visit
greenwich
time after time

# Royal Borough of Greenwich Destination Management Plan 2019-2023

## FINAL

**1 MAY 2019**

# Contents

# 1. Introduction

The Visit Greenwich partnership is now five years old. And in this time, as a collective, we have made great strides. We have strengthened our Board and governance arrangements, set up new intelligence and monitoring systems, grown our private sector base to over 135 partners, started to raise our brand profile in UK and overseas markets, enhanced our visitor welcome and we have received great recognition for our collective work via a number of national awards.

***And perhaps most importantly, the value of our visitor economy has grown by 26% between 2014 and 2017.***

Our visitor economy is now worth £1.4 billion, supporting 16,000 jobs, which is the highest ever measured, but we believe that we can grow this much further and in a sustainable way. To put this in perspective, London as a whole is worth c £36 billion making it the number three city in the world tourism league table. We have all of the ingredients to have a bigger share of the London market. We have a world class offering, a new emerging offer, ever improving transport links, a growing brand plus a powerful and maturing partnership.

***The only real barrier to further growth is the level of our own collective ambition.***

# 2. Executive Summary

We will increase value of our visitor economy to £1.6 billion (14% growth) by 2023.

This will provide economic, social and cultural opportunities for local people, our communities and our businesses.

We need to ensure we are:

***Recognised as the UK's best destination for Heritage, Culture and Entertainment by 2023.***

By ensuring we:

- Shape and develop our product offer with focus on Maritime Greenwich, Greenwich Peninsula and Woolwich;
- Build our brand and raise our profile;
- Recognise that "Maritime Greenwich" is our attack brand, Greenwich Peninsula our "Development brand" and Woolwich our "emerging brand";
- Connect our riverside assets and improve connectivity across the borough on and off line;
- Enhance our welcome, especially at key gateways;
- Ensure that local people are connected and empowered to benefit from this journey.

# 3. What is a Destination Management Plan?

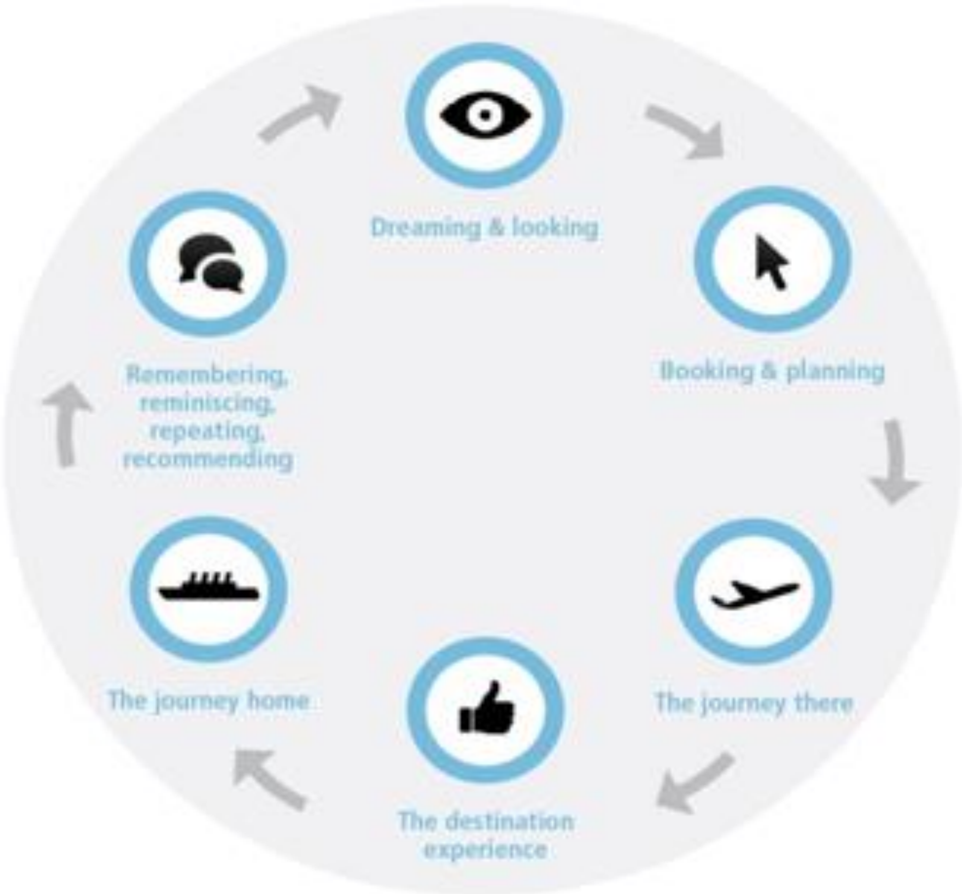
A Destination Management Plan (DMP) is a roadmap that outlines a clear direction for a destination to take in growing its visitor economy. It should address all elements that affect the destination and its potential, from planning, product development and infrastructure to skills, image and marketing.

## 3.1 Definition

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

> 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 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.
>
> 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 credible methods for measuring its success, so that activities can be refined and resources refocused as appropriate to achieve Greenwich's objectives.

## 3.2 Where Should we Intervene?



# 4. Vision and Objectives

## 4.1 Vision for the Destination RBG

*To be recognised as the UK's best destination for Heritage, Culture and Entertainment by 2023.*

## 4.2 Vision for Visit Greenwich

*To be recognised as the most effective DMO in the UK – a private/public organisation growing the value of the visitor economy to create opportunities for local people, communities and businesses.*

## 4.3 Strategic Objectives (by 2023)

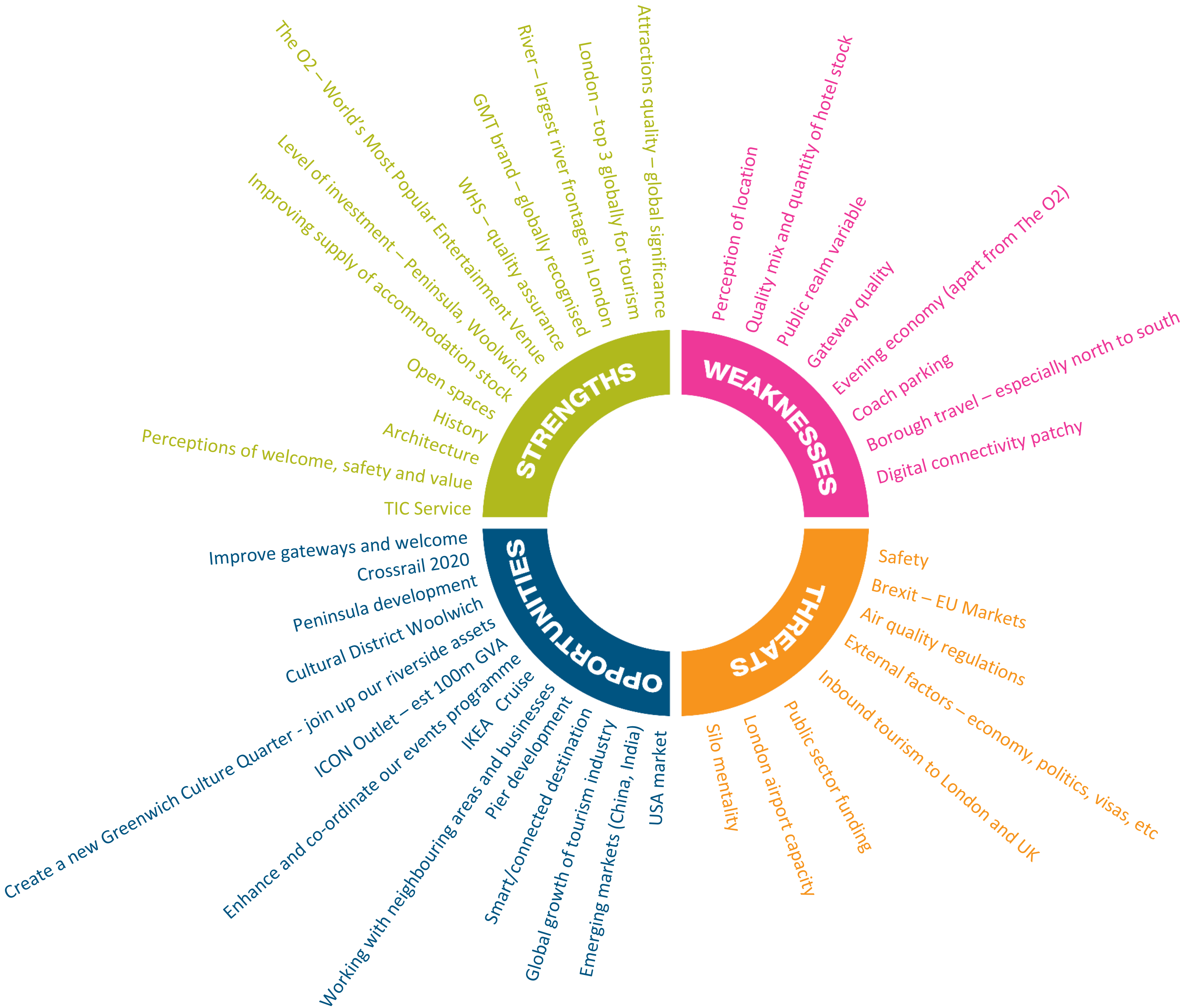
1. Increase the value of our visitor economy – by 14% (from £1.4 billion to £1.6 billion).
2. Increase our share of the London in-bound tourism market - by 0.55% (£200m).
3. Ensure that our tourism growth is sustainable and benefits are spread across the Borough – longer term approach ensuring local people and businesses are on board.
4. Improve transport connectivity to Greenwich and within the borough – three new routes enhanced/created.
5. Demonstrate the value and opportunities that our visitor economy presents to local people, businesses and communities – supporting 17,500 jobs by 2023.
6. Make Greenwich a smart destination - the most digitally connected and accessible place in the UK. Introduce at least one new digital programme to enhance our welcome.
7. Build the Greenwich brand around "heritage, culture and entertainment" and focus on projecting "an eventful destination".

The above will be measured using various systems and metrics including: Tstats, STEAM, local perceptions surveys and visitor surveys.

# 5. Destination SWOT

| STRENGTHS | WEAKNESSES |
|---|---|
| Attractions quality – global significance<br>London – top 3 globally for tourism<br>River – largest river frontage in London<br>Greenwich Mean Time (GMT) brand – globally recognised<br>World Heritage Site (WHS) – quality assurance<br>The O2 – world's No1 entertainment venue<br>Level of investment – Peninsula, Woolwich<br>Improving supply of accommodation stock<br>Open spaces<br>History<br>Architecture<br>Perceptions of welcome, safety and value<br>TIC service | Perception of location<br>Quality mix and quantity of hotel stock<br>Public realm variable<br>Gateway quality<br>Evening economy (apart from The O2)<br>Coach parking<br>Borough travel – esp. north to south<br>Digital connectivity patchy |

| OPPORTUNITIES | THREATS |
|---|---|
| Create a new Greenwich Culture Quarter – join up our riverside assets?<br>Improve gateways and welcome<br>Crossrail 2020<br>Peninsula development<br>Cultural District Woolwich<br>ICON Outlet – es.t £100m GVA<br>Enhance and co-ordinate our events programme<br>IKEA<br>Cruise<br>Pier development<br>Smart/ connected destination<br>Working with neighbouring areas and businesses<br>Global growth of tourism industry<br>Emerging markets (China, India)<br>USA market | Safety<br>Brexit – EU markets<br>Air quality regulations<br>External factors – economy, politics, visas, etc<br>Inbound tourism to London and UK<br>Public sector funding<br>London airport capacity<br>Silo mentality |



STRENGTHS
Attractions quality – global significance
London – top 3 globally for tourism
River – largest river frontage in London
GMT brand – globally recognised
WHS – quality assurance
The O2 – World's Most Popular Entertainment Venue
Level of investment – Peninsula, Woolwich
Improving supply of accommodation stock
Open spaces
History
Architecture
Perceptions of welcome, safety and value
TIC Service
WEAKNESSES
Perception of location
Quality mix and quantity of hotel stock
Public realm variable
Gateway quality
Evening economy (apart from The O2)
Coach parking
Borough travel – especially north to south
Digital connectivity patchy
THREATS
Safety
Brexit – EU Markets
Air quality regulations
External factors – economy, politics, visas, etc
Inbound tourism to London and UK
Public sector funding
London airport capacity
Silo mentality
OPPORTUNITIES
Improve gateways and welcome
Crossrail 2020
Peninsula development
Cultural District Woolwich
Create a new Greenwich Culture Quarter - join up our riverside assets
ICON Outlet – est 100m GVA
Enhance and co-ordinate our events programme
IKEA
Cruise
Working with neighbouring areas and businesses
Pier development
Smart/connected destination
Global growth of tourism industry
Emerging markets (China, India)
USA market

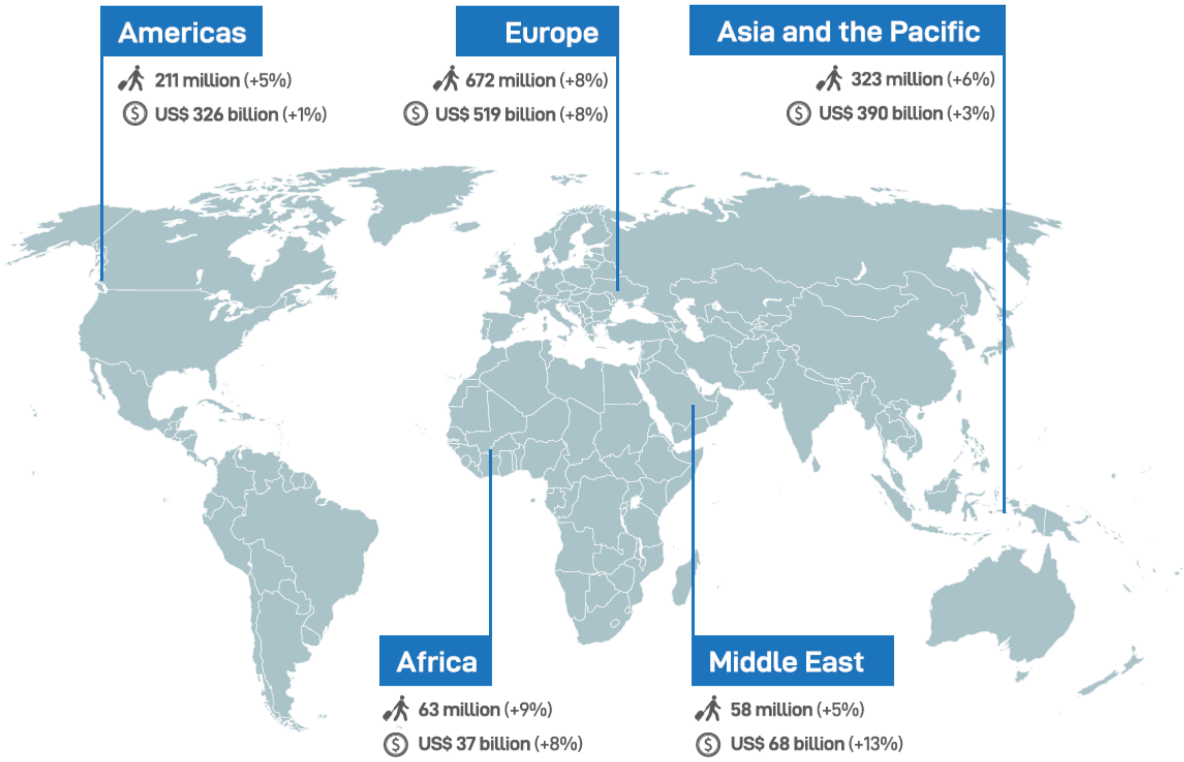
# 6. The Visitor Economy in London, UK, Global – Context

## 6.1 The Global Context

Globally, tourism is worth US$ 7.6 trillion (UNWTO, 2016) and worth 10.2% of world GDP. The direct economic impact of the industry, including accommodation, transport, entertainment and attractions, was approximately US$ 2.3 trillion. It is the world's third top export industry (after chemicals and fuel). Providing 292 million jobs, tourism equates to one in ten jobs globally. In the last 6 years, 23% of all new jobs are tourism-related.

2017 has seen the highest growth in international arrivals since 2010 – an increase of 7% (an extra 1,323 million arrivals). Visitor receipts has risen by 5% (US$ 1,340 billion additional spend).

Europe receives the highest share of visitor arrivals (672 million / 51%) and receipts (US$ 519 billion / 39%).




*Note: Revised and updated as of 13 September 2018*

Source: World Tourism Organization (UNWTO) ©

France receives the highest number of **visitor arrivals** with 86.9 million each year. The UK is in 7th place for visitor arrivals with 37.7 million (UNWTO 2017).

Although the USA is the third top destination for arrivals, it is the top for **visitor receipts**, receiving US$ 210.7 billion per year. The UK is in 5th place, receiving US$ 51.2 billion.

In terms of visitor expenditure globally, China was the **top spender** for outbound tourism, spending US$257.7 billion. It should be noted however that China is currently just 0.7% of the UK market: the 24th largest inbound source market for the UK in 2016, and the 12th for spend.

The USA is the 2nd largest spender at $US 135 billion, an increase of 9% from 2016 to 2017 (the largest increase in absolute terms among the top spenders).

The UK is in 4th place (behind Germany) spending US$71.4 billion abroad.

Regionally, Europe continues to provide the world's largest supply of tourists, generating nearly half (48%) of the world's international arrivals.

## 6.2 The National Context - The Value of Tourism

Tourism in England generates £126 billion a year (direct and indirect), supporting 2.6 million jobs and makes up over 80% of the UK's total visitor economy (Visit England 2017). Tourism works hand in hand with a wide range of sectors across England, including farming, transport, retail, sport, museums and the arts.

Although 2017 was a record year* for inbound tourism to the UK, provisional UNWTO data for 2018 (published January 2019, see Appendix), shows that international arrivals are down 5.3% and spend is down 2.3%. (Note: UNWTO spend figs are in $USD, so the exchange rate may have some influence.)

VisitBritain's forecast for 2018 is for continued growth. It has forecast 40.9 million visits, an increase of 4.4% on 2017. Its forecast for spending by visitors in 2018 is £26.3 billion, an increase of 7.1%.

At the time of writing, VisitBritain is due to publish a review of its forecast, and also a forecast for 2019. Its growth strategy for inbound tourism aims to attract 40 million international visitors a year, spending £31.5 billion, by 2020. And predicted to grow at 3.8% through to 2025.

*[* 39.2 million visits to the UK in 2017, up 4.3% on 2016, with these visitors spending £24.5 billion, an 8.7% increase on 2016. The growth in spending was the highest since 2013.]*

### Visit by Purpose - Inbound

Holidays continue to be the most common reason for visiting the UK. 77% of international tourism spend in the UK is on leisure and 23% business.

There were 15.4 million holiday visits to the UK in 2017, an increase of 11% and accounting for 39% of the total visits. Visits to friends and family (12.0 million) also increased in 2017. The number of business visits fell by 4% to 8.8 million in 2017.

**Visit by Purpose - Domestic**

Domestically, GB residents holidaying at home spent £19 billion in 2017. Day visits account for 92% of all visits and 60% of spend. Top 5 day visit activities – VFR, eating, outdoor leisure, special shopping, night out.

The most frequent reason for overnight visits by UK residents is for holidays:

| | | |
|---|---|---|
| **Holidays** | 47.25m | +47% on 2016 |
| **Visits Friends and Family** | 36.61m | +36% |
| **Business Visits** | 14.17m | +14% |

**Challenges**

Tourism performance is influenced by external factors beyond a destination's control -

**For better:**

- Exchange rates/currency
- Safety & security
- Oil prices
- Consumer spending
- Supply side - air capacity, bed-stock, quality

**For worse:**

- Economic uncertainty
- Terrorism
- Labour market (Brexit)
- Health fears/pandemics
- Nationalist sentiment
- Reputation & welcome (Brexit)
- Perceptions can be more powerful than reality

## 6.3 The London Context

Tourism plays a vital role in London's economy. It employs 1 in 7 of London's workforce (700,000 people) and generates 11.6% of the capital's GDP (£36 billion). London receives 53% of international tourism spend to the UK (£29 billion).

London is the 3rd most visited city in the world by international visitors and is the top non-Asian city, with 19.8 million overseas visits received in 2017, up 4% on 2016 and the 8th straight year of growth (Hong Kong 26.6 million, Bangkok 21.2 million). International spend also reached a record high of £13.55 billion (+14%). *[Source: www.visitbritain.org/nation-region-county-data]*

In addition to international visits, there were 337 million domestic day visits, generating £14.4 billion. The highest share of all tourism expenditure in London comes from domestic day visits, representing almost half of total spend (49%). However, domestic day visits vastly under-index on the share of spend they generate compared to their 91.5% share of volume, due to low spend per visit.

Holiday was the most popular reason to visit, accounting for half of all visits, followed by Study 25%, VFR 18% and Other 6%. London is a year-round destination, receiving visitors in similar proportions across all seasons – Spring 28%, Summer 26%, Autumn 23% and Winter 23%.

72% of visits expressed high satisfaction from their visit. 59% say they'll return in 2 years; 75% at some point in the future.

Intention to visit London remains strong. Over half of all visitors to the UK visit the capital.

### International Visitor Markets

The USA is the top visitor market for London, attracting 2.3 million visits in 2016, spending £1.98 million over 111 million nights. Followed by: France - 2 million visits, Germany - 1.5 million visits, Spain -1.3 million visits. Visit Britain research for 2017 shows that the top 3 markets by volume are the top spending also, but with USA being the top spender followed by Germany and France.

### UK Staying Visits

12.14 million trips, spending £2.68 billion. 4.05 million of which are holiday trips, generating £1.12 billion spend.

92% of trips are by non-UK residents, 16% from SE England.

### UK Day Trips

337 million trips (mostly 1-3 nights), spending £14.38 billion.

In 2017 there was a 5% annual increase in trips and 8% increase in spend.

*[Sources: Great Britain Tourism Survey 2017 and Great Britain Day Visits Survey 2016]*

### Forecast for London Tourism

The London Tourism Vision (2017 to 2025) forecasts that London will attract 40.4 million international and domestic visits annually by 2025 spending £22 billion.

- Top markets (absolute growth) continue to be USA, France, Germany, Italy, Spain.
- Asian markets have higher growth rates, but numbers are still relatively low.
- North America is the best prospect for numbers and growth rates.

It is important to consider the recommendations laid out in the London Tourism Vision to ensure Greenwich benefits from an increased share of the London tourism market. These relate firstly to pre-visit promotion to convince visitors to choose London, and on arrival to improve visitor information and the visitor experience to ensure that visitors do more and see more while they have an excellent experience in London.

The link to download the full Vision is listed in the Appendices.

## 6.4 Future Tourism Trends

#### Market and Social Trends

- Authentic and the Pursuit of Real – making connections, more than a visit
- Personalised and Customised Reality – tailored holidays, infinite choice, filter bubble, death of risk, wish-listing
- Maximising Behaviour – cramming a lot into a short space of time

- Short Breaks & Bucket Lists– more short breaks, less main holidays, bucket list hols every 3/4 years
- Non-traditional – ageing travellers, non-linear family groups, more about interests
- Sharing economy – accommodation, transport, live like a local

**Technical Trends**

- Public driving content creation, brand and experience – DMOs don't control, new curation role
- Power of images - video new currency for storytelling
- Social Media prominence in travel – YouTube, Instagram
- Virtual & Augmented Reality - new and enhanced - experiences pre, post and in destination

**Political and Economic Trends**

- A new relationship with Europe and the rest of the world – borders, visas, workforce, skills, exchange rates
- Industrial Strategy and Tourism
- Over-tourism – hotspots and rebelling residents
- Responsible Tourism obligations

**Research suggests:**

- 'Places stir the soul' – emotional, psychological and physical impact of places
- 'My sort of place' – the need for identification
- 79% want to share connection with a place with others
- Influence of reputation, recommendation, word of mouth, and travel media

*[Source: VB Visit England Future Trends report 2017]*

# 7. Strategic Programmes

## 7.1 Place Shaping

The Greenwich destination comprises a number of core areas with differing characteristics and attributes that gives Greenwich a unique outstanding appeal. With this comes opportunities and challenges for their promotion and development. Broadly, the key 'visitor hubs' can be identified as:

- Maritime Greenwich World Heritage Site (WHS)
- Greenwich Peninsula
- Woolwich
- Rest of borough – for hidden gems, parks, open spaces

This section highlights a number of Signature Projects currently underway that will continue to further shape the destination.

As an overview, Greenwich is known internationally to visitors for its cultural heritage. Visitor attractions are primarily cultural with museums and galleries in the WHS, with increasing new, more active experiences at Greenwich Peninsula such as Emirates Air Line cable car and Up at The O2. The Peninsula is establishing itself as a digital hub, working to the smart city agenda.

The destination has an improving supply of accommodation ranging from budget to luxury and a fair mix of serviced and non-serviced. The supply needs to continue to grow and improve in the range of quality options available. A summary of planned developments and hotels in the pipeline can be found in the Appendices.

In terms of places to eat, Greenwich is seeing a growth in popular chain restaurants such as Bills, Café Rouge, Zizzi as well as pubs, independent cafes and places to eat within the museums and attractions plus fresh and ethnic food at market stalls.

Greenwich's retail offer is varied and improving, comprising regular high street brands and specialist shops, plus the popular and visitor-friendly Greenwich Market. The new ICON Outlet at The O2 opened in October 2018 and has significantly increased and enhanced the retail offer, giving reasons for new audiences to visit, particularly the China market. IKEA opened in February 2019 providing a more local retail attraction.

Greenwich has a strong year-round calendar of events and since the launch of the Greenwich (Tourism) Events Strategy in April 2018, more energy is being given to promoting Greenwich as an 'Eventful' destination. Key 'pillar' events will be promoted as the main drivers to attract new visitors and encourage visitors to explore further, with all the other events continuing to show that Greenwich is ever-changing and is a place to keep coming back to, with family and friends. A new event management and marketing system will work as a 'clash diary' as well as identify gaps and opportunities to attract major events to locate in Greenwich.

Greenwich has the greatest range of transport options of possibly any London destination – the London Underground, Southeastern and Thameslink trains, buses, plus the Docklands Light Railway (DLR) and river services, and London's only cable car, the Emirates Air Line. London City Airport is Greenwich's 'local airport'. Greenwich Ship Tier is the arrival point for around 15 cruise ships each year. Crossrail will be a welcome addition to this transport network, with links to Woolwich and a new station at Abbey Wood, now scheduled for 2020.

**Key projects:**

7.1.1. Greenwich Culture Quarter – linking our riverside assets.

7.1.2. Signature projects – WHS (ORNC relaunch, Painted Hall – ticketed attraction), Cutty Sark 150$^{th}$ anniversary, Creative District Woolwich, Greenwich Peninsula masterplan.

7.1.3. Hotel and other accommodation development plan – encouraging more hotel development in the destination of a type and quality that attracts visitors and increases overnight stays; ideally chains and operators that recognise the value of working with the destination

7.1.4. New transport plan for inbound tourism – focus on DLR and river lines, cycling/electric bikes, coach parking, smart transport. See Appendices.

7.1.5. Co-ordination of Greenwich Events Strategy – new Culture Hosts database system for co-ordination and dissemination; new events; attracting major events. See schedule of events, openings and new developments in the Appendix.

**Key partners:** Royal Borough of Greenwich (RBG), Royal Museums Greenwich (RMG), Greenwich Foundation for the Old Royal Naval College (ORNC), Knight Dragon (KD), Visit Greenwich (VG)

## 7.2 Building the Brand

A brand is what is stored in people's minds - and perception is reality.

What we know is that the Greenwich brand is "smaller" and further to the back of people's minds that we would like it to be. Greenwich is perceived to be "about history" and is not seen as being on London's A list for first time visitors to London. It is seen as a place that can be experienced in half a day. Also many Londoners have never been to Greenwich or "not since school".

We want to reposition the brand and raise its profile – for promoting Greenwich as a destination for leisure and business. A bigger brand proposition, with a higher profile demands greater attention. Greater attention and dwell time leads to greater spend. And greater spend leads to increased profits and job creation.

For example, visitors staying overnight *spend four times more* than day visitors. Business visits spend is even higher, an average of £613 per delegate per event, higher if an international event.

The good news is that we have the product, we just need to present our offer in a different way. A good example of how we should project our "new brand" for leisure visits is seen in the article from OK magazine and a recent blog – in appendix 1.

For business tourism, there needs to be work around establishing Greenwich as a destination for conferences and events; the kind of event that requires a destination solution for its programming and not just a sole venue. Therefore, our focus will be on researching conferences, conventions and similar that are looking for host destinations in three/four years' time and will be attracted by Greenwich. The focus will be on targeting events in sectors that have an affinity to Greenwich, i.e. maritime, tourism, heritage, digital.

**Key projects:**

7.2.1. New branding toolkit – experiential led content for partners.

7.2.2. New "Big Greenwich" campaign – using the toolkit content for key outreach channels.

7.2.3. Marketing support for partners – helping our partners carry the brand better.

7.2.4. Review the Visit Greenwich logo, strapline and look & feel.

7.2.5. Discover England project – helping to animate our offer better and use ICT.

7.2.6. Website development – ensuring we retain an excellent on-line presence.

7.2.7. Business tourism – establishing Greenwich as a London conference and events destination. Researching and targeting events with an affinity to Greenwich themes. Lead generation for partners.

7.2.8. Welcome and product training for front line staff.

**Key partners:** VG, RBG, all VG partners

## 7.3 "Smart Destination"- Getting Connected

The Royal Borough of Greenwich (RBG) is at the forefront of delivering 'Smart City' innovation in the UK. Through Digital Greenwich, inward investment has been brought into the borough and is funding a broad set of 'Smart City' interventions, including water sourced heat pumps for heating council housing, electric assisted bike hire across the borough, electric vehicle charging points and investment in open data to help foster local innovation.

'Smart Mobility' is also an area of strength and leadership for RBG. Through Digital Greenwich's innovation company (DG Cities), a capability and legacy in 'Smart Mobility' is being built, with a number of Connected Autonomous Vehicle (CAV) trials having been successfully completed, a new Smart Mobility Living Lab (SMLL), a national centre of excellence, is being built which will establish Greenwich as a world leader in Connected Autonomous Vehicle and service testing and validation. This will also create further opportunities for enhanced business tourism.

Technology and connectivity are also changing the world in which we live and these advancements are having a significant impact on our sector. "The Internet of Things" (IOT) is already shaping the way places are managed and the way in which consumers plan, think and buy. The 'millennial' segment in particular want instant information and inspiration in one place. They have high expectations and want to be entertained. The tourism marketplace is historically very fragmented so there is an opportunity to begin to package real time experiences in a new and dynamic way. This is now being trialled in many ways via the Discover England Product Development Fund. There is an opportunity to make Greenwich more connected and easier to access and purchase.

Key technology opportunities to help deliver more integrated experiences rest on good connectivity, both fixed and mobile. Through Digital Greenwich and DG Cities work on both SMLL and Digital Connectivity, Visit Greenwich can keep apace with technological developments that we could capitalise on, and working with Digital Greenwich, utilise new sources of funding for innovation projects, with Innovate UK for example, and new business partnerships.

These new technologies and approaches will allow us to:

- Capture more information from visitors through potential public mesh network and Wi-Fi networks, free to use but registration required. Once logged in, we could track aggregate visitor movements and demographics, producing rich insights both for the borough and for retailers and attractions within the borough, helping us to fine tune our experiences and offers
- Better fixed digital information offerings could help deliver critical information (such as TfL network status) and offers to visitors
- Further investment in Digital Connectivity will allow visitors (as well as residents) to enjoy the highest levels of service and speed when connected, cementing Greenwich as both a destination of both historical and future value for visitors.

**Key projects:**

7.3.1. WHS shuttle bus – moving visitors around the site much better, specifically from Cutty Sark Gardens to The Royal Observatory

7.3.2. Driverless car trials throughout the borough to help drive Greenwich's status as a centre for innovation and tourism related demonstrations

7.3.3. Enhanced connectivity including publicly available Wi-Fi in key centres

7.3.4. 5G trials at key tourism destinations to enhance the visitor experience e.g. 5G trial at The O2 with Telefonica

7.3.5. New Welcome App – using augmented reality, virtual reality and portal technology to move visitors around key sites and slow them down

7.3.6. New digital overlays to enhance and personalise our experiences

7.3.7. Enhanced data analytics on visitors, customers and residents with the ability to tailor personalised communications and offers as well as producing rich insights

**Key partners:** Digital Greenwich, DG Cities, RBG, VG, WHS, University of Greenwich, Ravensbourne

## 7.4 Enhancing our Welcome

Our Visitrac surveys indicate that visitors perceive Greenwich to be a welcoming place. However, we can always do better. There are a number of areas where we need to enhance our welcome and our gateways are clearly an obvious starting point.

**Key projects:**

7.4.1. Enhancing our gateways

Improve the welcome, signage, sense of arrival and facilities in particular at:

- Cutty Sark for Maritime Greenwich DLR station
- Greenwich Pier

7.4.2. New Greenwich Peninsula signage scheme

7.4.3. Welcome/product training for front line staff

7.4.4. TIC - face to face welcome service

7.4.5. Website/social media support for visitors in destination.

**Key partners:** RBG, Transport for London (TFL), WHS, VG

## 7.5 Spreading the Benefits

It is important that we spread the benefits of tourism across the whole borough. This will ensure that our visitors have better experiences and that the economic benefit can be spread more evenly to ensure local people and businesses benefit from our growth vision.

The 16,000 jobs in the visitor economy is set to grow by 3.9% by 2023, 1.5% higher than for the rest of the UK. In order to maximise the opportunities this provides for the people of Greenwich, an investment in skills training is essential.

The Government's Tourism Sector Deal has set out four key themes, including a 10-year skills campaign to encourage more people to join the industry. Involvement in the Sector Deal will present significant opportunities for the people of Greenwich.

The overall impact of improved skills provision will ensure a better visitor experience which will increase Greenwich's economic prosperity for the benefit of its employers and local people.

Increasing the number of qualified individuals in the visitor economy will:

- Reduce the negative image of the industry by encouraging the necessity and importance of qualifications which will promote jobs in the industry as fulfilling and rewarding long-term career choices.
- Reduce the turnover rate of the industry by increasing the productivity and value of workers which will result in employers investing more time into their development.
- Reduce the negative effects of EU workers leaving the industry after Brexit by encouraging more UK workers into the industry.
- Modernise the industry by expanding the digital and creative provision offer in Greenwich, thereby allowing for the introduction of more modern industry practices.

**Key projects:**

7.5.1. Cultural Destinations Woolwich programme – new arts and cultural events programme

7.5.2. Creative District signage in Woolwich town centre

7.5.3 Borough-wide dispersal marketing activities – For Woolwich, Eltham, Charlton and Thamesmead

7.5.4. New cycle/electric bike schemes

7.5.5. Workzone – promote the benefits of our sector for employment and careers to local people

7.5.6. Investment in the new "Creative District" in Woolwich

7.5.7. Employment and Skills – improve local skills provision and brokerage to job opportunities

**Key partners:** RBG, VG, FESTIVAL.ORG, Royal Greenwich Heritage Trust (RGHT), TFL, London South East Colleges (LSEC), InterContinental London-The O2

# 8. Target Markets

Greenwich receives 19 million tourist visits each year - a mix of London, UK and international visitors. Over and above this are local residents who do not count in the 'tourist visits' data as they are visiting within their usual environment, but this market remains a key audience for the destination due to the easy potential for repeat visits and spend.

Visit Greenwich works to target key markets that are attracted by values and experiences that Greenwich has, and who are of most value to the destination.

The Target Markets are:

1. Local people – Borough wide
2. Londoners
3. South-east England
4. Rest of UK
5. North America
6. Western Europe – France, Germany, Spain
7. Emerging markets – China and India
8. Business tourists – focus on affinity association sectors e.g. maritime, tourism, digital

### Locals, Londoners and South East

This market tends to be day visitors: families, couples - double-income no kids (DINKS), empty-nesters (couples with no dependent children at home), school trips. There is the opportunity for Greenwich to encourage repeat visits and visits/stays with friends and family (SFR) through events, activities and promoting itineraries to showcase the breadth of things to do and keep coming back for.

### Rest of UK

Primarily short-break visitors to London - families, couples/double-income no kids, empty-nesters, school trips. Greenwich would fit as a short break destination, either as part of a London visit or as a base for a Greenwich and London visit.

### USA & Canada

Holiday visits continue to lead in terms of volume of visits from the North American market. 45% of all visits to the UK from the USA were made for holiday purposes, followed by 25% which were visits to friends and/or relatives in 2016.

London is the leading destination for a trip to Britain, based on the number of nights. North American visitors spent an average of 8 nights per visit in the UK in 2016, longer than the global average.

Two forms of accommodation dominate the picture with 39% of nights spent in a hotel or a guest house and 38% of nights spent for free with relatives or friends.

The average US traveller perceives London as a city with great history and traditions, and one that is easy to visit, though it is considered more expensive and less exciting than some emerging destinations.

**Key motivations for visiting the capital are:**

- history, British culture and royalty, which represent a contrast to the USA
- ease of visiting, language, transport and simplicity of combining with a wider European visit

Although history and heritage are key drivers for visitation to England, some US visitors also want experiences which deliver a sense of adventure and / or challenge.

**Key barriers to visiting London are:**

- it is considered one of the most expensive cities in the world
- there is a perception that London's food is poor value and low quality
- the accessibility of British culture in the US makes some other countries seem more exciting

The summer quarter remains the most important period for Americans to visit the UK. In 2016, 35% of visits from the USA to the UK were made in this third quarter, followed by 26% in the spring quarter. Americans visit the UK less often in the low seasons compared to the average international visitor.

## France

France accounts for 10% of all overseas visits to London *[L&P 2016].*

France is Britain's most important source market in terms of visits and 3rd most important for visitor spending (2016). 42% of spending came from holiday trips and 23% from business visits in 2016. In 2016 the number of business trips was still about 200,000 visits short of the peaks exceeding 1 million last seen in 2006.

London is the leading destination for a trip to Britain. The most popular activities undertaken by French travellers in Britain include shopping, going to the pub, visiting parks and gardens, visiting museums and art galleries as well as castles and historic houses followed by religious buildings.

About 1 in 10 French visits were bought as part of a package or an all-inclusive tour, slightly above the all-market average.

## Germany

Germany is Britain's 3rd most important source market in terms of visits and 2nd most important for visitor spending. 52% of spending came from holiday trips in 2016. In 2016 the number of business trips remained more than 300,000 lower than it was at its record-level in 2006.

London is the leading destination for a UK trip.

The most popular activities undertaken by German travellers in Britain include sightseeing of famous buildings/monuments, particularly castles, visiting parks/gardens and shopping.

One-in-five holiday visits from Germany were bought as part of a package or all-inclusive tour in 2016.

## Spain

The Spanish outbound market is forecasted to exceed 29 million trips abroad with at least one overnight stay by 2020. The UK was the second most popular destination behind France for such trips in 2016. Spain was the 5th most important inbound source market for the UK for volume and

6th for spend in 2016. 42% of spending came from holiday trips, 27% from visits to friends and/or relatives in 2016.

In 2016 the number of business trips (476,000) has outperformed the previous 2007 record for the first time.

London is the leading destination for a trip to Britain. Spanish visitors have a below average propensity to buy their trip to Britain as part of a package or all-inclusive tour.

The most popular activities undertaken by Spanish travellers in Britain include shopping, going to the pub, visiting parks and gardens, visiting museums and art galleries as well as castles and historic houses followed by religious buildings.

### China

China was the 24th largest inbound source market for the UK in 2016, and the 12th for spend. Chinese visitors could be good advocates for Britain as 73% would be 'extremely' likely to recommend Britain for a holiday.

46% of Chinese visits to the UK were made by holidaymakers in 2016. Business visits' share of inbound (18% of 2016 visits) has more than halved compared to ten years ago (41% in 2006).

Chinese visitors in the UK like going shopping, visiting parks and gardens, as well as museums and art galleries.

### India

India was Britain's 18th largest source market in terms of visits and 14th most valuable for visitor spending in 2016. 49% of spending came from business trips and 22% from holiday visits in 2016.

Visits to friends and/or relatives still represent around 30% of all visits from India to the UK.

London is the leading destination for a trip to Britain. The most popular activities undertaken by Indian travellers in Britain include dining in a restaurant, shopping, visiting parks and gardens, sightseeing famous buildings and monuments, visiting castles and historic houses as well as museums and art galleries.

12% of Indian visits were bought as part of a package or an all-inclusive tour, twice the all-market average.

## 8.1 Target Markets – *Example* Product Matrix

We will target the above markets by promoting a primary lead product and secondary product for that market.

| Market | Motivations | Primary lead | Secondary |
|---|---|---|---|
| **Locals** | Things to do for free / value<br>Events<br>Things to do for families | National Maritime Museum<br>Greenwich Park<br>Events<br>Greenwich Market | Woolwich<br>Eltham<br>Charlton<br>Pubs |

| | | | |
|---|---|---|---|
| **Londoners** | A day out<br>Exploring London<br>Families<br>Couples | Greenwich Market<br>Cutty Sark<br>The O2<br>ICON<br>Emirates Airline Cable car<br>Events | National Maritime Museum<br>Woolwich<br>Pubs<br>Planetarium |
| **South East** | Things to do for families | National Maritime Museum<br>Greenwich Park<br>Emirates Airline Cable Car<br>ICON<br>Events | Planetarium |
| **Rest of UK** | Heritage, culture | Royal Observatory<br>The Painted Hall | Queen's House |
| **France** | Shopping<br>Pubs<br>Parks and gardens<br>Museums and art galleries<br>Castles and historic houses | Royal Observatory<br>Greenwich Park<br>The Painted Hall | Queen's House |
| **Germany** | Famous buildings (castles)/ monuments<br>Parks / gardens<br>Shopping | The Painted Hall<br>Greenwich Park<br>Royal Observatory | Greenwich Market |
| **Spain** | Shopping<br>Pubs<br>Parks and gardens<br>Museums and art galleries<br>Castles and historic houses | Royal Observatory<br>Greenwich Park<br>The Painted Hall | Queen's House<br>National Maritime Museum |
| **USA** | Heritage, culture<br>Royalty<br>(Adventure) | Royal Observatory<br>The Painted Hall | Queen's House<br>Cutty Sark<br>Pubs |
| **China** | British icons – bucket list<br>Shopping<br>Parks, gardens Museums, galleries | Prime Meridian/Royal Observatory<br>Cutty Sark<br>The Painted Hall | Greenwich Market<br>ICON Outlet |
| **India** | Restaurant dining<br>Shopping<br>Parks and gardens<br>Famous buildings and monuments<br>Castles and historic houses<br>Museums and art galleries | Prime Meridian/Royal Observatory<br>Cutty Sark<br>Greenwich Park | Pubs |

# 9. Signature Investment Projects

## 9.1 Maritime Greenwich World Heritage Site – our Attack Brand

The Maritime Greenwich World Heritage Site (WHS) comprises the historic town centre, Royal Park and related institutional buildings, and was inscribed by the World Heritage Convention in 1997.

The Maritime Greenwich WHS includes a number of historic buildings representing its maritime importance: Cutty Sark, Old Royal Naval College, National Maritime Museum, Queen's House, Royal Observatory and St Alfege Church.

Maritime Greenwich has eight key attributes which convey Outstanding Universal Value:

- Architecture
- Masterplan of buildings and designed landscape
- The Grand Axis
- The Royal Observatory
- Town Centre and St Alfege Church
- Royal Patronage
- Relationship with the River Thames
- Silhouettes

The WHS is a popular centre of tourism and culture. There have been major capital projects to enhance its historic buildings, landscape and infrastructure, and many high-profile public events making it better known. In 2017 to celebrate the 20th anniversary of its inscription, the WHS held a unique night-time 'Lights Up' event involving the lighting up of the Queen's House, Cutty Sark and Old Royal Naval College. It is the aspiration to hold more of this kind extraordinary event to encourage repeat visits and to stay longer.

Members of the World Heritage Site Partnership work together to maximize the potential benefits for residents and visitor in environmental, educational and economic terms. Continuous improvement, conservation, outreach and fostering the contribution of Maritime Greenwich to the local and London economies have been firm commitments over the years and continue to be so for the future.

The WHS Management Plan sets out a framework for safeguarding the site as an important cultural asset and is a key part of the process for delivering the vision for the site. It is underpinned by a series of goals and objectives and brings together the commitment, policies and aspirations of a variety of stakeholders as a statement of their willingness to work together in partnership for its implementation.

The overarching goals of the Management Plan are:

- to protect, preserve, and enhance the Outstanding Universal Value of Maritime Greenwich World Heritage Site;
- to increase public awareness of the site and promote its educational and cultural value;
- to set down guidelines for the management of the site;
- to establish a programme of works and projects that will enhance the World Heritage Site and improve the enjoyment of Maritime Greenwich for all;
- to achieve excellence of new design appropriate to a World Heritage Site;
- to identify how the economic and cultural benefits of the inscription of the World Heritage Site can be used to the advantage of the local community and businesses;
- to manage the site in a sustainable and environmentally way;
- to focus on the improvement of Greenwich Town Centre

Further information can be viewed here greenwichworldheritage.org

## 9.2 Greenwich Peninsula Master Plan – our Development brand

*(Knight Dragon: artist impression)*

Greenwich Peninsula is seeing an abundance of new development and regeneration taking shape through Knight Dragon's delivery of the Greenwich Peninsula Masterplan.  £8.4 billion is being invested in Greenwich Peninsula to create an evolving community that will be the capital's most boldly modern cultural landscape.

Knight Dragon is a development company with long-term vision and robust financial backing. Its aim is to deliver a distinctive and sustainable new destination at Greenwich Peninsula.

The Masterplan includes:

- 7 neighbourhoods over 150 acres

- 15,000 new homes (including 3,930 affordable homes)
- 13,000 new jobs in a range of commercial and retail spaces
- two new schools for 2,000 Peninsula pupils
- a Design District hosting new designers, makers and artists opening in 2019 -London's first purpose-built district made specifically for the creative community.
- a 5km cultural walkway along the River Thames and intertwining through the site
- 48 acres of new parks, open spaces and leisure uses including a running track
- Peninsula Place – a landmark glass building on top of the present North Greenwich station, comprising apartments, offices and retail.

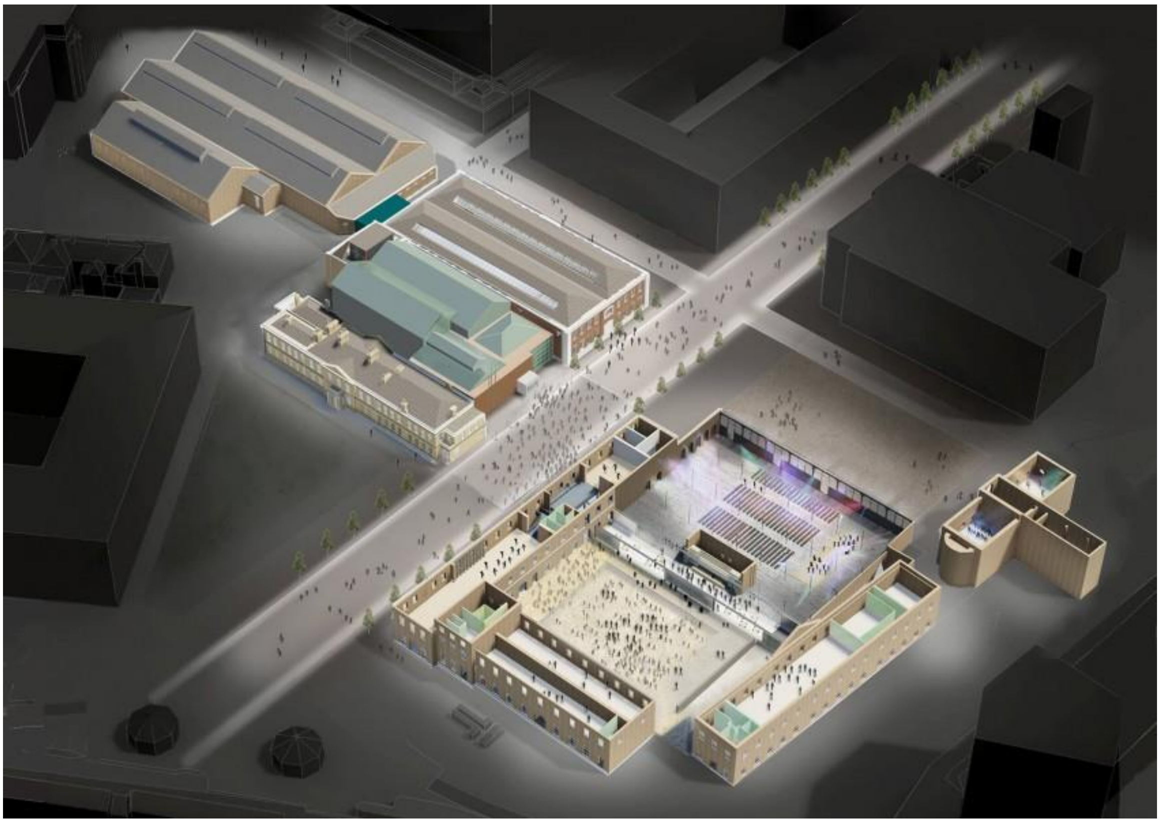
To date over 2,500 homes have been constructed and numerous commercial uses and as the development gathers pace the masterplan vision will be fully realised over the next 10-15 years.

Greenwich Peninsula enjoys a unique position in London set within 1.6 miles of River Thames frontage. It is located just minutes from Central London via the Jubilee Line and is also accessible by buses, MBNA Thames Clippers services and Emirates Air Line, connecting Greenwich Peninsula to ExCeL London.

The Masterplan has been designed to sit within the existing iconic structures and assets such as the world famous The O2, Emirates Air Line and the InterContinental London - The O2. These are shortly to be joined by Magazine London, a new purpose built 24,179 sq. m event space, the largest of its kind in London, opening in September 2019.

Further information on developments and happenings at Greenwich Peninsula, see greenwichpeninsula.co.uk.

## 9.3 Woolwich Creative District – our Emerging brand



Woolwich is embarking on a new chapter as the capital's next seminal cultural destination.

In March 2017, the Royal Borough of Greenwich approved a landmark £31.59 million investment in arts and culture with an additional contingency of £11.16 million.

The site on the River Thames has long been identified as a key driver for the local economy and will provide a new foundation in the continued revival of Woolwich and the surrounding area.

It is anticipated that the new Creative District will provide more than 400 local jobs in addition to new roles during construction.

The district will have a significant economic impact on Woolwich and the surrounding areas and bring benefits to the whole borough, much as the Arsenal did when it was operational.

It will help to reinforce the changing perceptions of Woolwich as a destination and increase the benefits of Crossrail, opening in 2020. It will also support the economic and social development of Woolwich and its surrounding communities, particularly those of Plumstead, Abbey Wood and Thamesmead.

With performance spaces on the size and scale of the Southbank Centre, the world-leading Creative District will include large-scale concert venues, rehearsal and studio spaces, offices, restaurants, and a base for internationally acclaimed theatre companies.

Resident companies confirmed to date include globally renowned Punchdrunk, with almost twenty years' experience creating boundary pushing theatre; Europe's first majority Black and Minority Ethnic orchestra Chineke! Orchestra, Woolwich-based Protein Dance and the Woolwich Contemporary Print Fair.

The flexible space will provide opportunities for public interaction and involvement, training and education, as well as being available for hire for meetings, conferences, celebrations and events.

The major investment will bring a series of landmark historic buildings back into use to form the Creative District. Bennetts Associates have been appointed to carry out the plan to transform five buildings, including:

- a former cartridge factory (Building 17)
- an old ammunitions factory (Building 41)
- a laboratory (Building 18)
- a carriage mounting shop (Building 19)
- the Royal Military Academy (Building 40).

The Grade II and Grade II* listed buildings boast historic, architecturally impressive features and expansive square footage, plus unparalleled acoustics found in the old ammunition factory (Building 41). This will be renovated into a large-scale performance venue with capacity for more than 4,000 people.

New developments include:

- a black box theatre seating up to 450
- an open-sided quadrangle courtyard for performance seating up to 600
- ten rehearsal studios, which can also be used as informal performance spaces
- artists' studios and offices for resident companies
- public facilities, including space for hire for community group and events.

The Creative District is due to be fully operational in 2020.

Further details about the plans can be viewed here.

# 10. Visit Greenwich Executive Roles and Responsibilities

Since its formation in 2014, Visit Greenwich's primary role has been to lead the delivery of the first Destination Management Plan influencing and engaging with stakeholders and partners and developing a 'destination first' mindset. Visit Greenwich is the destination's expert organisation for destination management and marketing and works to identify opportunities and areas for development for the benefit of the economic growth and destination success of the Royal Borough of Greenwich.

Visit Greenwich will continue to oversee the delivery of this next phase of destination management for Greenwich and success as ever will only be as great as the efforts it and its partners put in.

The key areas of work that will further enhance Greenwich as a successful visitor destination are listed below.

## 10.1 Place Shaping

We will work with partners and lobby key decision makers to ensure that our offer is developed in a way that will meet the aspirations of this plan. This will involve working with key asset owners to ensure their decision making is more likely to support our aims and objectives.

We will focus on:

- Supporting inward investment enquiries
- Lobbying for improved transport infrastructure
- Supporting signature projects

## 10.2 Destination Marketing

We will work with our partners to raise the profile of Greenwich and present a different brand to the market place. A brand that demands reappraisal and attention. A brand that is bigger and requires a much longer stay.

We will focus on:

- Attracting high yield markets
- Leading on one major destination campaign per annum
- Supporting partners own marketing to ensure the Greenwich brand is applied properly and consistently

## 10.3 Visitor Services

We will continue to help our 19 m visitors by providing face to face support and also via our digital channels. By giving objective help and guidance we will ensure that our visitors have a richer experience and are much likely to share this with their peers and friends.

We will focus on:

- Providing a warm and professional welcome
- Encouraging visitors to spend longer here and move around the Borough
- Encourage visitors to share their experiences and spread positive word
- Encourage visitors to return

## 10.4 Intelligence & Evaluation

We will continue to measure everything that matters.  Visitor profiles & perceptions, visitor levels and spend. This will help us to measure our progress and it will provide our partners with better intelligence to inform their own decision making.

We will:

- Continue to produce an up to date “destination snapshot”
- Provide monthly performance data for Greenwich and London
- Provide an annual evaluation of the performance of our visitor economy
- Monitor brand recognition and perceptions

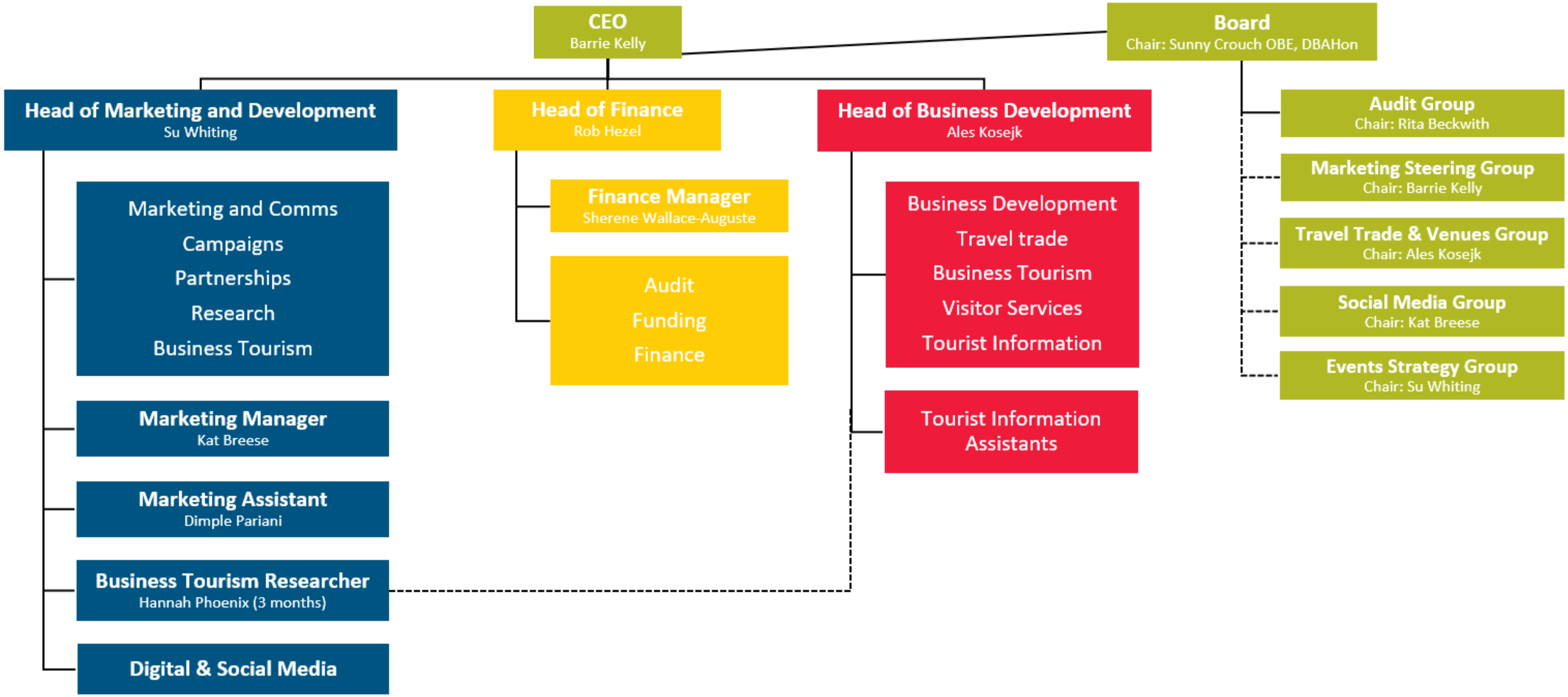
# 11. Governance and Structures

Our Board make up will continue to represent the key tourism delivery bodies across the Borough at the highest level.

## 11.1 Board of Directors

| Name | Role | Company |
|---|---|---|
| Rita Beckwith OBE | Chief Executive Officer | City Cruises |
| Sean Collins | Chief Executive Officer | AEG/MBNA Thames Clippers |
| Sunny Crouch OBE DBA Hon | Chairman | Visit Greenwich |
| Dr Kevin Fewster AM FRSA | Director | Royal Museums Greenwich |
| Rory O'Leary | General Manager | Hotels representative/DoubleTree by Hilton London Greenwich |
| Barrie Kelly | Chief Executive | Visit Greenwich |
| Angela McConville | Chief Executive | Old Royal Naval College |
| Kate O'Hara | Chief Executive Officer | London City Cruise Port |
| Sam Parrett OBE MSc FCIPD | Principal and Chief Executive | London South East Colleges |
| Hugh Player | Director | Greenwich Hospital |
| Cllr Denise Scott-McDonald | Cabinet Member for Environment, Transport and Public Realm | Royal Borough of Greenwich |
| Cllr Miranda Williams | Cabinet Member for Culture, Leisure and Third Sector | Royal Borough of Greenwich |

## 11.2 Organisation Structure and Working Groups



# 12. Measurement and KPIs

## 12.1 Strategic Objectives (a reminder)

1. Increase the value of our visitor economy – by 14% (from £1.4 billion to £1.6 billion)
2. Increase our share of the London in-bound tourism market - by 0.55% (£200 million)
3. Ensure that our tourism growth is sustainable and benefits are spread across the Borough – longer term approach ensuring local people and businesses are on board
4. Improve transport connectivity to Greenwich and within the borough – three new routes enhanced/created
5. Demonstrate the value and opportunities that our visitor economy presents to local people, businesses and communities – supporting 17,500 jobs by 2023
6. Make Greenwich a smart destination - the most digitally connected and accessible place in the UK. Introduce at least one new digital programme to enhance our welcome
7. Build the Greenwich brand around "heritage, culture and entertainment" and focus on projecting "an eventful destination"

## 12.2 Monitoring & Evaluation of Strategic Objectives

We will increase the value of our visitor economy by 14% (OBJECTIVES 1, 2 AND 5)

The visitor economy is currently worth £1.4 billion (2017) 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 just over 16,000 in 2017.

(Focusing on only direct tourism expenditure and direct jobs in 2018, the relevant figures from the STEAM model are £930 million and 11,211 jobs - full time equivalents).

## 12.3 Value of Tourism to Greenwich

*Direct plus indirect impact. 2018 prices.*

| | 2018 | 2019 | 2020 | 2021 | 2022 | 2023 |
|---|---|---|---|---|---|---|
| **REVENUE (£m)** | | | | | | |
| Revenue-Direct | 930 | 967 | 996 | 1,016 | 1,037 | 1,060 |
| Revenue-Indirect | 456 | 474 | 488 | 498 | 508 | 540 |
| S/T Revenue-Direct + Indirect | **1,386** | **1,441** | **1,484** | **1,515** | **1,545** | **1,600** |
| | | | | | | |
| **JOBS** | | | | | | |
| Jobs-Direct | 11,211 | 11,547 | 11,720 | 11,896 | 12,074 | 12,220 |
| Jobs-Indirect | 4,877 | 5,023 | 5,098 | 5,175 | 5,252 | 5,316 |
| S/T Jobs-Direct + Indirect | **16,088** | **16,570** | **16,818** | **17,071** | **17,326** | **17,536** |

Looking forward to 2023, our projections suggest that the following economic impact numbers can be achieved:

- Total direct tourism **expenditure** can go up from £0.93 billion to more than £1 billion in 2023 (2018 prices).

- Direct local **job opportunities** can be added at the rate an average of 9% growth from 2018 to 2023

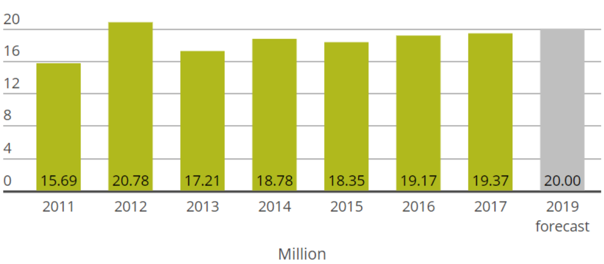
## 12.4 KPIs

### Destination

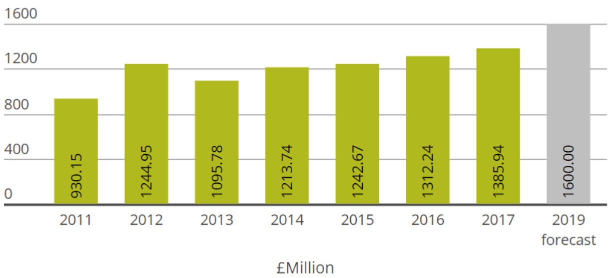
Greenwich attracts 19.37 million tourists each year, spending £1.4 billion (STEAM 2017).

### Annual Value & Volume

Visitor Numbers




Economic Impact




**1.2% increase**
2017 v 2016

**5.62% increase**
2017 v 2016

Further data on destination performance can be viewed at visitgreenwich.org.uk/greenwich-snapshot

### Visitor Perceptions (OBJECTIVE 7)

Our latest Visitrac visitor research (2016-17) reports that satisfaction for their overall visit rates at 9 out of 10. Also ranking highly is the likelihood to recommend at 9 out of 10. Greenwich is seen as a safe place to visit, with 9/10. Friendliness/welcoming and value for money is ranked at a good 8/10.

By 2023, we will continue to measure and monitor visitor satisfaction and strive to achieve 9/10 across the board. We will need to introduce a new measure around the brand positioning "heritage, culture and entertainment".

Satisfaction with Overall Visit Experience


Friendly and welcoming

**Tourist Information Centre Customer Service**


**Feeling of safety**


**Value for Money**


**Likelihood to recommend**


On TripAdvisor, Greenwich has received a Certificate of Excellence 2018 for consistently achieving high ratings from travellers (4.5 out of 5).

2018
CERTIFICATE of EXCELLENCE
tripadvisor

4.5

Greenwich has also been ranked as the 2nd most instagrammed destination in London (behind Camden but ahead of Westminster and City of London).


**Reasons for visiting "Greenwich" (Visitrac 2016-17)**

| | |
|---|---|
| It is a historic destination | 36% |
| For its museums, art galleries, attractions | 30% |
| It is a World Heritage Site | 25% |
| Personal recommendation | 18% |

31% of day visits spent 4-6 hours in Greenwich.  74% of visitors left before 6pm.

28% of visitors arrived in Greenwich without any pre-planning.  Of visitors using a mix of resources and researching online, 24% used TripAdvisor, 20% used visitgreenwich.org.uk and 20% used visitlondon.com.  20% said they also used a TIC.

The most popular things to do according to the Visitrac survey are:

| | |
|---|---|
| Museums, art galleries, attractions | 77% |
| Parks /gardens | 60% |
| Markets | 52% |
| Restaurants | 43% |

**Vox pop surveys filmed in 2018**

Visiting Greenwich

What's Your Favourite Thing About Greenwich?

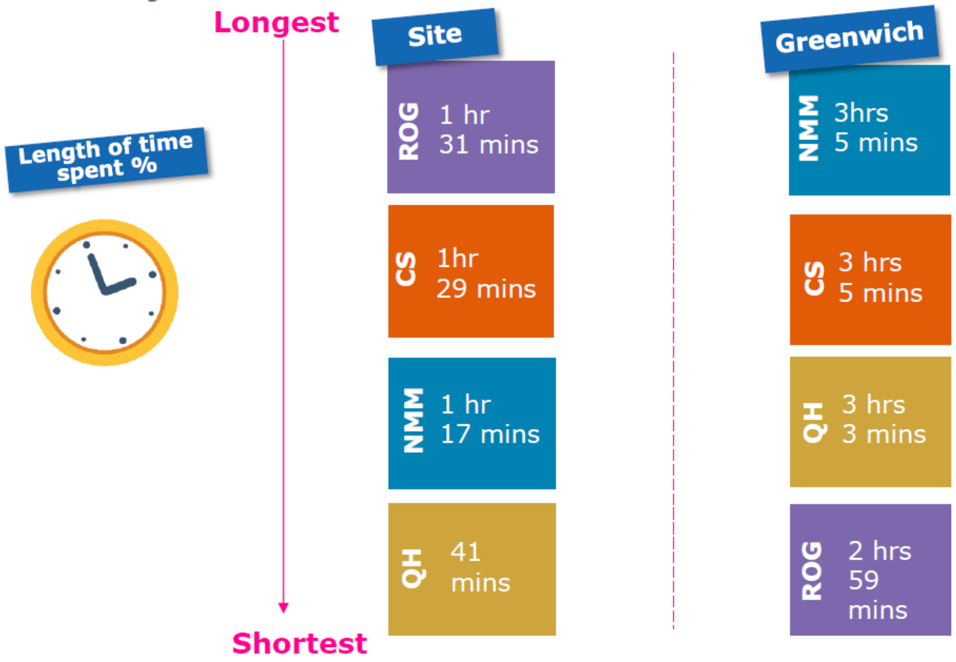
Visitors tell us about their Greenwich experience

Describe Greenwich in Three Words?

https://www.youtube.com/playlist?list=PLwko1pJMGJKFM2GQAl3zhI1nq0srGJ6Te

# Length of time spent in Greenwich and at RMG site

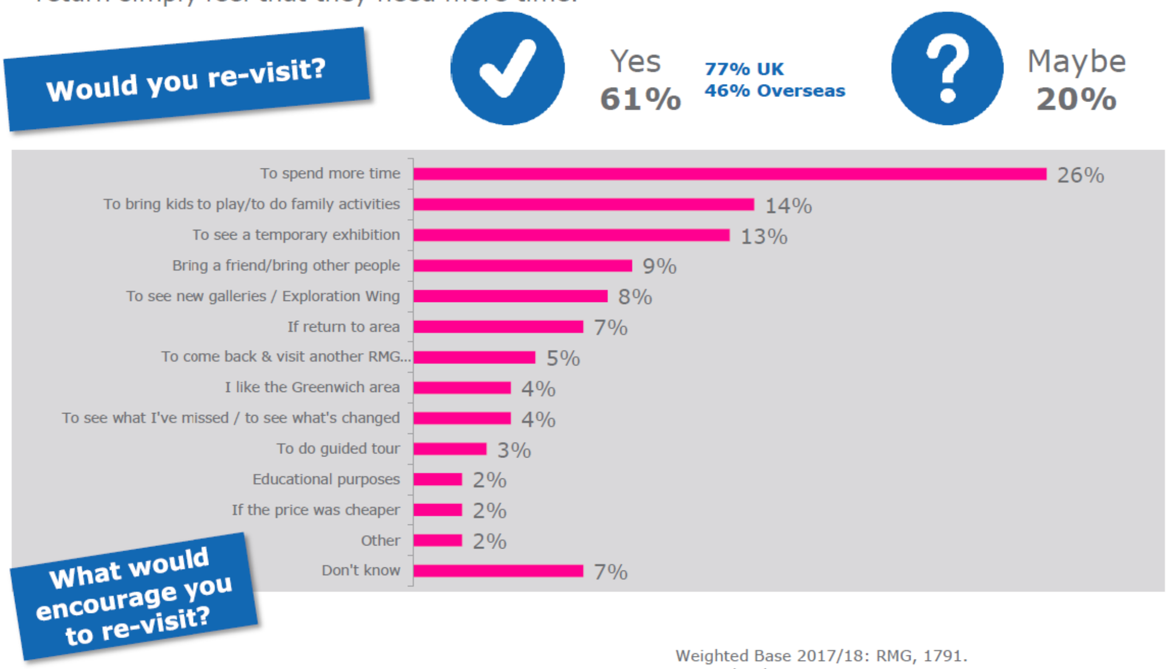
Nearly two thirds of visitors spend 1 – 2 hours at RMG, with a mean score of 1hr 20mins; nearly half of the time they spend in Greenwich overall (3 hrs 2mins). ROG or CS visitors spend the longest amount of time at the individual sites.



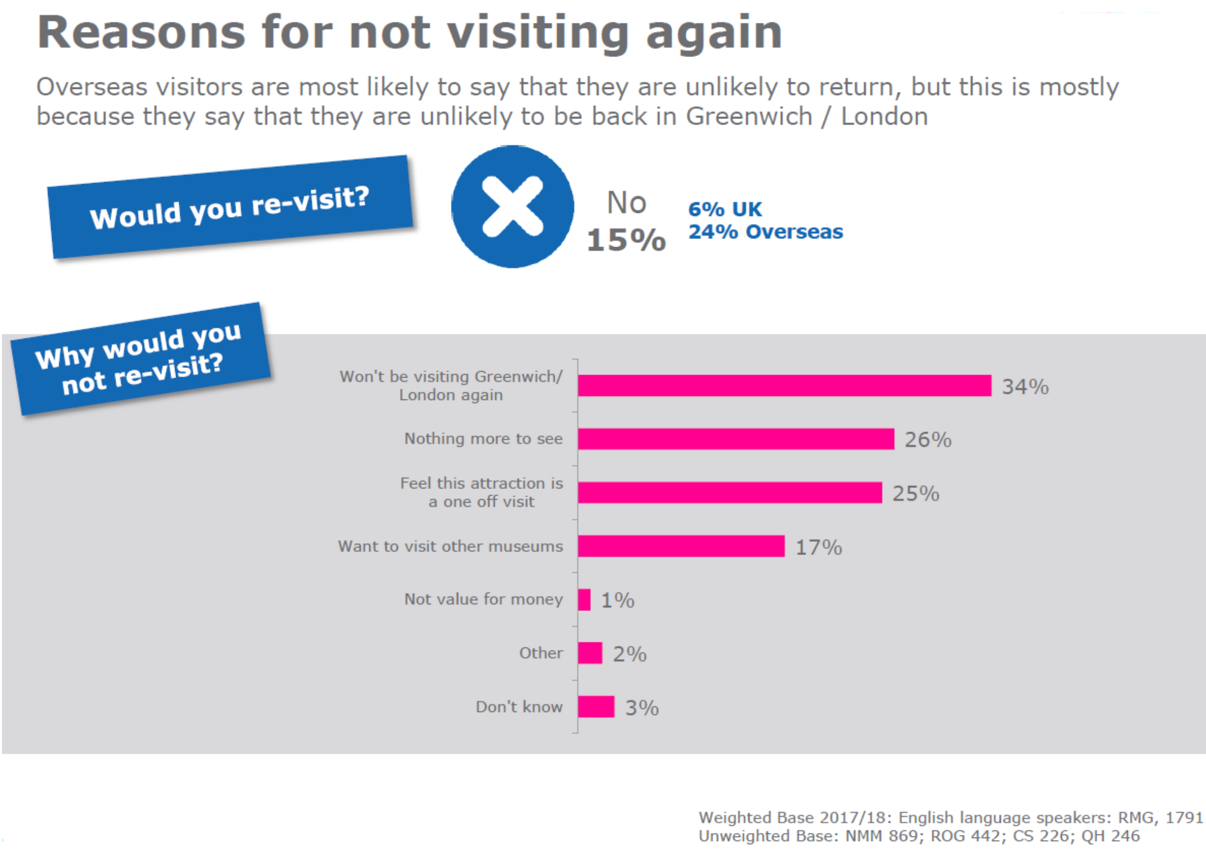

Weighted Base 2017/18: RMG, 3060.
Unweighted Base: NMM, 1344; ROG, 868; CS, 426; QH, 422

# Encouraging re-visitation

Despite the increase in overseas visitors, audiences across RMG are more likely to say that they will be back – this is particularly true for UK visitors. Many of the visitors who intend to return simply feel that they need more time.




Weighted Base 2017/18: RMG, 1791.
Unweighted Base: NMM, 1344; ROG, 868; CS, 426; QH, 422




**Industry recognition – media and industry bodies (CORPORATE MISSION TARGET)**

In 2018, Visit Greenwich has been successful in attaining a number of industry awards:

- UKinbound Awards for Excellence 2017: Winner, DMO of the Year
- CIM Travel Marketing Awards: Runner Up, Digital Marketing Campaign of the Year
- World Travel Market International Travel & Tourism Awards 2018: Finalist, Best Regional/City Campaign

We will continue to work on campaigns and activities that give further opportunity for at least one award submission every year.

## 12.5 Local Engagement/Spreading the Benefits

New targets required:

Woolwich performance stats

RBG residents survey – annual

## 12.6 VG Corporate Targets

| | 2019/2020 | 2020/2021 | 2021/2022 | 2022/2023 |
|---|---|---|---|---|
| **Commercial partners** | 135 | 140 | 145 | 150 |
| | | | | |
| **Marketing ROI** | >30:1 | >30:1 | >30:1 | >30:1 |
| | | | | |
| **TIC reach/ROI** | 400,000 >20:1 | 400,000 >20:1 | 400,000 >20:1 | 400,000 >20:1 |
| | | | | |
| **Online reach** | 2m | 2.1m | 2.2m | 2.3 |
| | | | | |
| **Social media reach** | 28,000 | 32,000 | 38,000 | 44,000 |

## 12.7 VG Budget

| | 2019/2020 | 2020/2021 | 2021/2022 | 2022/2023 |
|---|---|---|---|---|
| **Income** | | | | |
| | | | | |
| **RBG** | | | | |
| **Commercial** | 210 | 220 | 230 | 240 |
| **TIC** | 550 | 600 | 650 | 650 |
| **Other** | 100 | 40 | 40 | 40 |
| | | | | |
| **Expenditure** | | | | |
| | | | | |
| **Staff** | | | | |
| **Marketing** | | | | |
| **TIC** | | | | |
| **Overheads** | | | | |

# 13. Appendices and Useful Links

A full list of appendices is available on request.

Please contact: **partnership@visitgreenwich.org.uk**

- The Visitor Economy – additional UK and London context
- Investment Pipeline
- Approved Hotel Development Sites
- Integrated Inbound Transport Strategy work
- 'Eventful Greenwich' gantt chart
- Economic Impact Summary – 2017 Headline Data
- UNWTO World Tourism Barometer
- Visitor Perceptions
- Importance of Skills – London South East College

**Click on the titles to open these reports**

UNWTO Tourism Highlights 2018 edition

VisitBritain research and insights

VisitBritain Business Events research

London & Partners, London Tourism Vision 2017 to 2025

Visit England Future Trends report 2017

Visit Greenwich Snapshot