for all to see, hear and feel.
- **Recreated Georgian Quayside**
Take in the historic quayside setting at the National Museum of the Royal Navy Hartlepool. Travel back in time to the recreated 18th century seaport and its beautiful waterside setting. See how tradesmen like tailors, printers and instrument makers earned a wage. You can also see how people spent their leisure time playing traditional games.
- **Horrible Histories Pirates: UK exclusive!**
The bestselling series, by Terry Deary and illustrator Martin Brown, takes buccaneers of all ages on an epic adventure across the seven seas with hands-on displays and interactive exhibits in this temporary display. Follow a bossy pirate parrot and his ratty shipmate on a hilarious journey as you discover wicked weapons, terrible tactics and prisoner punishment used by Blackbeard himself. Lively illustrations, foul facts and gruesome games bring the stories of putrid pirates to life.

Visitors to the site are presented with one paid ticket option priced at a £8 online and £10 walk up on site (adult). This is a full year ticket and can be redeemed multiple times across 12 months.

In addition to the current offer NMRN has recently acquired a 58,000 square foot, three-acre site, with 250 car parking spaces, which lies alongside NMRN Hartlepool, unlocking much-needed space for an ambitious expansion which includes new galleries, conservation workshops, reception and retail space. This forms part of wider plans by Hartlepool Borough Council and the Tees Valley Authority to redevelop the waterfront space in which NMRNH sits.

2.3.1 PRE COVID NMRNH AUDIENCES

Reviewing sample data from NMRN CRM database shows a high concentration of visits from the local and regional area, with some hotspots from the midlands and North West.



NMRNH has high proportion of unique visitors but also a strong returner rate of 19%.

Taking a sample of data from the period of April 2019 – October 2019 from our ticketing system shows that the predominant audience tends to be made up of Adults and seniors totaling 61%, but the family audience has increased over the last few years, now sitting at approx. 28% from this sample.

Although local audiences seems to be the largest visitor group from looking at the postcode mapping, the returner rate only accounts for approx. 3% of total visits. This could indicate short staycations.

Taking a sample of data from the period of April 2019 – October 2019 from our ticketing portal shows that the predominant audience is made up quite evenly of families (34%) and adults (38%).

Research undertaken by the Audience Agency summarises the largest segments of the arts and culture participation market in the North East as being made up of the following:



Trips and Treats (21%) – Suburban Households, often with children whose cultural activities are usually part of a day out or treat. Market size c979K.

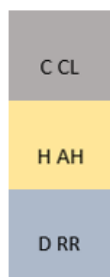


Dormitory Dependables (18%) – Regular but not frequent cultural attenders living in city suburbs or small towns. Market size c839K.



Home and Heritage (17%) – Conservative and mature households who have a love of the traditional. Market size c792K

The most prominent Mosaic classifications are:

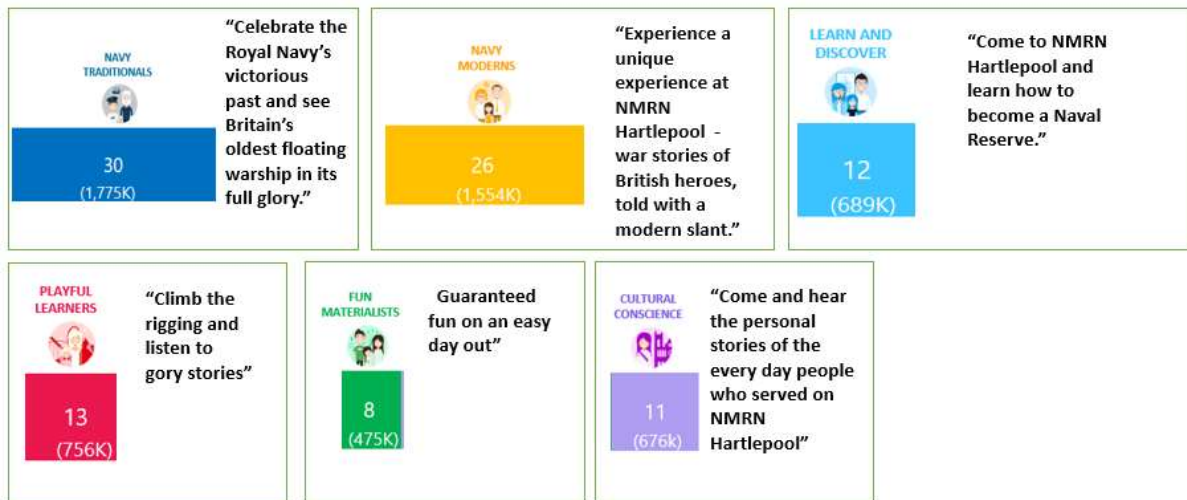


C Country Living (14%) – Well-off owners in rural locations enjoying the benefits of country life. Market size c652K.

H Aspiring Homemakers (12%) – Younger households settling down in housing priced within their means. Market size c559K.

D Rural Reality (11%) – Householders living in inexpensive homes in village communities. Market size c513K.

NMRN research with BDRC segmented the audience into six groups as outlined below.



2.3.2. POST COVID AUDIENCES

When reviewing postcode data of audiences that have visited NMRNH since COVID we can see the following:

NMRNH Summer 2021



NMRNH Summer 2022



In line with eased restrictions and changes in market opportunity, we have seen audiences visit from across the country but with a strong pick up across the South and midlands.

2.3.3. VISITOR NUMBERS

Visitor footfall for the period since 2019 is as follows:

Year	Total Visits (including returners and frees)	Paying Visits
2019 -2020 inc closure March 2020	48,801	37,030
August 2020 – March 2021 inc closure over November 2020 - March 2021	2,749	2,462
April 2021 – March 2022 inc closure April 2021 – May 2021	34,042	29,981
April 2022 to October 2022	39,795	30,477

2.4. HMS CAROLINE OVERVIEW

HMS Caroline (HMSC) is located in the Titanic Quarter of Belfast, a 185 acre urban-waterfront regeneration project and the site where RMS Titanic was designed and built. The Titanic quarter is based in central Belfast, and through its location is aligned to the wider tourism offer for Northern Ireland.

HMSC is a decommissioned C-class light cruiser of the Royal Navy that served in the First World War at the battle of Jutland and as an administrative centre in the Second World War.

The site centres around the ship, but is complimented by the adjacent pumphouse site which housed an exhibition on the history of HMSC.

HMSC closed in March 2020 in response to the pandemic, but has yet to reopen. It is scheduled to reopen in March 2023. This delay has been bought about by uncertainty around the funding and operational responsibilities for HMSC.

Business plans are being finalised for the future operation of Caroline including a new pricing model expected to be around £9 online and £11 walk up (adult).

2.4.1 PRE COVID HMSC AUDIENCES

Reviewing sample data from NMRN CRM database shows a high concentration of visits from the



local and regional area, with a large proportion from English and Scottish Cities, including London, Glasgow and Edinburgh.

This relates to Adult Group visits and domestic tourism trips from those areas with access to airports in which you can fly direct to Northern Ireland or get the ferry. The collapse of Flybe at the start of the COVID-19 outbreak will severely impact on some of these visits as the routes available become restricted and more costly.

Audience Agency data is not available for Northern Ireland. NMRN research with BDRC segmented the audience into seven groups as outlined below.



2.4.2. VISITOR NUMBERS

Visitor footfall for the period since 2019 is as follows:

Year	Total Visits (including returners and frees)	Paying Visits
2019 -2020 inc closure March 2020		

2.5. NMRN PROJECTS AND DEVELOPMENTS

In addition to the NMRN sites, there are a series of major projects and wider activities taking place. NMRN is considering development in new areas of the country including the Naval Base in Devonport Plymouth and at the home of Nelson's birth in Norfolk. In addition to those areas there are two projects in development which seek research support to help define their future progression.

- **HMS Victory Conservation Project**

The HMS Victory Conservation Project is a decade long project to protect Nelson's flagship from the impact of time and natural decline.

A team of HMS Victory Preservation Company Trustees have formed a committee to consider the best mechanisms to communicate with and engage audiences with this once in a lifetime work.

Package 7 of this brief will seek to better understand the brand perception and awareness of HMS Victory and how best it might seek to engage with audiences over the coming year.

- **NMRNH New Museum**

As detailed the NMRNH has purchased a large area adjacent to the existing site which it seeks to expand into.

Package 8 of this brief will seek to inform development of the site through engagement with audiences to inform the development of the proposition.

3. DIGITAL ENGAGEMENT AND ONLINE AUDEINCES

3.1. OVERVIEW DIGITAL

NMRN has a vast digital real estate. NMRN has a central website which is the home of to corporate information but also acts as a driver for ticketing income. PHD also has a central website which is the main portal for processing ticket sales for the Portsmouth and Gosport sites and acts as a destination marketing platform. <https://www.historicdockyard.co.uk/index.php>

NMRN also has a presence across social media with shared Twitter, Facebook and Instagram accounts for PHD.

Facebook <https://www.facebook.com/historicdockyard>

Twitter <https://twitter.com/PHDockyard>

Instagram <https://www.instagram.com/phdockyard/?hl=en>

Very little historic data is held on engagement with these accounts and as such the process for monitoring and evaluation has been reviewed. In October 2020 a Digital Marketing Agency was appointed jointly by NMRN and MRT to support these platforms and consequently we are accessing more data. A new social media strategy for 2023 will also seek to address more standardised reporting.

3.2. NMRN DIGITAL ENGAGEMENT

Historically NMRN has structured its digital content around commercial calls to actions. Whilst this targeting has aligned it to its commercial imperatives, it has resulted in poor engagement overall and as such NMRN's digital audiences have been largely dormant and little to no reporting has been in place.

Over the pandemic period digital platforms have been restructured and a content marketing approach has been implemented to drive awareness of NMRN, engagement with the Museum and to support commercial and fundraising asks. This approach is designed to 'widen the pool' and increase opportunity for financial return.

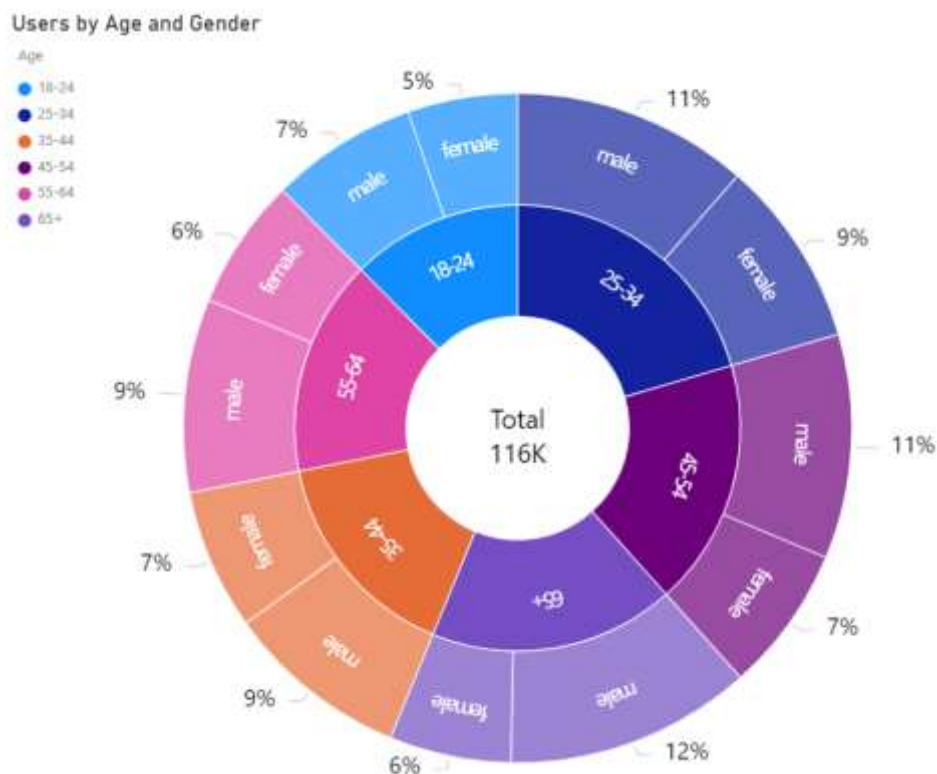
NMRN completed the first stage of a web refresh project to upgrade its central website in June 2022 and integrate some of the separate sites that it has adopted over the years. A summary of the NMRN digital real estate is provided below:

- NMRN central website <https://www.nmrn.org.uk/>
- NMRN Facebook <https://www.facebook.com/NatMuseumRN/>
- FAAM Facebook <https://www.facebook.com/FAAMuseum>
- NMRNH Facebook <https://www.facebook.com/NMRNHartlepool>
- HMS Caroline Facebook <https://www.facebook.com/hmscaroline>
- Explosion Museum of Royal Navy Firepower Facebook <https://www.facebook.com/explosionmuseum>
- Royal Navy Submarine Museum Facebook <https://www.facebook.com/RoyalNavySubmarineMuseum>
- Royal Marines Museum <https://www.facebook.com/RoyalMarinesMuseum>
- NMRN Twitter <https://twitter.com/NatMuseumRN>
- FAAM Twitter <https://twitter.com/FleetAirArmMus>
- NMRNH <https://twitter.com/HpoolQuay>
- HMS Caroline <https://twitter.com/HMSCaroline>
- Explosion Museum of Royal Navy Firepower Twitter <https://twitter.com/explosionmuseum>

- Royal Navy Submarine Museum <https://twitter.com/RNSubMuseum>
- The Royal Marines Museum <https://twitter.com/RoyalMarinesMus>
- NMRN Instagram <https://www.instagram.com/natmuseumrn/?hl=en>
- FAAM Instagram <https://www.instagram.com/fleetairarmmus/?hl=en>
- NMRNH Instagram <https://www.instagram.com/nmrn.hartlepool/?hl=en>
- Royal Navy Submarine Museum Instagram <https://www.instagram.com/royalnavysubmarinemuseum/?hl=en>
- NMRN Linked In <https://www.linkedin.com/company/the-national-museum-of-the-royal-navy/mycompany/>
- NMRN You Tube <https://www.youtube.com/user/NMRNPortsmouth>

NMRN has seen major developments in its digital offer over the COVID period as we sought to engage more audiences through our digital platforms.

Below is a summary of the gender and age demographics related to our NMRN.org digital audiences in 2021: This shows larger proportions of male vs female audiences across all age ranges. The largest proportions of users are male 65+(12%) followed jointly by male 25-34 (11%) and male 45-54 (11%). This is a shift from pre-CVODI levels when 42% of website visitors were male and 58% female and suggests our new content marketing initiative ‘Navigate the Navy’ via social media and focussing on core historical content and collections, may have driven more traditional enthusiasts through to the website.



The largest proportion of our audience defined by age is the 25-34 year olds who make up 20% of the total users. This would align to people likely to have young families and looking to visit our museums and attractions and who are likely to be visiting the site to plan a visit and/or support homework needs.

4. BRAND AND MESSAGING

4.1. NMRN BRAND PORTFOLIO

The National Museum of the Royal Navy (NMRN) was created in 2008 by amalgamating four existing Naval museums. The Navy Board recognised that only a unified National Museum could tell the Naval Story at a national and international level. The pathway was to bring together into a single charity, on the grounds of efficiency and effectiveness, the four existing naval museums (each of them a national museum). Those museums were the Royal Naval Museum, the Royal Navy Submarine Museum, The Royal Marines Museum and the Fleet Air Arm Museum.

The prime objective was to tell the story of the Navy - and its continuing importance to the nation - more coherently and more effectively, as well as making efficiency gains.

The objects of the NMRN, also approved by the Navy Board and the Cabinet Office, are:

- The promotion of education and learning of Naval Service and Auxiliaries personnel and the members of the public about the history, deeds and traditions of the Naval Service and its Auxiliaries.
- The promotion and enhancement of military efficiency by assisting recruitment and retention and fostering the esprit de corps of the men and women who serve in the Naval Service or Auxiliaries; and
- The commemoration and remembrance of those members of the Naval Service and Auxiliaries who have died while on active service: and the encouragement of public recognition of the sacrifice made by such persons.

Since its establishment NMRN has gone on to grow and develop, adding a wider range of ships and attractions to its brand portfolio.

Now the NMRN encompasses seven sites and eight major historic warships. Its flagship is HMS Victory, the ownership of which was transferred from the Royal Navy to the NMRN in 2012. The NMRN sites are:

- Portsmouth Historic Dockyard, although the NMRN does not own or control the Mary Rose or the Portsmouth Naval Base Property Trust which are separate independent charitable companies.
- The Royal Naval Submarine Museum, Gosport (RNSM).
- Explosion! The Museum of Naval Firepower, Gosport.
- The Fleet Air Arm Museum, Yeovilton (FAAM).
- The National Museum of the Royal Navy, Hartlepool (NMRNH).
- HMS Caroline, Belfast.
- Devonport Collection, Plymouth.

The NMRN Historic Fleet consists of:

- HMS Victory, battleship of 1759, Nelson's flagship at the Battle of Trafalgar.
- HMS Warrior, battleship of 1860, the ultimate deterrent of the mid-19th century.
- HMS M33, monitor of 1915, fought at Gallipoli in 1915 and against the Bolsheviks in 1919.
- HMS Alliance, World War 2 long range submarine.
- HMS Holland 1, the Royal Navy's first submarine built in 1901.
- HMS Trincomalee, Bombay-built frigate of 1817, the only surviving wooden warship built in that yard.

- HMS Caroline, Light Cruiser of 1914 the only surviving ship from the Battle of Jutland.
- LCT 7074, a Landing Craft (Tank) which took part in D-Day.

This is over half of all major historic warships preserved in the United Kingdom. The NMRN also has a collection of seven smaller but still very important naval vessels.

The NMRN also has a number of affiliates, organisations or assets which it does not control, but with which it works closely to promote the Royal Navy story. These include HMS Wellington, an Empires loop of 1924, in London; HMS Unicorn, a Leda Class frigate built in 1824, Dundee; the World War 2 Motor Launch Medusa, Portsmouth; The Diving Museum, Gosport; and the Milford Haven Museum.

The speed of NMRN's growth means the 'brand' has struggled to keep up and as such a major brand review is scheduled for 2023-24 in response to the Audience Development work.

4.2. NMRN NARRATIVE AND BRAND POSITIONING

NMRN'S story is encompassed within its Master Narrative. This document intends to provide historic information, to assist with planning content and programming at our Museum sites, and to act as a starting point for separate Service and Site Narratives.

Master Narrative is a living document, which will evolve over time as the story of the Royal Navy continues to unfold, and new perspectives on its long and complex history are revealed.

We aim to tell this emotionally nuanced story with balance; it involves failure and disorder as well as triumph and achievement. In order to do this, we have selected four key themes:

- **People**
We tell the story of the Royal Navy's people, explore the incredible diversity of people that the Navy has attracted, and examine the qualities that distinguish those serving at sea: courage, loyalty, and sacrifice but also incidents of ignorance, cruelty and cowardice.
- **Purpose**
We tell the story of the Royal Navy's roles in the past and explain its purpose today.
- **Power**
We tell the story of the Royal Navy's power as a defining influence.
- **Progress**
We tell the story of the Royal Navy and innovation through constant technological developments in ship design, weapons, navigation, infra-structure and communications. Its success has always been defined by innovation both in the complex logistical operations which keep warships at sea, and in the warships and weaponry themselves.

In 2021 the NMRN Interpretation Strategy was approved, this concentrates on the big picture. It focuses on the wider act of interpretation; a statement of intent, highlighting high-level ideas around interpretation for NMRN. It lays out five key themes for NMRN interpretation:

- Sea, Land and in the Air
- Science, Technology, Innovation & Discovery
- Peace and conflict
- A Source of inspiration
- Places, communities and cultures

In addition to these policies and strategies, the Audience Development work will sit alongside these

4.3. PHD NARRATIVE AND BRAND POSITIONING

In 2020, NMRN and MRT undertook a refresh of the destination brand for PHD. It defined the brand positioning as part of that process as outlined below:

PHD is an important destination brand which has the opportunity to engage with a wide range of audiences. A visit to PHD is one that should engage visitors intellectually, emotionally and socially as they seek to connect with their national and naval heritage through dynamic and unique experiences.

Families are an important part of our market, however the brand should stretch and flex to enable us to create thought-provoking and emotionally-engaging campaigns as well as fun ones.

As a destination brand, PHD also needs to appeal to the broader tourism market, both domestic and international. It should reflect the world class heritage on display but should avoid appearing triumphalist.

We want to ensure that we promote the historical importance of PHD on the world stage, how the site made history across the centuries and is truly the heart and soul of our sea faring nation.

5. DETAILED SCOPE OF SERVICE

5.1. PACKAGES OF WORK

The brief has broken the scope of service into 8 packages of work.

- **Package 1** NMRN Brand awareness of NMRN's brand
- **Package 2** Local Site-specific Market and macro environmental study
- **Package 3** Site Specific Micro Environmental Review
- **Package 4** Digital Audiences review
- **Package 5** Audience Segmentation Analysis and Ongoing Review Process
- **Package 6** Audience Prioritisation Strategy
- **Package 7** HMS Victory Brand Impact Study
- **Package 8** NMRNH Hartlepool Proposition Testing

Package 1 NMRN Brand awareness of NMRN's brand

Detailed requirements:

- To capture a snapshot of awareness of NMRN's proposition and products nationally
- To ascertain market Interest in NMRN's proposition and products at a national level
- To measure the propensity to attend an NMRN site across the general UK population
- To measure the propensity to engage with NMRN's proposition away from site from the general UK population
- To identify NMRN's position in the competitive museum and visitor attraction market place
- To provide a series of summary findings to demonstrate NMRN's corporate brand position and identify opportunities for development of the brand to reach new markets and audiences and widen engagement
- To provide an evaluation mechanism for 'sense checking' the brand 'temperature to monitor change and evolution

Package 2 Local Site-specific Market and macro environmental study

Detailed requirements:

- To work on a site by site basis to capture awareness of each NMRN site proposition and product
- To understand the awareness of NMRN's brand as part of the individual site proposition and product and perception of the relationship between those brand offers
- To identify market Interest in NMRN proposition and products at a site level
- To measure the propensity to attend at an NMRN site level
- To understand the propensity to engage with site proposition away from site
- To understand the position of each NMRN site in the competitive market place
- To identify the relationship between the Portsmouth Historic Brand and NMRN at the Portsmouth and Gosport sites.
- To provide a series of summary findings to demonstrate each sites brand position and identify opportunities for development of the site brands to reach new markets and audiences and widen engagement.

Package 3 Site Specific Micro Environmental Review

Detailed requirements:

- To review the quantitative data held by NMRN on its existing visitors over the last four years, to include but not be limited to, postcode analysis of origin of visitor, review of patterns of visitation including repeat visits, days of the week, times of the year etc.
- To undertake a competitor analysis of each site will provide a central resource, to understand the position of NMRN's individual propositions
- To undertake a review of historic consultation and data and industry benchmarking data to provide context for NMRN's proposition within the visitor attraction and museum marketplace
- To deliver a programme of Internal consultation with staff and volunteers to understand their perception of the NMRN audiences and how they visit and where opportunities may exist
- To provide a series of summary findings of the strengths and weaknesses which exist for the sites and identify opportunities for development of the site brands to reach new markets and audiences and widen engagement.

Package 4 Digital Audiences Review

Detailed requirements:

- To undertake an inventory of NMRN digital platforms ascertaining the visitor profiles attached including but not limited to demographic and geographic data and insights into online behaviours
- To provide a series of summary findings of the of the strengths and weaknesses which exist for the digital platforms and identify opportunities for development of digital NMRN to reach new markets and audiences and widen engagement.
- To identify key KPI's to provide an evaluation mechanism for monitoring change and evolution of digital audiences.

Package 5 Audience Segmentation Analysis and Ongoing Review Process

Detailed requirements:

- To propose a segmentation approach to NMRN audiences which best supports future strategy planning. NMRN is open to consider motivational, behavioural or psychographic/lifestyle or a mixture of all, but the approach must be presented with clear reasoning and demonstrate how it can feed into longer term monitoring and evaluation
- To provide NMRN with a segmentation system for its audiences which is accessible to all areas of the business. To unify the language used around our audiences and streamline the number of segments being proposed demonstrating cross over and differences between sites
- To have identified which segments apply to the individual sites, as well as demonstrating where wider corporate impact is
- To have developed a process (e.g. series of 'golden questions') which enables NMRN to continue to evaluate its audiences against consistent criteria and measure change and evolution of audiences.
- To make recommendations about the frequency and implementation of evaluation practises and best ways in which to imbed that evaluation within NMRN's existing processes and systems.

Package 6 Audience Prioritisation Strategy and Audience Development Plan

Detailed requirements:

- To undertake a series of workshops with NMRN stakeholders to review the opportunities identified through the research process and undertake a prioritisation exercise. Providing guidance on site specific and corporate audience priorities.
- To bring together findings and decisions into a single Audience Development Strategy with clear recommendations and rationale.
- To identify and deliver mechanisms to support the communication and implementation of recommendations across the business.

Package 7 HMS Victory Brand Impact Study

Detailed requirements:

- To capture a snapshot of awareness of the HMS Victory proposition and history nationally
- To ascertain market Interest in the HMS Victory proposition and products at a national level
- To measure the propensity to attend HMS Victory on site across the general UK population
- To measure the propensity to engage with HMS Victory's proposition away from site from the general UK population
- To identify HMS Victory's position in the competitive museum and visitor attraction market place
- To identify the relationship between the Portsmouth Historic Brand and HMS Victory brand.
- To provide a series of summary findings to demonstrate HMS Victory's corporate brand position and identify opportunities for development of the brand to reach new markets and audiences and widen engagement, this should be able to work as a stand along report
- To provide an evaluation mechanism for 'sense checking' the brand 'temperature to monitor change and evolution

Package 8 NMRNH Hartlepool Proposition Testing

Detailed requirements:

- To undertake specific qualitative research with target audience groups regarding the new NMRNH proposition as part of the Capital Redevelopment Project.
- To explore different approaches to narrative and storytelling within the new proposition.

5.2. SCOPE OF SERVICE

The appointed contractor will be expected to:

- Develop a thorough methodology made up of qualitative and quantitative research techniques to deliver the packages of work outlined their detailed to requirement's
- To create a timeline for delivery and ensure work is completed on time and to budget
- To plan, manage and execute all research activities including the recruitment and reward of research participants
- To co-ordinate all research sessions, developing testing materials and stimuli
- To capture and record all research outcomes and make available to NMRN
- To report outcomes of packages of work through the development of an Audience Development Strategy
- To identify input required from NMRN at key milestones and co-ordinate that input
- To review all desk top research sources and evaluate them
- To produce a complete segmentation model, supported by wider recognised data sets drawn from demographic, geographical and economic data
- To create a series of recommendations for the ongoing monitoring and evaluation of audiences to ensure NMRN to track evolution and change over time
- To support findings and reporting through referencing to industry standards and benchmarks
- To identify and deliver mechanisms to support the communication and implementation of recommendations across the business including presentations to stakeholders where appropriate
- To work with NMRN internal teams in the delivery of the activity and in embedding outcomes and future evaluation techniques

6. CONTRACT DETAILS

6.1. DURATION OF CONTRACT

The contract will be for the period of project delivery the anticipated timelines are outlined below:

- January 2023 Appointment
- February 2023 quantitative research studies
- March 2023 qualitative research studies
- April 2023 Audience Prioritisation and finalisation of outcomes

There is a possibility that some areas of Package 7 and 8 may require support beyond this timeline.

The chosen supplier should work closely with NMRN's internal teams to deliver the outcome resources that will support implementation of recommendations across the business to implementation from May 2023 onwards.