

Visit Greenwich Annual Report 2015/6

March 2016

Visit Greenwich Annual Report

1. Introduction.

The Royal Borough of Greenwich is one of London's most popular visitor destinations, attracting 18.5 million visitors per annum, providing over 15,000 jobs and generating some £1.2 billion for the local economy. (These figures are based on 2014 as measured by the STEAM economic activity model which is used by most destinations in the UK) London is now one of the world's leading tourism destinations with a visitor economy worth c £36Bn, accounting for over a third of all of tourism revenues in the UK.

Our task is to grow the value of our visitor economy and our strategy is to grow our sector by 30% over the next three years. The precise details of how this will be achieved are set out in our updated Destination Management Plan (DMP) 2014-19. This was discussed, developed and agreed by the Visit Greenwich Board.

Visit Greenwich has now been operating since December 2013 and is currently setting up phase II of its operations which is detailed in its 2016-19 business plan which can be found on our website.

This report focusses on the operational activities that have taken place over the last 12 months and should be viewed as delivery against the strategic framework set out in the DMP.

2. Governance and Operations

Visit Greenwich operates as a public/private 'Not for Profit' Community Interest Company (CIC).

The Members of the company are formed by those organisations currently on the Board, who are responsible for generating the bulk of Greenwich's visitors, namely:

- Royal Borough of Greenwich
- Royal Museums Greenwich
- Greenwich Foundation for the Old Royal Naval College
- London City Cruise Port
- The O2/AEG
- Greenwich Hospital
- City Cruises
- Hotel representation (annual roving Chair representative)

The Board can comprise of up to 13 Non-Executive Directors. The Council have been allocated two seats on the Board and the other Members one seat each. The appointment of other Non-Executive Directors reflects both financial investment into the company and the broader representation of the tourism sector.

The Audit & Finance Group, reports into the main Board and is chaired by Hugh Player of Greenwich Hospital. Cllr Denise Scott-MacDonald represents RBG on this Board. It provides direction and scrutiny of the company's financial and HR functions. The Marketing Steering Group also reports into the main Board. It provides strategic guidance and endorsement of the company's planned marketing activities and is chaired by Barrie Kelly, CEO of Visit Greenwich.

3. Strategic Objective

The aim of Visit Greenwich is to capitalise on Royal Greenwich's current success as a visitor destination and maximise opportunities of future developments. It provides strategic leadership for the tourism sector, and draws on marketing expertise and resources from the sector to promote and grow a sustainable tourism economy.

Visit Greenwich plays a leading role in tourism delivery and promotion, working closely with a wide range of partners and stakeholders. It will champion the sector and engage and influence all aspects of the visitor experience in order to nurture a thriving tourism industry.

Its mantra is:

"We lead on marketing and developing Greenwich as a visitor destination for leisure and business. We are private sector led, working with partners to grow the visitor economy and boost the profile of Greenwich, for the benefit of businesses, visitors and residents."

4. Commercial Partnerships

A major priority is to establish a financially sustainable organisation, which meets the needs and aspirations of its shareholders and commercial partners. Generating a sustainable number of commercial partners is critical to the company's future success. The strategy is to grow this gradually and to retain all partners and generate increased levels of commercial activities with them.

Visit Greenwich provides services, sales and marketing opportunities to organisations involved in the visitor economy sector, within the Royal Borough and adjoining areas. The cost of membership ranges from £300 to £30,000 per annum, with the level of service and benefits scaled accordingly.

Visit Greenwich currently has 101 net commercial partnerships which represents 109 businesses. The strategic focus in this area is to focus on a partnership culture with a value exchange that includes more than subscription monies. Partners can offer brand equity, intelligence, contents and marketing channels in addition to cash. Visit Greenwich is focussed on quality establishments that want to grow, value the Greenwich brand and see the value of working in partnership.

See appendix 1 for a list of current partners.

5. Destination Marketing

UK Campaigns

We ran an on-line test campaign in the summer time using Rocket Fuel's artificial intelligence system. The campaign had mixed results but informed us of the key types of websites that provide referrals to our site.

We are now planning a new Destination Campaign 2016: Greenwich Hub on visitlondon.com

All partners on the Marketing Steering Group have now signed up as campaign sponsors to the new VL campaign so it will be going ahead at the full £100k. Tier levels range from £5k to £20k, plus Visit Greenwich as the Anchor Tier.

A project group has been set up to meet with the VL campaign team on a quarterly basis to drive the campaign forward.

Content will be based around the top ten things to see and do in Greenwich, plus 6 themes agreed:

- Family fun - summer
- Culture – autumn
- Adventure/extreme
- River – September (Totally Thames)
- Royal Greenwich (rest of borough, royal heritage)
- Tall Ships / Easter – April 2017

Places to stay and travel will be included and an events calendar.

The campaign will be driven by four competitions (for data capture), banner ads, social media, a destination video, a series of mini videos and an Instawalk. There will be a banner takeover of the vl.com homepage for a number of weeks to drive traffic to the Hub. Greenwich content already on vl.com will all feature within the Hub. The videos and B-roll will be owned by Visit Greenwich and campaign partners for use in own channels.

Planning stage is Feb/March and to launch in April for a 12/13 month campaign.

Website and Online Activity

We relaunched our website on a new WordPress platform to maximise speed levels for users. Site traffic is growing and we have added a new box office which sells a range of e-tickets for our partners. See Appendix 2 for visuals.

We are investing heavily in our social media platforms - @visitgreenwich. We now have over 10,000 followers. Twitter and Instagram are providing the most impressive growth rates.

Our social media work has been voted number 10 in the UK ahead of over 200 other destinations including prominent destinations such as Oxford, Bath, Liverpool and Manchester.

See appendix 3 for performance data.

Print

We have created a new visitor map and a new brochure for Eltham.

PR Activity

We work hard to target key national and international media that can provide profile for Greenwich. We use a range of hooks to position stories in the media and we also run many familiarisation trips for important travel writers.

Coverage includes:

- International Travel Writers Association – Focus on Greenwich, June 2015
- Travel GBI - summer festivals article, June 2015
- British Heritage – Greenwich visit feature, July 2015
- Familytraveltimes blogger – various Greenwich blogs, August 2015
- Sunday People – Tall Ships, August 2015
- AOL Travel – August Bank Holiday / Tall Ships article, August 2015
- Made in Essex - August Bank Holiday / Tall Ships article, August 2015
- Sheerluxe. Com – 14 reasons to visit Greenwich, August 2015
- Exclusive Homes Worldwide - Greenwich visit feature, October 2015
- Property Matters – Rivington Greenwich feature as a result of EHW visit above, October 2015
- Travel GBI – World Travel Market article, November 2015
- London Planner – Greenwich feature, November 2015
- Britain magazine - Greenwich visit feature, September 2015
- Travel GBI – Greenwich What’s New 2016, February 2016 issue
- South London Press – Tourism Superstar shortlist for awards March 2016
- Mirror - Tourism Superstar shortlist for awards March 2016
- Visitlondon.com – Greenwich What’s New 2016, March 2016

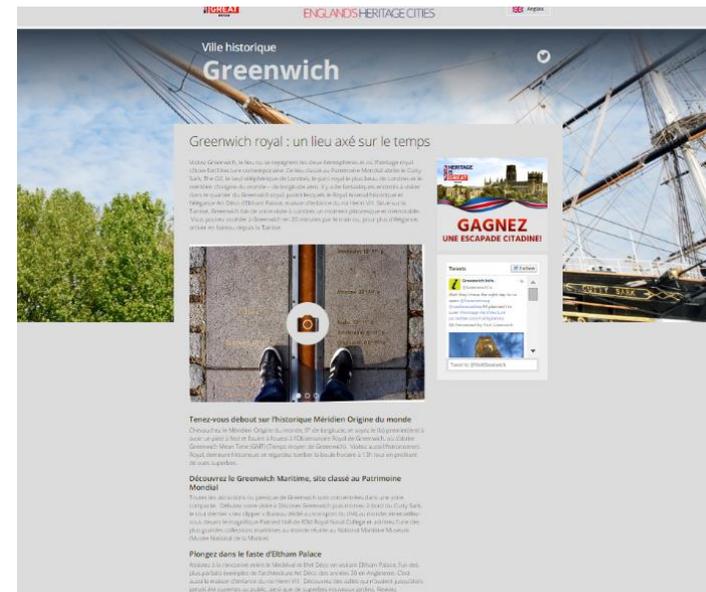
Overseas Marketing

GREAT UK Challenge Fund – Heritage is GREAT / France campaign for England’s Heritage Cities

This project is now underway to promote English Heritage Cities to consumers in France to encourage them to explore London and beyond London. This runs until end March 2016. Online campaign using on-line consumer channels to target “London Lovers”. We are working with Carat and Visit London and their French site www.visitlondon.com/fr

The campaign will drive people from Visit London website to the EHC website. There is an English and French version. The video can be seen here:

<https://www.youtube.com/watch?v=yoFWi0oP098>



Cruise marketing

We have been working with London City Cruise Port to raise awareness of Greenwich as a destination in London to the international cruise trade. We have attended and exhibited at the major international cruise events in Hamburg, Barcelona and Miami and also undertake a sales mission to the head offices of the number of major cruise decision makers in the USA.

We are pitching a range of exclusive packages to the cruise trade in a way that can be resold to their clientele. The aim being that cruise passengers will spend at least half of their time and money in Greenwich. See appendix 4 for creative visuals.

Business Marketing

We work with 25 venue partners to raise awareness of Greenwich as a place to host conferences, exhibitions and events. The new InterContinental London - The O2 hotel is a real game changer for our destination. The size and scale of its operation is already attracting businesses from global blue chip brands that historically would not have come to Greenwich. We have supported the hotel to train over 100 members of its front line and marketing staff to ensure that we are selling our destination well.

We are also working with the University of Greenwich to conduct research with venues to see how well they are selling and packaging our destination to their clients. As many business travellers extend their business trips for pleasure there is a massive potential of tourism growth in this market. The purpose of this project is to create an innovative way of distributing leisure products and packages to business travellers and conferences goers around venues in Greenwich. The development of a new sales mechanism will persuade business travellers to spend more leisure time and money in Greenwich during and after an event. The outcome of this project will increase the economic impact of events taking place in Greenwich and increase job opportunities and wealth around this area.

Working with key partners, we held a familiarisation visit (22 Jan 2016) of Greenwich hotels and attractions for conference and event organisers to demonstrate the range of Greenwich venues and inspiring spaces and to push ease of access messages.

Travel Trade

We hosted a series of travel trade events in January and February to showcase Greenwich to tour operators and group travel organisers.

England's Heritage Cities Workshop, Old Royal Naval College, Thursday 14 January

28 operators and 43 suppliers attended the event at the Old Royal Naval College where presentations and a series of one-to-one appointments took place. Visit Greenwich brought two partners, Royal Museums Greenwich and MBNA Thames Clippers to this event giving them an opportunity to do business direct with operators. Operators were impressed with the offer in Greenwich. Both partners found the workshop style of trade events much more productive than trade shows. One partner is drawing up a business contract as a result of meeting a buyer at this event.

Excursions 2016, Alexandra Palace, Saturday 23 January

For the second year, we have adopted a demand led approach whereby partners can pay into having stand presence at trade shows for a fee. Royal Museums Greenwich, MBNA Thames Clippers and London Splash Tours exhibited with us which enabled them to influence group travel organisers direct. Generally, most

delegates we spoken to had visited Greenwich recently, were interested in day trips and they have already planned their outings and excursions for 2016. There is more and more of a need for suppliers to make announcements on exhibitions, products and rates for one-two years ahead.

Scandinavian tour operator's familiarisation trip, Sunday 24 January

Working with London & Partners and Tourism South East, we hosted a familiarisation trip for 6 Scandinavian tour operators as part of their visit to Excursions. The group was taken on a sightseeing cruise on board City Cruises to Greenwich and a guided tour of *Cutty Sark*. Positive feedback was received with the operators very impressed with *Cutty Sark* as a group's attraction.

Explore GB, ACC Liverpool 3 & 4 March 2016

We were among 300+ UK & Irish suppliers in attendance at the ExploreGB, VisitBritain's flagship event providing tourism suppliers and destinations with an opportunity to meet and do business with up to 300 international travel buyers from 40+ countries. The event consisted of a two-day workshop filled with pre-scheduled, one-to-one appointments.

Generally, most buyers we spoke to either visited Greenwich many years ago or had never visited Greenwich before and were very impressed with what Greenwich has to offer. A large number of buyers were interested in day trips with some of them already planning their outings and group excursions to Greenwich in 2016. The new The InterContinental London – The O2 hotel with its conference centre, The Queen's House 400th anniversary and Designers Retail Outlet at The O2 planned for 2017 were the most exciting 'news' to buyers and will be hugely attractive to overseas visitors in 2016/17. Park and Glide - free coach parking at The O2 with MBNA Thames Clippers was also in high demand with coach groups travelling to Greenwich and London.

Explore GB 2016, Chinese Tour Operators Familiarisation Trip to Greenwich, Sunday 6 March

As part of the ExploreGB buyers' programme, 25 Chinese delegates attended a familiarisation trip to Greenwich on Sunday 6 March. The group was taken on a guided tour of Greenwich, which included a tour of the Royal Observatory, the Old Royal Naval College, National Maritime Greenwich and *Cutty Sark*. Participation also included a dinner at *Cutty Sark*, which was the highlight of the visit, and a river transfer by MBNA Thames Clippers on a way back to the buyer's hotel.

Event Marketing

We have developed bespoke marketing packages for Festivals & Events to provide additional exposure on Visit Greenwich channels at key times in their marketing/communications plans. This has now become a regular package for Greenwich + Docklands International Festivals and Greenwich Music Time.

6. Visitor Services

The Tourist Information Centre (TIC), operating at Cutty Sark Gardens received c360, 000 visitors in 2015 which makes it one of the UK's busiest TICs. It is also one of only two remaining TICs in London and provides a real unique selling point for Greenwich. It provides a valuable contact point with visitors and acts as a shop window for the Royal Greenwich tourism product. Visit Greenwich continues to provide a high quality information service and welcome to visitors and will seek to improve the type and nature of local information available to visitors and significantly increase revenue from accommodation bookings and ticket sales, via online and offline activity. Recent surveys indicate that satisfaction levels (excellent and good) of the TIC staff are c 99%.

TICs are not designed to make a profit and Visit Greenwich is not seeking to do so. However we believe that the TIC service can be delivered in a far more cost effective way. As such we are entering into a new partnership with the Greenwich Foundation to create a new integrated "Welcome to Greenwich Desk – at Old Royal Naval College". The new information desk will be centred in the middle of the old "Discover Greenwich" attraction. The benefits will include a new higher profile information service reaching far more visitors. The service should also be more cost effective as it will be based on a staff sharing model between the two organisations.

The Greenwich Welcome will also be enhanced through new tourism information points which are being developed at key gateways into Maritime Greenwich. This has been agreed in consultation with RBG, TfL and the World Heritage Site Steering Group. The project will commence this summertime and the plan is to implement the scheme in time for the Tall Ships Regatta in 2017.

We are also working with TfL/DLR to create a better welcome at key train and DLR stations. And we are working with TfL to boost Greenwich's presence in their key gateway visitor centres which include St. Pancras, Gatwick and Heathrow.

7. Employment, Skills and Training

We secured funding from The Big Lottery Awards for All programme to create a new employment initiative called WORKZONE.

The WORKZONE campaign aims to tackle youth unemployment and to encourage the creation of career paths, jobs, apprenticeships and structured work placements for under 25's in the tourism, leisure and hospitality industry. With 15,000 people already working in our sector there are already some great career opportunities for our young people. And this is set to grow as the value of our sector is predicted to grow by 30% by 2018.

Industry experts will share advice with delegates on how to get into the industry, and Visit Greenwich co-hosted a panel discussion on the benefits of working in the industry & how to start off in the industry using soft skill (people skills', 'interpersonal skills', 'social skills' or 'transferable skills'). The WORKZONE campaign not only offers young people living in Greenwich a chance to meet great employers in the region but to leave the day with a career pathway in this vibrant industry.

The events will be attended by 100 local people and will be held in March 2016 over 3 days at Greenwich Heritage Centre, the Tudor Barn, Eltham and Mitre Passage on Greenwich Peninsula.

We are working on a plan with Job Centre Plus to expand and develop the programme.

8. Intelligence

We operate a Destination Dashboard which collects monthly performance data from transport providers, attractions and hotels. This is being moved to a new on-line model called T-stats which will provide real time performance data. It will also allow for benchmarking with other heritage destinations across the UK including Oxford, Cambridge, Bath and York.



Historical data going back to 2011 has been input and will continue to be updated on a monthly basis to inform our Destination Dashboard.

This includes a round-up of performance for the year 2015 compared to 2014.

Key results for 2015 compared to 2014 are:

Hotel occupancy: ↓ 2%

RevPAR: ↑ 3%

Attractions: ↓ 4.6%

Transport: ↑ 3%

9. Place Shaping/Lobbying

We have worked hard to support and lobby on behalf of a range of partners' projects which are relevant to the aims set out in our DMP.

They include:

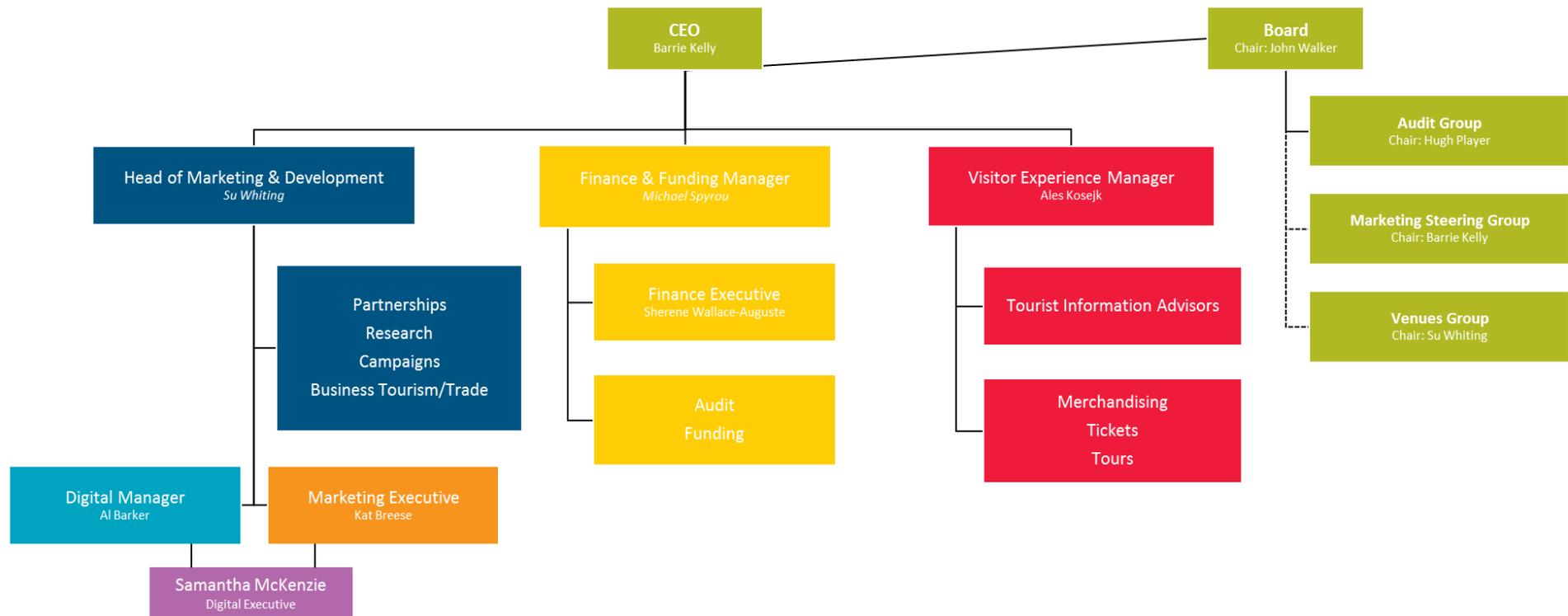
- London City Cruise Port planning decision
- New Legible London signage on the World Heritage Site
- The new access strategy at Greenwich Park – including transport through the park and coach parking on Charlton Way
- Supporting RBG's Smart City agenda
- Supporting new operators as they enter our sector e.g. Intercontinental – The O2 Hotel and European Splash Tours, Volunteers Greenwich

10. Finance

On request.

11. Staffing

The team has been recently restructured as follows:



12. Evaluation/KPIs

Visit Greenwich Corporate Targets 2016 – 17 and beyond

	2014-5	2015-6	YE forecast	2016-7	2017-8	2018-9
Commercial partners	90	100	102	110	120	130
Partner Retention rate	100%	>90%	>90%	>90%	>90%	>90%
Website traffic unique users	700k pa	750k pa	700k	600kpa	850kpa	900kpa
Website max user time peak	2.5 mins	3 mins	3 mins	3 mins	3 mins	3mins
Social media following	6,000	11,000	10,700	17,500	24,000	30,000
TIC footfall	330,000	340,000	360,000	400,000	450,000	500,000
Total non-grant income	£450,000	£585,000	£577,000	£630,000	650,000	670,000
TIC income	£250,000	£360,000	£360,000	£360,000	370,000	380,000
Public-private funding ratio	46%	39%	40%	31%	29%	25%
Annual surplus	£2,000	£2,000	£1000	£5,000	£5,000	£5,000
Campaign ROI	n/a	>15:1	n/a	>15:1	>15:1	>15:1

Destination Targets 2013 to 2018

Every month Visit Greenwich collects business performance data from our partners and the year-end totals are fed into the STEAM economic activity model. These figures show actual performance to 2014 and projected performance from 2015 to 2018.

The actual performance figures for 2015 will be available after April.

The Value of Tourism to Greenwich	2013	2014	2015	2016	2017	2018	Increase 2013-2018
REVENUE (£m)							
Revenue-Direct	756.16	815.01	855.85	901.18	949.40	1,000.75	244.59
Revenue-Indirect	369.93	398.73	421.54	443.86	467.61	492.91	122.98
S/T Revenue-Direct + Indirect	1,126.09	1,213.74	1,277.30	1,345.04	1,417.01	1,493.66	367.57 (33%)
JOBS							
Jobs-Direct	9,642	10,607	11,105	11,625	12,174	12,753	3,111
Jobs-Indirect	4,172	4,621	4,886	5,115	5,357	5,611	1,439
S/T Jobs-Direct + Indirect	13,814	15,228	15,991	16,740	17,531	18,364	4,550 (33%)

13. Critical success factors and key milestones for 2016

- The Visit Greenwich Board to remain strong and continue to develop its “destination first” mindset
- Product development to continue and remain on track i.e. London City Cruise Port, Painted Hall Restoration
- Visit Greenwich to continue to develop its commercial revenues and diversify its funding sources
- Visit Greenwich to continue to build and develop a high performing team
- The new “Welcome to Greenwich” information desk at ORNC to be a major success
- Our new on-line marketing campaign with Visit London to be successful
- The new wayfinding signage at the WHS to be given planning permission and be delivered in time for Tall Ships in April 2017

Appendices

1. Current Partners
2. Box Office creative visuals
3. Social media performance data
4. Cruise marketing creative visuals

Appendix 1

Current Partners

Royal Borough of Greenwich
Royal Museums Greenwich
TfL/DLR/Emirates Air Line
London City Cruise Port
Greenwich Market
University of Greenwich
Old Royal Naval College
City Cruises
AEG - The O2/MBNA Thames Clippers
Charlton Athletic
Mercure London Greenwich
Novotel London Greenwich
InterContinental London - The O2
Hyde Housing (University of Greenwich accommodation)
Blackheath Football Club
Greenwich Music Time
Greenwich Park
Thames River Services
Petite Futé
Eltham Palace
Royal Greenwich Heritage Trust
Sunborn London
Abbey Travel
Berkeley Homes
Greenwich Community College

Vinothec
St Alfège
The Fan Museum
Greenwich Royal Tours
Laban
Ravensbourne
Sail Royal Greenwich
Rivington Grill Greenwich
Eltham Lodge - Royal Blackheath Golf Club
Greenwich Tour Guides Association
Greenwich Tavern
Charlton Cars
Severndroog Castle
Greenwich + Docklands International Festival
Greenwich Dance
Thames Barrier Information Centre
The Clarendon Hotel
Talk-Tourism
The Ahoy Centre
Staycity Aparthotel Greenwich High Road
Staycity Aparthotel Greenwich Deptford Bridge Station
Four Seasons Hotel London at Canary Wharf
Greenwich Theatre
The Pilot Greenwich
The Crystal

Devonport House
Apple Apartments
Maryon Wilson Animal Park
Splash Tours
Greenwich Peninsula Ecology Park
Goddards at Greenwich
Meantime Brewing Company
Wimdu
Thames Limo
Morris Visitor Publications

Lyreco
Tourist Network
Thames RIB Experience
Harbour & Jones
Lantern Ghost Tours
Cathedral Hotels Ltd
Southeastern Trains
NOW Gallery
Greenwich Prime
Kuoni
Splento Limited
Café Rouge Greenwich
The Dinner Jacket
Champagne & Fromage
Anderson Travel

Hilton Canary Wharf
The Sail Loft
Café Rouge Greenwich Peninsula
Eukanuba Discover Dogs
Meridian Magazine
Sixt rent a car

The Greenwich Show
Cloud IT
Arty Globe
Clocktower Market
Oxfam Bookshop
Richard I
Busaba Eathai (The O2)
South London Wine School
Frankie & Benny's (Greenwich Pier)
Locale Blackheath
Satisfaction Tour
Zizzi's Greenwich Pier
Zizzi's The O2
Golden Tours
Sticky World
Fit Creative
Capital Centric
Web Ticket Manager
CNT Associates

Appendix 2

Visit Greenwich Box Office

The screenshot displays the Visit Greenwich Box Office website interface. At the top, the URL is boxoffice.webticketmanager.com/visitgreenwich. The header features the Visit Greenwich logo with the tagline "time after time", a search bar, and navigation options for "Date from", "Date to", "GO", and "My Wishlist". A green banner below the header reads "Book Here - No Hidden Charges - 100% Guaranteed".

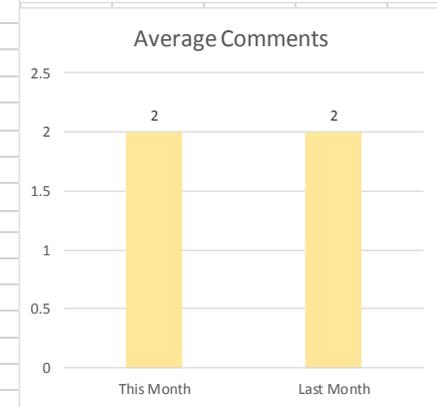
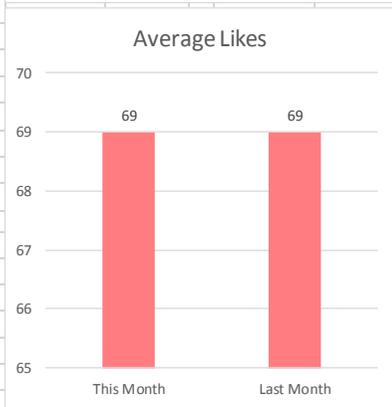
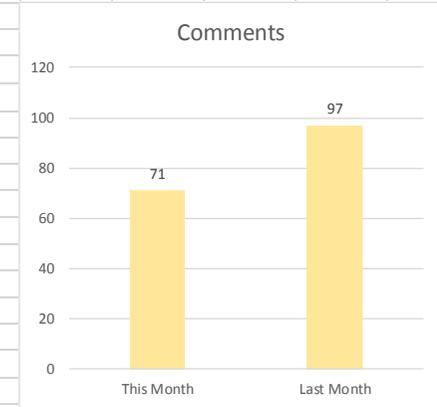
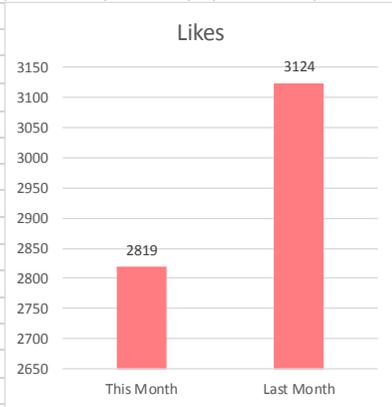
The main content area is a grid of event listings:

- GREENWICH HIGHLIGHTS HALF DAY TOUR**: A photograph of a group of people in a grand hall with a large mural.
- ROYAL OBSERVATORY**: A photograph of a stone wall with latitude and longitude coordinates: Dublin 6° 12' W, Greenwich 00° 00' W, Berlin 13° 25' E, Amsterdam 4° 54' E, and Greenwich 00° 00' E.
- SATISFACTION TOUR TICKETS**: A photograph of two men performing on stage.
- GREENWICH PRIME MARITIME HE...**: A photograph of a group of people walking through a grand hall.
- THAMES JAZZ CRUISE**: A photograph of a jazz band performing on a boat, with the "citycruises" logo in the top right corner.

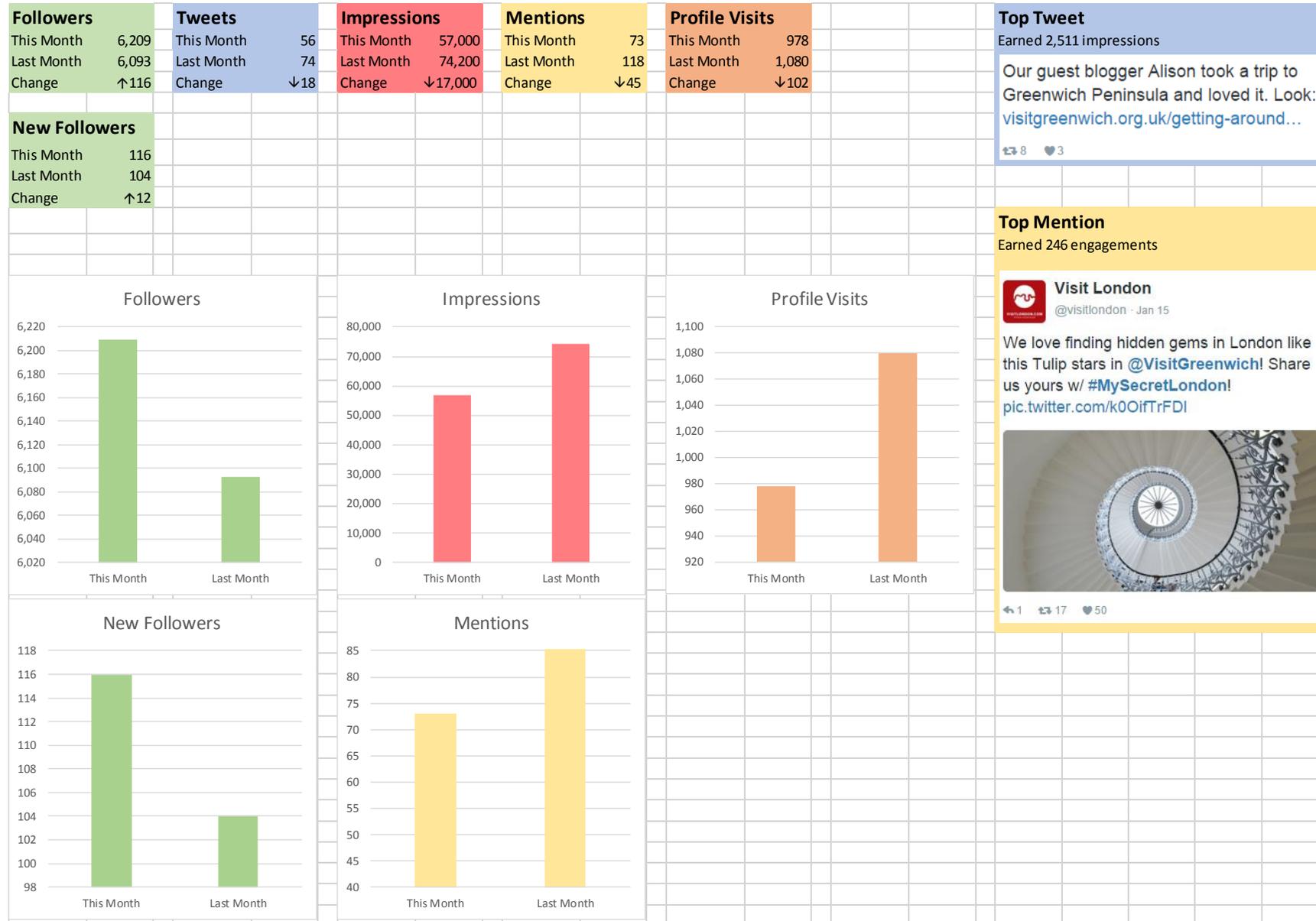
At the bottom of the page, there are links for "List My Event" and "Privacy", and a "Powered by web" logo.

Appendix 3: Social Media Performance Instagram, January 2016

				Likes This Month 2,921 Last Month 1,891 Change ↑1,030	Comments This Month 98 Last Month 58 Change ↑40	Most Liked Image 143 Likes 
				Avg Likes This Month 94 Last Month 79 Change ↑15	Avg Comments This Month 3 Last Month 2 Change ↑1	
			Posts This Month 31 Last Month 24 Change ↓0			

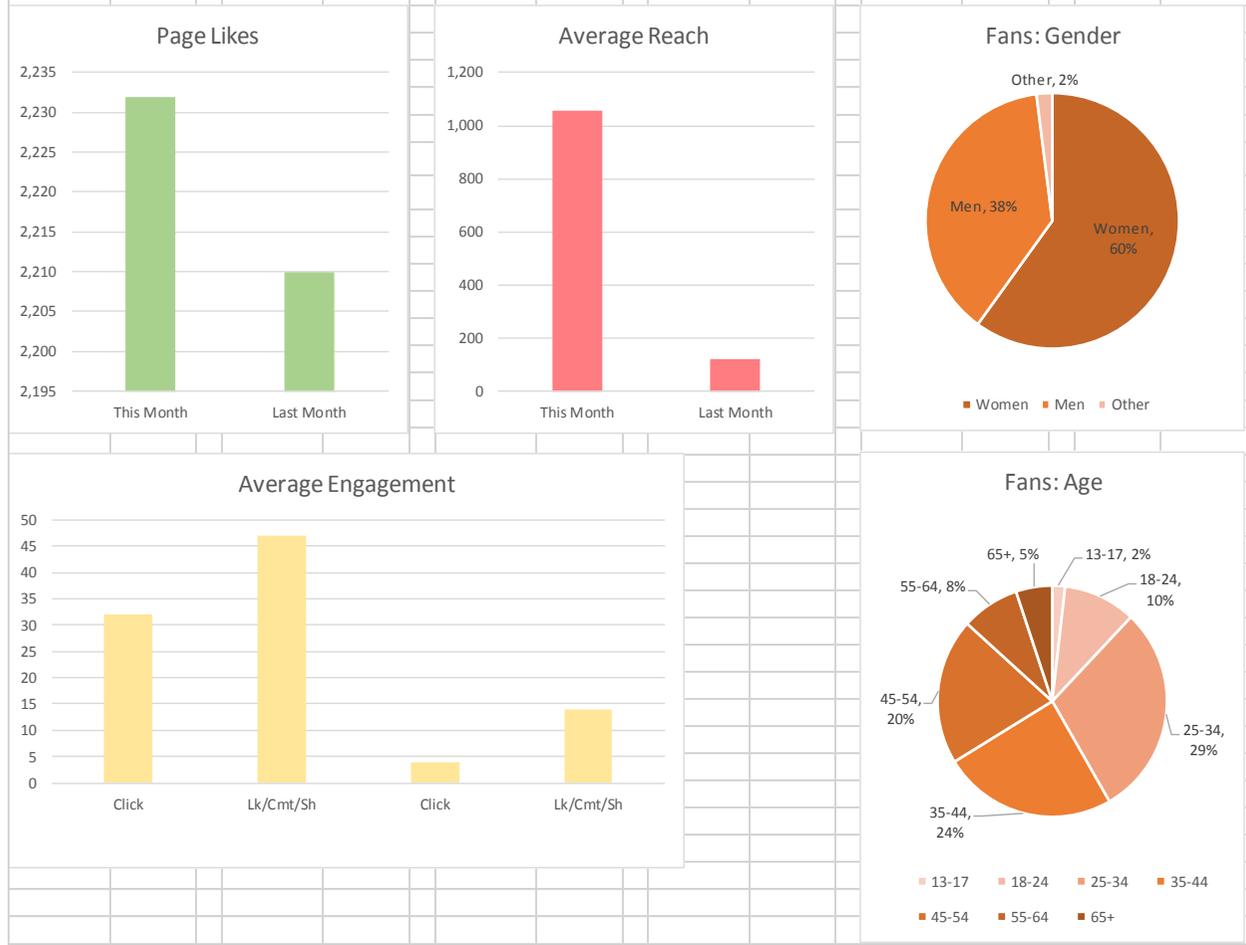


Twitter, January 2016



Facebook, January 2016

Page Likes		Posts		Avg Post Reach		Avg Engagement		Fans: Gender		Fans: Age	
This Month	2,232	This Month	6	This Month	1,057	Photo		Women	60%	13-17	2%
Last Month	2,210	Last Month	5	Last Month	119	Click	32	Men	38%	18-24	10%
Change	↑22	Change	↑1	Change	↓14	Lk/Cmt/Sh	47	Other	2%	25-34	29%
						Link				35-44	24%
						Click	4			45-54	20%
						Lk/Cmt/Sh	14			55-64	8%
										65+	5%



Appendix 4: Cruise Brochure Visuals

