

INVITATION TO TENDER

Requirement Title	Audience Research Consultant
Issue Date	5 October 2026
Closing Date of Tender	26 October at 12 noon
Contact	Pollyanna Hall Pollyanna.h@harewood.org 07776391215

1. About Harewood House Trust

Harewood House Trust (HHT) is an independent charity caring for Harewood House, its collections and 140 acres of Grade I listed landscape. We welcome around 270,000 visitors each year through our heritage, exhibitions, events and learning programme.

Harewood House is an 18th-century country house and an Accredited Museum with a nationally Designated collection. The House was built in part with wealth derived from the transatlantic trade in enslaved people. We have explored and shared this history through our programming and community work for many years.

Further information is available at www.harewood.org

2. Background

HHT is seeking an experienced audience research consultant to support the development phase of **Reimagining Harewood**, for which we have received a Stage 1 development grant from The National Lottery Heritage Fund.

Reimagining Harewood is a major project to improve how people arrive at, move around and understand Harewood. It will reconnect the House with important historic buildings and landscape features, restore views, and create a more accessible and biodiverse landscape.

A central part of the project is the restoration of the Grade II listed Bakehouse as a new visitor centre. This will become the main arrival point for visitors, providing a welcome, accessible facilities, orientation and interpretation that helps people understand Harewood's landscape and complex history. The project will also improve routes, wayfinding and access across the site, including moving the pay barrier to the Bakehouse.

The primary purpose of this research is to inform the development of Reimagining Harewood. We need evidence about current and potential audiences to shape the Bakehouse visitor centre, the arrival experience, interpretation, accessibility and the wider landscape improvements. We also need to understand how these changes could attract new audiences, improve visits and encourage people to return.

HHT aims to grow and diversify its audience, increasing annual visits to more than 330,000 by 2030. Reimagining Harewood is central to that ambition. Our wider business plan also includes a new garden on the site of the former Bird Garden. The new garden is a separate project and is not part of the Heritage Fund-supported Reimagining Harewood project, although it is an important part of our wider plans for visitor growth.

HHT has not undertaken substantial audience research since 2019. Spektrix, our ticketing and CRM system introduced in January 2025, has improved our understanding of booking behaviour, but tells us less about people's motivations, expectations and decisions. We want to understand who visits now, what they value, what barriers others face and what would make Harewood more relevant and welcoming to them.

Our exhibitions and wider public programme are important drivers of visits. The research should explore how they influence decisions to visit, attract new audiences, encourage repeat visits and affect membership. This insight will help us understand how the improved visitor experience can support a varied programme and a strong year-round offer.

We also want to test our current admissions and membership model. Harewood currently offers an all-inclusive admission ticket alongside member access, Community Membership and Access+ tickets. The research should explore how visitors and potential visitors understand these options, whether price or the structure of the offer creates barriers, and whether different approaches could increase visits, membership and income. In particular, we want to understand the opportunities created by the new Bakehouse arrival point and the proposed move of the pay barrier. Recommendations should consider how best to improve income and yield per visitor while maintaining accessible routes into Harewood, including Community Membership and Access+ tickets.

The research should also explore whether visitors recognise HHT's charitable status and feel motivated to support its future.

The detailed research requirements and deliverables are set out in **Appendix 1**.

3. Instructions to Tender

3.1 General information

All tenders will be in accordance with and subject to these instructions and other documents comprising the Invitation to Tender (ITT).

HHT reserves the right, without prior notice, to change, modify, or withdraw the basis of its request and/or to reject all proposals and terminate negotiations at any time. In no circumstance will HHT incur any liability in respect of time, effort or cost in regard to either discussions, meetings or reviewing and/or responding to this document or subsequent material.

The issue of this ITT does not bind HHT or any official of it to accept any proposal, in whole, or in part, nor does it bind any officials of HHT to provide any explanation or reason for its decision to accept or reject any proposal. Acceptance of a proposal neither commits HHT to award a contract to any Tenderer, even if all requirements stated in this tender are satisfied, nor does it limit HHT's right to negotiate in their best interest. HHT reserves the right to contract with a tenderer for reasons other than lowest cost. Contract award will be post tender process and may be awarded without discussions or negotiations.

For any queries please contact Pollyanna Hall and allow up to 5 working days for a response. Other than those persons identified, no other representative of HHT may make any representation regarding this procurement process.

All tenders are to be valid for 90 days from the end of the tender submission period to allow HHT to undertake review.

3.2 Confidentiality

HHT have issued this ITT to tenderers to inform their preparation of a tender for this requirement and for no other purpose.

HHT gives this ITT and any other documentation on the basis that they remain HHT's property and tenderers must treat the contents as confidential. If tenderers are unable or unwilling to keep to this rule, they:

- Must destroy this ITT and all associated documents at once; and
- Must not keep any electronic or paper copies.

3.3 Preparation of Tender

A Tenderer must inform HHT of its intention to submit a tender at the earliest opportunity by emailing Pollyanna Hall so that HHT may inform the tenderer of any potential changes to timescales etc.

HHT reserves the right to issue additional documentation or information related to the tender at any time. At the discretion of HHT, the closing date may be extended. Tenderers already having submitted a tender at this point may be invited to re-submit their tenders at their discretion.

3.4 Submission of Tender

By submitting a tender, the Tenderer confirms that they are able and willing to enter into a formal contract with HHT if awarded. The tender shall be signed by persons authorised to submit tenders and make contracts for the Tenderer.

Any applications received after the deadline will not be considered unless agreed with HHT prior to the close of the submission period.

3.5 Evaluation criteria and process

HHT will evaluate tenders against the award criteria set out in section 4 and appendix 1.

HHT reserve the right to seek clarification from any or all of the tenderers during the evaluation period. This may be in writing or by means of a clarification meeting.

After initial evaluation, a shortlist of tenderers may be invited to an HHT panel (in person or online via Teams). Following this, final evaluations will take place, and a preferred tenderer nominated and offered the contract, subject to checks. The expected timescales are set out in section 3.7.

3.6 Tenderer's Warranties

In submitting its tender, the Tenderer warrants, represents and undertakes to HHT that:

All information, representations and other matters of fact communicated (whether in writing or otherwise) to HHT by the Tenderer, its staff or agents in connection with or arising out of the tender are true, complete and accurate in all respects, both as at the date communicated and as at the date of tender submission;

It has full power and authority to enter into the contract and perform the obligations specified in the contract documents;

It is of sound financial standing and has and will have sufficient working capital, skilled staff, equipment and other resources available to it to perform the obligations specified in the contract;

It shall indemnify and keep indemnified HHT against all actions, claims, demands and expenses incurred or made against the HHT in respect of any loss or damage which arises from any advice given or anything done or omitted to be done under this tender to the extent that such loss or damage is caused by the negligence or other wrongful act of the Tenderer or its agents.

3.7 Timescales

It is intended that the procurements process for this tender will run to the following timetable. Please note that HHT reserves the right to amend the timescales listed below and will inform tendering organisations of any changes.

Activity/Action	Date
ITT issue date	5 October 2026
Tenderers last date for clarifications	19 October
Closing date	26 October at 12 noon
Initial evaluation	Week beginning 26 November
Shortlisted tender interviews	Week beginning 9 November

Contract award	Week beginning 30 November
Start of service delivery	14 December 2026

4. Specification

- 4.1 The brief and required deliverables are set out in **Appendix 1**. Tenderers should explain how their proposed research will produce practical evidence for the development of Reimagining Harewood, particularly the Bakehouse visitor centre, arrival and orientation, interpretation, access and movement through the landscape.

Proposals should also explain how the research will assess the impact of exhibitions and public programming, and test HHT's admissions and membership offer. This should include the current all-inclusive ticket, member access, Community Membership and Access+ tickets; visitor perceptions of price and value; opportunities arising from the Bakehouse arrival point and relocation of the pay barrier; and approaches that could improve income and visitor yield while maintaining access.

Tenderers should set out their proposed methodology, timetable, project team and arrangements for working with HHT. They should identify what existing HHT data they expect to use, any primary research they propose to undertake, and how they will reach people who do not currently visit Harewood.

The proposed contract start date is 14 December 2026. HHT expects to hold a start-up meeting that week, with research beginning in the week commencing 4 January 2027. Final findings must be presented and documented by 1 October 2027.

Tenderers must provide the hourly or daily rates for each proposed team member and identify all expenses and other costs.

5. Terms required within the contract

Notice period must not be less than 3 months
Agreed hourly rates required for roles

6. Evaluation process

The evaluation process will be scored by quality and cost using the form and any supporting material that you provide. No tender will be considered until after the tender process closing date.

HHT will evaluate tenders based on cost and quality as follows:

Cost: day rates, discount, service, added value and value for money	20%
Quality: Strength of the proposal for managing and delivering the services	30%
Quality: Relevant skills and experience, including impact and relevance of case studies	30%
Quality: Strategic understanding of the aims, objectives and challenges of the tender brief	20%
	100%

Total:	
---------------	--

6.1 Cost

Cost will be evaluated on a sliding scale, with a % score awarded as follows: $\text{Score} = (\text{max score}) \times (\text{Lowest Cost/Actual Cost})$

For example: if cost is weighted as 30% of the overall score - Tender One bids £500, Tender Two bids £750. Tender One scores $30\% \times 500/500$, i.e. 30%. Tender Two scores $30\% \times 500/750$ i.e. 20%.

Tenderers must fill in the Costing Schedule set out in the Tender Submission Form to provide all the obligations under the Contract. Tenderers can add any extra or alternative costing proposals to the end of the costing Schedule with reasons for including these.

Quotes or tenders may be accepted in Pounds Sterling and quotes must include any VAT or other taxes required.

Tenderers must also show all other costs that will be associated with the contract for example rates or expenses. HHT will not consider claims for extra payment for items that have not been specified.

Abnormally low tenders: If, for a given contract, tenders appear to be abnormally low in relation to the goods, works or services, HHT shall, before it may reject those tenders, investigate the elements of the tender which it considers to be unsustainable. If HHT's investigations determine the bid to be unsustainable, HHT may reject the tender from the process.

6.2 Quality

Quality will be scored on a scale of 0 – 10 as follows:

0 - 1	Very limited or no relevant information.
2 - 4	Response is limited or goes part way to demonstrating the ability to deliver against the specification.
5-7	Tenderers show that they understood the specification and can deliver against the contract as required, with limited evidence of successful delivery
8-10	Tenderer strongly demonstrates that they understood the specification, can deliver against the contract as required and further demonstrate evidence of added value they can bring and evidence of a strong history of successful delivery.

If a score of 0-1 is given for any element of the tender, then it will be determined to have failed and may not be considered further.



AUDIENCE RESEARCH BRIEF

Project	Reimagining Harewood
Client	Harewood House Trust
Address	Harewood, Leeds, LS17 9LG
Client contact	Pollyanna Hall
Email	pollyanna.h@harewood.org

1. Background

Harewood House Trust (HHT) is an independent educational charity caring for Harewood House, its collections and grounds. Harewood welcomes around 270,000 visitors each year and aims to grow and diversify its audience to more than 330,000 annual visits by 2030. HHT has received a development grant from The National Lottery Heritage Fund for **Reimagining Harewood**. The project will reconnect the House with important historic buildings and landscape features, restore views, and create a more accessible and biodiverse landscape.

Central to the project is the restoration of the Grade II listed Bakehouse as a visitor centre. It will provide a new arrival point, accessible facilities, welcome, orientation and interpretation that helps visitors understand Harewood's landscape and complex history. The project will also improve routes and wayfinding and move the pay barrier to the Bakehouse.

HHT is also developing a contemporary garden on the site of the former Bird Garden, designed to offer a changing experience through the seasons. It is a separate development from Reimagining Harewood, but together the projects will play an important role in strengthening Harewood's visitor offer and encouraging people to return.

HHT has not undertaken substantial audience research since 2019. Spektrix, our ticketing and CRM system introduced in January 2025, has improved our understanding of booking behaviour, but tells us less about people's motivations, expectations and decisions.

HHT has separately commissioned an Audience Development Consultant to lead focus groups with Leeds African-Caribbean and descendant communities, Community Access Membership participants and other groups with lived experience of barriers to engagement. That work will help inform the project's interpretation, activities and approach to inclusion. The two consultants will share relevant emerging findings and avoid duplicating consultation.

2. Purpose of the commission

HHT is commissioning audience research to understand who visits Harewood, how they use the site, what they value and what influences their decisions to visit or return. We also need

to understand who does not currently visit, the barriers they face and what might encourage them to come. The findings will help HHT grow and diversify its audiences, improve the visitor experience and make informed decisions about programming, admissions and membership.

The research is an important part of the development of Reimagining Harewood, supported by The National Lottery Heritage Fund. It should identify the opportunities created by the Bakehouse visitor centre, new arrival experience, improved routes and restored landscape to welcome and engage different audiences. The main elements of the capital project are established, so recommendations should focus on how HHT can make the most of them through welcome, orientation, interpretation, activities and communication.

The research should consider the full visitor experience, including the House and collections, gardens, exhibitions, events, learning, play, retail and food and drink. It should examine what drives first and repeat visits, satisfaction, membership and visitor income. It should also test how our admissions and membership offer works now and what opportunities arise from moving the pay barrier to the Bakehouse.

The commission will provide audience baselines, priority audience profiles and practical recommendations for HHT. Relevant findings and measures will also support the Reimagining Harewood Delivery Phase application and activity plan.

3. Scope of work

Review existing evidence

Review and draw together relevant information, including:

- Audience research undertaken by MHM in 2017–18 and any subsequent research or consultation.
- HHT's business plan, audience targets and existing use of Culture Segments.
- Spektrix data, visitor feedback and post-visit surveys.
- Relevant local population data, sector research and comparable visitor attractions.

The review should establish what HHT already knows, identify gaps in the evidence and shape the primary research.

Research current and potential audiences

Develop and deliver a proportionate research programme with current visitors, members, lapsed visitors and non-visitors. Tenderers should propose methods and a sample that will produce useful evidence within the available budget. The consultant should identify how to hear from underrepresented audiences without repeating the focus groups already commissioned through the Audience Development Consultant.

The research should establish an audience baseline and, where the evidence allows, examine:

- Where visitors come from, including the proportion travelling from beyond a 30-minute drive time.
- Age and life stage, particularly families, young adults and older visitors, distinguishing organised coach groups where relevant.

- Ethnicity, including whether Harewood is reaching Black Caribbean and Asian audiences.
- The proportion of visitors who identify as disabled and the barriers experienced by people with different access needs.
- Socio-economic background and the reach of Community Access Membership and Access+ tickets.
- Group size and composition, visit frequency, and the proportion of first-time, regular and returning lapsed visitors.
- People who use free routes through the wider estate but do not currently visit the Trust's paid attractions.

The consultant should identify which audiences have the greatest potential to engage with Harewood, what motivates them and what prevents them from visiting or returning. Findings should distinguish between reliable measures, indicative findings and gaps that will need further investigation.

Identify opportunities from Reimagining Harewood

The research should explore how different audiences might use and benefit from the Bakehouse visitor centre, improved arrival experience, facilities, routes, interpretation and restored landscape.

Findings should help HHT make decisions about welcome and orientation, how the offer is communicated, activities and programming, and how visitors are encouraged to explore more of Harewood. The consultant should identify opportunities to increase engagement with the heritage through the project, together with any barriers that HHT should address during detailed planning and delivery.

The research should examine opportunities arising from the move of the pay barrier to the Bakehouse. This includes how HHT might welcome people using the wider estate and encourage them to engage with the Trust's offer. Recommendations should work within the established capital project.

Explore programming, admissions and membership

HHT wants to understand how exhibitions, events and its wider public programme influence decisions to visit, attract new audiences, encourage repeat visits and affect membership. The research should also consider how the developing contemporary garden could encourage visits at different times of year and strengthen the reasons to return.

We want to test our current charging model. Harewood currently offers an all-inclusive admission ticket alongside member access, Community Access Membership and Access+ tickets. Parking is generally free, although we charge for it at Christmas. With the Bakehouse visitor centre potentially accessible without an admission ticket, we want to understand how parking and paid access might work together. The research should consider approaches at comparable sites, including National Trust and English Heritage properties where parking charges sometimes apply, and take account of limited parking in Harewood village. It should assess how different options might affect access, visitor behaviour, membership, income and perceptions of value, without assuming that a parking charge will be introduced.

The research should consider how we can grow membership: what prompts visitors to join, how to convert first-time and repeat visitors, what makes membership feel worthwhile, and what influences renewal or lapse. It should assess whether changes to the visitor offer, programming and admissions model could strengthen both recruitment and retention. Recommendations should examine visitor numbers, income and yield per visitor alongside the continued accessibility of Harewood through Community Access Membership and Access+.

4. Research questions and measures

The consultant should propose a proportionate way to investigate the following themes, drawing on existing data and new research. The methods should include opportunities for open responses about visitors' overall experience, alongside questions that allow HHT to establish useful baselines and compare audiences. Tenderers should explain which measures can be established reliably within the commission and where findings will be indicative.

Visiting behaviour and decisions

- The proportion of regular visitors and members, the return of lapsed visitors, and frequency of visits.
- How people use the House, grounds, exhibitions, events, activities, retail, food and drink, transport, accessible facilities and play offer.
- Digital engagement with Harewood, including the website, digital interpretation and social media.
- Booking routes, including online, on-site and third-party sales.
- How people decide whether and when to visit, what prompts a visit through different channels, and the roles of admission and parking costs in that decision.

Connection, satisfaction and loyalty

- Visitors' trust in Harewood's communications and actions, emotional connection with the place, understanding of HHT's charitable purpose and willingness to support it.
- Whether visits meet expectations, likelihood to recommend, and satisfaction with specific parts of the experience, including welcome, environment, interpretation, retail and food and drink.

Audiences, motivations and barriers

- Whether Culture Segments remains the right model for HHT, including the current balance of Essence, Expression, Enrichment and Stimulation audiences where this can be established.
- Priority audience groups, their likely scale and location, interests, motivations and potential to visit Harewood.
- What attracts people to Harewood, including landscape and nature, art and craft, history, social visits, play and wellbeing.
- Barriers to first and repeat visits, including cost, awareness, access and perceptions that the offer does not appeal to them.

The competitive landscape

- How other visitor offers within Harewood's audience catchment affect decisions to visit.
- How Harewood's admission price, ticket structure, membership, parking arrangements and wider offer compare with relevant alternatives.
- What these comparisons suggest for admission, parking and membership following the move of the pay barrier to the Bakehouse.

Engagement outcomes and opportunities from the project

- Whether a visit increases knowledge or understanding of Harewood's heritage, and contributes to wellbeing, belonging, social connection or an interest in taking further action.
- Which aspects of the existing experience and planned Bakehouse and landscape offer are most likely to influence future visits, engagement and Harewood's reputation.
- Opportunities to engage people using the wider estate, including whether parking and the Bakehouse offer might encourage paid visits or generate other income.

The research should establish what audiences think of Harewood now and what they hope to gain from Reimagining Harewood. It should recommend practical measures that HHT can use to see whether the completed project attracts new audiences, improves visits and helps people engage with Harewood's heritage.

Research may include online, on-site and post-visit surveys, analysis of existing data, and research with non-visitors. The appointed consultant should agree the methods with HHT and coordinate with the separately commissioned Audience Development Consultant, who is leading the community focus groups.

5. Working with other consultants

The Audience Research Consultant will work with HHT's project team and the separately appointed Audience Development Consultant.

An initial meeting should agree the boundaries between the commissions, shared research questions, opportunities to exchange emerging findings and how the outputs will contribute to the Delivery Phase application. The Audience Research Consultant will remain responsible for their own methodology, analysis and conclusions.

The Audience Development Consultant's focus groups are scheduled to run between January and August 2027, with reports expected in May and August. The Audience Research Consultant should consider relevant findings as they become available, while recognising that those focus groups provide in-depth insight from particular communities rather than a representative measure of Harewood's audiences as a whole.

6. Deliverables

The consultant will provide:

1. **An evidence review and research plan** summarising existing insight, gaps in knowledge, proposed methods and the audiences to be researched. This will be agreed with HHT before primary research begins.

2. **Primary research findings** on current and potential audiences, including their motivations, barriers, visiting behaviour and responses to opportunities created by Reimagining Harewood.
3. **An audience baseline and priority audience profiles** showing who Harewood currently reaches, who it could reach, the evidence behind those choices and the needs and motivations of each priority group.
4. **Practical recommendations for Harewood's visitor experience**, including opportunities created by Reimagining Harewood. These should cover welcome and orientation, interpretation, activities, communications and ways to encourage visitors to explore the Bakehouse and wider site. Recommendations for the capital project should work within its established scope and inform detailed planning and The Heritage Fund Delivery Phase application.
5. **Recommendations for audience growth, access and income**, including the contribution of exhibitions, public programming and the developing contemporary garden to first and repeat visits; opportunities to recruit and retain more members; and options for admissions, membership and parking associated with the new arrival experience. The report should assess how Reimagining Harewood can contribute to HHT's ambition of more than 330,000 annual visits by 2030, without treating that wider target as an outcome of the capital project alone.
6. **Audience measures and targets** that HHT can use to track growth, diversity, satisfaction and engagement, with clearly identified measures relevant to Reimagining Harewood and its future evaluation. These should be developed with the evaluation consultant and be realistic for HHT to collect.
7. **A concise, usable audience framework for HHT staff**, setting out priority audiences, their needs and motivations, recommended actions and measures of success.
8. **An Audience Research Report and presentation**, with the underlying methods and findings documented so that relevant material can support the Heritage Fund Delivery Phase application and activity plan.

The consultant will share emerging findings with the project team at agreed points so that the research can inform decisions as the project develops.

7. Experience required

Tenderers should demonstrate relevant experience of audience research for heritage or cultural organisations, including any work undertaken during the development phase of National Lottery Heritage Fund-supported projects.

We are particularly interested in examples where audience research has informed a capital project, an activity plan or a Heritage Fund delivery stage funding application. Experience of researching non-visitors and underrepresented audiences, assessing visitor demand and pricing, and turning findings into practical recommendations will also be important.

8. Timetable and budget

Proposed start: 14 December 2026, with a start-up meeting that week

Research begins: Week commencing 4 January 2027

Initial report and presentation: 22 March 2027

Further work and final report: 1 October 2027

The March report should present the evidence review, research undertaken to date, audience baseline, priority audiences and early recommendations needed to inform the developing project. It should identify questions that remain open, including findings expected from the Audience Development Consultant's later focus groups. The final report should bring together the completed research and relevant findings from the other commission. The maximum budget is **£30,000 excluding VAT**, inclusive of consultancy fees and expenses. Any proposed travel costs for research participants should be identified separately and agreed with HHT in advance.

Tenderers should provide a total fixed price and a breakdown by phase or deliverable, together with the daily or hourly rates of proposed team members.

9. Response to the brief

Proposals should include:

- The proposed approach and methods, including how non-visitors and priority audiences will be reached.
- How findings will be shared during development so they can inform the project.
- A timetable and cost breakdown against the deliverables.
- Relevant experience and case studies, particularly Heritage Fund-supported development phase and capital projects.
- The roles and short biographies of those delivering the work.
- Two references.

The procurement instructions, submission deadline and evaluation criteria are set out in the accompanying **Invitation to Tender**.