visit greenwich

Royal Borough of Greenwich Destination Management Plan: Review and Update 2015

November 2015

Prepared by

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time after time

In association with

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International Destination Consultancy

Contents

Section 1: Introduction

1.1 Context

The first Greenwich Destination Management Plan (DMP) was developed in 2014. Its aim was to provide a platform to stimulate the growth of the visitor economy throughout the Borough of Greenwich – and particularly to increase jobs for local people and revenue from visitors in the Borough, with a particular focus on Greenwich town centre/World Heritage Site, North Greenwich/Peninsula, Woolwich and Eltham. The 2014 DMP set out a clear, ambitious vision and a number of actions to be undertaken by Visit Greenwich and its partners to achieve this aim. It is our intention to review the DMP on an annual basis.

This review looks at changes in the last year, assesses progress against the original 2014 DMP and makes recommendations for future priorities.

1.2 Aims

The aims of this review are:

- To review **progress** against the original DMP (2014);
- To identify **critical/outstanding issues** facing the development of Greenwich's visitor economy;
- To revise **economic impact projections** were required;
- To set future **priorities.**

1.3 Critical Success Factors

As identified in the 2014 DMP, 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 across the Borough.

The greatest challenge remains for major Greenwich stakeholders to work effectively together to deliver this growth, while at the same time pursuing success in their own individual businesses. Most significantly this requires a strong commitment to destination development by all key stakeholders to be successful – a "Destination First" mind-set, which drives growth both to the destination and, thereby, to individual businesses.

Section 2: Progress Against Objectives

2.1 The Big Picture: Revenue and Jobs

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

Based on STEAM economic impact figures (see tables below), the long-term projection for revenue and employment growth associated with tourism remains optimistic and relatively consistent to 2019, if slightly more positive than the picture forecast in 2014. Two scenarios have been assessed primarily to ensure that we have better consistency with the original DMP, which did not include projections for retail development at The O2.

Scenario A: Excluding estimates associated with the opening of The O2 retail development

+29% increase in revenue by 2019
+ 26% increase in jobs by 2019

This amounts to an average growth in jobs associated with the visitor economy (both direct and indirect) over the period to 2019 of c. +800 jobs per annum.

The picture in 2014 was as follows:

Projections in 2014 DMP

Table 1: Value of Tourism to Greenwich – direct and indirect (2013 prices)

The Value of Tourism to Greenwich	2013	2018 target	Increase 2013-2018
REVENUE (£m)			
Revenue-Direct	737.4	943.4	206.0
Revenue-Indirect	360.7	464.6	103.9
S/T Revenue-Direct + Indirect	**1,098.1**	**1,408.0**	**309.9 (28%)**
JOBS			
Jobs-Direct	9,806	12,148	2,342
Jobs-Indirect	4,234	5,223	989
S/T Jobs-Direct + Indirect	**14,040**	**17,371**	**3,331 (24%)**

Source: Derived from STEAM figures

The picture in 2015, excluding estimated growth associated with the opening of The O2 retail development is as follows:

Table 2: Current Projections in 2015, excl. O2 growth – direct and indirect impact (2014 prices)

The Value of Tourism to Greenwich	2014	2019 target	Increase 2014-2019
REVENUE (£m)			
Revenue-Direct	815	1,055	240
Revenue-Indirect	399	520	121
S/T Revenue-Direct + Indirect	**1,214**	**1,575**	**361 (29%)**
JOBS			
Jobs-Direct	10,607	13,364	2,757
Jobs-Indirect	4,621	5,880	1,259
S/T Jobs-Direct + Indirect	**15,228**	**19,244**	**4,016 (26%)**

Source: Derived from STEAM figures

Scenario B: including estimates associated with the opening of The O2 retail development

+33% increase in revenue by 2019
+ 28% increase in jobs by 2019

The picture in 2015, including estimated growth associated with the opening of The O2 retail development (largely in day visits to The O2), is as follows:

Table 3: Current Projections in 2015, incl O2 growth – direct and indirect impact (2014 prices)

The Value of Tourism to Greenwich	2014	2019 target	Increase 2014-2019
REVENUE (£m)			
Revenue-Direct	815	1,087.2	272.2
Revenue-Indirect	399	535.5	136.5
S/T Revenue-Direct + Indirect	**1,214**	**1,622.7**	**361 (33%)**
JOBS			
Jobs-Direct	10,607	13,577	2,970
Jobs-Indirect	4,621	5,974	1,353
S/T Jobs-Direct + Indirect	**15,228**	**19,551**	**4,016 (28%)**

2.2 Challenges and Objectives

Last year we summarised the main challenges facing Greenwich, set six key objectives, and proposed a series of action to address these as follows:

2.2.1 Challenges

Greenwich has an outstanding tourism product, which is justifiably famous. But it is slightly 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" mind-set, 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 almost 96% of Greenwich's visitors and c. 85% of Greenwich's direct tourism revenue.

We identified Greenwich's major challenges as:

- 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.

2.2.2 Objectives

We set six key objectives to address these challenges in growing Greenwich's visitor economy:

- Distinguish Greenwich as a **distinctive destination** (acknowledged that this needs to be made smart or revised – visitrac research needs to include a new question on "distinctiveness")
- 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**.

2.3 Progress 2014-2015

How did we perform?

2.3.1 Progress against High-Level Objectives

Overall, the direction of travel is positive. We have achieved a robust basis for marketing Greenwich, based on a strong brand theme; clocked up high single percentage increases in both visitor numbers and revenue; and put in place a range of new products, which will provide a sound foundation for future growth and repositioning of Greenwich to attract a higher-yield market.

Against our six key objectives we achieved the following:

Objective 1: Distinguish Greenwich as a distinctive destination

Achieved:

- Developed '*Time after Time*' theme and implemented this in VG's marketing.
- Persuaded stakeholders to use the '*Time after Time'* theme in some of their own marketing communications.
- Developed a new suite of marketing collateral for the leisure, conference and cruise markets.
- Developed a new "responsive" website and social media channels (Twitter and Instagram being key).
- The World Heritage Site has developed a new master plan.
- A new master plan for Greenwich Peninsula has been produced by Knight Dragon and RBG
- Planning permission was granted for the revised and upgraded London City Cruise Port.
- RBG's commitment to Tall Ships in 2017
- RBG's commitment to Greenwich & Docklands International Festival/Royal Greenwich Festivals programme
- RBG's emerging cultural strategy for Woolwich.
- Greenwich Hospital's investment in Greenwich Market plus general retail and food & drink upgrades in the town centre.

Objective 2: Increase dwell-time and spending by day visitors in Greenwich

Achieved:

- Number of day visitors increased by almost 9% from 16,482,000 in 2013 to 17,932,000 in 2014.
- Direct expenditure by day visitors increased by c. 6% from £650.4m (at 2013 prices) in 2013 to £691.6m (at 2014 prices) in 2014.
- Developed a new welcome and wayfinding signage scheme with RBG and WHS (to be implemented in 2016/17).
- Enhanced the performance of the TIC/plans to integrate the TIC more closely with ORNC for 2016.
- Increased usage of new mobile friendly website by visitors whilst in Greenwich.
- Increased reach of visitors in destination via our Twitter network - @visitgreenwich. Instagram is working well also
- Enhancements to existing product offer e.g. Greenwich Market, The Painted Hall, Eltham Palace, Emirates Air Line etc.

Objective 3: Increase day visits to Greenwich outside the main season

Achieved:

- Day visitors in Q1 (Jan-March) increased by just over 9% from 3,662,000 in 2013 to 4,007,000 in 2014.
- Day visitors in Q4 (Oct-Dec) increased by just over 6% from 3,705,000 in 2013 to 3,944,000 in 2014.
- Improvement in the festivals and events programme – Royal Greenwich Festivals, Greenwich Comedy Festival (Sept), Greenwich Music Time (night time), Totally Thames (Sept), London Open House (Sept), Greenwich Market events.
- Major investment in RMG's exhibition programmes e.g. NMM's Ships Clocks and Stars 2014 and Samuel Pepys' Plague, Fire, Revolution (Nov 2015).
- Planning permission granted for retail development at The O2, planned for 2017.

Objective 4: Position Greenwich as a place to stay for business travellers with business in London

Achieved:

- Major investment in hotel development on Greenwich Peninsula. The 5* InterContinental London - The O2 officially opens 1st December 2015. 452 bedrooms, vast conference and events space for c 3,000 delegates
- VG working with the University of Greenwich to create a new conference co-ordination and management unit.
- This is a medium-long-term objective, which depends on the development of new, business-friendly products, particularly suitable hotel capacity. The recent addition of mid-range hotels and the impending opening of the 5-star Intercontinental Hotel in December 2015 will provide a sound basis for achieving this objective – both in terms of increasing the number of business travellers and attracting conferences, as well as increasing the yield per visitor.
- We have developed new high level "Venue content" on the visitgreenwich website and we plan to create a business tourism toolkit for our partners

Objective 5: Establish Greenwich as a UK short break destination

Achieved:

While length of stay by staying visitors is not broken down, the overall number of staying visitors and the amount they spent increased as follows:

- Number of staying visitors increased by 15% from 733,100 in 2013 to 845,600 in 2014.
- Expenditure by staying visitors increased by 20% from £153.2m in 2013 to £183.83m in 2014.
- Significantly too, while both day-and staying-visitors increased in 2014, the ratio of expenditure between day and staying visitors is moving very slightly in favour of staying visitors: from 14% spent by staying visitors / 86% by day visitors in 2013 to 15% spent by staying visitors / 85% by day visitors in 2014 (historic prices, based on 2009 baseline).
- New hotel opened – Travelodge (Sept)
- New hotel to open - InterContinental (Dec).

- New apartment capacity – StayCity apartments x 2 and Apple Apartments.
- Existing hotels performing at a high level of 90% occupancy.

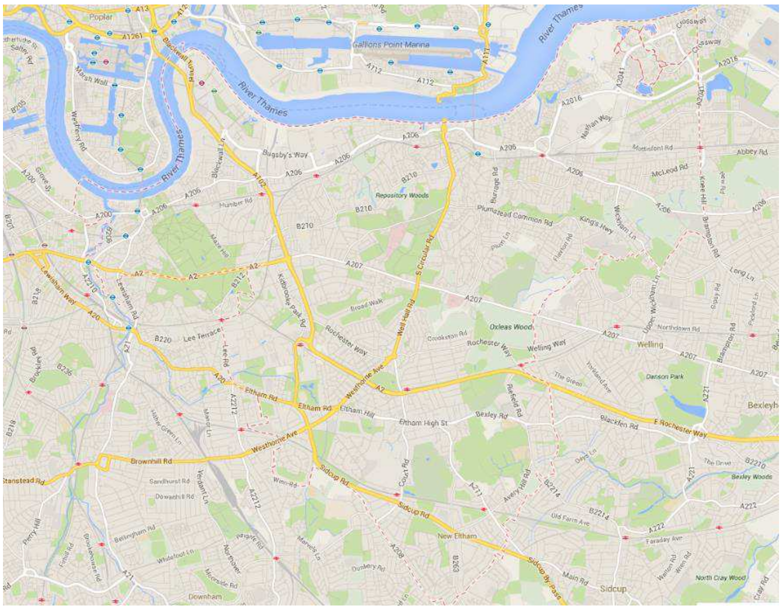
Objective 6: Establish Greenwich as a premium national and international conference destination

Status:

This is a medium-long-term objective, which depends on new conference product developments, particularly the impending opening of the 5-star InterContinental London The O2 in December 2015.

VG is working with London City Airport to promote the airport links and access to quality venues in Greenwich and The Royal Docks area.

2.3.2 Visitor Economy Infrastructure: Progress against Planned Developments



Changes in visitor-critical infrastructure since 2014 and their implications for Greenwich are:

Accommodation

2014 DMP statement:

Until fairly 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 five star hotel and conference centre.

2015 status:

The total number of existing and planned bed spaces for Greenwich in 2015 represents an increase of c. 21% over the number existing and planned in 2014. Some of the plans for budget hotel developments have stalled and the InterContinental London - The O2 represents the greatest single growth in bed spaces, scheduled to open in Nov 2105. (See *Accommodation Developments 2015 compared to 2014* below and *Appendix 1 Product Inventory Comparison*)

Implications:

The growth in upscale accommodation, as well as conference-quality rooms and space, primarily in the InterContinental London - The O2, offers an opportunity to attract new markets to Greenwich – particularly conferences and corporate business. This is already happening, with some corporates switching major events from central London and planning to use the new accommodation in Greenwich for their London events and exhibitions.

Places to Eat

2014 DMP statement:

In terms of places to eat, Greenwich has no iconic, signature restaurant as such. 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.

2015 status:

Bills restaurant will shortly open in Greenwich town centre.

Implications:

The Greenwich market upgrade, upscale hotel development, and planned O2 retail development will send a message that Greenwich is changing and provide the critical mass required to attract new, higher quality restaurant investment.

Retail

2014 DMP statement:

Greenwich's retail offer is varied, comprising regular high street brands and specialist shops, plus the highly 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.

2015 status:

Greenwich market is being upgraded and The O2 retail development is planned to open in late 2017. This will significantly change Greenwich's retail offer: the O2 will attract high-spending international visitors, particularly Asians and specifically Chinese, as well as domestic visitors and residents of London and the South East, the latter driven perhaps more by curiosity than a desire to splurge. Nevertheless, it offers another string to Greenwich's bow to attract regional visitors and, by bringing them into the area, the opportunity for other businesses in Greenwich to attract them to linger and spend in the Borough. Optimising visitors' presence in Greenwich, in terms of attracting them to spend more, will depend on good transport links between North Greenwich and Greenwich Town, as well as on clear information about these links. The market revamp will offer a 'refreshed product' to attract regional visitors, particularly at weekends.

Also the high street in Eltham town centre is being enhanced with new investment in public realm and a multiplex cinema complex.

Transport/Connectivity

2014 DMP statement:

While transport to Greenwich can be confusing and overwhelming 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 MBNA Thames Clippers and City Cruises, and the unique Emirates Airline cable car. London City Airport is Greenwich's 'local airport' and the new London City Cruise terminal for London to open in 2017 at Enderby Wharf will attract new yield international visitors. Crossrail too will be a welcome addition to this transport network, with links to Woolwich and a new station at Abbey Wood scheduled for late 2018.

2015 status:

Works involving temporary but long-term (2015-18) disruption to Greenwich rail services from central London (Charing Cross) have resulted in a shift eastwards of the Greenwich access hub to London Bridge. This is significant in perceptual terms, as it undermines the notion of easy access to Greenwich from central London. Nevertheless, longer-term and particularly with Crossrail, rail access to Greenwich should be even better. The cruise terminal remains scheduled to open in 2017/18. Two new MBNA Thames Clipper vessels have just been launched, further improving the capacity and quality of transport on the river.

Implications:

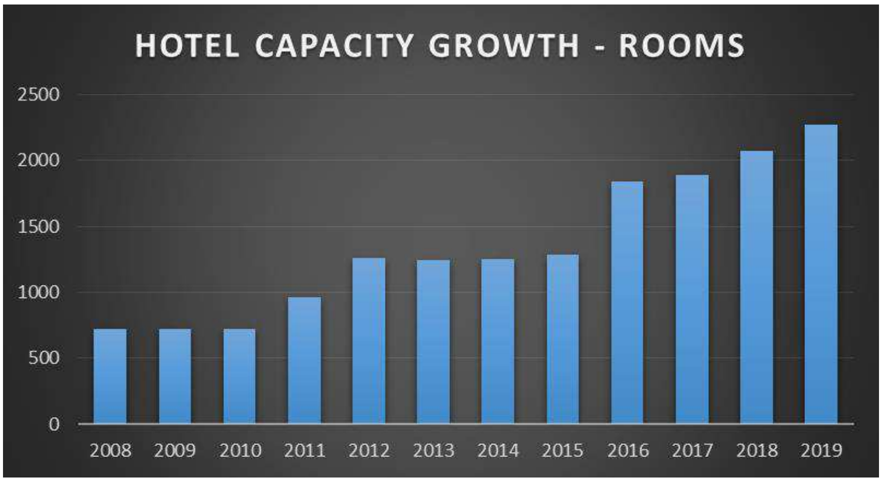
This is a long-held perceptual, rather than real, issue. Nevertheless, addressing perceptions/misperceptions and promoting Greenwich's accessibility will be critical to Greenwich's success. This will require balanced communications about surface and river transport, whereby messaging about the speed and ease of surface transport is in harmony with the more leisurely alternative of river access. Retaining a percentage of cruise passengers in Greenwich and encouraging them to see Greenwich as a destination in its own right, rather than just a gateway, will require astute marketing.

Hotel Growth to 2019

Hotel capacity in The Borough of Greenwich is predicted to more than double by 2019 (+c. 213%), from 725 rooms in 2008 to 2,270 rooms in 2019.

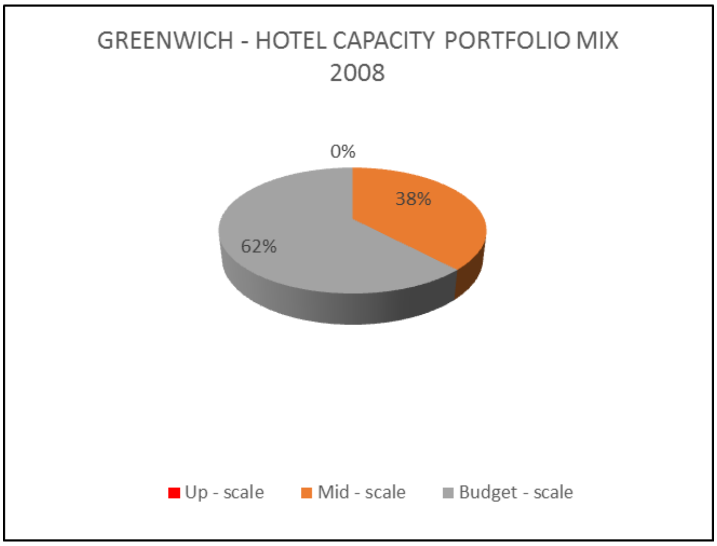
Table 4: Greenwich Hotel Capacity Growth 2008-2019 (Rooms)

The greatest growth will come from upscale accommodation. However, budget properties are likely to remain the dominant hotel sector in terms of the number of rooms and bed spaces.



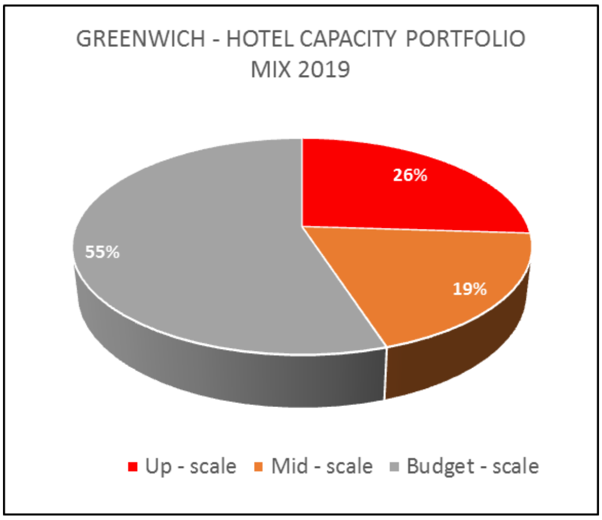
In 2008, Greenwich's accommodation inventory comprised exclusively budget-mid-scale properties, with no upscale properties of 4-star or above.

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



But this is changing. By 2019, upscale properties are projected to account for c. 26% of Greenwich's rooms. The growth in apartments, which reflects a nationwide trend of aparthotel development, will add to the range of quality-upscale accommodation in Greenwich.

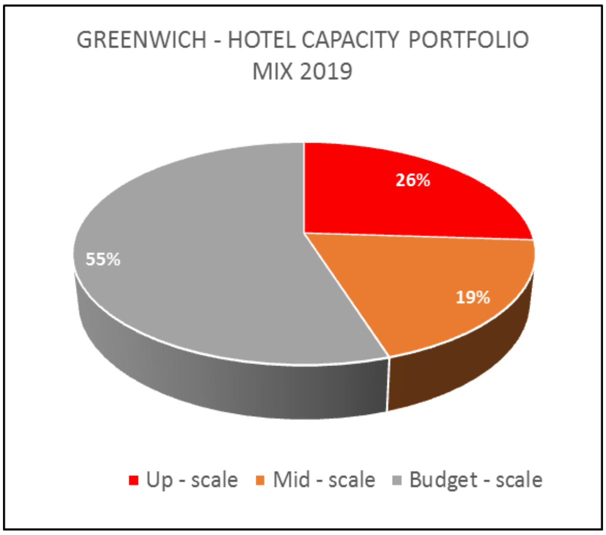
Table 6: Greenwich - Hotel Capacity Portfolio Mix (2019)

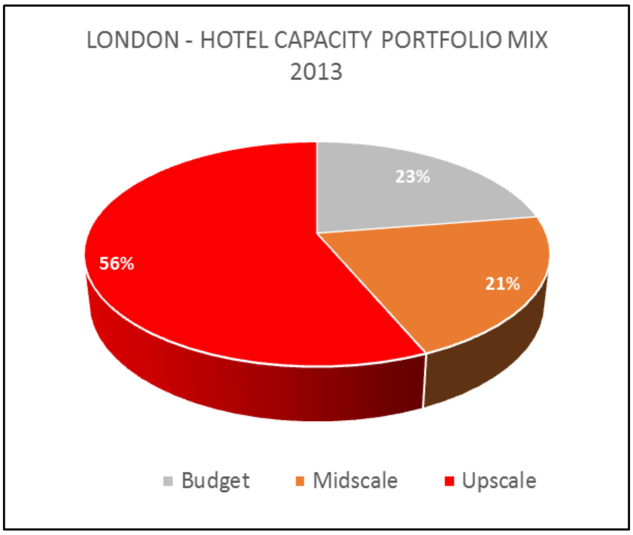


This compares with London as a whole:

- Upscale rooms: Greenwich 26% (2019) vs. London 56% (2013)
- Budget rooms: Greenwich 55% (2019) vs. London 23% (2013)

Table 7: Greenwich 2019 vs. London 2013 - Hotel Capacity Portfolio Mix





Accommodation Developments 2015 compared to 2014

Total Hotel Capacity

HOTELS	2014 status	2015 status	Comment
Existing stock	1,219 rooms	1,219 rooms	No change
Planned future stock	1,232 rooms	1,486 rooms	**21%** increase

Existing

- No change in number of existing total number of hotel bedrooms which remains at **1219 bedrooms**
- This will, however, change imminently with the opening of 2 major new hotel developments:
  - InterContinental London – The O2**,** with **453** bedrooms, is the most significant new opening scheduled for Q4, 2015
  - Travelodge (Greenwich High Road) with **104** bedrooms, opened in September 2015

Planned

- Planned new hotel developments increased by **21%** to **1,486** rooms (September 2015) from 1,232 rooms (2014)
- This increase in planned stock is largely due to the inclusion of **500 rooms** in the Greenwich Peninsula Masterplan scheduled for development within 5 – 10 years
- A further increase in planned stock is from a new **100 bedroom hotel** - Cross Quarter at Abbey Wood – where a Sainsbury's store is also planned
- 2 planned hotels have now switched use to alternative developments:
  - Enderby Wharf – planned 251 bedroom hotel now changed to a residential development
  - Travelodge Charlton – planned 120 bedroom hotel now changed to a retail development

Total Serviced Apartment Capacity

APARTMENTS	2014 status	2015 status	Comment
Existing stock	80 apartments	201 apartments	151% increase
Planned future stock	161 apartments		2 developments completed summer 2014

Existing

- Large % increase in the number of apartments **(+151%) to 201** is due to the significant new development by StayCity in 2 separate locations:
  - StayCity Deptford Bridge: **93** serviced apartments
  - StayCity Greenwich High Road: **68** serviced apartments

- The confirmed figure for Apple Apartments in 2 locations in 2015 is 29 which is significantly less than the estimated figure when the 2014 report was compiled, at which point they were testing the market. The 29 apartments do however include 1, 2 and 3 bedroom apartments

Planned

- The 2 StayCity 2014 planned developments (see above) opened in summer 2014 but after the DMP was prepared, hence reflected in the 2015 status figure.
- No information currently available on new serviced apartment developments.

Total Guest Accommodation Capacity

GUEST ACCOMODATION	2014 status	2015 status	Comment
Existing stock	89 bedrooms	94 bedrooms	6% increase

Existing

- The 6% increase is due to one small 5 bedroom development above The Pelton Arms.

Total Youth Hostel Capacity

YOUTH HOSTELS	2014 status	2015 status	Comment
Existing stock	84 bed spaces	84 bed spaces	No change
Future stock		8 bed spaces	8 additional bed spaces planned

- St Christopher's Inn Hostel plans an 8 additional bed spaces.

Camping & Caravanning Capacity

APARTMENTS	2014 status	2015 status	Comment
Existing stock	312 bed spaces	312 bed spaces	No change

- No change in the number of pitches which remains at 156 so, working on basis of 2 people per pitch, equates to 312 bed spaces.

Total University Accommodation (summer only)

UNIVERSITY ACCOMMODATION	2014 status	2015 status	Comment
Existing stock	1530 bed spaces	2574 bed spaces	68% increase

- Due to changes in ownership difficult to obtain reliable data.
- While the figures suggest a significant increase, the fluid situation means it is unwise to draw any conclusions until the data can be substantiated.

Appendices

Five appendices are attached. These 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. There is also a comparison between inventory planned in 2014 and delivered/still planned in 2015. These appendices are:

Appendix 1: Greenwich Product Inventory Comparison (2014 vs. 2015)

This looks at the changes in tourism products between 2014 and 2015, in terms of developments planned in 2014 and still planned or delivered in 2015.

Appendix 2: Greenwich Destination Inventory (2015)

This lists existing and planned accommodation, and planned attractions and cruise developments.

Appendix 3: Current Hotel Developments in Greenwich (2015)

This summarises the current situation with regard to hotel developments planned in Greenwich and identifies their planning status.

Appendix 4A: Economic Impact Projection Template – excluding O2 Retail Estimates

This spreadsheet includes detailed figures for economic impact in terms of visitor revenue and jobs up to 2019. 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.

(N.B. This is a modest estimate, as it <u>does not include</u> estimates of visitor numbers or the potential economic impact of the O2 retail village planned to open in 2017.)

Appendix 4B: Economic Impact Projection Template – including O2 Retail Estimates

This spreadsheet includes detailed figures for economic impact in terms of visitor revenue and jobs up to 2019. 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.

(N.B. This is a 'best case' estimate, as it <u>includes</u> estimates of visitor numbers and the potential economic impact of The O2 retail development planned to open in 2017.)

Section 3: Outstanding Challenges and Opportunities

This section reviews progress against the major challenges outlined in the 2014 DMP and assesses the ongoing nature of these challenges. It then prioritises challenges for 2015-2016 and recommends a number of focal points to steer the direction for the future and also to provide guidance for VG's business plan 2016-9.

3.1 Summary

The greatest opportunity to grow revenue for the Borough and its businesses and to create jobs lies in attracting more staying visitors and persuading more day visitors to come, linger longer, and spend more.

Success will depend on developing Greenwich's image as a 'must-visit' part of London for international visitors, and as a 'cool London village' with plenty to do, good shopping, and quality places to eat for regional day visitors.

This requires:

- **Ease of access** – in both real and perceived terms: a perceptual problem that needs to be addressed vigorously;
- **Constant improvement in the tourism products and visitor experiences** on offer in Greenwich: to give people a reason to come and, most importantly, to come back.
- **Increased hotel stock –** especially in the 4* boutique category
- **Consistent and brand-compliant promotion** by Visit Greenwich and all Greenwich stakeholders: in order to make more 'noise' in the regional marketplace and achieve greater marketing impact, in terms of both the quality of the Greenwich message and its reach.
- **A new destination campaign** – to build awareness and change perceptions.

3.2 Overview of Major Challenges Identified in 2014 DMP

The main challenges identified in the 2014 DMP remain, as follows:

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 the new cruise terminal, Crossrail, and The O2 retail development will make Greenwich even more accessible and attract new markets.

Greenwich's major challenges were identified as:

- 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.

3.3 Specific Challenges and Opportunities Identified in 2014 DMP

The challenges outlined in the 2014 DMP are re-presented below, with comments on progress in blue. Most persist and require a sustained approach over the long-term to address them.

The Economy and Visitor Trends:

This represents a tripartite challenge for Greenwich: to increase the number and value of international visitors, of staying visitors, and of day trips.

The challenges and opportunities remain, with improved consumer confidence, but economic challenges, particularly in major European markets.

Greenwich's main growth opportunity remains in the domestic, and especially regional, market. But stimulating domestic tourism remains a significant challenge. Consumer confidence is returning slowly, but the 'staycation' effect, and particularly short breaks by British residents, is in decline. And, while international visits and foreign visitor expenditure in Britain have grown, spend per day has reduced slightly[1].

More significantly, with eight out of Britain's top ten international markets in the Eurozone[2] and a sustained weakness in the Euro against sterling, this represents an ongoing challenge for Greenwich. Nevertheless, Britain's largest international market, which is also a significant market for Greenwich, the USA, continues to show strong growth and delivered the highest absolute volume growth in 2014[3].

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" mind-set, 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;

This too is an ongoing challenge, not least as new players enter the business. However, some progress appears to have been made towards a 'destination first' mind-set, as evidenced by the collaborative approach of the Visit Greenwich Board and the Marketing Steering Group. The challenge remains to widen this collaboration amongst more businesses throughout Greenwich.

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 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,

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[1] https://www.visitbritain.org/2014-snapshot
[2] ibid
[3] ibid

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.

This challenge remains. VG has undertaken low key in-London marketing and online campaigns targeting visitors and residents in London. Further campaigns are planned to target visitors who have already "bought London". A new campaign for 2016 is currently being created by VG and its partners.

Greenwich's Identity:

Greenwich has strong royal, historic and naval associations, forged over many years through institutions such as the Old Royal Naval College, the Royal Observatory, Queen's House, Greenwich Park, Eltham Palace and the Royal Arsenal. These have been supplemented more recently by the National Maritime Museum, the Cutty Sark, The O2 and The Emirates Airline cable car, as well as Greenwich Market 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.

The challenge of focusing and updating Greenwich's image remains. A clear brand vision needs to be developed for Greenwich and driven through all marketing communications by Visit Greenwich and its partners. The theme of 'Time after Time' has been developed as a useful and unifying communications concept to promote our existing offer. Further elaboration of Greenwich's future brand personality, core brand values, tone of voice, and competitive positioning would be valuable.

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.

This remains one of Greenwich's major challenges – albeit more in perceptual than real terms.

Surface access: It appears to be not the distance, but the ease of access, which is a psychological barrier preventing regional residents and visitors to London from visiting Greenwich independently.

Without intervention, this perception is likely to become more entrenched and exacerbated amongst regional residents over the next three years of rail works, potentially resulting in a decline amongst Greenwich's best prospect visitor markets. Therefore, promoting the ease and short time it takes to reach Greenwich from central London – through informative and thought-provoking messages – could help reposition Greenwich and persuade more of these markets to visit Greenwich.

River access: As well as promoting the ease and speed of getting to Greenwich by surface transport to address these misperceptions, Greenwich's uniqueness can be enhanced by promoting access by river as a more leisurely and entertaining method of getting to Greenwich, but still fairly quick.

Cruise terminal: The greatest challenge for Greenwich in relation to the cruise market will be to persuade cruise passengers to spend time in Greenwich, rather than merely use it as a gateway to London and for trips to other destinations in the south and south east. Cruise tour operators, ground handlers and excursion operators will be an important channel to influence in this regard. Visit Greenwich has been working with LCCP for some time to present a range of unique experiences that can be packaged and sold by excursion agents to cruise clients and this sales task will continue in 2016 through attendance at major cruise exhibitions e.g. Sea Trade Miami/Fort Lauderdale and by hosting a series of familiarisation visits from senior cruise company decision makers.

Connectivity and Legibility:

The fragmentation of Greenwich, which comprises of four visitor areas - Greenwich town centre/WHS and park, North Greenwich and the peninsula (O2, Emirates Airline et al.), Woolwich (Greenwich Heritage Centre/Royal Arsenal) 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.

This is a long-term challenge, which is related to connectivity and legibility. But it is possibly slightly simpler and quicker to address, at least in terms of taking small but significant steps forward. Developing a strong sense of place will depend on the development of a clear Greenwich brand to promote a distinct identity for Greenwich. This will guide product developments and public realm investment, as well as destination marketing.

The newly planned welcome and wayfinding signage on the World Heritage Site for 2016/7 will greatly enhance our welcome and hopefully improve dwell time.

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.

This is another ongoing challenge, which depends largely on the domestic, and particularly regional, market. Product developments, such as the InterContinental London - The O2, The O2 retail development, and Greenwich market revamp will, hopefully, send positive signals to potential investors and communicate the message that Greenwich is changing to potential visitors.

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.

This remains as an ongoing challenge. VG has undertaken in-London marketing and online campaigns targeting visitors in London. There are plans to increase activity in this area – a new destination gateway campaign is being planned in 2016.

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.
- Twitter and Instagram are becoming increasingly important marketing channels for VG and its partners. Significant headway is being made and collaboration is improving via the new VG social media group.

- Visit Greenwich has just launched a new box office. There is now on single place where visitors can see and book most of Greenwich's attraction offers.
- 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.

Some progress has been made in the provision of visitor information. However this could be accelerated, by greater collaboration between businesses in terms of cross-selling /disseminating information on each other's products. This requires a 'destination first' mind-set, which does appear to be growing.

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.

This should pick up swiftly with the opening of the InterContinental London - The O2 in December 2015.

VG is working with The University of Greenwich to set up a new business tourism co-ordination unit.

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 Bills; 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.

Significant developments are in the pipeline with the proposed O2 retail development in 2017 and Greenwich market revamp for 2016.

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 good 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.

While little progress has been made, the Greenwich market revamp, the opening of the InterContinental London - The O2, and the proposed O2 retail development might attract potential investors' attention to the market opportunity for more varied and quality places to eat.

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 development.

Visit Greenwich has undertaken a programme of new marketing activities aimed at addressing this. (See *2.3.1 Progress against High-Level Objectives* above)

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 95% of Greenwich's visitors and 85% of Greenwich's direct tourism revenue[4], 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.

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[4] STEAM 2014 figures

Defining and communicating the potential impact of tourism in terms of revenue and employment in Greenwich is essential to help people appreciate this.

While the impact of tourism in terms of jobs and revenue for local businesses and the Borough appears well understood in decision-making circles, more needs to be done to 'sensitise' residents and encourage them to see tourism as a positive phenomenon, with the potential to improve their opportunities and public realm.

VG has received a small amount of funding from The Big Lottery Awards for All programme. The project will promote jobs and careers opportunities to local people (18-25 year olds) in the Borough. A new jobs page has been created – visitgreenwich.org.uk/jobs. Future promotional activities are planned with RBG's GLLaB service and Job Centre plus.

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.

Visit Greenwich has been working with LCCP for some time to present a range of unique experiences that can be packaged and sold by excursion agents to cruise clients and this sales task will continue in 2016 through attendance at major cruise exhibitions e.g. Sea Trade Cruise Global (Miami/Fort Lauderdale) and by hosting a series of familiarisation visits from senior cruise company decision makers.

3.4 Overview of Major Challenges for 2016-2019

The Visit Greenwich Board held an 'away day' to review progress against targets and identify the most important challenges for the coming year. The discussions focussed on the following topics:

- The main **challenge** remains to find ways of working more closely together: at its simplest, this means businesses informing each other about mutual opportunities in terms of products and experiences, which might result in joint packaging or information-sharing with customers; at a higher level this could involve joint marketing.

- **Key insight:** "the value of the whole is bigger than the sum of its parts". Success in delivering on this requires a 'destination first' mind-set.

- **Marketing campaigns** need to target 'low-hanging fruit' as a first priority (e.g. London and south east regional residents), followed by markets offering the next greatest growth potential that are cost-effective to penetrate (e.g. international visitors in London, prioritised by volume and interest in the type of visitor experiences Greenwich offers).

- An **events strategy** should be developed, to maximise both market opportunities and the potential of new accommodation capacity in Greenwich. As a starting point an online calendar of events should be created. This will be useful to help residents and prospective visitors plan their attendance/trip, as well as for event planners to avoid date clashes.

- Do we really know how people feel about Greenwich, why they come, and why they don't? Qualitative **research** is needed to answer these questions. This will help us focus our marketing and target our messages even more compellingly on our best prospects.

- 'Time after time' is an appropriate theme to promote our existing product offer; but we need to develop a more robust **brand vision for the future.** We need to explore further what are our core brand values, tone of voice we should use in our marketing, symbols, personality, behaviour – all of which should emanate from, and reinforce, the brand. This will also guide investment in public realm improvements and product development, as well as marketing communications. Qualitative research to find out what people feel about Greenwich will help put this flesh on the brand bones.

- The **Visit Greenwich Marketing Steering Group** should progress these issues – research and brand development.

3.5 Main Challenges for 2016-2019 in Order of Priority

The Board identified the most important challenges in the following order of priority:

- **Challenge 1: Perception**
  - How can we improve the profile and perceptions of Greenwich:
    - Internally within and around the Borough?
    - Externally amongst potential visitors?

- **Challenge 2: Connectivity, Quality and Welcome**
  - How can we improve connectivity to, and access within, Greenwich, as well as Greenwich's place appeal – esp.:
    - Movement around Greenwich?
    - Signage and interpretation?
    - Welcome /sense of arrival?
    - Visitor experience? – Needs to be consistently good.
    - Town centre/public realm/sense of place?
  - Greenwich is difficult to navigate around because of the disconnect between its different parts, particularly North Greenwich and the town centre and the rail station.
  - The multitude of travel options to Greenwich makes it confusing, often resulting in a perception that Greenwich is difficult to get to. There is a gap between (negative) perceptions and the (more positive) reality.

- **Challenge 3: Alignment/Synergy**
    - How can we align the activities of important players in the Greenwich visitor economy to achieve greater impact from working together where possible and appropriate? We need to minimise the waste and opportunity cost that is incurred by the dissipated effort of people working in individual silos. Major areas in which greater alignment should be sought are:
        - Planning
        - Marketing
        - Information provision

Other challenges were identified as follows and many of these are not mutually exclusive with the above.

- **Residents' Civic Pride**
    - Need to engage residents so that they understand the benefits of tourism, feel pride in Greenwich, and become ambassadors for Greenwich.
    - The volume of visitors in the town centre often results in congestion.
    - This irritates some residents, who fear new developments will exacerbate this and affect their quality of life in their town centre, which they can feel is beyond their ability to influence.
    - This can lead to residents becoming 'negative ambassadors' for Greenwich, and talking Greenwich down.

- **Off-Season Growth**
    - Attracting business in the off-season is critical to businesses' cash flow and, potentially, survival. Residents and nearby markets offer the best opportunity to attract spending in the off-seasons.

- **Funding**
    - Public funding, particularly for non-statutory activities such as tourism development, is declining UK-wide. But the gap is unlikely to be filled completely by the private sector. Businesses are more likely to want to invest, if at all, in destination marketing organisations that will deliver a short-term return on investment. This threatens the public-private partnership model and risks leaving a potential gap in areas of 'market failure' critical to a destination's competitiveness, such as leadership, advocacy, strategic destination planning, market research and insights.

- **Brand/Distinctive Product**
    - "What is Greenwich's character?" Greenwich does not have a clear brand/sense of itself and what it wants to be in the future
    - "It needs to distinguish itself from London", while at the same time 'piggybacking' on the opportunities London offers – 'Greenwich village' – a real London village.

- **Public Realm – Town Centre**
    - The World Heritage Site status of Maritime Greenwich creates expectations about the town centre as a whole.
    - The public realm needs to be both more distinctive of Greenwich's brand character ("what is it?") and more welcoming.

- **Information Communication and Interpretation**
    - “There are many events and a lot going on. But it isn’t easy to find out about them – they are not widely promoted”.
    - The Greenwich events calendar is not joined up
    - “Attractions need to lead visitors’ expectations more”, by promoting their accessibility in terms of local interest – particularly for local residents. “Residents can feel intimidated by big attractions and assume they are only for tourists, but ‘not for me’ ”.

- **Booking Simplicity**
    - Ticketing for attractions and events needs to be simpler: “Greenwich isn’t easy to book” – e.g. “joint Greenwich-wide tickets/packages throughout the seasons, for residents”.

3.6 Solutions to Challenges for 2016-2019

The following solutions were proposed to address the challenges identified:

Challenge 1: Perception

How can we improve perceptions of Greenwich, internally and externally?

Solutions:

- Develop an aspirational **brand strategy/master plan for Greenwich town centre**: to drive the kind of investment Greenwich wants to attract in keeping with the image it aspires to (e.g. products, experiences, retail, restaurants etc. – cf. Marketing Edinburgh). This could be driven by Greenwich Hospital and/or the WHS and supported by Visit Greenwich

- Undertake **insights research** to identify what we need to do: “What’s the problem we’re trying to solve?” This will inform the brand strategy.

- Aim to attract **better hotels and restaurants**: esp. a ‘signature’ restaurant and more accommodation at 4 star level

- **Develop a residents campaign** and promote off peak offers to residents, for example using RBG’s new Greenwich One Card

- Create a ‘**gateway campaign**’ in London to:

    - Demonstrate ease of access to Greenwich from London

    - Develop and promote trails and places of interest around Greenwich (e.g. shore, town centre etc.)

Challenge 2: Connectivity, Quality and Welcome

How can we improve connectivity to, and access within, Greenwich, as well as Greenwich’s place appeal?

Solutions:

- Install “Legible London style” attractive, directional/wayfinding and interpretive **signage** for pedestrian visitors.

- Produce a **travel guide**, which shows how to get to and around Greenwich by public transport and on foot.

- Encourage the bus operator running the **O2-town centre shuttle bus** to brand it as clearly a Greenwich bus. Help bus operator to improve communications with other players in the Greenwich tourism sector, so they know about it and can promote it.

- Talk to **Knight Dragon** about integrating some of these proposals into their physical planning (e.g. signage, interpretation et al). Identify how these might help KD's aims and how they might be addressed by the tourism sector.

- Involve the **University of Greenwich** in strategic planning, research and implementation of ideas to improve the visitor economy.

- Develop a **'Greenwich ambassadors**' network – on a volunteer basis – to assist visitors in the town centre (cf. Leeds, Oxford, Glasgow, London Olympics).

- Introduce **free Wi-Fi** throughout Greenwich.

- Improved PR and communications e.g. "Need to come up with one single phrase that succinctly, clearly, and with impact says '***how to get to Greenwich'*** "

Challenge 3: Alignment/Synergy

How can we align the activities of important stakeholders in the Greenwich visitor economy to achieve greater impact from working together where possible and appropriate?

Solutions:

- Undertake a simple **audit of the key products and experiences** offered by the main players in Greenwich's tourism sector and identify a mutual theme/marketing approach.

N.B. This needs to be at the highest common factor, not lowest common denominator, level. At one level this could be a common way of talking about Greenwich and its core assets; at another it could be a set of shared brand values. This should also emerge from any work that might be undertaken in developing a brand strategy.

- Industry players with common interests should get together to explore opportunities for **joint marketing or links** to each other's products. At the least they could share their product information with each other, and particularly with their guest-facing staff, so that they are equipped to communicate the appeals of 'greater Greenwich' to inspire visitors and intensify their experience of Greenwich.

Section 4: Recommendations and Next Steps

4.1 Maintaining Momentum

Many of the challenges identified above are ongoing and require significant commitment by a range of players as well as considerable investment. They outline the direction that Greenwich should follow. But they will not happen overnight. They are the roadmap, but not the milestones. Therefore, in order to start hitting some milestones and ensure Greenwich continues the momentum recently built up by Visit Greenwich, a range of smaller, more achievable steps are recommended for immediate action.

The next steps proposed below are designed to help maintain Greenwich's forward momentum. These have been selected for three reasons:

- They are fundamental building blocks, which underpin a focused and strategic direction;
- Their potential impact in moving Greenwich forward is substantial;
- They are relatively easy to implement and do not involve an extended planning horizon.

While some can be done at no/little cost, others will require a budget to be found.

4.2 Next Steps and Key Priorities 2016-2019

The following priorities are a combination of current plans and priorities plus those identified at the Board away day. We need to agree on the ranking according to importance, time scales and by the level of resource required. The Visit Greenwich 2016-19 business plan will then be designed to deliver the following priorities.

Each priority is ranked in order of priority, has been given an expected year of delivery and the level of resource required has been identified as high, medium or low:

1. Continue to embed a **'destination first' mind-set** throughout the tourism sector in Greenwich. This can be achieved in line with participants' express wish for "more collaboration at no extra cost!" - **2016, low**

2. Develop a **'gateway campaign'** in London (off and on line) to increase our share of voice in the capital. Include a new "how to get here" message that all partners can adopt. - **2016, high**

3. Enhance the Greenwich welcome. VG to work with ORNC to create a new "**Welcome to Greenwich" information service** – and develop a new range of Greenwich merchandise to be sold by a number of retail partners. - **2016, medium**

4. **Develop a residents' campaign** for off season promotion (e.g. using RBG's Greenwich One Card) - **2016, medium**

5. Continue to develop and sell inspirational products and services **to the international cruise trade** to generate business from 2017. - **2016, medium**

6. Deliver the agreed and planned **welcome and wayfinding signage scheme** (as part of RBG's/TfL's town centre project). - **2017, medium**

7. Work with The University of Greenwich to undertake **qualitative research** to identify what visitors think of Greenwich, why they come, and what they don't like. Use the research to develop an aspirational long term **brand strategy and vision** for Greenwich. - **2016-17, medium**

8. Draw up a prioritised list of **public realm improvements** (e.g. signage, welcome, coach parking, sense of arrival, sense of place). - **2017, medium**

9. Produce a Greenwich **travel guide**, which clearly explains how to get to and around Greenwich, by public transport and on foot. - **2016, low**

10. **Set up jobs/careers portal** and work with RBG/GLLaB/Job Centre Plus to help local people connect with our industry and the career opportunities that are being created. - **2016, low**

11. Work with the University of Greenwich to **set up a new business tourism co-ordination unit** to capitalised on the arrival of the new 5* Intercontinental hotel. **- 2017, high**

12. Create a **new "Get China Ready"** training programme for partners. - **2017, medium**

Appendices

A full list of appendices are available on request.

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

visitgreenwich.org.uk