

COMMISSIONING BRIEF:

Understanding Our Audiences



1. Introduction

Port Sunlight Village Trust (PSVT) is looking for an experienced company, consultant, or group of consultants to undertake a programme of audience research. It must inform the development of a new strategic plan, inform our current and future visitor offer, - including food and retail, exhibitions experience, public programming, product development, on-line engagement, marketing, access, and movement -, and help us to reconsider existing strategies completed since the COVID-19 pandemic.

We want to:

- Understand the profile of our current museum* visitors.
- Understand the profile of visitors to the village, and our penetration rate.
- Find out if our audiences have changed since the last programme of research, how, and why.
- Explore the potential for new audiences and how we might attract them.

We need this work to start as soon as possible to take advantage of the main visitor season and to align with the delivery programme for our new strategic plan and other projects and key pieces of work.

2. About Port Sunlight

Port Sunlight was founded in 1888 by the industrialist William Lever. He wanted to provide the employees of his new Lever Brothers soap works and their families with decent and affordable housing and a wide range of facilities, services, policies, and incentives to ensure their well-being and 'betterment'.

Port Sunlight is not the first example of an industrial worker village, but it is one of the finest surviving examples in the world. It was an immediate precursor to and a model for the Garden City movement and influenced the design of planned worker settlements, garden villages and garden suburbs around the world from the turn of the twentieth century to the present day.

Visitors and tourism are not new to Port Sunlight. It has been part of Port Sunlight's purpose since 1891. It was designed and maintained to be a visitor attraction. That is why Lever Brothers developed it to look the way it looks and why Unilever invested in it throughout the twentieth century. Port Sunlight is for in-person visitors.

Today Port Sunlight is a Conservation Area and most residential properties, public buildings and monuments are Grade II listed. The war memorial is Grade I listed. These provisions provide statutory protection to the village enforced by the local planning authority (LPA) Wirral Council. Furthermore, there are restrictive covenants in the title deeds of all residential property. Two sections of the landscape – The Dell, and The Diamond and The Causeway - are included in Historic England's register of Parks and Gardens of Special Historic Interest. Ten of Port Sunlight's green spaces are also designated for protection as Urban Greenspace by Wirral Council.

The village is home to approximately 2,000 residents, a mixture of owner-occupiers and private tenants, living in 1,059 residential properties. Prior to the Covid-19 global pandemic,

Port Sunlight attracted in the region of 300,000 domestic and international visitors each year. There are a variety of community organisations and businesses operating in Port Sunlight today, from the village school and Grade II* listed church to two pubs, a hotel, conference and events space, a garden centre, and a theatre.



There are other important stakeholders in the village too, namely:

- Wirral Council (the LPA) who as well as planning and enforcement provide statutory services for highways, waste management and transport.
- National Museums Liverpool is responsible for the Lady Lever Art Gallery. Founded by William Lever, the gallery has one of the UK's finest collections of fine and decorative art.
- Unilever whose historic home in the UK is Port Sunlight; Lever Brothers became Unilever in 1929 following a merger with the Margarine Union. Today, Port Sunlight is an advanced manufacturing hub for Unilever and a centre for the company's Home Care and Beauty & Personal Care Research & Development.

3. About Port Sunlight Village Trust (PSVT)

PSVT is an independent charity founded in 1999 by Unilever Plc. Our vision is to make "Port Sunlight, an inspiring place to live, work and visit." Our mission "We are guardians of a unique and beautiful village, working with its community to ensure a great quality of life for residents and to celebrate William Lever's amazing legacy through cultural and learning experiences for all."

PSVT is directly responsible for:

- A diverse group of monuments (listed and unlisted).
- A permanent museum collection and village archive.
- All landscapes within the Conservation Area (except the back gardens of houses).
- 292 Grade II-listed houses, 323 garages and 22 non-residential/community buildings.
- *Port Sunlight Museum & Gift Shop, including the Edwardian Worker's Cottage and a regular programme of public and community events, and walking and coach tours for general visitors and groups.
- Formal and informal learning programmes, which include the STEM gallery SoapWorks.

It also works with partners and stakeholders to:

- Tackle social issues and promote community cohesion.
- Manage the visitor destination and raise its profile.
- Provide conservation advice to homeowners.

PSVT employs approximately 50 members of staff and works with organisational and community volunteers to discharge its charitable objectives. We are governed by a voluntary Board of Trustees with expertise in housing, surveying, finance, conservation, landscape, planning, museums, and heritage.

4. The need for the commission

There are two key drivers for this commission.

The first is to inform the development of a new strategic plan for the organisation. The lifecycle of our current 5-year plan has recently concluded and our aim is to launch a new plan at the start of 2025 for the next 3-5 years.

The second is to help shape a new vision and masterplan for the site, which will clearly set out how the buildings and green spaces in our ownership will be used. We want to transform the village into a world-class visitor destination, improve the quality of life for its residents and the local community, and ensure the long-term sustainability of this historically important site. (A survey of the village residents has also recently been commissioned.)



PSVT last commissioned a detailed audience research programme in 2017. It was undertaken by Northwest Research & Strategy who are now part of the Liverpool City Region Combined Authority. The purpose was to establish the profile of existing visitors to Port Sunlight Museum and Port Sunlight Village as well as the potential opportunities to attract new markets. Commercial development opportunities were also explored through benchmarking with comparator destinations. Fieldwork was supplemented by focus groups to test assumptions and conclusions drawn from the comparator analysis in terms of product development and marketing.

As well as the development of our first strategic plan, the final recommendations from the 2017 research programme informed a core visitor proposition for Port Sunlight. This was further interrogated through the commissioning of an Asset & Property Income Generation Strategy and a Narrative Study & Interpretive Masterplan completed in 2021, both of which advocated for a dispersed visitor proposition supported by a Visitor Hub in the Lyceum Building, a key location in the village. The hub would be the linchpin of the site masterplan and an obvious place to start in terms of delivery.

Work has started to develop the concept for the Lyceum Visitor Hub and initial conversations have been held with potential funders. This commission affords us the opportunity to strengthen the proposition through new audience research, which is particularly important in this post-pandemic world. It will benefit PSVT's wider interpretive masterplan too, which will be reviewed and updated later this year along with other strategies completed since the COVID-19 pandemic, e.g. public realm strategy.

We will also want to commission other supporting pieces of work, including a Marketing & Communications Strategy, Transport & Movement Strategy and an Access Audit and Strategy. Up-to-date audience intelligence is foundational and needs to happen as soon as possible.

Over the last few years, we have undertaken a small amount of survey work in-house with museum visitors and attendees at our events and other public programmes. This tells us that a large proportion of museum visitors are aged 55-64, with the majority 45+. The most prominent audience segments are Commuterland Culture Buffs, Dormitory Dependables, Trips & Treats, and Home & Heritage, with the first two being the largest segments by far. Most visitors are from the Northwest, with an even spread across Liverpool City Region, however we enjoy a healthy number of visitors from further afield, particularly The Midlands.

We will ensure that all past visitor reports along with audience data we have collected is made available upon appointment. We will also try to source data from other village attractions. You will note that we currently use the Audience Spectrum segmentation model. However, we are open to considering other models if they are more suitable for our organisation and visitor attraction, or to use more than one model to create a broader profile of existing and potential audiences, e.g. Historic England Segments, which also look at mental outlook.

5. Scope of Works

Below is a summary of the scope of works for the commission.



- A. Complete a desktop review of PSVT, its current visitor offer, any relevant strategies, information about the Lyceum Visitor Hub project and the wider interpretive masterplan, and any existing audience data held by PSVT and other village attractions.
- B. Work with the Project Team to agree the aims and intentions of the audience research and the areas of PSVT's work it needs to support.
- C. Develop and deliver a programme of fieldwork on-site at the museum and other key village attractions, off-site in the Liverpool City Region, and on-line.
- D. Undertake benchmarking and comparator analysis looking at food and retail, exhibitions experience, public programming, on-line engagement, product development, and marketing. The list of visitor attractions must be agreed with PSVT in advance.
- E. Present and workshop the findings with the Project team highlighting key themes, challenges, and opportunities, and thoughts on segmentation models.
- F. Draft a final report for presentation to the PSVT Board, including recommendations regarding future audience research.
- G. Ensure the project always complies with the Data Protection Act 2018 and adheres to PSVT policies and procedures in this regard.

6. Skills and Experience

We believe that to deliver this piece of work successfully you will require:

- Considerable experience of undertaking audience research, including fieldwork and focus groups, in museums and historic sites, and translating the findings into clear, actionable plans.
- In-depth understanding of the visitor economy in the Liverpool City Region and Northwest.
- Demonstrable experience of using audience segmentation models and applying them to a complex visitor attraction and heritage site.
- Effective communication and stakeholder engagement skills are essential.
- Evidence of appropriate insurance, including Public Liability Insurance

7. Equity, Diversity, and Inclusion

PSVT is actively working to be a diverse and inclusive organisation. As part of PSVT's commissioning practice, we welcome submissions from people who are from the Global Ethnic Majority, Disabled, Neurodiverse, D/deaf, LGBTQ+, and/or from working-class backgrounds.

8. Budget

A budget of £12.500 + VAT has been assigned to this commission.

The total cost of the works presented to PSVT as part of the response to the brief should include all costs of delivery. PSVT can support some costs, e.g. venues to host meetings.

9. Reporting relationships

You will report to Katherine Lynch, Director of Projects at Port Sunlight Village Trust. The Project Team is also likely to include:

- Paul Harris, CEO
- Mike Ward, Chief Commercial Officer & Deputy CEO
- Jean Milton, Director of Heritage, and project lead for PSVT's Lyceum Visitor Hub
- Brian Pilkington, Marketing & Communications Manager
- Charlene Davies, Public Programme Manager.



You may also have contact with consultants working on the Lyceum Visitor Hub project as well as relevant members of PSVT's Board of Trustees.

10. Application method

You are invited to submit a proposal that must demonstrate the following:

- Your proposed approach and schedule to deliver the scope of work described above, highlighting any opportunities and anticipated issues. (45%)
- Examples of previous relevant projects, the names of two referees who have experience of working with you on similar projects and CVs for you (and your team, if applicable). 35%
- Breakdown of costs by scope of work, including number of days and day rate for individual members of your team. (20%)

Proposals will be evaluated on a quality (80%) and cost (20%) basis. The evaluation weighting is provided in brackets above.

Your proposal should be emailed to Katherine Lynch, Director of Projects k.lynch@portsunlightvillage.com

11. Timescales

The deadline for proposals is **10.00am on Tuesday 18th June 2024**. Ideally an appointment will be made during w/c 17th June based on submissions received. However, on-line interviews may be required.

To support the development of PSVT's 5-year Strategic Plan, this project must be completed by the beginning of September 2024. The final report will be required by 5th September 2024 to present to PSVT's Board at their September meeting.

12. Further Information

For an informal conversation please contact Katherine Lynch, Director of Projects k.lynch@portsunlightvillage.com The deadline for questions is 1.00pm on Friday 14th June.

PSVT's 5-year strategic plan and 10-year Conservation Management Plan (CMP) are available to download from PSVT's website www.portsunlightvillage.com

All other relevant documents, reports and audience data will be shared upon appointment.