

Audience Strategy Development



INVITATION TO TENDER – AUDIENCE STRATEGY DEVELOPMENT

DEADLINE FOR SUBMISSION OF PROPOSALS – 5PM, Thursday 20th July

1 BACKGROUND

1.1 About The National Archives

The National Archives (TNA) is a non-ministerial government department and an executive agency of the Department for Culture, Media and Sport. TNA is well known for its high profile public role as the official archive and publisher for the UK government, and for England and Wales. It is guardian of some of the most iconic national documents, dating back over 1,000 years. Its 21st century role is to collect and secure the future of the government record, both digital and physical. Further information about TNA's role, its plans, policies, performance and projects can be found on its website [here](#).

TNA's current business plan, [Archives Inspire](#), sets out to change the way that people think about archives, focusing on four key audiences: public, government, academic/research, and the wider archives sector.

1.2 Current Public Engagement

We engage with our public audiences in the following ways:

1. Online - We have just over a million visits to our website a month. The majority of these are to access our online search facility (family history and academic or professional research are the most popular activities)
2. Onsite - visitors to the reading room to research (family history and academic or professional research are the most popular activities)
3. Onsite - visitors to the site for events and activities (individuals)
4. Onsite - visitors to the site for events and activities (groups, including schools and community groups)

We are a public service and our Kew site welcomes c. 80,000 visitors a year. We are equipped with large reading rooms for general and specialist researchers, a new 250 capacity events space, a permanent exhibition of treasures ('the Keeper's Gallery'), a small conference facility, teaching suites, coffee shop and restaurant and pleasant outdoor spaces. We have a free public car park and are a 10 minute walk from Kew Gardens station on the District and Overground lines. We are also near the M4/M25 intersection, and just off the South Circular road.

The majority of our visitors are currently 'self-directed' in that they are attracted to our site to undertake their own research. They arrive with a question or area to research (e.g. their family tree or a PhD thesis) and our staff assist them to find the documents that will support their research. The numbers of these visitors are in long term decline. This is in part due to the greater availability online of the most popular family history record series. However, the majority of our records are not and never will be digitised, so there will always be a need for

Audience Strategy Development

a reading room and access to original material. We see this service continuing to be central to our offering but we do not anticipate any increase in 'self-directed' visitors at our Kew site.

Instead, we are seeking to grow our public engagement through an expanded programme of 'facilitated' engagement. By this we mean activities and learning opportunities where we provide/curate/deliver to the public. This would include:

1. An exhibition programme
2. An events programme for adults
3. An events programme for children and young people
4. Volunteer activities
5. Education activities for schools
6. Outreach activities with community groups

Activities 1-2 are marketed directly to individuals and are open to anyone.

Activities 5-6 are bespoke activities or curriculum-based programmes, developed dynamically with community organisation leaders and/or schools. Participation in the session is always mediated through a group or school leader and is not open to the public at large.

Activities 3-4 fall somewhere between the two – children and young people are not necessarily the decision-makers or the target of the marketing, and volunteer programmes are subject to interview and clearances.

Currently, only a small, but growing, proportion of our visitors are attracted by our events and activities programme. This 'What's On' programme has been active for two years and has proved successful. It's the first stage in an ambitious programme to support this transformation, which includes:

- Capital programme to redevelop the visitor areas of our Kew site
- Realignment of staff resources
- Launch of fundraising strategy to help realise this transformation

1.3 Public Engagement Vision and Audience Development Strategy

We want to inspire the public with new ways of using and experiencing our collection. Our goal is to 'grow our audience by connecting with new users' and to be identified as a cultural institution and destination. To achieve this, we are reshaping our public programming to devise new and exciting ways to reach out to and involve both existing and new audiences.

In April 2017, The National Archives, working with a contracted Supplier, launched an Audience Engagement Strategy. This provides the organisation with an understanding of our existing and aspirational audiences through a segmentation of our public audience and has equipped us with the tools to become an audience-first organisation. We have a simple framework with which to segment our audience as well as a strategy to grow them. Seven public audiences were identified in the segmentation (see **Appendix A**) ranging from existing audiences to new, aspirational ones. The segmentation presents us with both a new

Audience Strategy Development

way of looking at our existing audiences and a clear focus for prioritising and targeting aspirational new audiences.

The Audience Strategy and segmentation is already being used to inform planning of public events by those involved in the 'What's On' decision-making processes, and we are in the early stages of embedding it more widely across the organisation through interactive workshops.

2 THE REQUIREMENT

We wish to appoint a single Supplier to a no minimum commitment call-off contract covering the period 14th August 2017 – 31st July 2019, to work with us to embed and develop further our Audience Engagement Strategy and segmentation.

Through quantitative and qualitative research amongst the variety of public audiences represented in our segmentation, the appointed Supplier will help deepen our understanding of the audience segments and how to engage with them. The appointed Supplier will transform the data into insights and recommendations to enable us to develop our Audience Strategy, inform our public engagement programme, and achieve our goal of growing our public audience.

Areas of work required by the appointed Supplier may include, but will not necessarily be limited to,; measuring and evaluating the impact of the Audience Strategy; collaborating with our data analyst supplier to connect any audience data with our Single Customer View (SCV) dataset; and deepening understanding of The National Archives' online audiences and digital engagement.

We require the appointed Supplier to have demonstrable experience of the following areas in the cultural sector:

- audience strategy
- audience segmentation
- concept testing (for example, of exhibitions or campaign design)
- digital engagement and online audiences
- quantitative and qualitative research methodologies

In addition, we require the appointed Supplier to have extensive industry knowledge that can be drawn upon to make comparisons with other cultural institutions.

We would also like to understand applicants' experience of:

- formative and summative evaluation of exhibitions
- other audiences in the cultural sector and their needs and modes of engagement, such as Education and Learning, and Community and Outreach audiences

The appointed Supplier will be expected to identify research needs and propose projects to help us develop and move forward with our Audience Strategy, as well as respond to specific research briefs issued by The National Archives. The appointed Supplier will be required to work closely with TNA's Customer Insight Officer.

Audience Strategy Development

The call-off contract will be valid until 31st July 2019 and will cover all work up to a maximum value of £100,000 excluding VAT. *Potential Suppliers should note that a contract award will not represent a commitment or obligation by The National Archives to commission work totalling this value in the time period, but rather that work may be commissioned with the awarded Supplier up to a maximum value of £100,000 over the course of the contract period.*

3 HOW TO RESPOND

3.1 Please submit your Response by **5pm on Thursday 20th July** to procurement@nationalarchives.gsi.gov.uk.

3.2 Your Response should include:

- i. Your understanding of the requirement and an explanation of your proposed approaches and methodologies to fulfil the requirement;
- ii. Details of your expertise and relevant experience, including case studies of work with cultural institutions;
- iii. A brief explanation of how you would work with an established audience segmentation developed by another Supplier
- iv. Brief CVs of the individuals who would be assigned to the contract;
- v. A rate card detailing the charges that would apply to the call-off contract, along with the details of any contingent discounts that you are offering.

3.3 If you have any clarification questions, please submit these to procurement@nationalarchives.gsi.gov.uk by **midday on Monday, July 3rd**.

3.4 Submissions will be evaluated as follows:

- Quality of Response (70%)
- Price (30%)

4 CONTRACT

The Contract will be awarded under our [standard terms and conditions](#).

Please note that the information you supply in your Response may be used, in whole or in part, to populate the Contract. As such, please make clear and unambiguous statements about the commitments you are making.

TNA reserves the right, at its sole discretion, not to appoint and to achieve the outcomes of the project through other methods.

Audience Strategy Development

5 PROCUREMENT TIMETABLE

Ref.	Description	Date(s)
1	Deadline for submitting clarification questions	Midday, July 3 rd 2017
2	Deadline for TNA to respond to clarification questions*	July 10 th , 2017
3	Deadline for submitting tender responses	5pm, July 20 th 2017
4	Shortlisting completed	July 28 th 2017
5	Presentations by shortlisted potential Suppliers	August 8 th 2017
6	Contract award	August 14 th 2017

**Any clarification question that TNA deems to be relevant to more than one Potential Supplier will be shared with all Potential Suppliers*

Appendix

Appendix A

Our new segmentation

A summary of the segments is outlined below, listed in order from existing audiences to new. More detailed profiles will be available to the appointed supplier.

1. Invested Loyals: *'Archives are who I am'* /volunteers /advocates

This segment views archives as 'part of who they are'. One in six already volunteers for us, and use our services frequently (in last 12 months). They have a high online usage and deep engagement with a range of things that we do. They are not particularly 'cultural', and if they attend anywhere it is likely to be British Library or British Museum. They are not yet heavy users or advocates of our public programme, but have potential to become so. They have an appetite for personal research more than any other segment.

2. Head down Kew Researcher: *Self-directed/onsite not online /not cultural*

This segment makes up a large portion of our current users. They mainly use the reading rooms or self-directed research, with a very specific purpose for their visit. They have the lowest online usage and the lowest interest in the public programme. They are not cultural but will go to cultural events if they are on their radar. Their interaction with the public programme is mainly via daytime events. There are more males in this segment than others. Their main motivation is to learn for academic or professional reasons.

3. Curious Minds: *Multi-platform /debaters /thirst for knowledge*

This segment is intellectually curious, interacting with our brand for a range of services – online and offline. They are the 2nd highest-ranking segment to be introduced to our offer by using online services first. They actively seek out cultural experiences, and regularly attend cultural events, and they visit other archives more than any other segment. There are more females in this segment than others.

4. Online only: *Online not onsite/UK-wide/single-use*

This segment only uses our online facilities. They are less frequent users and are likely to only use one service sporadically. They are most likely to use the site for family history. They are spread throughout the UK, and have a broad demographic. There is a limited knowledge of the site in Kew – but when asked, would want to know more about touring, online learning and family events. They are currently not demonstrating high cultural attendance, although their preference for rock & pop is a trend. They were the biggest segment whose activities were limited due to disability.

5. Cultural Devotee: *Social, enthusiastic for change, event-orientated*

This segment represents a smaller group within our current visitors, but they have used a wide variety of our services. Likely to have attended an event by way of introduction to our brand, they are very likely to attend an event or exhibition in the future. They are very high users of arts and heritage sites, and look for entertainment and socialising from their visit. They were the segment that were most enthusiastic about our new programme plans, indicating that five or more of the options outlined in our research appealed to them. They also indicated the café and shop offer was important to them. They are slightly younger and more female than male.

Appendix

6. Family for me: *Motivated by family event/family history/learning*

This segment has children or grandchildren, and is motivated by child-orientated events. Over half cite learning as their motivation and high expectation that we will deliver a family learning experience. Their main interaction is family history online, with many in this segment only selecting this option. They are likely to be super-local – but they don't currently visit the Kew site.

7. Community Concept: *Strong community tie, long-time residents, broad demographic*

This segment is new to our brand, not demonstrated in our data, but more in the bigger picture of where we might draw audiences from. They have a strong tie to either their community or area – with many likely to be supporters or members of community clubs, religious institutions or involved in local activity. They are interested in local history and the social connection they get from mixing with other residents or groups. They are diverse in age and ethnicity. They reside in the harder to reach boroughs of London, many of which are quite local to us.