Destination Management Plan

2014 - 18

Prepared for
visit greenwich

time after time

By

Yellow Railroad
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Section 1: Introduction

Greenwich Destination Management Plan – Vision

The aim of this destination management plan (DMP) is to contribute to the growth of the visitor economy in Greenwich – and particularly to increase jobs for local people and revenue from visitors in the Borough, with a particular focus on Greenwich town, North Greenwich, Woolwich, Eltham and Blackheath. The DMP sets out a clear, ambitious vision and a number of actions to be undertaken by Visit Greenwich and local stakeholders to achieve this.

Success will be defined by an increase in the number of visitors and, most importantly, the amount they spend and the employment this expenditure sustains and the new jobs it creates. But this will not happen without partnership and commitment to a common goal by Greenwich stakeholders. The greatest challenge will be for major Greenwich stakeholders to work effectively together to deliver this growth, while at the same time pursuing success in their own businesses.

This plan sets out a vision to increase revenue and jobs in Greenwich over the period 2015-2018.

What is a Destination Management Plan?

Roadmap

A DMP is a roadmap that outlines a clear direction for a destination to take in growing its visitor economy. It should address all elements that affect the destination and its potential, from planning, product development and infrastructure to skills, image and marketing.

Definition

Visit England has defined destination management and a DMP as follows¹:

“Destination Management is a process of leading, influencing and coordinating the management of all the aspects of a destination that contribute to a visitor’s experience, taking account of the needs of visitors, local residents, businesses and the environment.”

“A Destination Management Plan (DMP) is a shared statement of intent to manage a destination over a stated period of time, articulating the roles of the different stakeholders and identifying clear actions that they will take and the apportionment of resources.”

Working Document

This DMP is also a working document, capable of evolving as opportunities arise, market circumstances change, and the financial and operating environment fluctuates. It also contains

¹ Visit England: Principles for Developing Destination Management Plans
credible methods for measuring its success, so that activities can be refined and resources refocused as appropriate to achieve Greenwich’s objectives.

Why a Destination Management Plan for Greenwich?

Context

Tourism is traditionally a fragmented industry with a mix of large and small, public and private, third sector and community organisations. Critically, many of these organisations work in isolation from each other with the frequent result that opportunities to grow the visitor economy are not maximised – whether in terms of taking account of visitor needs in the development of new infrastructure, transport access and urban legibility, or factoring them into planning and policy decision-making.

Greenwich is in many ways fortunate in that its tourism offer comprises a disproportionate number of major tourism players, most especially: the local authority, The O2, Cutty Sark, a World Heritage Site - Greenwich Park, Royal Observatory, Prime Meridian, Old Royal Naval College - Greenwich Market, Royal Arsenal Woolwich, Eltham Palace, Ranger’s House – Wernher Collection; and a significant hinterland that includes The Westfield Stratford, ExCel exhibition centre; plus probably London’s most diverse range of transport options including Thames Clippers, City Cruises, DLR, Emirates Air Line cable car, London City Airport, as well as future plans for a retail outlet village, Crossrail and a new cruise terminal.

This cluster of iconic attractions and venues, plus London’s greatest variety of transport options, is likely to ensure a steady market of visitors to these attractions. So this DMP is not about launching an unknown quantity on to the tourism map. But in a way it is. Its aim is to maximise the impact for the Borough, in terms of revenue and jobs, and to leverage the potential all these and other smaller attractions and tourism businesses offer. By setting out a plan that addresses the areas in which Greenwich can improve on its already significant assets, this DMP aims to add value to the individual efforts of all these businesses. By focusing on the potential of the visitor economy and identifying future visitor needs, it addresses the potential for cooperation and opportunities to achieve growth – through a focus on infrastructure, planning, product development, marketing and evaluation. It aims to help develop Greenwich as a destination, rather than as a series of unconnected experiences, with a focus on increasing visitor traffic and spend, and thereby jobs.

This DMP is a roadmap for Visit Greenwich and local stakeholders to develop the visitor economy over the next 5 years, with a clear set of actions allocated to stakeholders responsible for carrying them out. The focus is on targeted growth over the next five years to 2018, which will sow the seeds for continuing growth in subsequent years.

Most significantly the DMP requires a strong commitment to destination development by all key stakeholders to be successful – a “Destination First” mindset, which drives growth both to the destination and, thereby, to individual businesses.
Purpose

The main purpose of this DMP is to create a shared strategy for managing the development of, investment in, and delivery of, tourism in Greenwich over the next 5 years by:

- Setting out a strategy and processes for managing aspects of the destination that contribute to the visitor’s experience, taking account of the needs of the visitors, local residents, businesses and the environment.

- Describing the roles of the various stakeholders and identifying clear actions they can take to manage, improve and grow the destination.

- Addressing the planning, development and marketing of Greenwich as a tourism destination and proposing how this should be managed physically, financially and operationally.

- Setting out a strategic direction for destination development and investment.

- Identifying opportunities to attract new tourism-related investment.
Section 2: Executive Summary

2.1 Destination Management Plan – Purpose and Aim

Purpose

Tourism contributes significantly to the lives of Greenwich residents, particularly in terms of jobs and, through revenue earned from visitors, to the provision of public services. Tourism also contributes indirectly to the viability of a range of facilities and events available to local residents – from entertainment and leisure to shopping, restaurants and bars, and links to central London.

This destination management plan (DMP) sets a direction for the development of Greenwich’s visitor economy – a roadmap for all Greenwich stakeholders to follow. It requires the commitment of all key stakeholders to be successful – a “Destination First” mindset, which drives growth to the destination and, thereby, to individual businesses.

Aim

The aim is to grow tourism consistently and thereby increase its contribution to the livelihoods and quality of life of Greenwich residents.

Our vision is to work collaboratively to increase the contribution of tourism to the Greenwich economy by 28% in terms of value and create more than 3,330 new jobs by 2018.

Table 1: Targeted Tourism Growth by 2018 (direct plus indirect impact)

<table>
<thead>
<tr>
<th>The Value of Tourism to Greenwich</th>
<th>2013</th>
<th>2018 target</th>
<th>Growth</th>
</tr>
</thead>
<tbody>
<tr>
<td>Value (£) (^2)</td>
<td>£ 1.10 billion</td>
<td>£ 1.41 billion</td>
<td>28% / £ 310 million</td>
</tr>
<tr>
<td>Employment</td>
<td>14,040</td>
<td>17,371</td>
<td>24% / 3,331 jobs</td>
</tr>
</tbody>
</table>

2.2 Opportunities and Challenges

Greenwich has a strong, longstanding historical appeal and is included in many London tours. However, it tends to be seen as a swift coach tour stop or a visit lasting a half-day to a day. For visitors with limited time in London, Greenwich has to compete with the vast range of other London sights and attractions, or it is squeezed into an itinerary with other destinations such as Leeds Castle, Canterbury and Dover. And, until recently, Greenwich has had limited quality accommodation. It is also perceived as difficult to reach, with the main attractions, apart from the O2, not being on the tube line, which forms a powerful reference framework for visitors to London. And, even then, there is confusion and a disconnect between the disparate parts of Greenwich, and particularly between

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\(^2\) £ figures are rounded up here to nearest million. Detailed figures are in Table 2 below and in Appendix 5.
North Greenwich, Greenwich town centre Woolwich and Eltham. The result is that Greenwich is disproportionately dependent on day visitors, many of whom have little opportunity to visit and spend time and money in Greenwich, other than in the attractions to which they are bussed in and out of.

Nevertheless, especially for independent visitors whose time and itinerary are not so constrained, Greenwich offers an absorbing range of things to do and see, places to eat and drink, and, increasingly, places to stay. This more contemporary and vibrant side of Greenwich has perhaps been overshadowed by the dominance of Greenwich’s iconic heritage attractions, which may have prevented Greenwich being perceived as little more than a brief visit on a whistle-stop tour. The Greenwich offer also extends beyond the boundaries of Greenwich, with significant potential contributors to tourism in Greenwich, such as Excel and London City Airport. The increase in quality hotels and conference facilities opens up a new market for Greenwich to attract national and international conferences. And proposed new developments such as a new cruise terminal, Crossrail and a retail outlet village will make Greenwich even more accessible and attract new markets.

Developments that would enhance Greenwich’s appeal and position it to attract more higher spending, independent visitors include further improvement in hotel and restaurant quality. A boutique hotel and a signature restaurant would transform both the image of Greenwich and its market mix.

This calls for a new approach – in terms of both the markets Greenwich targets and the way it projects itself, as well as in addressing the infrastructure impediments to visitors.

Greenwich’s major challenges are therefore:

- To communicate the ease of getting to Greenwich by public transport from the centre of London;
- To make it easy for visitors to experience all Greenwich and get around within Greenwich.
- To create a strong sense of place, with clear directional and interpretive signage for visitors on foot;
- To project a lively, vibrant image in addition to the current dominant heritage character of Greenwich;
- To ‘join up’ and project the Greenwich offer (including neighbouring attractions and venues) in a way that convinces potential visitors that Greenwich is worth more than just a whistle-stop visit for a half-day or day.
- To persuade visitors – and particularly business visitors – to London that Greenwich offers an alternative, characterful and affordable option to stay overnight while in London.
- To attract national and international conferences, in light of new hotel developments.

2.3 Objectives

Six key objectives are proposed to grow Greenwich’s visitor economy:

- Distinguish Greenwich as a distinctive destination;
- Increase dwell-time and spending by day visitors in Greenwich;
• Increase day visits to Greenwich outside the main season;
• Position Greenwich as a place to stay for business travellers with business in London;
• Establish Greenwich as a UK short break destination;
• Establish Greenwich as a premium national and international conference destination.

2.4 Target Markets

Target markets have been selected according to those that offer the greatest potential to meet these objectives, and particularly revenue growth, and which are most cost-effective to reach. These are, in descending order of priority:

• **Day visitors from London and the South East**: families, couples - double-income no kids (DINKS), empty-nesters (couples with no dependent children at home), school trips;
• **Staying visitors**: business visitors to London;
• **Conferences**: national and international association conferences.
• **International visitors**: coach trips for visitors to London, independent visitors to London, particularly from markets with an interest in heritage – USA, Canada, Australia, New Zealand, and repeat visitors seeking an alternative to London’s West End and a different perspective, plus, eventually Chinese shoppers to the proposed retail outlet village at The O2;
• **Short-break visitors to London**: primarily from the UK - families, couples/double-income no kids (DINKS), empty-nesters, school trips;

2.5 The Greenwich Identity

Greenwich needs to distinguish itself as a stand-alone destination, worthy of more than just a half-day inclusion on a whistle-stop tour. This means identifying Greenwich's core strengths from the perspective of a wider range of visitors – packaged, independent, day and staying, leisure and conference visitors – which can be communicated consistently in all marketing communications for Greenwich. The following are proposed as core elements of the Greenwich identity:

• Time
• Royal
• Maritime
• Intriguing
• Exciting

The purpose of these is to project a distinctive and differentiating image for Greenwich that both reinforces Greenwich’s acknowledged strengths (time, royal and maritime) and adds a broader dimension that will convey the more vibrant and contemporary side of Greenwich’s character, which reflects Greenwich’s character beyond its visitor attractions (intriguing and exciting).

These elements of Greenwich’s identity, or brand values, should be conveyed in all marketing communications – individually or in whatever combination is appropriate – by Greenwich stakeholders. They should also be projected in the way Greenwich presents itself, in terms of its
public realm, street art, street furniture, signage and architecture; and they should guide, wherever possible, the development of new products and experiences that Greenwich mounts or hosts – from events and festivals to activities and trails.

2.6 Action

Actions to achieve Greenwich’s growth objectives are set out under five pillars, following the theme of ‘time’, Greenwich’s leading value. These cover:

• Time for a Break: Marketing Greenwich
Recommendations cover marketing Greenwich through traditional media, PR and social media and trade intermediaries, including: promotion of Greenwich’s identity; development and promotion of a “Gorgeous Greenwich” cluster; London area residents’ campaign; UK short breaks campaign; coach operator sales; tour operator sales; cross-selling by Greenwich businesses; last minute availability sales; event packages; promoting Greenwich’s accessibility and connectivity; and, when developments are in place, conference promotion and sales, shopping promotion, and cruise passenger retention.

• Time Well-Spent: Ensuring a Great Visitor Experience and Maximising Revenue
Recommendations aimed at ensuring visitors have a great experience in, and maximising their value to, Greenwich include: developing and implementing a clear sense of place; information points; signage (directional and interpretive); coach drop-off points; expansion of coach itineraries; improved connections between North Greenwich and Greenwich town; and events.

• Time Together: Partnership Working
Partnership working amongst key Greenwich stakeholders will be fundamental to the success of this DMP and its aim to grow the Greenwich visitor economy, particularly in the following areas: promotion of the Greenwich identity; cooperative marketing; identifying future product, infrastructure and skills development needs; and evaluating the impact of programmes aimed at growing the visitor economy.

• Time to Think Ahead: Identifying Product and Skills Development Needs
Areas in which future product, infrastructure and skills development might be needed are identified as follows: coach drop-off points; signage (welcome, directional and interpretive); themed walking trails; Thames Path National Trail maintenance and integration; mounting local events and identifying mobile events that Greenwich might bid to host; hospitality skills development in collaboration with Greenwich Local Labour and Business Unit and Greenwich College.
• **Time to Reflect: Monitoring and Evaluation**

Evaluating progress against this DMP and success in achieving Greenwich’s growth objectives is essential. This will require cooperation amongst stakeholders and a focus on the following performance indicators: monitoring the take-up and promotion by stakeholders of the Greenwich identity and brand recognition amongst key target markets; visitor spend, staying visitors and conferences attracted to Greenwich.

2.7 **Governance, Structure and Financial Model**

**Governance**

A three-tiered structure is proposed to manage the Greenwich visitor economy, comprising:

- **A lead organisation and delivery body** (Visit Greenwich), which reports to:
  - **A non-executive board**;
  - **Plus a tourism advisory panel**, which comprises a wide range of people with an interest in the Greenwich visitor economy, including tourism sector experts and practitioners, whose expertise can be applied as required, and which can represent the collective view of the tourism sector as far as possible.

**Structure**

As the lead body responsible for the strategic development of Greenwich’s visitor economy and delivery body for destination management and marketing, a structure is proposed for Visit Greenwich that includes the following core functions: strategy, planning and evaluation; marketing; finance and HR; business development; and visitor services.

**Financial Model**

The budget required to fully implement the recommendations of this DMP is c. £1,500,000. This allocates approximately one third each to marketing, visitor services and staffing.

The long-term ambition should be to increase funding from those who benefit most from tourism in Greenwich. However, realistically, and in light of experience elsewhere, the following funding sources are proposed:

- c. 30% annually for core funding from Greenwich Council;
- c. 30% annually from businesses and organisations in the private, public and third sectors for membership of Visit Greenwich;
- c. 40% on an ad hoc basis from businesses and organisations in the private, public and third sectors and Royal Borough of Greenwich Council to undertake specific projects and match-funded initiatives, and from sponsorship.
**Conclusion**

In summary, Greenwich has an outstanding tourism product, which is justifiably famous. But it is underperforming against its potential and is disproportionately dependent on low-spending day visitors. Transforming Greenwich’s visitor economy to generate more revenue and create more jobs requires its identity to be updated and clearly projected; a greater sense of place, welcome and arrival; better connectivity and signage; a focus on attracting higher-spending visitors, particularly independent visitors from London and the South East as well as staying visitors and conferences; attracting more quality hotel and restaurant investors; and, above all, a “Destination First” mindset, whereby all key stakeholders collaborate to drive growth both to Greenwich and, thereby, to their own businesses.

This will be critical if Greenwich is to shift its disproportionate dependence on lower-spending day visitors, who account for 96% of Greenwich’s visitors and 86% of Greenwich’s direct tourism revenue.
Section 3: The Visitor Economy Context

3.1 The National Context

Greenwich is not alone in its effort to grow tourism. It sits within a national and international context, whereby Visit Britain (VB) and Visit England (VE) are both active in attracting visitors to the UK and to London. The activities of Visit Britain and Visit England benefit Greenwich in two significant ways:

- VB and VE deliver a certain amount of business to London, which Greenwich can therefore target in an attempt to attract them to Greenwich.
- VB and VE offer a range of partnership opportunities, some of which may be valuable to Greenwich in seeking to ensure Greenwich is included in potential visitors’ UK holiday plans.

Visit Britain’s mission is to grow the value of inbound tourism to Britain, working with a wide range of partners in both the UK and overseas. It aims to grow visitor numbers by 23 per cent to 40 million by 2020, adding 200,000 new jobs, and generating £31.5 billion in revenue from international visitors.3

Its strategic objectives are as follows:

- To inspire travellers from overseas to visit and explore Britain;
- To use VB’s global network to support the promotion of British tourism overseas;
- To advise Government and the industry on tourism issues, particularly affecting Britain’s global competitiveness;
- To maximise public investment through partner engagement and commercial activity.

Visit England’s headline ambition is for a 5% year on year growth in visitor value/revenue and 225,000 new jobs by 2020.4

Its strategic objectives are as follows:

- To increase England’s share of global visitor markets;
- To offer compelling destinations of distinction;
- To champion a successful, thriving industry;
- To facilitate greater engagement between the visitor and the experience.

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3 Visit Britain: Delivering a Golden Legacy - A growth strategy for inbound tourism to Britain from 2012 to 2020, pub. 2013
3.2 The London Context

London is a major world city, with an exceptionally healthy leisure and business tourism industry. It ranks as the third most popular city destination worldwide, with 15.29 million visitor arrivals in 2011/2012.\(^5\)

Tourism contributes £45.5 billion to the London economy and supports 852,000 jobs.\(^6\)

The largest volume growth to London in the foreseeable future (2013-2015) is expected to come from the UK domestic market (+1.1 m visitors) followed by Europe (+703,000 visitors) and then North America (+277,000 visitors). Growth projections for these markets dwarf all other markets, even though percentage growth rates are faster from Latin America and the Asia-Pacific region.\(^7\)

Substantial new hotel developments are planned in London to 2017, which account for c. 182 new hotels and 21,600 more rooms. In addition to these hotels with detailed planning permission, a further c. 190 hotels with another c. 20,700 rooms either have or are likely to obtain outline planning permission over the period to 2017.\(^8\)

While the majority of these developments are planned for central London and the west end, they are spread throughout the Greater London area.

Significantly for Greenwich, three of Greenwich’s major attractions are in London’s top 20 most visited attractions: Old Royal Naval College (at #10), the National Maritime Museum (at #14) and the Royal Observatory (at #20).

This volume of visitors to London, forecast growth, and London hotel occupancy averaging 82% since 2009\(^9\) all suggest an opportunity for Greenwich – both to attract a greater share of visitors to London and to attract hotel investors to build more quality accommodation in Greenwich. Fortunately, Greenwich’s greatest growth potential is likely to lie amongst the more traditional markets, those that are more interested in history and heritage, and repeat visitors who are more likely to explore beyond central London. And this is where the greatest volume growth is forecast to come from – UK, North America and Europe.

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\(^5\) London Tourism Report 2012/13 – London & Partners
\(^6\) Ibid. (N.B. Includes, direct, indirect and induced inputs.)
\(^7\) Ibid.
\(^8\) Ibid. (N.B. These figures cover the Greater London area and include hotel developments planned in Greenwich.)
\(^9\) Ibid.
3.3 Greenwich Visitor Economy Infrastructure

Existing and Planned Developments

Greenwich has a longstanding and robust tourism infrastructure, in terms of the outstanding appeals it offers to visitors - both within the borough and in neighbouring but accessible boroughs.

This includes: a cluster of iconic attractions, including the UNESCO World Heritage site comprising Old Royal Naval College, Royal Museums Greenwich, Cutty Sark, Royal Observatory, plus other attractions spread further from the centre of Greenwich, such as Eltham Palace, and the Greenwich Heritage Centre in Woolwich; high profile entertainment venues, including The O2, ExCeL, Charlton Athletic FC, Greenwich Theatre.

Until recently, accommodation quality and capacity in Greenwich was relatively limited. However, this has begun to change with the addition of budget chain hotels, luxury apartments, and development of a new four star hotel and conference centre.

In terms of places to eat, Greenwich has no iconic, signature restaurant (Jamie’s Italian being the closest). But it is particularly well-endowed at the less formal, but still quality, level from
independent cafes and cafes in museums and attractions to fresh and ethnic food at market stalls, as well as a few pubs and other restaurants.

Greenwich’s retail offer is varied, comprising regular high street brands and specialist shops, plus the popular and tourist-friendly Greenwich market. Proposals to develop a retail outlet village inside The O2 will extend the retail offer significantly. As the first significant retail outlet village within the Greater London area, this has the potential to attract a new and high-spending market into Greenwich, particularly from Asian countries and especially China.

While transport to Greenwich can be confusing for visitors, Greenwich has perhaps the greatest range of transport options of any London destination – including the regular transport modes favoured by visitors, underground, rail and buses, plus the DLR and the more specifically visitor-focused Thames Clippers and City Cruises, and the unique Emirates Airline cable car. London City Airport is Greenwich’s ‘local airport’ and plans for a new cruise terminal for London to open in 2017 at Enderby Wharf will challenge Greenwich to find ways of retaining visitors in Greenwich, rather than the port being merely an arrival and departure point for excursions to London and other parts of Britain. Crossrail too will be a welcome addition to this transport network, with links to Woolwich and a new station at Abbey Wood scheduled for 2018.

A summary of Greenwich’s existing tourism products and planned developments can be found at Appendix 1 Greenwich Tourism Product Audit - Destination Inventory (covering accommodation, attractions, cruise, events and entertainment venues) and Appendix 3 Proposed Hotel Development in Greenwich – Planning Status.

Future sites for major developments in Greenwich will be visible on the Greenwich Rising website:

https://www.google.com/maps/ms?msa=0&msid=206954213022840860426.0004b6171d650b24282b&ie=UTF8&t=m&vpsrc=6&ll=51.489186,0.017681&spn=0.042755,0.137329&z=13&source=embed&dg=feature
3.4 The Importance of Tourism to Greenwich

Direct and Indirect Economic Impact

The visitor economy is currently worth £1.1 billion (2013) to the Royal Borough of Greenwich, as measured by the STEAM tourism economic model. This worth is a proxy for economic impact and combines direct visitor expenditure plus indirect expenditure. Jobs deriving from this total tourism expenditure are estimated by STEAM to have been around 14,040 in 2013.

(Focusing on only direct tourism expenditure and direct jobs in 2013, the relevant figures from the STEAM model are £737 million and 9,806 jobs - full time equivalents).

Table 2: Value of Tourism to Greenwich (direct plus indirect impact) (2013 prices)

<table>
<thead>
<tr>
<th>The Value of Tourism to Greenwich</th>
<th>2013</th>
<th>2018</th>
<th>Increase 2013-2018</th>
</tr>
</thead>
<tbody>
<tr>
<td>REVENUE (£m)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Revenue-Direct</td>
<td>737.4</td>
<td>943.4</td>
<td>206.0</td>
</tr>
<tr>
<td>Revenue-Indirect</td>
<td>360.7</td>
<td>464.6</td>
<td>103.9</td>
</tr>
<tr>
<td>S/T Revenue-Direct + Indirect</td>
<td>1,098.1</td>
<td>1,408.0</td>
<td>309.9</td>
</tr>
<tr>
<td>JOBS</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Jobs-Direct</td>
<td>9,806</td>
<td>12,148</td>
<td>2,342</td>
</tr>
<tr>
<td>Jobs-Indirect</td>
<td>4,234</td>
<td>5,223</td>
<td>989</td>
</tr>
<tr>
<td>S/T Jobs-Direct + Indirect</td>
<td>14,040</td>
<td>17,371</td>
<td>3,331</td>
</tr>
</tbody>
</table>

Looking forward to 2018, and bearing in mind that 2012 was an exceptional year, which show-cased Greenwich to the World through the Olympic Games, our projections suggest that the following economic impact numbers can be achieved:

- Total direct tourism expenditure can go up from £0.74 billion to more than £0.94 billion in 2018 (2013 prices).

- Direct local job opportunities can be added at the rate of 450 – 500 per year through 2014 - 2018

Clearly tourism is a major economic activity within Greenwich, very much focused on the exceptional tourist attractions and facilities within this London Borough. New investment in hotels continues to take place with a substantial number of new properties opened in the last two/three years and operated by leading international hotel companies. More are under construction, such as the Arora (Intercontinental) alongside The O2, and more are planned such as the hotel at the proposed new cruise terminal.
Exceptional tourist attractions combined with new capital investment in hotel and other tourist facilities indicates that growth will take place and that the local opportunity for jobs and local incomes (employed, self-employed, and for small businesses) deriving from tourism will be significant.

None of this can be taken for granted. Substantial capital investment in tourism facilities requires that all ancillary activities combine effectively to deliver good returns to capital. All such activities are reliant on infrastructure working efficiently and on the overall tourism offer being marketed incisively to appropriate market segments.

**Drivers of Change**

The opportunities to increase economic impact by this amount flow from:

- The significant **increase in hotel capacity** opening up opportunities for increasing the number of staying visitors and spend;
- The shift in the **hotel portfolio mix** to more up-scale accommodation, which opens up opportunities for increasing yield from staying visitors. This is a trend that should be encouraged – attracting quality hotels and apartments of 4-star standard and, ideally, a boutique hotel capable of putting Greenwich on the map as a fashionable, “cool” place to stay.
- For day visitors, the **quality of the tourist attractions** opens up the potential opportunity for increasing the yield.
- Effective and appropriately **targeted marketing** of Greenwich as a distinctive destination.
- Collaboration between Greenwich stakeholders, with a “Destination First” mindset, whereby tourism businesses and organisations work together to grow the market for Greenwich.
- **Improved access** to Greenwich – e.g. Crossrail and the new cruise terminal.
- **New market opportunities** – e.g. the proposed retail outlet village at the O2, which should attract the Chinese market in significant numbers.

Staying visitors and their expenditure will become an increasing proportion of the expenditure and incomes coming into the Borough, thus reducing, to a modest extent, the dependence on day visitors. (Estimates suggest a possible shift from 89% to 83% by 2018 in terms of expenditure by day visitors.)
### Table 3: Key destination KPI’s 2009-13

<table>
<thead>
<tr>
<th>KEY INDICATOR</th>
<th>2009</th>
<th>2010</th>
<th>2011</th>
<th>2012</th>
<th>2013</th>
<th>SOURCE</th>
</tr>
</thead>
<tbody>
<tr>
<td>CONTRIBUTION TO ECONOMY (Direct + Indirect – 2013 Prices)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>ECONOMIC IMPACT to Greenwich economy (annual) (£ million):</td>
<td>906.3</td>
<td>922.5</td>
<td>999.7</td>
<td>1287.3</td>
<td>1098.1</td>
<td>STEAM</td>
</tr>
<tr>
<td>EMPLOYMENT (FTE jobs supported in Greenwich):</td>
<td>11980</td>
<td>12128</td>
<td>12948</td>
<td>16517</td>
<td>14040</td>
<td>STEAM</td>
</tr>
<tr>
<td>PERFORMANCE</td>
<td></td>
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<td></td>
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<tr>
<td>HOTEL OCCUPANCY: % annual average - rooms - Greenwich</td>
<td></td>
<td></td>
<td>81.0%</td>
<td>79.8%</td>
<td></td>
<td>STR Global</td>
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<tr>
<td>HOTEL AVERAGE ROOM RATE - ADR - Greenwich (£)</td>
<td></td>
<td></td>
<td>£79.00</td>
<td>£80.20</td>
<td></td>
<td>STR Global</td>
</tr>
<tr>
<td>HOTEL REV PAR - Greenwich (£)</td>
<td></td>
<td></td>
<td>£64.00</td>
<td>£64.00</td>
<td></td>
<td>STR Global</td>
</tr>
<tr>
<td>VISITOR NUMBERS (in thousands)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>All Visitors to Greenwich:</td>
<td>14,506</td>
<td>14,977</td>
<td>15,690</td>
<td>20,777</td>
<td>17,221</td>
<td>STEAM</td>
</tr>
<tr>
<td>Staying Visitors to Greenwich:</td>
<td>531</td>
<td>545</td>
<td>607</td>
<td>700</td>
<td>739</td>
<td>STEAM</td>
</tr>
<tr>
<td>Day Visitors to Greenwich:</td>
<td>13,975</td>
<td>14,432</td>
<td>15,083</td>
<td>20,077</td>
<td>16,482</td>
<td>STEAM</td>
</tr>
</tbody>
</table>

Indirect expenditure and jobs, according to the STEAM model, can add a further more than £450 million in 2018, and a further more than 5,000 jobs in 2018 to the direct tourism jobs of more than 12,000.
Hotel Growth to 2018

Hotel capacity in Greenwich is predicted to more than double by 2018 (+c. 264%), from 725 rooms in 2008 to 2,636 rooms in 2018.

Table 4: Greenwich Hotel Capacity Growth 2008-2018 (Rooms)

The majority of this growth will come from upscale properties:

Table 5: Greenwich - Hotel Capacity Portfolio Mix (2008)

Table 6: Greenwich - Hotel Capacity Portfolio Mix (2018)
3.5 DMP Structure

Core Content

In its role as a roadmap for the development of Greenwich’s visitor economy, this DMP takes four fundamental factors into account:

- **The supply side:** Greenwich’s current and planned tourism product and infrastructure;
- **Potential demand:** tourism markets and factors affecting visitors’ travel decisions;
- **Drivers of change:** projected developments and marketing interventions;
- **Ambition:** Projections for the future in terms of revenue and employment potential.

Within this strategic context, the DMP addresses the following main areas:

- **Vision and growth target** for Greenwich: a shared statement of intent to which stakeholders are committed.
- **Objectives:** a list of priorities for growing, developing and managing the destination.
- **Challenges and Opportunities** for Greenwich: identification of issues critical to the successful development of the visitor economy, including new product development, infrastructure needs, economic impact assessment, future projections, and partnership opportunities.
- **Strategy & Actions:** a list of actions, with roles and responsibility for their delivery allocated to lead organisations/champions and supporting organisations.
- **Evaluation:** a suite of key performance indicators and measurement methods, whereby impacts of recommended priorities and actions can be measured in terms of job creation, visitor impacts and return on investment.
- **Governance structure and funding model:** a structure for the role of Visit Greenwich (VG) and stakeholders in implementing the DMP, including a funding model.
- **Geographical Scope:** this DMP for Greenwich adopts a consumer-centric perspective whereby, in addition to attractions within the Royal borough, nearby attractions and venues beyond the borough’s political boundaries are also factored into the plan, such as Canary Wharf, London City Airport, The Westfield Stratford, and ExCeL exhibition centre. The test for their inclusion is whether they could reasonably be construed by visitors as part of a coherent tourism product, thereby enhancing the appeal of Greenwich. This is about making the most of neighbouring assets to benefit Greenwich, whether in a marketing partnership with them or through information provision and links in VG activities, because visitors don’t recognise administrative boundaries.
Appendices

Five appendices are attached, which provide an evidence base in the form of a destination product inventory and data on visitor numbers and spend as well as the impact in terms of revenue and jobs. A scenario-planning template is also included, so that the economic impact of tourism in Greenwich can be predicted as circumstances change. These appendices are:

Appendix 1: Greenwich Tourism Product Audit – Destination Inventory
This covers accommodation, attractions, cruise, events and entertainment venues.

Appendix 2: Tourism Numbers and Economic Impact – Executive Summary (2013)
This looks at the changes between 2012 and 2013 in terms of visitor numbers and spend. It also analyses visitor spend by sector, and jobs created.

Appendix 3: Proposed Hotel Developments in Greenwich: Planning Status
This summarises the current situation with regard to hotel developments planned in Greenwich and identifies their planning status.

Appendix 4: Hospitality Courses Offered in Greenwich
This summarises the hospitality courses offered by the local authority’s Greenwich Local Labour and Business Unit (GLLAB) and Greenwich College.

Appendix 5: Economic Impact Projection Template
This spreadsheet includes detailed figures for economic impact in terms of visitor revenue and jobs up to 2018. This includes both direct and indirect impacts of tourism activity. It is also designed as a scenario-planning tool to enable Greenwich stakeholders to project different future scenarios, in terms of economic impact – jobs and revenue – as circumstances change.

Appendix 6: New corporate branding draft
Section 4: Challenges and Opportunities

4.1 Challenges and Opportunities

Overview and Major Challenges

Greenwich has a strong, longstanding historical appeal and is included in many London tours. However, it tends to be seen as a swift coach tour stop or a visit lasting a half-day to a day. For visitors with limited time in London, Greenwich has to compete with the vast range of other London sights and attractions, or it is squeezed into an itinerary with other destinations such as Leeds Castle, Canterbury and Dover. And, until recently, Greenwich has had limited quality accommodation. It is also perceived as difficult to reach, with the main attractions, apart from The O2, not being on the tube line, which forms a powerful reference framework for visitors to London. Also, the distance between North Greenwich, which is on the tube line, and the centre of Greenwich town, which is on the DLR, can cause confusion over which is the visitor heart of Greenwich and, although both are linked by boat and public bus, these services are either considerably more expensive than land transport (boat) or not particularly visitor-friendly (bus). The result is that Greenwich is heavily dependent on day visitors, many of whom have little opportunity to visit and spend time and money in Greenwich, other than in the attractions to which they are bussed in and out of. This is exacerbated by limited coach drop-off facilities in Greenwich town, with most coaches dropping visitors off at the south side of the Royal Observatory, leaving little time to wander freely and spend money in Greenwich itself.

Nevertheless, especially for independent visitors whose time and itinerary are not so constrained, Greenwich offers an absorbing range of things to do and see, places to eat and drink, and, increasingly, places to stay. The increase in quality hotels and conference facilities opens up a new market for Greenwich to attract national and international conferences. And proposed new developments such as a new cruise terminal, Crossrail and a retail outlet village will make Greenwich even more accessible and attract new markets.

Greenwich’s major challenges are:

- To communicate the ease of getting to Greenwich by public transport from the centre of London;
- To make it easy for visitors to experience all Greenwich and get around within Greenwich.
- To create a strong sense of place and arrival, with clear directional and interpretive signage for visitors on foot;
- To project a lively, vibrant image in addition to the current dominant heritage character of Greenwich;
- To ‘join up’ and project the Greenwich offer (including neighbouring attractions and venues) in a way that convinces potential visitors that Greenwich is worth more than just a whistle-stop visit for a half-day or day.
• To persuade visitors – and particularly business visitors – to London that Greenwich offers an alternative, characterful and affordable option to stay overnight while in London.
• To attract national and international conferences, in light of new hotel developments.

Tourism is a highly competitive industry, particularly in the London area. In order to grow the visitor economy in Greenwich, Greenwich needs to stand out from the crowd, delight visitors when they're here, and give them reasons to return. While Greenwich possesses considerable tourism assets, it is poised for further growth if it can meet these challenges and take advantage of some significant opportunities.

Specific Challenges and Opportunities

The Economy and Visitor Trends: Stimulating domestic tourism remains a significant challenge. Consumer confidence is returning slowly. Holidays have recently become an essential, rather than luxury, annual purchase, but the number of short breaks by British residents appears to have decreased during the recessionary years since 2008\(^\text{10}\). However, while overseas leisure visits to the UK grew to record levels in 2013\(^\text{11}\), domestic tourism remained relatively flat, with a slight drop in overnight stays\(^\text{12}\), and domestic day trips also in decline\(^\text{13}\). This represents a tripartite challenge for Greenwich: to increase the number and value of international visitors, of staying visitors, and of day trips.

London as an Under-Exploited Asset: Greenwich’s proximity to central London, the hub and primary destination for a large number of visitors to the UK, is both an asset and a constraint on value growth. This is because, while Greenwich has an opportunity to attract some of the vast numbers of visitors while they are on a trip to London, Greenwich can easily be visited on a day trip from London, thereby reducing the potential to attract staying visits in Greenwich. This enormous flow of visitors to London offers an opportunity to attract a greater share of these visitors to Greenwich.

Greenwich’s Identity: Greenwich has strong royal, historic and naval associations, forged over many years through institutions such as Old Royal Naval College, the Royal Observatory and the Royal Arsenal. These have been supplemented more recently by the National Maritime Museum, the Cutty

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\(^{10}\) GBTS 12-Month Analysis, May 2006 – Oct 2013, Visit England

\(^{11}\) 2013 saw record levels of visits for a calendar year for holiday visits (7% above 2012 and 6% above the previous record from 2011) – per GB TOURISM SURVEY – October 2013, Visit Britain Monthly Inbound Update, Dec 2013.

\(^{12}\) Domestic trip volumes in the first ten months of the year were similar to the same period the year before (103.6m in 2012 and 103.5m in 2013). Expenditure also remained flat (remaining at £20.1bn), whilst nights have decreased slightly (down -2% from 325 million in 2012 to 320 million in 2013) – per Great Britain Tourism Survey (GBTS) 2013, Oct 2013.

\(^{13}\) Per Visit England Day Visits 2013 survey: down 7% in volume and 6% in spend.
Sark, The O2 and the Emirates Airline cable car, as well as Greenwich Park and a range of other attractions. However, the historic dominance of these outstanding heritage attractions and number of disparate sites may have inhibited awareness of Greenwich’s more textured character. And, as these iconic attractions are the focus for tour groups with little time to spend in the rest of Greenwich, this may have contributed to perceptions that Greenwich is merely a one-off day visit destination. Greenwich faces a challenge in pulling all these appeals together into an appealing and coherent brand proposition that clearly defines and differentiates Greenwich from other London boroughs and yet still leverages the benefits of its proximity to central London. Greenwich’s contemporary side may have been overshadowed by the strength of its heritage. Therefore, there is an opportunity to increase the relevance of Greenwich to a larger, and potentially longer-staying, audience by also conveying its vibrant character and range of things to do and places to eat and drink.

**Accessibility:** Although it is easy to get to Greenwich using the Docklands Light Railway, river boat, train or bus, or the Jubilee line to North Greenwich, which is a short bus ride from Greenwich town centre, the fact that the centre of Greenwich is not on a tube line is a psychological deterrent for visitors. Independent – as opposed to packaged – visitors to London tend to orientate themselves via the underground network and are more likely to visit places and attractions close to an underground station. This represents a challenge for Greenwich – to emphasise how easy it is to reach Greenwich from central London.

**Connectivity and Legibility:** The fragmentation of Greenwich, which comprises four visitor areas - Greenwich town centre and park (Cutty Sark, the World Heritage Site - Greenwich Park, Royal Observatory, Prime Meridian, Old Royal Naval College, and Greenwich Market), North Greenwich and the peninsula (O2, Emirates Airline et al.), Woolwich (Greenwich Heritage Centre) and Eltham (Eltham Palace) is spread out and difficult to comprehend as a coherent destination from a visitor perspective. Most particularly the two separate centres, which contain the most visited attractions and are the prime transport hubs – Greenwich town centre and North Greenwich – do not lend themselves easily to a combined visit. Transport between these two centres is an issue; but perhaps more significant is the need for clear directional, informative and interpretive signage that both informs and inspires visitors and makes it easier for them to find their way around the main appeals of Greenwich.

**Sense of Place and Sense of Arrival:** Greenwich needs to celebrate its unique status in a visible way to visitors, so they feel they are somewhere different and somewhere that is worthy of more than a whistle-stop tour. This means reflecting Greenwich’s core values – time, royal, maritime, intriguing and exciting - tastefully and appropriately throughout Greenwich in its public realm, from street art and architecture to signage (welcome, directional and interpretive), and temporary exhibitions. This starts with a sense of arrival at all main hubs into Greenwich, through which no visitor should pass without feeling they’ve arrived somewhere special that has a keen sense of itself. This applies to the feeling of welcome, information provision, and directional signage at North Greenwich underground station, Greenwich rail station, DLR stations and river bus disembarkation points.
Destination Appeal – Year-Round: Greenwich needs consistently to provide the type and quality of visitor experience that will attract visitors and inspire them to return. Ensuring Greenwich’s attractions are not perceived as ‘one-off’ visits – particularly for its closer markets in and around London and the South East – is important. Events, such as changing exhibitions at the Royal Maritime Museum, can contribute significantly to this. So too can a programme of events during the shoulder and off-seasons to boost travel and revenue during these more difficult periods.

A “Must-See” Part of London: Positioning Greenwich as one of London’s “must-sees”, along with Trafalgar Square, Buckingham Palace, the Houses of Parliament etc. offers an opportunity to increase the number of coach-borne and independent visitors to Greenwich.

Enhancing the Visitor Experience – Maximising Revenue (Dwell-Time and Spend): The opportunity exists to encourage day visitors to stay longer – and therefore spend more – in Greenwich by providing up-to-date information on what to do, see and where to eat. Several initiatives could accelerate this, some of which are already being planned:

- **Cross-Selling:** Greenwich businesses can assist by cross-selling, or providing information on, each other’s’ facilities to visitors when they are in Greenwich, as well as through links on their own websites (and to VisitGreenwich.org.uk at the very least). Cross-promotion of attractions and facilities to visitors by all major Greenwich tourism operators, and through the immediacy of social media, can drive additional visits and expenditure in attractions and facilities, if the information is constantly relevant and up-to-date. This could also encourage visitors to return by making them aware there is more to see and do in Greenwich than they might have imagined before they arrived.

- **The Greenwich Mega-Ticket:** In the borough of Greenwich there are 12 paid-for attractions. The new combined ‘mega-ticket’ will package our offer more succinctly and offer our visitors an incentive to do more and spend more. The ticket will be trialled with a 5 day pass for the tall ships regatta. It will then be rolled out at off peak times and shoulder seasons. This offers the potential to drive more business at times when it is most needed and to help even out seasonal troughs.

- **Hive Hub:** Visit Greenwich is developing a real time m-commerce platform. This will allow visitors to download a new free app. The app will have a range of tickets, packages and offers that can be purchased and redeemed via a smart phone. The system will be supported by a range of Bluetooth emitters that will provide high speed internet coverage in our tourist hotspots. The pioneering programme will allow the local trade to publicise their offers in real time. Prices can be adjusted instantly to reflect demand and supply. This offers the potential to capture impulse purchases and thereby drive up last-minute revenue.

- **Visitor Orientation:** In addition to information provision online and at key arrival hubs in Greenwich, a central information point, in the form of the Tourist Information
Centre, is likely to remain a valuable resource for visitors, which can orientate and inform them of the range of sights and activities available in Greenwich. The disconnected nature of the different tourism nodes in Greenwich and potential visitor confusion make this centrally located information function more essential than in many destinations, particularly if Greenwich is to grow the number of independent visitors. But, most importantly, this represents an opportunity to maximise visitor spending in Greenwich by enabling visitors to make the most of their time in Greenwich.

**Business Tourism:** The increase in quality hotel accommodation in Greenwich, and in particular the conference product, raises Greenwich’s potential to attract both national and international conferences of a type and size that Greenwich was not previously competitively positioned to attract. This will require a conference bidding function to mount a professional approach to attracting conferences to Greenwich.

This increase in hotel capacity can help support inward investment growth. Better quality places to stay and the consequent likely increase in business visitors, as well as a stronger sense of place that will underpin awareness of Greenwich’s appeals, will enhance Greenwich’s potential to attract inward investment from its main target sectors of ICT, construction, education and tourism. The limited range of quality restaurants in Greenwich, however, is a potential brake on this growth.

**Night-time Economy:** Residents suggest Greenwich does not have a particularly thriving night-time economy. However, several factors are in place that provide fertile ground for developing an attractive night-time economy: a sizeable student population; the demand for rehearsal spaces by Trinity Laban Conservatoire of Music and Dance students, which could fuel a very distinctive sense of place for Greenwich in the evening; new investment by iconic restaurant businesses, such as Jamie’s Italian; and the growing number of hotels.

**Retail:** Greenwich offers an intriguing mix of small, visitor-oriented shopping facilities, from the famous Greenwich market to museum shops, antique shops to designer-style shops, and a limited number of High Street stores to independent shops, including independent food and produce shops.

**Restaurants and Café Culture:** Less formal places to eat are important to day and short break visitors. Greenwich does not offer the fine dining options of central London, but it does have a range of places to eat. It is particularly well-endowed at the less formal, but still quality, level from independent cafes and cafes in museums and attractions to fresh and ethnic food at market stalls, as well as a few pubs and other restaurants. In the same way that a boutique hotel would enhance Greenwich’s image, a ‘signature’ restaurant could put Greenwich on the map amongst a local London high-spending market that it is currently not reaching. Greenwich should also seek to capitalise on the growing trend of kerb/street food and pop-up restaurants.

**Market Priorities:** While existing, traditional visitor markets need to be nurtured and, where possible, grown, new markets should also be developed. Digital media and PR make accessing new markets much more affordable now than ever before. Both can be targeted, albeit with different
levels of emphasis, according to priority and budget availability. An opportunity to attract Chinese visitors on an unprecedented level for Greenwich will be presented by the opening of the O2 retail outlet village.

**Visitor Economy Development:** If they are to view tourism positively and contribute to the development of tourism in Greenwich, opinion-formers and residents need to appreciate the economic importance of tourism and how it affects their daily lives. This may be even more of a challenge in Greenwich because of the dominance of day visitors, who account for 96% of Greenwich’s visitors and 86% of Greenwich’s direct tourism revenue\(^\text{14}\), because of the mixed economy of the wider area, and because, as a London borough, Greenwich is often perceived more as part of London than as a destination in its own right. Defining and communicating the potential impact of tourism in terms of revenue and employment in Greenwich is essential to help people appreciate this.

**Cruise Passenger Retention:** Cruise terminals are generally primarily arrival and departure points for passengers, many of whom will take excursions to a much wider region beyond the port – e.g. London and further afield within Britain. The challenge for Greenwich will be to work with the cruise companies – and cruise planners in particular – London excursion operators and the new London Cruise Port at Enderby Wharf to develop programmes aimed at encouraging passengers to choose to visit Greenwich.

**Partnership Working:** There is a clear link between successful destinations and business profitability. There is a compelling argument for Greenwich businesses to work together to overcome some of these challenges, particularly that of a fragmented destination product with a diffuse identity. Success elsewhere has shown how a “Destination First” mindset, whereby key attractions work together to grow tourism to the destination, both benefits their own businesses and the destination as a whole. Greenwich stakeholders can help create greater impact for Greenwich as a destination by working together as part of “Team Greenwich”, particularly in the following areas:

- Through regular communication with each other, where they focus on identifying mutual opportunities;
- By cross-selling each other’s products;
- By carrying the same messages about Greenwich in their own marketing communications.
- By identifying areas where cooperative activity – in product development and marketing – might be possible by virtue of mutual markets and cost-sharing opportunities.
- By identifying ways in which they can work together on a regular basis, rather than only doing so when a special event, such as the Tall Ships regatta is in town;

\(^{14}\) STEAM 2013 figures
### 4.2 SWOT Analysis

Greenwich’s key strengths, weaknesses, opportunities and threats as a visitor destination are as follows:

<table>
<thead>
<tr>
<th><strong>STRENGTHS</strong></th>
<th><strong>WEAKNESSES</strong></th>
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<tbody>
<tr>
<td><strong>Visitor Appeal:</strong></td>
<td><strong>Visitor Perceptions:</strong></td>
</tr>
<tr>
<td>- UNESCO World Heritage Site, suite of iconic attractions.</td>
<td>- Other, contemporary aspects of Greenwich can be overshadowed by the dominance of the heritage product.</td>
</tr>
<tr>
<td>- Longstanding reputation, famous destination.</td>
<td>- Short dwell time and low spend by day visitors.</td>
</tr>
<tr>
<td>- Combination of historic attractions and world-class contemporary experiences (e.g. The O2)</td>
<td>- Perception as merely a one-off, short ‘whistle-stop’ in a day/half-day tour.</td>
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<tr>
<td>- Major inclusion in London coach tours.</td>
<td>- Low awareness of the true diversity of Greenwich amongst Londoners, Greenwich’s greatest potential market.</td>
</tr>
<tr>
<td>- Environment: riverine location, historic buildings, parkland setting.</td>
<td>- Night-time economy is limited – in terms of places to eat and entertainment, except when the O2 hosts a major event/concert.</td>
</tr>
<tr>
<td>- Product mix: historic attractions, contemporary venues and events, Greenwich market, independent cafes/food outlets and shops.</td>
<td><strong>Visitor Infrastructure and Communications:</strong></td>
</tr>
<tr>
<td>- University – creates ‘buzz’ and demand for leisure facilities and food outlets.</td>
<td>- Limited hotel capacity and quality; no ‘boutique’ hotel.</td>
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<tr>
<td>- Trinity Laban Conservatoire: demand for rehearsal space, which could add to the ‘buzz’ of Greenwich and a unique flavour.</td>
<td>- Limited quality restaurants/no unique ‘signature’ restaurant</td>
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<tr>
<td>- Proximity to central London (for business and leisure tourism).</td>
<td>- Disconnect between Greenwich’s tourism centres, particularly between North Greenwich and Greenwich town centre.</td>
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<tr>
<td><strong>Visitor Infrastructure and Communications:</strong></td>
<td>- Accessibility: confusion/perception that Greenwich is difficult to reach.</td>
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<td>- Probably the greatest range of transport options in London (underground, cable car, riverbus, DLR, rail and bus; and, soon, Crossrail and cruise terminal).</td>
<td><strong>Organisational:</strong></td>
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<tr>
<td>- Increased hotel capacity, particularly at higher quality levels (4-star) but also budget-mid range;</td>
<td>- Fragmented tourism stakeholder community – limited collaboration to promote the destination, as opposed to individual business focus.</td>
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<tr>
<td>- Compact nature of Greenwich town centre and UNESCO World Heritage Site</td>
<td>- Historically, few links between planning and marketing functions in relation to the visitor economy.</td>
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<tr>
<td>OPPORTUNITIES</td>
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<td>------------------------------------------------------------------------------</td>
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<tr>
<td><strong>Visitor Appeal:</strong></td>
<td></td>
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<tr>
<td>- Opportunity to strengthen Greenwich’s identity and attract new markets,</td>
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<tr>
<td>particularly from London and the South East.</td>
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<tr>
<td>- Opportunity to position Greenwich as a ‘must-see’ London destination.</td>
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<tr>
<td>- Growth in tourism to London.</td>
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<tr>
<td>- New emerging tourism markets, esp. China if The O2 retail outlet village</td>
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<td>opens.</td>
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<tr>
<td>- Opportunity to promote Greenwich as an accessible and affordable place to</td>
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<td>stay for visitors to London.</td>
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<tr>
<td>- New cruise terminal.</td>
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<td></td>
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<tr>
<td><strong>Visitor Infrastructure and Communications:</strong></td>
<td></td>
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<tr>
<td>- Growth in hotel investment, particularly at higher quality levels (4-star)</td>
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<td>but also budget-mid range.</td>
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<tr>
<td>- Conference facility development – in 4-star hotel.</td>
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<tr>
<td>- Proposed retail outlet village in The O2.</td>
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<td>- Improve awareness of the different modes of transport serving Greenwich.</td>
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<td>- Technology: Hive Hub and mcommerce, whereby Greenwich can deliver last-</td>
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<td>minute visitor experiences and increase revenue from impulse purchasing.</td>
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<tr>
<td>- Greenwich Mega-Ticket covering major attractions, which can stimulate</td>
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<td>traffic and increase revenue outside the main season.</td>
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<td>- Cross-selling tourism products.</td>
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Section 5: Strategic Direction

5.1 Aim and Objectives

Aim

This plan sets out a vision to increase revenue in Greenwich by 28% to £1.41 billion in terms of value and create more than 3,330 new jobs by 2018.

Objectives

In order to achieve this growth, Greenwich should focus on the following objectives:

- Distinguish Greenwich as a distinctive destination;
- Increase dwell-time and spending by day visitors in Greenwich;
- Increase day visits to Greenwich outside the main season;
- Position Greenwich as a place to stay for business travellers with business in London;
- Establish Greenwich as a UK short break destination;
- Establish Greenwich as a premium national and international conference destination.

5.2 Target Markets

Growth Potential

The greatest revenue growth over the next five years is likely to come from the following five areas and types of visitor, in descending order of priority:

<table>
<thead>
<tr>
<th>Source Area and Type of Visitor</th>
<th>Rationale</th>
<th>Pro</th>
<th>Con</th>
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</table>
| Day visitors from London and the South East | - The volume of potential visitors in London and the South East is enormous.  
- They have the propensity to visit year-round and thereby help reduce seasonal troughs.  
- This market has the potential to repeat many times in a lifetime.  
- As regional residents, amongst whom there are many arbiters of taste and trendsetters, these people can become advocates of | | - Low spending visitors (at the moment).  
- Short dwell time (at the moment).  
- Competition for these people is intense. |
Greenwich and, through their networks, help change Greenwich’s image in the regional marketplace, which can have a knock-on effect both throughout the UK and internationally.

**Business Visitors to London (corporate meetings and exhibitions)**

- Increase in hotel capacity and quality provides an opportunity to attract a new, relatively high-spending market to Greenwich.
- This is potentially a 5-day per week, all year-round market.
- Proximity to major business destinations (Canary Wharf, Excel)
- Potential repeat business.

- Less discretionary in terms of destination choice than leisure visitors, as the destination is largely determined by business location.
- Transport access to central London.

**Conferences (national and international association conferences)**

- New hotel capacity and quality, plus associated conference facilities, offer an unprecedented opportunity to attract conferences to Greenwich.
- Conference visitors are amongst the highest spending visitors to most destinations.
- Low and off-season potential.
- Volume of business traffic to London, across a wide range of sectors, which is often an indicator of conference potential.

- This is a very competitive market nationally and internationally.
- Competition from central London, particularly for international conferences.
- Transport access to central London.

**International Day Visitors (coach-borne)**

- High volume.
- Spread of markets.
- Main season ‘cash cow’ for many attractions.
- Growth opportunity as international visitors to UK – and therefore London – increase.
- Further growth potential as new international markets open up (esp. China when the O2 retail outlet village comes on stream).

- Low spending visitors.
- Short dwell time.
- One-off, limited likelihood of repeat visit.
- Predominantly main season.

**UK Short Breaks**

- Potential to fill weekend troughs.
- Opportunity to leverage word-of-mouth and ‘word-of-digit’ (social media) to boost Greenwich’s image and increase awareness of its destination appeal.

- This is an intensely competitive market throughout the UK, with both ‘staycation’ destinations and the plethora of low cost flights to many European cities.
- Competition from central London.
Market Segments

Target markets have been selected according to those that offer the greatest potential to meet Greenwich’s objectives and are most cost-effective to reach. Within the growth areas outlined above, market segments offering the greatest potential return on marketing investment for Greenwich, are:

- **Day visitors:**
  - **London and the South East:**
    - Local residents;
    - Families;
    - Couples - double-income no kids (DINKS);*
    - Empty-nesters (couples with no dependent children at home);*
    - School trips;
  - **International visitors:**
    - Coach trips for visitors to London;
    - Independent visitors to London, particularly from markets with an interest in heritage: USA, Germany, France, Canada, Australia, New Zealand; and repeat visitors seeking an alternative to London’s West End and a different perspective.
    - Chinese shopping visitors, once the proposed O2 outlet village is open.
    - Cruise passengers, once the new cruise terminal opens (although retention in Greenwich will be a major challenge).
  - **Other UK domestic visitors:**
    - Families;
    - Couples - double-income no kids (DINKS);*
    - Empty-nesters;*
    - School trips;

- **Staying visitors:**
  - Business visitors to London
  - Short-break visitors to London

- **Conferences:**
  - National association conferences
  - International association conferences

[* N.B. While the DINKS segment traditionally covers the age range 25-45 and empty-nesters 55+, the important issue is their life-stage and economic situation, which enables them to travel, as they have both the time and money to do so, regardless of their age.]
Communications – Timing and Type

The way in which these market segments travel determines the most cost-effective means of communicating with them. For some segments, the most cost-effective way is to target them after they arrive in London; while for others the main opportunity lies in influencing intermediaries with whom they travel, such as tour operators and coach companies.

- **Pre-travel:**
  o PR and social media can be used to target all of these segments before they leave home, to stimulate their interest in a trip to Greenwich.
  o A stimulating destination website, with links to local tourism operators is fundamental.
  o An opportunity also exists to encourage tour operators to use Greenwich hotels for their London trips.

- **Post-Arrival / in London:**
  o Coach-borne visitors: The main opportunity lies in persuading coach tour operators to include Greenwich in their itineraries and to extend their dwell-time in Greenwich.
  o Independent visitors: the main opportunity lies in targeting visitors, particularly international visitors while they are in London, and people living and working in London, through key visitor touch points, such as hotel concierges, London Underground and cross-track poster advertisements, and other targeted media.

- **Post-Arrival / in Greenwich:**
  Tactics to maximise spending by visitors after they arrive in Greenwich should include:
  o Cross-selling by local businesses and other organisations;
  o Hive Hub: real time m-commerce platform and app (See above);
  o Independent social media apps – e.g. Foursquare, Urban Spoon, Time Out etc.
  o Tourist information provision: through Greenwich TIC, museums and attractions, posters, welcome and interpretive signage;

5.3 The Greenwich Identity

Greenwich needs to reposition itself as an alternative London destination, offering a different experience as a distinctive destination in its own right, which is worthy of a longer visit and deeper exploration than the dominance of day visitors would suggest.
While a fully-fledged brand development has not been undertaken, the following core elements of the Greenwich identity are proposed, based on experience and top-line competitor analysis:

- **Time**
- **Royal**
- **Maritime**
- **Intriguing**
- **Exciting**

The purpose of these is to project a distinctive and differentiating image for Greenwich that both reinforces Greenwich’s acknowledged strengths (time, royal and maritime) and adds a broader dimension that will convey the more vibrant and contemporary side of Greenwich’s character, which reflects Greenwich’s character beyond its visitor attractions (intriguing and exciting). By complementing the strength of Greenwich’s acknowledged heritage character (time, royal, maritime) with a flavour of contemporary Greenwich (intriguing and exciting), this adds a more vibrant dimension that opens up the opportunity to talk about other things to do and see and places to eat and drink, which make a visit to Greenwich more rounded and appealing as a place to visit. Importantly, this also offers the opportunity to talk to a wider market, primarily of independent travellers, who might be persuaded to see Greenwich as a distinctive part of London that is worth longer than the traditional half-day visit.

These elements of Greenwich’s identity, or brand values, should be conveyed in all marketing communications – individually or in whatever combination is appropriate – by Greenwich stakeholders. They should also be projected in the way Greenwich presents itself, in terms of its public realm, signage, street art, street furniture, and architecture; and they should guide, wherever possible, the development of new products and experiences that Greenwich mounts or hosts – from events and festivals to activities and trails.

The rationale for selecting these as Greenwich’s core values, which distinguish Greenwich from every other London borough and destination, are as follows:

- **Time**
  - Greenwich is the ‘home of time’ – not just nationally, but worldwide. The Greenwich meridian defines how the world wakes, works and sleeps. The historical significance of anchoring longitude at the Greenwich meridian is immense in terms of navigation, exploration and global understanding. Nowhere else in the world can claim such a hold on time. And Greenwich is globally famous for this.
- The concept, as well as the word ‘time’ itself, lends itself to a wide range of creative strategies; it is highly flexible and very ‘campaignable’.

- **Royal**
  - Greenwich’s royal associations are very strong and longstanding. They are also iconic in terms of both the national psyche and as ‘must-see’ attractions for visitors – from the site of the 15th century palace and birthplace of notorious English monarchs, Henry VIII and Elizabeth I, to the Queen’s House, Royal Hospital-Naval College and Royal Observatory, as well as Eltham Palace.
  - Greenwich’s status as a royal borough reflects this extensive royal history.

- **Maritime**
  - There is no more iconic site of maritime heritage in the UK than the Old Royal Naval College. Awarded UNESCO World Heritage status and described by UNESCO as being of "outstanding universal value" and the "finest and most dramatically sited architectural and landscape ensemble in the British Isles", this site and collection of architectural heritage dominates and defines Greenwich.
  - The National Maritime Museum, which is included within the UNESCO World Heritage site of the Old Royal Naval College/Greenwich University.
  - As the ‘home of longitude’, Greenwich’s contribution to global navigation and naval exploration is seminal.
  - The Cutty Sark, a magnificently restored Clyde-built tea clipper is one of only three remaining clipper ships from the 19th century built using composite construction (a wooden hull on an iron frame).
  - Other maritime associations include the former resting place of Gypsy Moth (now commemorated by a pub of the same name), on which Sir Francis Chichester was the first recorded sailor to circumnavigate the globe single-handedly from west to east on the old clipper route.
  - Greenwich’s location on the river, with river bus access to central London makes it a distinctively different and resolutely maritime London destination.

- **Intriguing**
  - Greenwich offers a lot more than its dominant heritage values (time, royal, maritime) suggest. Importantly, the atmosphere of Greenwich – on the river with Greenwich Park, its historic market, narrow lanes, and a small but quality range of places to eat and drink – provides an intriguing alternative to central London – a place to escape to and explore.
  - The blend of contemporary facilities and standards in historic buildings and within an intensely historic environment – from places such as the National Maritime Museum and the Cutty Sark to bars and cafes in historic buildings around town – lend an air of intrigue and fascination to a trip to Greenwich.
More esoteric and eclectic displays, such as the Fan Museum, the Ranger’s House, Greenwich Heritage Museum, and the Royal Observatory clock collection endow Greenwich with a level of intrigue that is not obvious at first glance.

Although perceived as not particularly easy to reach, Greenwich is served by perhaps the greatest range of transport options in London: London underground, Emirates airline cable car (North Greenwich), riverbus, DLR, rail and bus; and, soon, Crossrail.

- **Exciting**
  - The values of “intriguing” and “exciting” both complement and reinforce each other. Different market segments might find something intriguing that others find exciting; and Greenwich offers a range of such experiences.

  - While some of Greenwich’s visitor attractions might be intriguing to adults, they might be exciting for children. Similarly the Greenwich Meridian may be intriguing to those with a more intellectual interest in the history of longitude, whereas the opportunity to straddle the Meridian, the global definer of time, may be exciting to others. The first glimpse of the imposing UNESCO World Heritage Site from the deck of a riverboat might be exciting to a visitor from overseas, in the way that the first sight of the Eiffel Tower or the Statue of Liberty is a breath-taking experience; while the interior of the most visually iconic building on the Site, the Old Royal Naval College, is intriguing to most.

  - The Emirates Airline cable car offers an exciting route into Greenwich.

  - The O2, the world’s most popular music venue, has an exciting range of world class programming – from concerts by global mega stars to sporting events featuring sportsmen and women at the top of their game.

  - The O2’s pioneering roof walk offers an exciting activity and perspective over London.

  - Aspirationally, we should seek to position a trip to Greenwich as exciting – by virtue of the range of means of transport, and especially by river and cable car, as well as in light of the range of experiences on offer in Greenwich when visitors get here.

5.4 **Action**

**Five Pillars**

Actions to achieve growth are set out under five pillars of the DMP. These pillars are:

- **Time for a Break: Marketing Greenwich**
- **Time Well-Spent: Ensuring a Great Visitor Experience and Maximising Revenue**
- **Time Together: Partnership Working**
- **Time to Think Ahead: Identifying Product and Skills Development Needs**
- **Time to Reflect: Monitoring and Evaluation**
Pillar 1:  Time for a Break: Marketing Greenwich

We will drive tourism growth by stimulating greater awareness and interest in Greenwich. We will do this by establishing a clear identity for Greenwich and positioning Greenwich effectively in key target markets through cost-effective marketing, in partnership with our stakeholders.

<table>
<thead>
<tr>
<th>Objective</th>
<th>Action</th>
<th>Lead Organisation</th>
<th>Supporting Organisations</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Distinguish Greenwich as a Distinctive Destination</strong></td>
<td><strong>Greenwich Identity:</strong> Establish a clear identity for Greenwich that distinguishes it from other London destinations and as a ‘must-see’ destination/part of London. Apply this identity – its essence and core values – in all appropriate marketing communications by Visit Greenwich and Greenwich stakeholders. The core values of the Greenwich identity are: time (lead value), royal, maritime, intriguing and exciting. Greenwich’s UNESCO World Heritage Status also runs through its identity.</td>
<td>Visit Greenwich</td>
<td>Greenwich stakeholders</td>
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<td></td>
<td><strong>Greenwich Brand Extension:</strong> Work with stakeholders to develop Greenwich-branded products (cf. Meantime beer).</td>
<td>Visit Greenwich</td>
<td>Greenwich stakeholders</td>
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<td></td>
<td><strong>Media Partnerships:</strong> Develop partnerships with media that target Greenwich’s core markets and reflect Greenwich’s brand values – e.g. Time Out Greenwich supplement.</td>
<td>Visit Greenwich</td>
<td>Greenwich stakeholders</td>
</tr>
<tr>
<td></td>
<td><strong>Pairing with Greenwich Village:</strong> Explore opportunities to “pair”, as opposed to officially “twin” with Greenwich Village, New York. The opportunity to hear and watch young musicians and artists in rehearsal spaces throughout Greenwich from the Trinity Laban Conservatoire can lend Greenwich a fresh, artistic buzz.</td>
<td>Visit Greenwich</td>
<td>Royal Borough of Greenwich Council</td>
</tr>
<tr>
<td><strong>Increase Spending by Day Visitors</strong></td>
<td><strong>Coach Operator Sales:</strong> Encourage coach operators to include Greenwich in their programmes/increase the number of programmes that include</td>
<td>Visit Greenwich</td>
<td>Greenwich stakeholders</td>
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</table>
Greenwich. Develop key partnerships (e.g. Host a seminar/event for UKInbound and the Coach Tourism Council to showcase Greenwich).

**Travel Trade:** Develop easy-to-distribute online pack with itinerary suggestions for ½ and full day tours. Produce top 10 slides for tour operators to use in their programmes. Provide a free ‘trade pass’ offering free entry to trade members to enable them to undertake self-guided ‘fam trips’ at non-peak times that suit Greenwich operators.

**Top-Ten “Must-Sees”:** Develop a list of the “top-ten ‘must-sees’” in Greenwich and publish this online, as a leaflet, and in appropriate points throughout Greenwich on boards. Promote awareness of Greenwich’s UNESCO World Heritage Status through this list.

**Cross-Selling:** Encourage Greenwich tourism operators (accommodation, attractions, food and drink outlets, and transport hubs) to provide information on each other’s businesses to visitors. Provide inspiring ‘pop-up’ displays for key visitor touch points (e.g. hotels, attractions etc.) with Greenwich’s Top-Ten “Must-Sees” etc. Explore possibility of cross-selling each other’s products (cf. Windsor hotels).

**Last Minute Availability:** Work with attractions to devise a method of notifying visitors already in Greenwich of last minute availability to increase sales on-the-day – e.g. via real-time Apps.

**Shopping Promotion:** Promote Greenwich as a major, and highly varied, London shopping experience – when the new retail outlet village opens in The O2.

**Cruise Passenger Retention:** Work with cruise companies (cruise planners), excursion operators, and Visit Greenwich
the new London City Cruise terminal at Enderby Wharf both to attract cruises to Greenwich (e.g. via Cruise Shipping trade fairs in Miami, Barcelona and Hamburg) and, most importantly, to develop Greenwich itineraries for cruise passengers.

<table>
<thead>
<tr>
<th>Increase Day Visits to Greenwich Outside the Main Season</th>
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<tr>
<td><strong>Coach Operator Sales:</strong> Encourage coach operators to include Greenwich in their programmes/increase the number of programmes that include Greenwich.</td>
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<tr>
<td>Visit Greenwich</td>
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<tr>
<td>Greenwich stakeholders</td>
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<tr>
<td><strong>“Gorgeous Greenwich” Cluster:</strong> Create a “Gorgeous Greenwich” cluster of attractions, shops and places to eat.</td>
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<tr>
<td>Visit Greenwich</td>
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<tr>
<td>Greenwich stakeholders</td>
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<tr>
<td><strong>London Area Residents’ Campaign:</strong> Promote Greenwich, and particularly events in Greenwich, through PR and targeted media: press releases, journalists’ visits, social media, London Underground in-carriage and cross-track posters.</td>
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<tr>
<td>Visit Greenwich</td>
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<td>Greenwich stakeholders</td>
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<tr>
<th>Establish Greenwich as a UK Short Break Destination</th>
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<tbody>
<tr>
<td><strong>Tour Operator Sales:</strong> Encourage UK short break tour operators to include Greenwich in their programmes/increase the number of programmes that include Greenwich.</td>
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<tr>
<td>Visit Greenwich</td>
</tr>
<tr>
<td>Greenwich stakeholders</td>
</tr>
<tr>
<td><strong>UK Short Breaks Campaign:</strong> Promote Greenwich as a short break destination to key UK market segments, through PR and targeted media – press releases, journalists’ visits, social media – in partnership with UK short break operators.</td>
</tr>
<tr>
<td>Visit Greenwich</td>
</tr>
<tr>
<td>Greenwich stakeholders; UK short break operators</td>
</tr>
<tr>
<td><strong>Event Packages:</strong> Work with The O2 and Excel to develop accommodation packages around events at the O2 and Excel.</td>
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<tr>
<td>Visit Greenwich</td>
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<tr>
<td>The O2, ExCeL, Greenwich hoteliers</td>
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<tr>
<th>Position Greenwich as a Place to Stay for Business Travellers with Business in London</th>
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<tbody>
<tr>
<td><strong>Accessibility/Connectivity:</strong> Highlight Greenwich’s proximity to, and accessibility from, the City and central London – through PR and social media.</td>
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<tr>
<td>Visit Greenwich</td>
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<tr>
<td>Greenwich hoteliers</td>
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<tr>
<th>Establish Greenwich as a Premium National and International</th>
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<tbody>
<tr>
<td><strong>Conference Sales:</strong> Work with Greenwich stakeholders, and conference hotels in particular, and London &amp; Partners, to attract national and international</td>
</tr>
<tr>
<td>Visit Greenwich</td>
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<tr>
<td>Greenwich stakeholders; London &amp; Partners</td>
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</table>
Conference Destination

association conferences to Greenwich. This will require a dedicated conference bidding function.

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Pillar 2: Time Well-Spent: Ensuring a Great Visitor Experience and Maximising Revenue

We will work to ensure Greenwich offers an outstanding experience for visitors, which also maximises revenue for Greenwich businesses. We want visitors to leave as Greenwich advocates and keen to return.

<table>
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<tr>
<th>Objective</th>
<th>Action</th>
<th>Lead Organisation</th>
<th>Supporting Organisations</th>
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</thead>
<tbody>
<tr>
<td>Distinguish Greenwich as a Distinctive Destination</td>
<td><strong>Sense of Place:</strong> Ensure Greenwich conveys a strong sense of place, reflecting its brand values (time, royal, maritime, intriguing, exciting) in its public realm, street furniture and visitor attractions.</td>
<td>Royal Borough of Greenwich Council</td>
<td>Visit Greenwich; Greenwich stakeholders</td>
</tr>
<tr>
<td>Increase Spending by Day Visitors</td>
<td><strong>Information Points:</strong> Ensure good quality information on key activities for visitors (what to see and do, where to eat and drink, and activities) is available at main visitor touch points (e.g. in all attractions, at transport hubs and on-board boats, in cafes, restaurants and bars etc.), as well as online.</td>
<td>Visit Greenwich</td>
<td>Greenwich stakeholders; Royal Borough of Greenwich Council</td>
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<td></td>
<td><strong>Signage – Welcome, Directional and Interpretive:</strong> Erect new ‘Welcome to Greenwich’ signage at major entry points to the borough and transport hubs. Provide clear directional signage to attractions for pedestrians in Greenwich town, particularly from main transport hubs. Mount clear and attractive interpretive signage at key points in Greenwich. Reinforce Greenwich’s UNESCO World Heritage Status through signage, and particularly welcome signage.</td>
<td>Royal Borough of Greenwich Council</td>
<td>Visit Greenwich; Greenwich stakeholders</td>
</tr>
<tr>
<td><strong>Walking Trails:</strong></td>
<td>Develop a series of themed Greenwich self-guided walking trails (e.g. time, maritime, royal etc.).</td>
<td>Visit Greenwich</td>
<td>Greenwich stakeholders</td>
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<tr>
<td><strong>Coach Itineraries:</strong></td>
<td>Persuade coach operators to extend their itineraries to allow passengers to spend ‘free time’ in Greenwich after their visit to specific attractions.</td>
<td>Visit Greenwich</td>
<td>Coach operators</td>
</tr>
</tbody>
</table>
| **Connect North Greenwich to Greenwich Town:** | - Explore visitor-specific opportunities to connect North Greenwich to Greenwich town centre (i.e. other than public bus) – e.g. ‘fun train’ or minibus timed to meet the boat service at North Greenwich pier.  
- Connect the Thames Path National Trail along the entire section between connect North Greenwich and Greenwich town centre as a seamless and attractive pedestrian/cycling route. Adorn it with, e.g., outdoor art/sculptures with a branded (riverine) theme. | Visit Greenwich | Royal Borough of Greenwich Council; Thames Clippers |
| **Night-time Economy:** | Explore opportunities to enliven Greenwich’s ‘night scene’ – e.g. providing rehearsal spaces for Trinity Laban students in public venues, bars, halls, churches etc. and licensing for public performances; establishing a regular night market etc. | Visit Greenwich | Royal Borough of Greenwich Council; |
| **Increase Day Visits to Greenwich Outside the Main Season** | **Events:** Mount locally generated events and bid to host mobile events. See under Pillar 4 below. | Visit Greenwich | Royal Borough of Greenwich Council; Greenwich stakeholders |
| **Establish Greenwich as a UK Short Break Destination** | See above under ‘Increase Spending by Day Visitors’: signage, walking trails, night-time economy and events. | Visit Greenwich | Greenwich stakeholders |
Position Greenwich as a Place to Stay for Business Travellers with Business in London

See above under ‘Increase Spending by Day Visitors’: night-time economy and signage.

Visit Greenwich
Greenwich hoteliers

Establish Greenwich as a Premium National and International Conference Destination

See above under ‘Increase Spending by Day Visitors’: information points, night-time economy and signage.

Visit Greenwich
Greenwich stakeholders; London & Partners

Pillar 3: Time Together: Partnership Working

Greenwich needs a “Destination First” mindset. This DMP can only be delivered by Greenwich stakeholders working together to achieve it – in the public, private and third sectors. We will work together locally, and where appropriately with national partners, to ensure the best outcome for the Greenwich visitor economy. This means partners being involved from the start in developing ideas, a universal commitment to clear communication, and an atmosphere of mutual trust and respect.

<table>
<thead>
<tr>
<th>Objective</th>
<th>Action</th>
<th>Lead Organisation</th>
<th>Supporting Organisations</th>
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<tbody>
<tr>
<td>Distinguish Greenwich as a Distinctive Destination</td>
<td><strong>Greenwich Identity:</strong> Work with key Greenwich stakeholders to ensure they understand and commit to conveying the Greenwich brand values (time, royal, maritime and intriguing, exciting) wherever appropriate in their own marketing communications and product developments.</td>
<td>Visit Greenwich</td>
<td>Greenwich stakeholders</td>
</tr>
<tr>
<td>Increase Spending by Day Visitors</td>
<td><strong>Partnership Activities:</strong> Stakeholders need to adopt a “Destination First” mindset to grow tourism to Greenwich and thereby also to their businesses. This means close partnership working, as appropriate, on all activities identified in Pillar 1 (Marketing Greenwich: cross-selling, last minute availability, London residents’ campaign, UK short breaks campaign and conference sales) and Pillar 2</td>
<td>Visit Greenwich</td>
<td>Greenwich stakeholders</td>
</tr>
<tr>
<td>Establish Greenwich as a Premium National and International Conference Destination</td>
<td>(Ensuring a Great Visitor Experience and Maximising Revenue; sense of place, information points, signage, walking trails and events) and Pillar 4 (Identifying Product and Skills Development Needs).</td>
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**Pillar 4: Time to Think Ahead: Identifying Product and Skills Development Needs**

We will identify future visitors’ needs and work with appropriate stakeholders to ensure Greenwich meets them. This means: identifying future product, infrastructure, and skills development needs; taking account of the visitor economy in planning and policy decision-making; and ensuring those best-placed to deliver improvements are aware of these visitor needs and related business opportunities and can meet them.

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<tr>
<th>Objective</th>
<th>Action</th>
<th>Lead Organisation</th>
<th>Supporting Organisations</th>
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<tbody>
<tr>
<td>Increase Spending by Day Visitors</td>
<td><strong>Coach Drop-Off:</strong> Explore infrastructure and traffic flow issues to enable more coaches to drop passengers in Greenwich town or Charlton Way. This will encourage greater spend in Greenwich.</td>
<td>Visit Greenwich</td>
<td>Royal Borough of Greenwich Council; Coach operators</td>
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<td></td>
<td><strong>Mini-Train to Observatory:</strong> Explore potential to link the Royal Observatory to Greenwich town centre by a tourism tram or mini-train. This would enable older and less mobile visitors to experience Greenwich town centre on a trip to the Observatory and vice versa.</td>
<td>Visit Greenwich</td>
<td>Royal Borough of Greenwich Council, Royal Parks, RMG</td>
</tr>
<tr>
<td></td>
<td><strong>Signage:</strong> See under Pillar 2.</td>
<td>Royal Borough of Greenwich Council</td>
<td>Visit Greenwich; Greenwich stakeholders</td>
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<td></td>
<td><strong>Walking Trails:</strong> See under Pillar 2.</td>
<td>Visit Greenwich</td>
<td>Greenwich stakeholders</td>
</tr>
<tr>
<td></td>
<td><strong>Thames Path National Trail:</strong> Ensure the National Trail is maintained to National Trail standards throughout Greenwich to its end at the Thames Barrier.</td>
<td>Royal Borough of Greenwich Council</td>
<td>Visit Greenwich</td>
</tr>
<tr>
<td><strong>Increase Day Visits to Greenwich Outside the Main Season</strong></td>
<td><strong>Skills Development:</strong> Ensure front-line staff in key attractions, hotels and food and drink outlets are aware of the main things to do and see in Greenwich and can effectively cross-sell each other’s facilities (e.g. through ‘fam trips’, staff exchanges etc.).</td>
<td>Visit Greenwich</td>
<td>Greenwich Local Labour and Business unit (GLLAB); Greenwich College, Greenwich University</td>
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<tr>
<td><strong>Events -1:</strong> Develop a series of locally generated events in Greenwich, which reflect Greenwich’s sense of place – e.g. sailing regatta, local and ethnic food festival, walking/running/cycling skateboarding competitions along the Thames Path National Trail etc.</td>
<td><strong>Events -2:</strong> Identify mobile events, which reflect Greenwich’s sense of place, and bid to host them (cf. Tall Ships) and to which Greenwich is suited – e.g. The Matrix Fitness Grand Prix Series (cycling) which requires “spectator-friendly town and city centre circuits”, World Sport Kite Championships et al. See under ‘Increase Spending by Day Visitors’ above: signage, walking trails, Thames Path National Trail and events</td>
<td>Visit Greenwich</td>
<td>Greenwich stakeholders</td>
</tr>
<tr>
<td><strong>Establish Greenwich as a UK Short Break Destination</strong></td>
<td><strong>Skills Development:</strong> Identify local hospitality/customer service skills needs and work with Greenwich Local Labour and Business unit (GLLAB) and Greenwich College to develop appropriate training courses. (N.B. Certain jobs at senior and skilled levels, such as hotel managers, chefs, sales directors etc. are more likely to be mobile and recruited from a wider and experienced geographical base. However, the link between local training courses and local employment tends to be much stronger in entry level, service and semi-skilled areas of employment.)</td>
<td>Visit Greenwich</td>
<td>Greenwich stakeholders</td>
</tr>
<tr>
<td><strong>Position Greenwich as a Place to Stay for Business Travellers with Business in London</strong></td>
<td>Visit Greenwich</td>
<td>Greenwich hoteliers</td>
<td></td>
</tr>
<tr>
<td><strong>Establish Greenwich as a Premium National and International Conference Destination</strong></td>
<td>Visit Greenwich</td>
<td>Greenwich stakeholders; London &amp; Partners</td>
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</table>
Pillar 5: Time to Reflect: Monitoring and Evaluation

We will devise key performance indicators for each objective, and ultimately for programmes addressing each objective, and measure our success rate. This will require the commitment of all partners to provide the requisite data and qualitative assessment to enable achievements to be measured.

<table>
<thead>
<tr>
<th>Objective</th>
<th>Headline Performance Indicators</th>
<th>Lead Organisation</th>
<th>Supporting Organisations</th>
</tr>
</thead>
</table>
| Distinguish Greenwich as a Distinctive Destination | ● Recognition of the Greenwich brand in key markets.  
● Number of stakeholders using the Greenwich brand/reflecting Greenwich’s core values.  
● Extent of take-up of the brand and its application in Greenwich stakeholder activities. | Visit Greenwich | Greenwich stakeholders |
| Increase Spending by Day Visitors | ● Increased spend (STEAM) | Visit Greenwich | Greenwich stakeholders |
| Increase Day Visits to Greenwich Outside the Main Season | ● Increase in visitors (STEAM) | Visit Greenwich | Greenwich stakeholders |
| Establish Greenwich as a UK Short Break Destination | ● Increase in staying visitors (STEAM and Greenwich hotels survey) | Visit Greenwich | Greenwich hoteliers and major accommodation operators |
| Position Greenwich as a Place to Stay for Business Travellers with Business in London | ● Increase in staying visitors (STEAM and Greenwich hotels survey) | Visit Greenwich | Greenwich hoteliers and major accommodation operators |
| Establish Greenwich as a Premium National and International Conference Destination | ● Number of conferences held in Greenwich (via hotels and conference venues) | Visit Greenwich | Greenwich hoteliers, major accommodation operators and conference venues |
Section 6: Governance

6.1 Destination Management Structure

Collaborative Working

The most important element of a structure to develop the Greenwich visitor economy is to develop a “Destination First” mindset amongst stakeholders. This requires an understanding of the benefits of, and commitment to, collaborative working. Such an approach was exemplified in the ‘total destination’ approach by Liverpool several years ago, which is an outstanding model of achievement against the odds. Greenwich is in a different position to Liverpool, but the commitment to working together and the resultant growth in visitors both to Liverpool and to individual businesses in the city offer salutary lessons from which Greenwich could benefit.

Executive, Non-Executive and Advisory Roles

Destinations where a clear leadership role is defined with respect to the development of the visitor economy, and where transparency and collaborative working with stakeholders are the norm, tend to be more successful. This depends not on the lead organisation undertaking every task, but on it having a strategic understanding of the tourism sector and being able to work collaboratively with other organisations that impact on the visitor experience, but which may not have the visitor at the forefront of their responsibilities.

A three-tiered structure is proposed to manage the Greenwich visitor economy, comprising:

- **Lead organisation and delivery body**, which reports to:
- **A non-executive board**;
- Plus a **tourism advisory panel**, which comprises a wide range of people with an interest in the Greenwich visitor economy, including tourism sector experts and practitioners, whose expertise can be applied as required, and which can represent the collective view of the tourism sector as far as possible.

This enables as wide an involvement as possible of those with an interest in the development of Greenwich’s visitor economy, which should encourage greater collaboration, while still retaining a formal structure with a clear and accountable executive function.

The following structure and roles are proposed to maximise the potential of Greenwich’s visitor economy:
<table>
<thead>
<tr>
<th>Role/Purpose</th>
<th>Organisation</th>
<th>Structure</th>
<th>Responsibilities</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Lead in destination management:</strong></td>
<td>Visit Greenwich</td>
<td>- Executive team reports to:</td>
<td>- Delivery body – implementation of activities agreed with Board</td>
</tr>
<tr>
<td></td>
<td></td>
<td>- Non-executive board</td>
<td>- Strategic oversight of Visit Greenwich executive team</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Visitor Economy Advisory Panel:</strong></td>
<td>Greenwich Tourism Advisory Panel</td>
<td>- Panel selected from a wide range of tourism sector stakeholders to provide a broad range of experience. This will be larger than the Board, so that a wider range of experience can be drawn on as necessary. This also aims to ensure the panel is as inclusive and representative of the wider visitor economy as possible.</td>
<td>- Contribute to destination management planning process.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>- Panel has authority to co-opt members.</td>
<td>- Advise on any issue relating to the visitor economy – either on an ongoing or ad hoc basis.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>- Panel has the authority to ask anyone to attend to give evidence on any relevant issue.</td>
<td>- Secure as wide a participation in developing Greenwich’s visitor economy as possible.</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>- Report Panel conclusions and views on visitor economy issues to the VG Board (although the Panel would not have any formal reporting relationship to the VG Board).</td>
</tr>
</tbody>
</table>
Visit Greenwich Structure

As the lead organisation charged with both destination management and delivery – in terms of horizon-scanning, destination planning and development, stakeholder inspiration and marketing, as well as investor relations and promotion (with RBG et al) – the outline Visit Greenwich structure required to carry out the activities identified in this DMP is as follows (boxes represent functions, not people):
6.2 Financial Model

Budget

The following is an indicative budget to which Visit Greenwich should aspire in order to lead and implement the destination management plan for Greenwich.

This is based on having the human and financial resources required to undertake the role outlined for Visit Greenwich above and the activities identified proposed in Section 5.4 Action.

N.B. This starts as a baseline budget in 2014/15 and progresses to 2017/18, on the assumption that inflation increases and capital costs incurred in the first two years (2014/15 & 2015/16) will reduce and the resource thus ‘saved’ can be applied in future years (2016/17 & 2017/18) to boost marketing activities. (e.g. Up-front capital investment will be required in the early stages for development of items such as information points, mcommerce platforms, signage etc., which can be scaled back to maintenance levels in subsequent years.) This should be reviewed annually in light of changes in market circumstances and destination needs, as well as currency fluctuations and inflation.

Ideal scenario:

| VISIT GREENWICH: INDICATIVE BUDGET REQUIREMENTS 2014/15 - 2017/18 (£) |
|---------------------------|-----------------|-----------------|-----------------|-----------------|
| Item                      | 2014/15 | 2015/16 | 2016/17 | 2017/18 |
| Marketing                 | 550,000  | 605,000  | 805,000  | 885,500  |
| Visitor Services (incl. capital costs) | 500,000  | 500,000  | 300,000  | 330,000  |
| Staffing (of which a significant amount covers fundraising, planning, management implementation and operations, and evaluation, as well as the delivery of marketing and visitors service functions) | 450,000  | 495,000  | 544,500  | 598,950  |
| **TOTAL**                 | **1,500,000** | **1,600,000** | **1,649,500** | **1,814,450** |

Funding Sources

While the aim should be to increase funding from the main beneficiaries of tourism to Greenwich, and primarily from the private sector, experience around the world has shown that few destination management organisations (DMOs) can operate sustainably in terms of destination management and marketing without some core public sector funding. Main funding sources for DMOs tend to be as follows, with the proportion of funding from different sources varying according to local circumstances:

- **Core funding**: Universally a significant percentage is raised from the municipality/local government to cover staffing, administrative and fixed costs, which local businesses and others are generally unwilling to fund to any great extent. This is because the direct benefit to local businesses is not always clear and, if all
businesses do not contribute, some obtain a “free-rider” benefit at the expense of others, thereby undermining the commitment of those willing to contribute. Also, significant benefits accrue indirectly to the local authority in terms of local revenue generation, image enhancement, which can add to the area’s appeal amongst inward investors, business maintenance, and job creation.

- **Partnership/Membership**: Funding raised from DMO membership, in return for which members receive a member benefits package, often scaled according to the level of contribution (e.g. Gold, Silver, Bronze).
- **Partnership/project-based funding**: Funding raised from partners to fund specific projects, such as marketing campaigns and event development etc. This cannot be used to fund core activities;
- **Match-Funded Initiatives**: Similar to project-based funding, but with activities less directly linked to partner benefits, whereby a public sector organisation agrees to match funds raised by private sector partners in order to undertake a specific project initiative (e.g. event development, signage, training programme etc.).
- **Sponsorship**: Funding raised from sponsors, who generally require very specific returns for their sponsorship investment.
- **Merchandising**: Selling “Visit Greenwich” branded products to our visitors

Against this background, and with a long-term ambition to increase the proportion of funding raised from private sector sources, the following funding model is ideally where Visit Greenwich needs to get to:

**Ideal scenario by 2017:**

<table>
<thead>
<tr>
<th>Source</th>
<th>Purpose of Funding</th>
<th>Timing</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Royal Borough of Greenwich Council</td>
<td><strong>Core funding</strong>: to cover staffing, administrative and fixed costs</td>
<td>Annual</td>
<td>30%</td>
</tr>
<tr>
<td>Businesses and organisations in the private, public and third sectors</td>
<td><strong>Partnership</strong>: to contribute to ongoing operations and delivery of projects</td>
<td>Annual</td>
<td>30%</td>
</tr>
<tr>
<td>Businesses and organisations in the private, public and third sectors and Royal Borough of Greenwich Council</td>
<td><strong>Project-based funding, sponsorship and match-funded initiatives</strong>: to fund specific projects and initiatives</td>
<td>Ad hoc as appropriate</td>
<td>40%</td>
</tr>
</tbody>
</table>
## 6.3 Monitoring and Evaluation

<table>
<thead>
<tr>
<th>Destination</th>
<th>Visit Greenwich</th>
</tr>
</thead>
<tbody>
<tr>
<td>London market share</td>
<td>Private sector leverage</td>
</tr>
<tr>
<td>Hotel occupancy</td>
<td>Campaign - ROI</td>
</tr>
<tr>
<td>Average spend per visit</td>
<td>Brand reach</td>
</tr>
<tr>
<td>Economic impact</td>
<td>Changing perceptions</td>
</tr>
<tr>
<td>Jobs</td>
<td>Business opportunities for partners</td>
</tr>
</tbody>
</table>

The following outputs and outcomes will be used to measure the performance of Visit Greenwich and the destination.
There are a number of specific projects that can now be initiated to meet the objectives and aims set out in the plan. They include;

1. **Launch the Destination Management Plan**
   We need to ensure that all key stakeholders are aware of the 5 year plan and understand their role within it. The plan will be launched to all stakeholders at the end of September. This will be followed up by a series of briefing sessions with RBG and other major operators.

2. **Thames Gateway/Culture Path**
   It is critical that we physically join Greenwich with the Peninsula, but in a way that is engaging for our visitors. To kick start this process we need to create a visioning paper and illustrations which demonstrate how art and sculpture can create an attraction to join our two greatest assets.

3. **The Greenwich Welcome**
   We need to enhance the visitor welcome at key visitor arrival points across the borough. We need to create new directional signage and interpretation to ensure our visitors make the most of their stay. We also need to be more coach friendly. As such, we need to re-institute the project looking at Charlton Way as a possible venue to provide a new official paid for coach parking facility. A new transport facility up the hill in Greenwich Park would be a great boost for our Welcome programme too.

4. **WHS/The O2 Cross-marketing campaign**
   There is a potential easy win to cross-pollinate our two largest markets. We need to create a marketing tool that will promote our World Heritage Site to O2 visitors and vice versa. Even if the market overlap is small, there will be significant returns for a minimal marketing outlay.

5. **Improved Overseas Marketing**
   We need to lobby key overseas marketing agencies including VisitBritain, VisitEngland and London and Partners to ensure they maximise the exposure of Greenwich and its products to a global audience.

6. **The Greenwich Pass**
   We need to package our offer with more imagination and make it easier for our visitors to access our products in one place. A mega ticket or “Pass” can take many forms and can be complex to set up. However, we believe a trial in January and February is feasible and will give us a platform to test various approaches. The new m commerce platform called Hive Hub will be tested in
October also. This will provide real time packages which can be purchased “on the go” via I phone.

7. **Maximising the Cruise Opportunity**
   We are already raising awareness of Greenwich to the cruise market but moving forward we need to create bespoke itineraries for the cruise operators. These itineraries need to be packaged and priced in a way that positions Greenwich as more than a gateway to London and a destination in its own right. Packages need to be in place for March 2015 at very latest. Visit Greenwich will support London City Cruise Port in September 2014 at Cruise Med.

8. **Destination Marketing Campaign 2015**
   All major partners need to pool their marketing expertise and resources more effectively. By pooling resources behind the Visit Greenwich brand we can achieve much greater audience reach at lower cost through economies of scale. A new campaign will be planned this autumn time and be launched in early 2015. The campaign will principally target visitors to London to ensure they don’t visit London without visiting Greenwich.

9. **Visit Greenwich/Strategic Conference Bidding Unit**
   The Aurora development is a game changer for the destination and provides the opportunity to reposition the Greenwich brand into the international conference market arena. A bidding unit will proactively target international corporate and association business and in particular markets where there is a clear affinity with Greenwich.
Appendices

A full list of appendices are available on request.

Please contact: partnership@visitgreenwich.org.uk