

Our Audiences

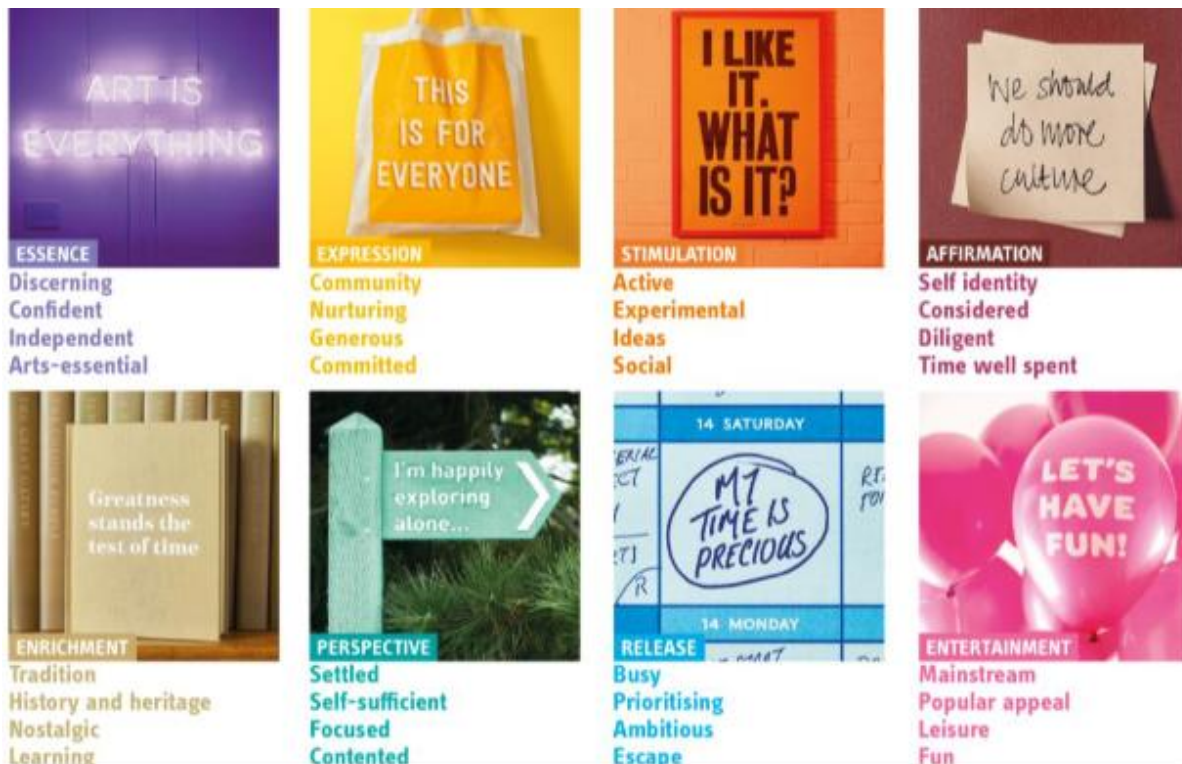
1. Audience Research

In 2023, the National Museum of the Royal Navy commissioned Morris Hargreaves McIntyre to undertake comprehensive audience research. This work provided valuable insight into both our current and potential audiences, using a combination of quantitative and qualitative methods.

The research focused on individuals with an interest in heritage and days out and applied MHM's Culture Segments psychographic profiling system to help us better understand the regional and national audiences. This was then followed up by a current/lapsed booker survey in 2024. This approach has enabled us to identify priority audiences and pinpoint areas for growth.

A summary of key findings is provided below. A full set of audience insights will be made available to the appointed companies on the framework to inform campaign strategy and creative development.

Find out what your segment is here [Survey | Morris Hargreaves McIntyre](#)



The research focused on:



2. Priority Audience Segments

2.1. Potential Audiences

Using MHM's research as a base we undertook an exercise in 2024 to develop an audience prioritisation matrix to help us to inform our marketing campaigns. The following segments were identified as the ones that had the largest market share and highest propensity to visit. Priority segments also align to our other individual organisations priorities in terms of volunteering, fundraising and reaching underrepresented audiences.

			
Expression	Affirmation	Stimulation	Perspective
Nurturing Committed Community Generous	Considered Self-identity Diligent Time well spent	Active Experimental Ideas Social	Fulfilled Self-sufficient Focused Reflective
People people	Nothing happens by accident	All about the big idea	Happy in their own bubble
'Celebrate' 'Dream' 'Get involved'	'Admired' 'Absorbing' 'Experiential'	'Edgy' 'Best kept secret' 'Adventure'	'Self-development' 'Learning' 'Meaningful'
Living life to the full: fun-loving, with a wide range of interests Community and family: enjoy inclusive activities and sharing experiences with others Civic responsibility: Support organisations who promote egalitarianism,	Personal development: made a conscious decision to embrace more culture Quality experiences: looking for wholesome learning that helps them feel good Doing the right thing: careful researchers, want to be recognized as going to	Enjoying life: live in the moment, seek out the new and extraordinary Ahead of the curve: like to make discoveries first and see things before everyone else Spectacle: looking to be amazed, from risk-taking and rule breaking to the special	Fulfilled: happy doing their own thing, focused on a limited no. of interests Individuality: seek out private experiences, where stimulation is quite personal Thinkers: enthusiasm for their particular interests,

Expression is our golden thread segment, this segment has the greatest potential for growth across all NMRN sites, including PHD. Most sites already attract a healthy number of visitors from this segment, but there is significant opportunity to convert more of the expression segment into visitors. As such, Expression will be the primary focus of our brand and advertising campaigns.

Each site has tailored audience priorities via an Ansoff Strategy matrix (this can be shared with successful bidders) which leans on a number of factors including market penetration, product development, market development and diversification:

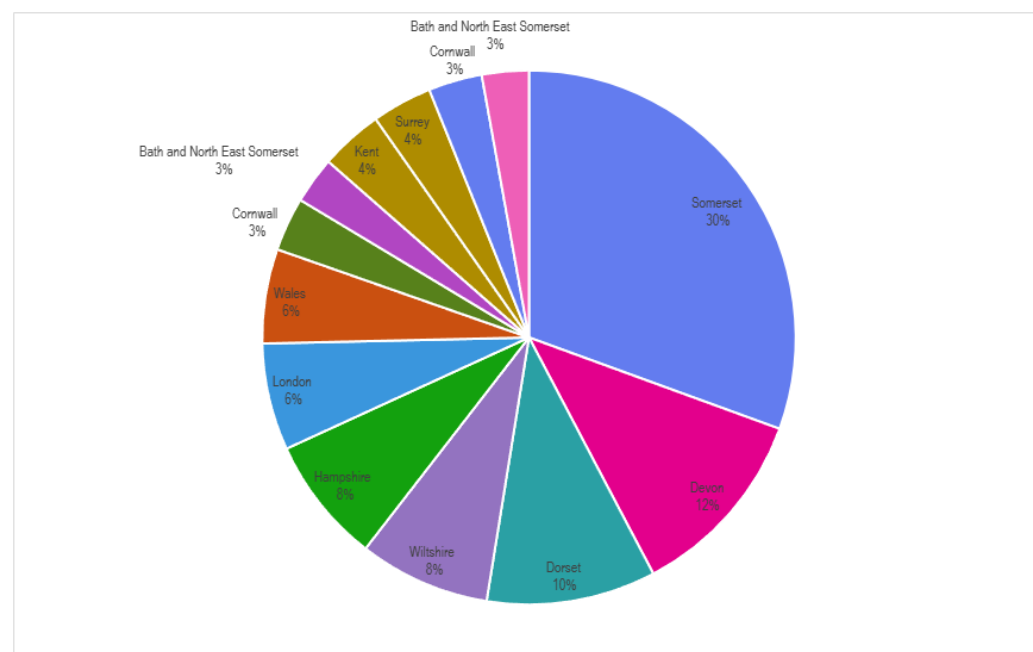
NMRN Site	Primary Segment	Secondary Segment	Challenge Segment
PHD	Expression	Affirmation	Stimulation
FAAM	Expression	Affirmation	Stimulation
NMRNH	Expression	Affirmation	Entertainment
HMS Caroline	Expression	Stimulation	Essence

Fleet Air Arm Museum Audience

1. Current

The majority of FAAM's visitors come from the local area, typically within a 60-minute drive time of the site. This local audience has grown since covid and as a result of a local loyalty scheme which usually runs in the shoulder season November – February Half Term. In addition, FAAM attracts tourists from further afield, including London and Wales as it is located on the A303 a busy arterial road serving the South West. It is likely these visitors incorporate FAAM into their travel plans enroute to Devon and Cornwall, making it an ideal strategic stop on their journey.

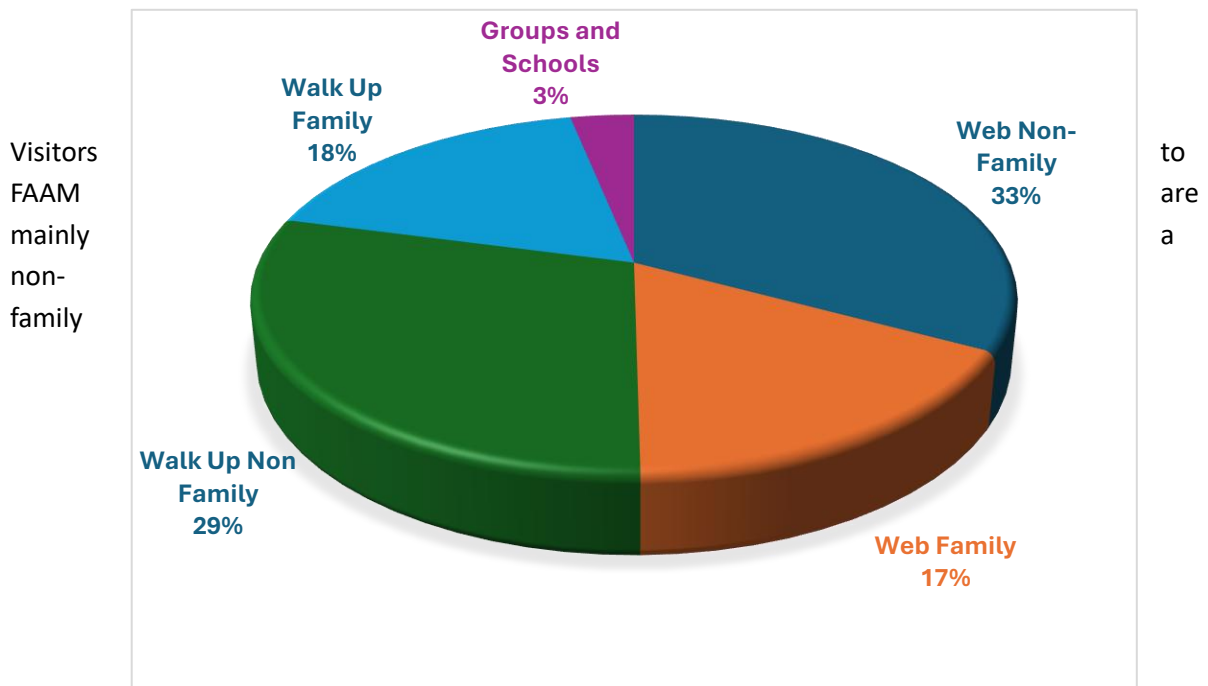
1.1. Audience Location



1.2 Audience numbers based on financial years April – March

Year	Total Visitors (Including returners and free tickets)	Paying visitors
2025-2026 YTD	50,103	40,803
2024-2025	79,742	66,448* data incomplete due to cyber attack
2023-2024	88,141	76,205
2022-2023	71,640	63,974
2021-2022	57,692	53,651

1.3 Ticket Type



audience, and this group remains our most prominent visitor type throughout the year and will be made up of individual, couples and groups of friends. While some families may be included within this segment (approx. 20%), they fall outside the definition of our family ticket (soon to be changed), which is structured for either one adult and three children or two adults and three children. As a result, these family groups are not captured within our core family audience data. Family audiences as expected come more frequently in the school holidays and weekends.

1.4 Past Campaign Examples



segments visiting FAAM

1.5 Current MHM



FAAM's current audiences come from perspective, expression and enrichment segments. Perspective is the audience currently very

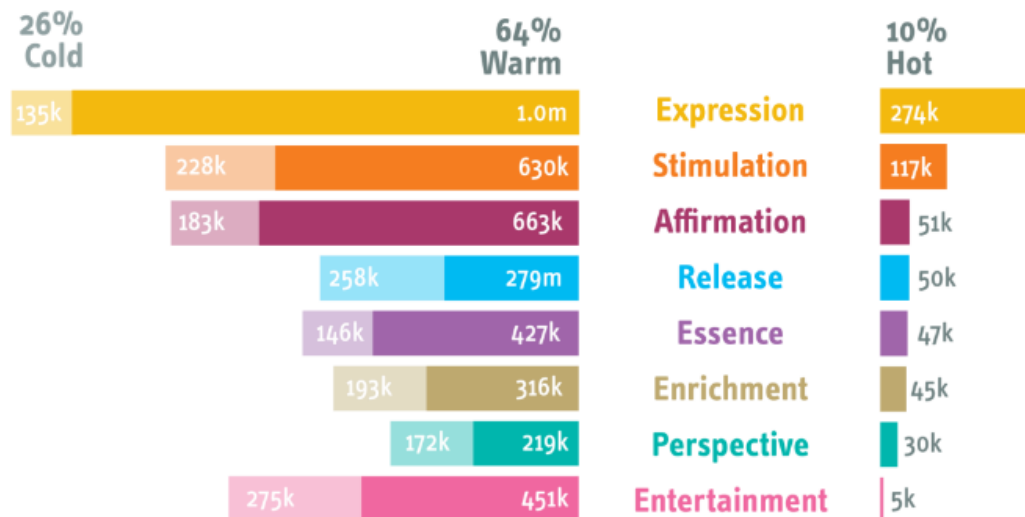
engaged with FAAM. While they are important to us, they are less influenced by marketing campaigns and represent a smaller share of the potential market. We will continue to attract this group through organic channels, but they will not be the central focus of paid advertising efforts. The same can be said for Enrichment, whilst we do not want to alienate them, they are not the biggest area for potential growth.

1.6 Priority Audiences for FAAM

Expression is the largest and most valuable audience segment for FAAM in terms of future growth potential, showing the highest propensity to visit. The focus now is on deepening engagement and converting interest into visits

Affirmation is identified as the secondary priority segment. This audience is more readily accessible through FAAM's existing offer, making them easier to engage without significant investment. They align well with Expression in terms of values and motivations but require clear communication of the visit's value.

Stimulation is considered the challenge segment. While this group includes strong warm and hot leads and offers potential for future growth, they are less likely to engage with the current offer. Reaching them effectively will require investment in new programming and experiences. Creative approaches and strategic development will be essential to attract and retain this audience.



NATIONAL MUSEUM OF THE ROYAL NAVY HARTLEPOOL AUDIENCES

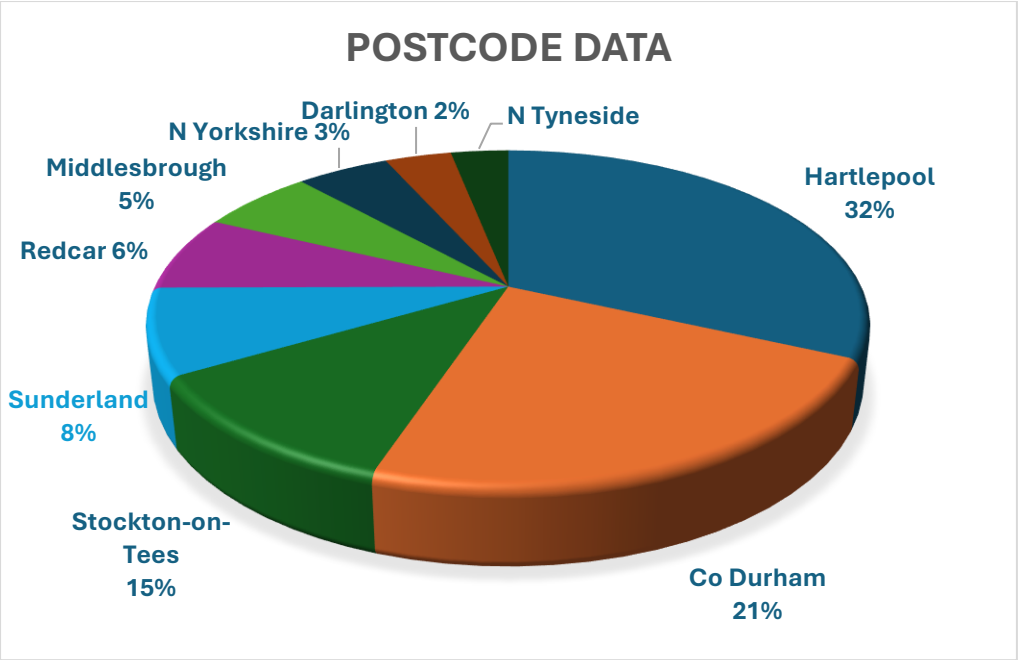
2. Current

Audiences at NMRN Hartlepool are primarily local, with most visitors travelling from within a 30 to 60-minute drive time. There has been limited progress in attracting visitors from larger cities in the North, such as Leeds and York.

Hartlepool and its surrounding towns and villages are not densely populated, which naturally results in lower visitor numbers. Additionally, brand recognition remains a challenge, partly due to the museum undergoing several name changes over the years, which has potentially led to confusion amongst visitors.

Further research has shown a low propensity to travel to Hartlepool, with survey participants expressing uncertainty about its location and questioning the appeal of the area as a visitor destination.

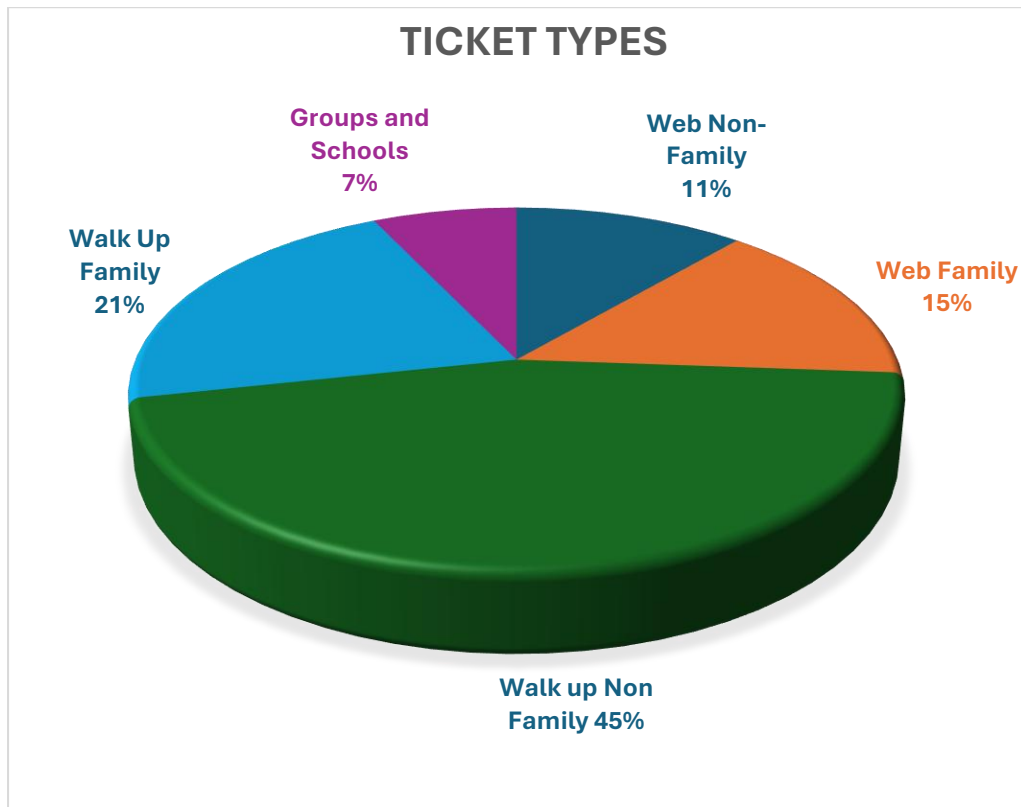
2.1 Audience Location



2.2 Audience numbers based on financial years April – March

Year	Total Visitors (Including returners and free tickets)	Paying visitors
2025-2026 YTD	30,059	21,761
2024-2025	43,341	32,601_*figures incomplete due to cyber attack
2023-2024	53,029	40,319
2022-2023	51,697	39,463
2021-2022	34,042	29,981

2.3 Ticket Types



Visitors to NMRN Hartlepool are predominantly from a non-family audience, and this group remains the most consistent throughout the year. While some families are likely included within this segment, they fall outside the definition used for our family ticket, which is structured for either one adult and three children or two adults and three children. As a result, these family groups are not fully captured in our core family audience data.

However, we believe that family visitation is stronger than the data currently reflects. NMRNH offers a family-friendly experience, and we know from observation and feedback that it is particularly popular with families during school holidays and weekends.

2.4 NMRNH Past Campaign Examples





2.5 Current MHM segments visiting NMRNH

NMRNH's current audiences come from Expression, Perspective and Stimulation segments. Expression takes the biggest market share followed by the niche audience of Perspective. Stimulation and Essence hold joint third position.

2.6 Priority Audiences for NMRNH

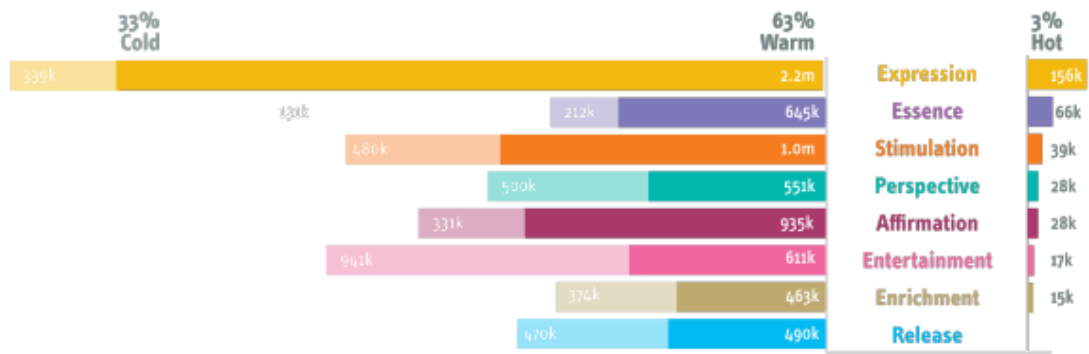
At NMRNH, the Expression segment represents the most promising audience, offering the highest number of warm and hot leads. The site is already attracting visitors from this group, but the key challenge now is to deepen engagement and increase market penetration through targeted campaigns.

Affirmation is the secondary priority segment. It shows strong market potential and shares similar values and motivations with Expression. To effectively engage this audience, campaign messaging should focus on value for money and relevance to their interests.

Entertainment segment is identified as a challenge audience. After further research undertaken any new product for the Museum will be developed to attract the Entertainment audience.

Although the Perspective segment represents a smaller share of the market, it's important that campaigns do not alienate these existing visitors. While they may not be the focus of paid advertising, they remain a valued part of the audience.

2.7 Potential Audiences



HMS Caroline Audiences

3. Current

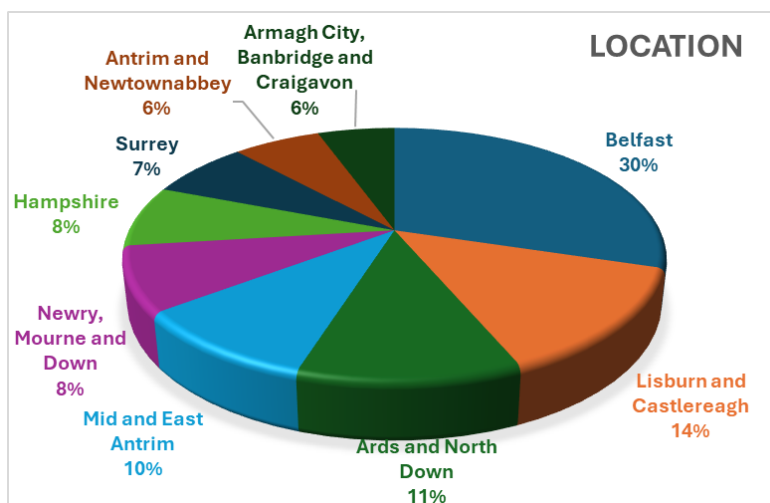
HMS Caroline reopened to the public in April 2023, following its closure during the pandemic. Current data shows that the majority of visitors are local, typically travelling from within a 30-minute drive time.

However, there is clear potential to expand reach within nearby districts such as Antrim and Newtownabbey and the Armagh, Banbridge and Craigavon (ABC) Council area, both of which fall within a 60-minute drive radius. This suggests that targeted marketing efforts in these areas could help grow audience numbers.

Caroline is also clearly picking up some tourist traffic from South-East England.

It's important to note that the data we hold for HMS Caroline comes with limitations, we currently lack insight into audiences from the southern part of the island, which means our understanding of the audience is incomplete.

3.1 Audience Location

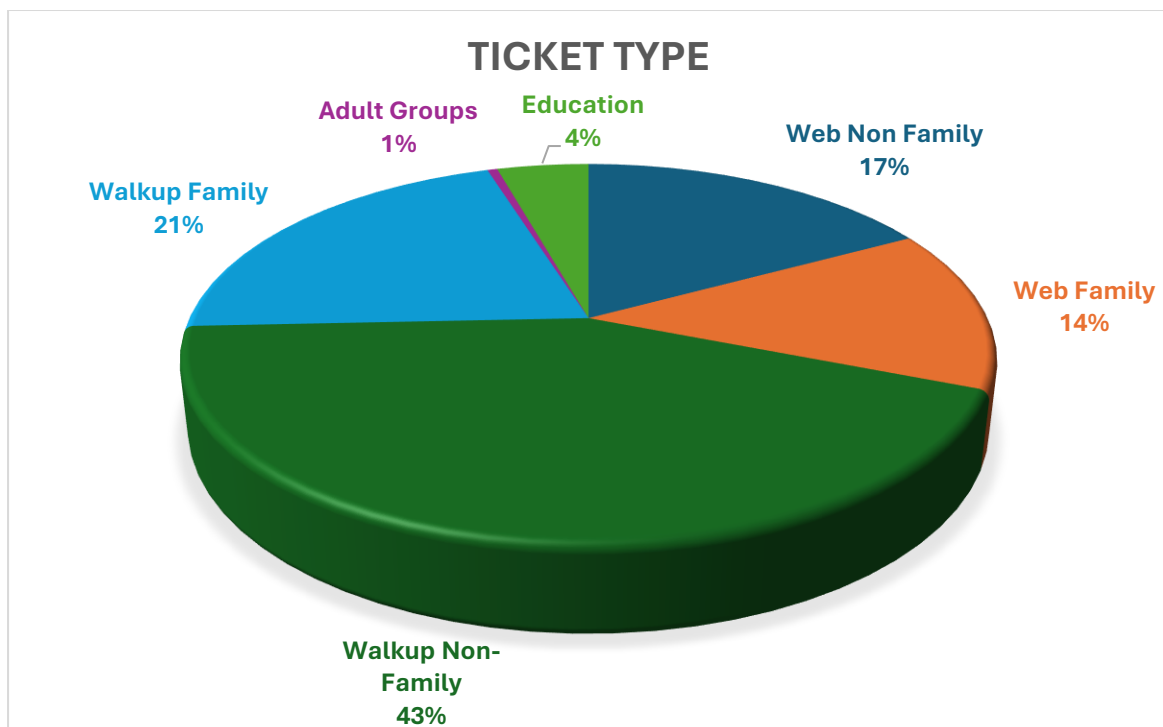


3.2 Audience numbers based on financial years April – March

Year	Total Visitors (Including returners and free tickets)	Paying visitors
2025-2026 YTD	5904	6203
2024-2025	7377	7936
2023-2024	21,386	23,139

The operating model has changed from a seven-day opening to its current offering of 3 days during term time and five days during school holidays which explains the reduction in visitors.

3.3 Ticket Types



Non-family audiences are the majority of visitors coming to HMS Caroline and they are our top audience type all year around which is reflective of the ship's offering. It is important to note that some families may be included within our Non-Family audience but they fall outside the makeup of our family ticket.

3.4 Caroline Past Campaign Examples



3.5 Current MHM segments visiting Caroline

Recent data shows that the Expression segment is the strongest audience group currently visiting HMS Caroline. The Perspective segment ranks second, indicating a steady stream of visitors who are

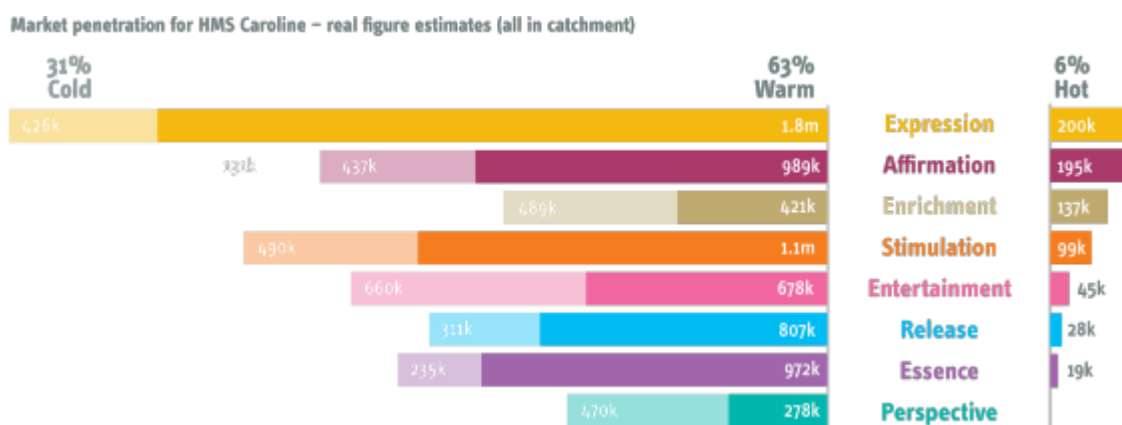
likely to attend regardless of marketing efforts. Stimulation and Essence segments are tied in third place. These groups show lower levels of current engagement.

3.6 Priority Audiences for Caroline

HMS Caroline already attracts visitors from the Expression segment, and they represent the greatest opportunity for growth. Campaigns will focus on deepening engagement and increasing reach within this segment.

Stimulation is a site-specific secondary priority. This audience is active, experimental, social, and driven by ideas. HMS Caroline has already seen engagement from this group, often through shared initiatives such as the film festival. The challenge is to give them new reasons to return, which may include refreshed programming, collaborative events, and dynamic digital content.

Essence is identified as a challenge segment for HMS Caroline. This audience is discerning, independent, confident, and sees the arts as essential. While current engagement is low, Essence offers strategic opportunities to reach female audiences, volunteers, and potential donors. Success with this segment will need further investment in product development, curated experiences, deeper cultural programming, and opportunities for meaningful involvement.

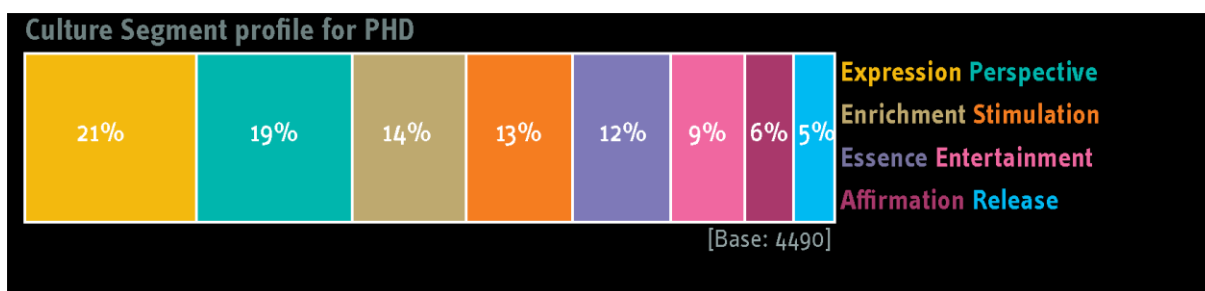


PHD Audiences

4. Current

Recent visitor survey data from 2024 indicates that PHD is currently perceived as a specialist offer, which is reflected in the profile of its core audience. The majority of visitors are older adults not attending with young children, typically living 60 to 120 minutes' drive time from Portsmouth.

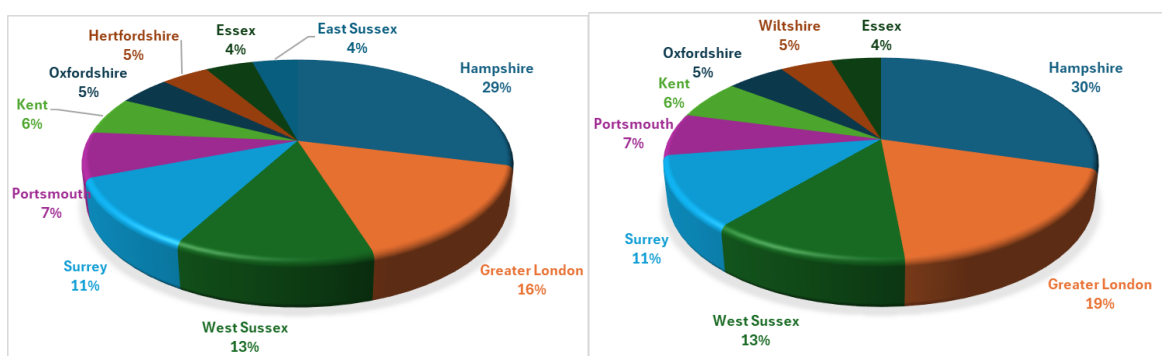
Using the MHM segmentation system, [Culture Segments](#) we can see that our largest proportion of current audiences fall into Expression (21%) and Perspective (19%) segments.



4.1 Audience Location

April 24 – March 25

April 25 – August 25:



The geographic origin of PHD's visitors is fairly stable year on year, with consistent patterns in regional and national visitation:

- Local Catchment (0–60 minute drive time): 36% of visitors come from Hampshire, including Portsmouth
- Regional Corridor (60–90 minute drive time): A significant proportion of visitors travel from West Sussex (13%) and Surrey (11%), forming a key corridor of engagement along the A3
- Metropolitan Reach (90–120 minute drive time): Greater London is the second largest single source area, with visitors primarily coming from outer boroughs such as Kingston, Richmond, and Croydon. This demonstrates PHD's appeal beyond the regional catchment and into a major metropolitan market.
- Extended Catchment (2–3 hour drive time): There is additional engagement from counties including Kent, Oxfordshire, Hertfordshire, Essex, and East Sussex, indicating potential for growth in longer-distance day trips and short breaks.

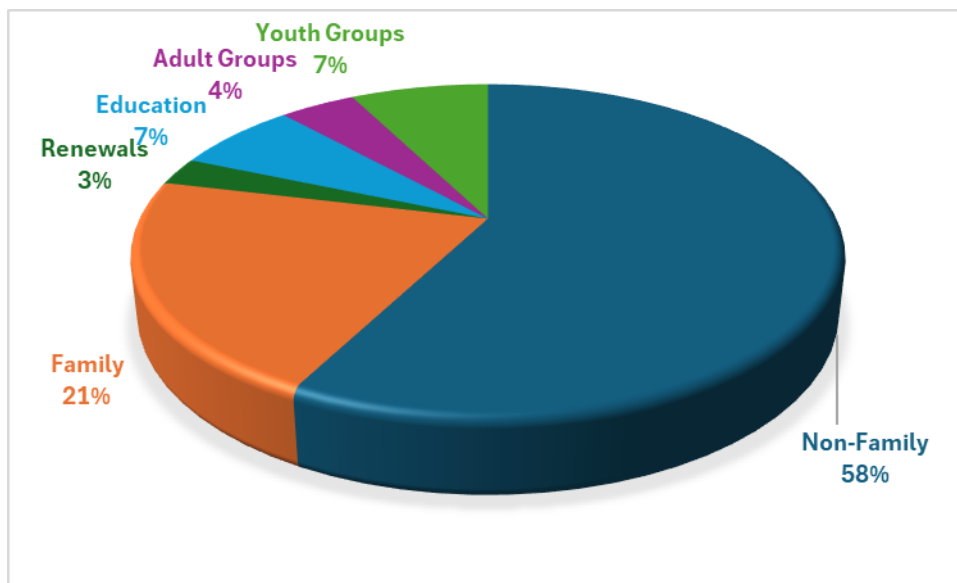
4.2 Audience numbers based on financial years April – March

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	354,527	205,819

April 2022 to March 2023	718,990	508,872
April 2023 to Feb 2024	873,491	605,430
April 2024 to March 2025	868,252	*number not available due to cyber attack

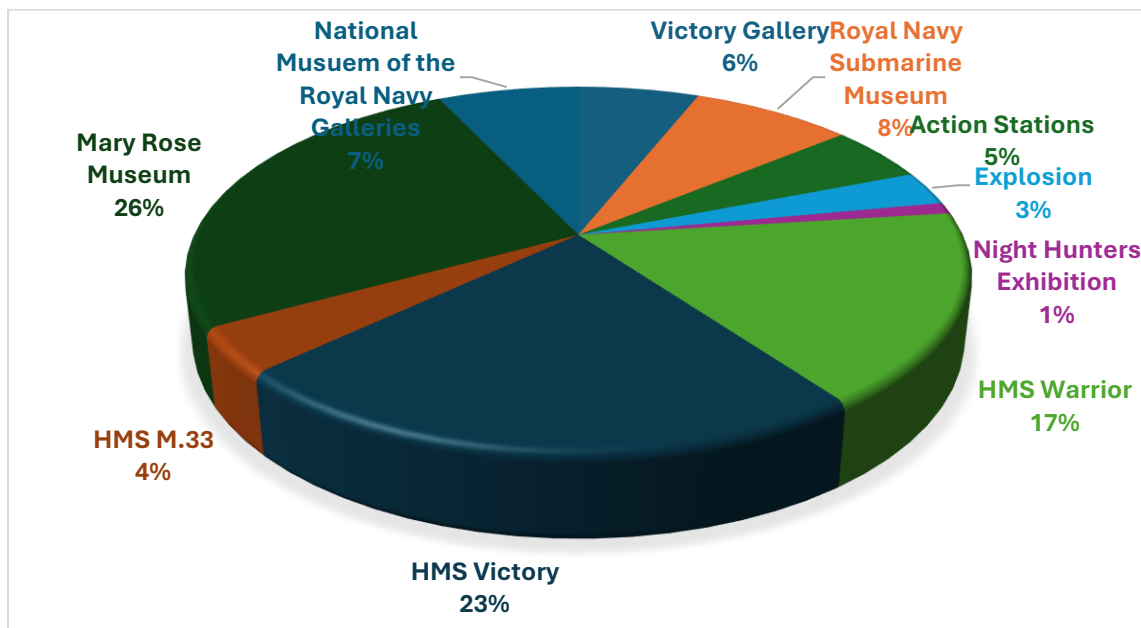
4.3 Ticket Types

The data below is based on ticket sales data between 1 April 2024 – 28 September 2025, as follows:



Visitors to PHD are mainly a non-family audience, and this group remains our most prominent visitor type throughout the year. Some families may be included in the non-family audience (roughly 20%), they fall outside the definition of our family ticket, which is structured for either one adult and three children or two adults and three children (this structure will be changing soon). As a result, these family groups are not captured within our core family audience data. Family audiences as expected come more frequently in the school holidays and weekends.

4.4 Which attractions our visitors go to see at PHD



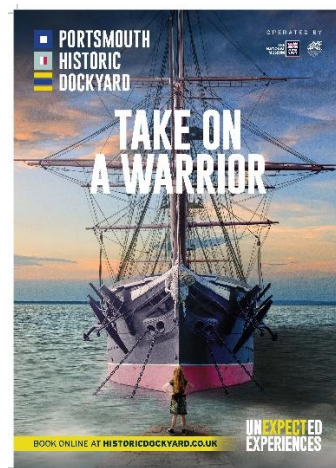
Mary Rose Museum and HMS Victory are the most popular attractions on site, with HMS Warrior and the Submarine Museum also receiving a good proportion of visitors. The visitation to each attraction does not currently vary greatly year on year.

4.5 PHD Past Campaign Examples

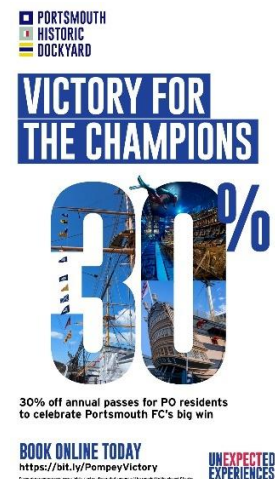
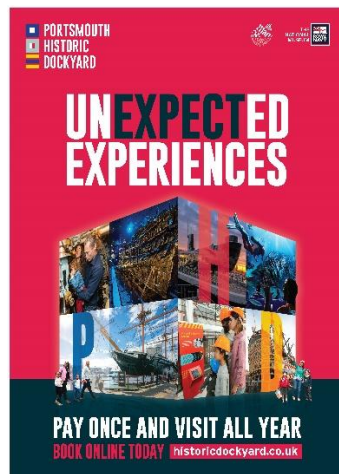
2025/2026



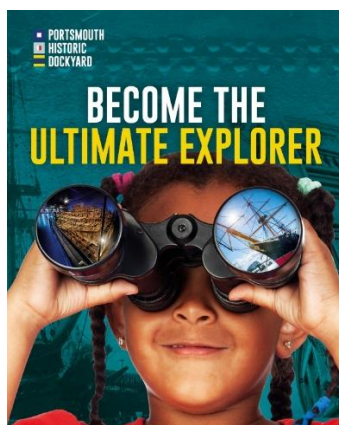
2024/2025



2023 – 2024



2022/2023



4.6 Potential Audiences

While our current audiences remain important to us, our recent research with MHM shows limited growth potential within the existing core segments particularly those within the 0–60 minute drive time, which is now considered saturated.

From the MHM research, we undertook an exercise in 2024 to develop an audience prioritisation matrix to help us to inform our marketing campaigns. The following segments were identified as the ones that had the largest market share and highest propensity to visit.

Expression	Affirmation	Stimulation	Perspective
Nurturing Committed Community Generous	Considered Self-identity Diligent Time well spent	Active Experimental Ideas Social	Fulfilled Self-sufficient Focused Reflective
People people	Nothing happens by accident	All about the big idea	Happy in their own bubble
'Celebrate' 'Dream' 'Get involved'	'Admired' 'Absorbing' 'Experiential'	'Edgy' 'Best kept secret' 'Adventure'	'Self-development' 'Learning' 'Meaningful'
Living life to the full: fun-loving, with a wide range of interests Community and family: enjoy inclusive activities and sharing experiences with others Civic responsibility: Support organisations who promote egalitarianism, access and democracy	Personal development: made a conscious decision to embrace more culture Quality experiences: looking for wholesome learning that helps them feel good Doing the right thing: careful researchers, want to be recognized as going to interesting places	Enjoying life: live in the moment, seek out the new and extraordinary Ahead of the curve: like to make discoveries first and see things before everyone else Spectacle: looking to be amazed, from risk-taking and rule breaking to the special and intimate	Fulfilled: happy doing their own thing, focused on a limited no. of interests Individuality: seek out private experiences, where stimulation is quite personal Thinkers: enthusiasm for their particular interests, motivated to focus their time in ways that relate

- Expression is our biggest audience share both in terms of current audiences and potential audiences.
- Affirmation is our second largest market opportunity audience. Currently only 6% of our audiences come from this segment.
- Stimulation is an important audience to us but attracting them is a medium to long term goal.
- Perspective is currently our second biggest audience. This audience have a natural affinity to our offer. Whilst not the segment our marketing campaigns will be targeted at, they are important to us.

We would like the new campaign creative to resonate strongly with the Expression, Affirmation and Stimulation audience segments.