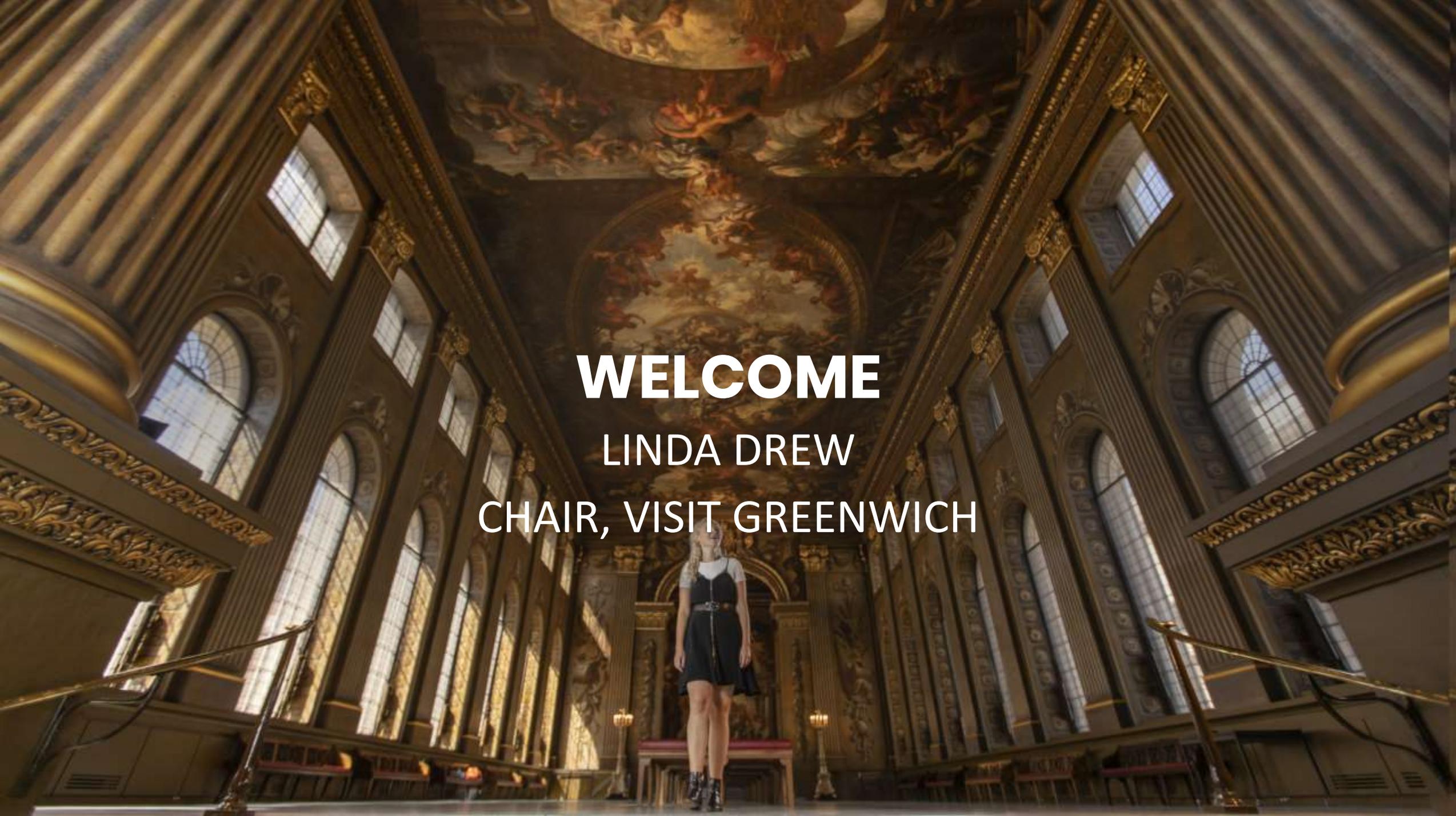


# VISIT GREENWICH DESTINATION MANAGEMENT PLAN LAUNCH

WEDNESDAY 24 MAY, 2023 / BUREAU, DESIGN DISTRICT

visit  
**greenwich**  
time after time

A woman with blonde hair, wearing a black dress with a white top and a black belt, stands in the center of a grand, ornate hall. The hall features a vaulted ceiling with intricate murals and a large central dome. The walls are lined with tall, arched windows and classical columns. The lighting is warm and dramatic, highlighting the architectural details. The text is overlaid in the center of the image.

**WELCOME**  
LINDA DREW  
CHAIR, VISIT GREENWICH

## PROGRAMME

- 3.00pm Arrival & Registration
- 3.15pm Welcome by Professor Linda Drew, Chair, Visit Greenwich
- 3.20pm Welcome to Greenwich Peninsula by Laura Flanagan, Marketing Director, Knight Dragon
- 3.30pm Destination Management Plan Overview, Barrie Kelly, Chief Executive, Visit Greenwich
- 4.00pm Guest presentations
- Jacob Tilley, Public Affairs Lead, Heathrow Airport
  - Ross Murray, Principal Client Partner, TripAdvisor
  - Sean Collins, CEO, Uber Boat by Thames Clippers
- 4.30pm Q&A
- 4.45pm Tour of the Design District with Alex Howard, Design District
- 5.30pm Drinks & networking, Canteen
- 6.00pm Close

### **Wifi**

Network: BureauClub

Password: BureauClub!

Access Token: VISIT202023



**WELCOME TO GREENWICH PENINSULA**

LAURA FLANAGAN

MARKETING DIRECTOR, KNIGHT DRAGON



GREENWICH  
PENINSULA

# WELCOME TO GREENWICH PENINSULA

Our vision is to create a thriving and profitable riverside neighbourhood at the forefront of art, culture and design where people want to live, work and socialise.

# LONDON'S LARGEST REGENERATION PROJECT

48

Acres of public and green space (equivalent to 32 football pitches)

7

Neighbourhoods

12,000

New jobs

1.6

Miles of the River Thames

34,000

Residents upon completion

30+

Year project

1

Single developer

17,000+

New homes being built

# THE FUTURE

BRICKFIELDS

PARKSIDE

LOWER RIVERSIDE

PENINSULA  
CENTRAL

DESIGN  
DISTRICT

PENINSULA  
QUAYS

UPPER RIVERSIDE

# WHAT'S BEEN HAPPENING AT GREENWICH PENINSULA?



## 2013

Knight Dragon acquires 100% of Greenwich Peninsula



## 2014

First homes launched



## 2015

First Residents move in to Lower Riverside



## 2016

Planning consent achieved for 15k homes, Upper Riverside launched, Golf Driving Range opens



## 2017

Greenwich Peninsula Lettings business launched



## 2018

Completion of No1 Upper Riverside, Magazine opens doors to 3000-capacity event venue, St Mary Magdalene school open



## 2019

The Tide (London's HighLine) is launched with free public art trail including Damien Hirst, Morag Myerscough and Alex Chinneck



## 2020

No4 Upper Riverside rental product launched, outperforming market



## 2021

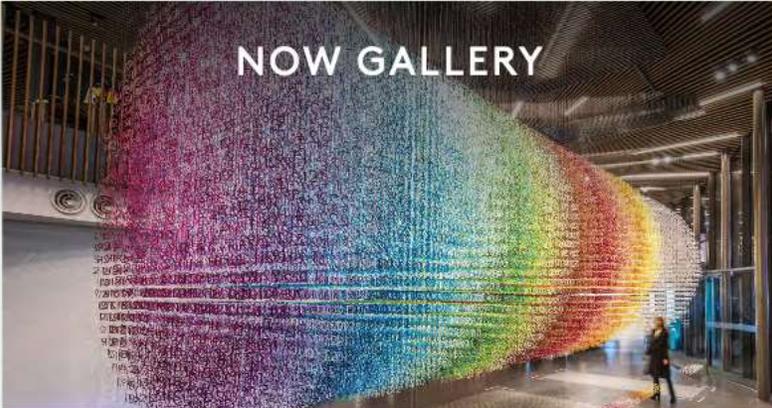
Design District launched, with 85% of space pre-let, Canteen Food Hall launched



## 2022

Peninsula Gardens and Bureau, the co-working space at Design District launches

# CULTURAL PLACEMAKING



**4 million**  
visitors to the Peninsula every year



# RESIDENTS OF GREENWICH PENINSULA



5,500+  
current residents

Including  
1,200+  
renters



Currently  
**37%**  
of Affordable  
Housing



**26+**  
Resident Community Groups  
including resident associations,  
book clubs, dog walking groups  
and charitable initiatives

# DESIGN DISTRICT

16

Buildings

8

Architects

1

Landscape architect



150,000<sup>sqft</sup>  
of workspace

Canteen

Food Hall

Bureau

co-working club



1,800  
Creatives



3

whole buildings

10

whole floors

61

individual units

74

different spaces

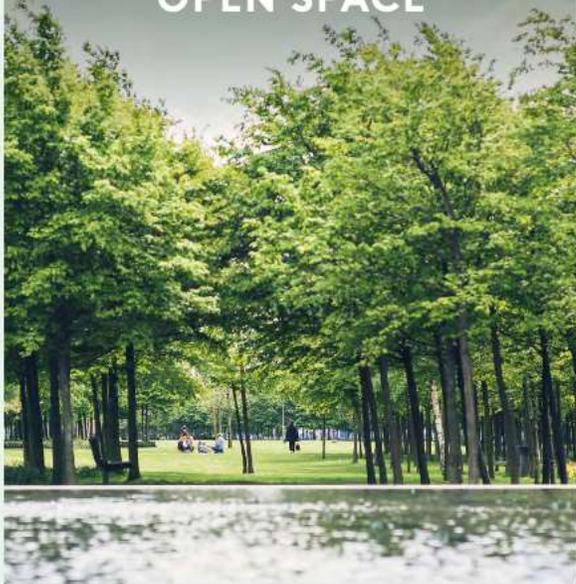
95%

let



# PLACES & SPACES ACROSS THE PENINSULA

## GREEN AND OPEN SPACE



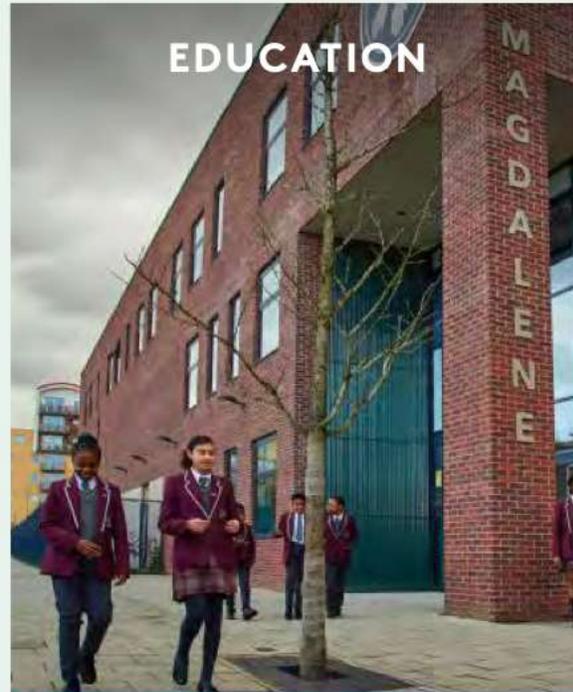
- 1.6M OF RIVER ACCESS  
Accessible by Uber Boat
- ECOLOGY PARK  
4 acres of green space and wildlife

- THE TIDE  
5km trail connecting the whole Peninsula
- GOLF DRIVING RANGE  
23 million balls hit a year
- COMMUNITY SPACES  
Aperture, a traditional village hall for the Peninsula residents

## HEALTH AND WELLBEING



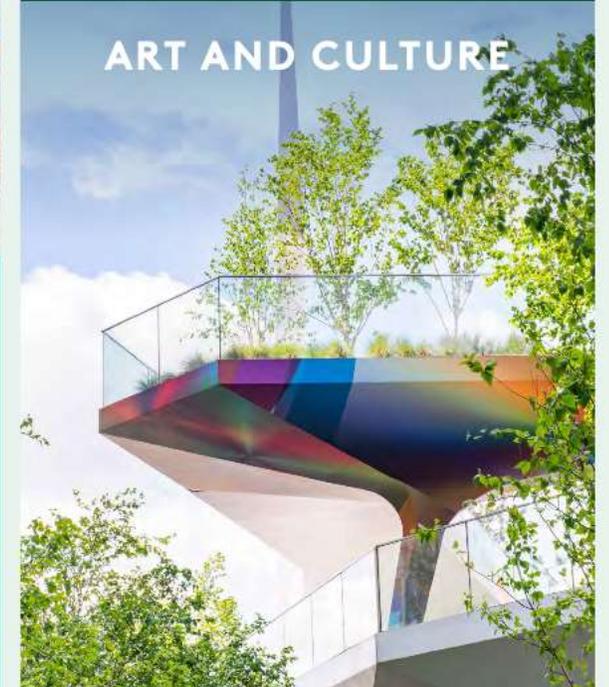
## EDUCATION



- SCHOOLS  
St Mary Magdalene School
- UNIVERSITIES  
Ravensbourne University  
Coventry University campus

- FREE PUBLIC ART TRAIL  
17 public art pieces across the Peninsula
- NOW GALLERY  
40k visitors in 2022

## ART AND CULTURE





GREENWICH  
PENINSULA

# JOIN AT SLIDO.COM



**#VGDMP**

Scan the QR code on the screen, or  
Go to [slido.com](https://slido.com)

Enter the #code - VGDMP

Once in, there are two tabs - one for Q&A and  
one for Live Poll

Use Slido to vote in a poll that will go live in a  
moment

In the Q&A tab, please enter your questions  
during each of the presentations.  
We will run a Q&A session at the end of each  
section.

## **Wifi**

Network: BureauClub

Password: BureauClub!

Access Token: VISIT202023

**slido**



**How did you travel here today?**

ⓘ Start presenting to display the poll results on this slide.



**VISIT GREENWICH**  
**DESTINATION MANAGEMENT PLAN, 2023-28**

BARRIE KELLY  
CEO, VISIT GREENWICH

# THE VISIT GREENWICH PARTNERSHIP



The Visit Greenwich Partnership co-ordinates and joins up our visitor economy to ensure that visitors have incredible experiences and that economic and social impacts are maximised for our businesses and communities in a sustainable way.

# OUR VISION



We will develop the Royal Borough of Greenwich as the “**must see**” destination in London to maximise the value of our unique **historic, contemporary** and **riverfront** assets.

Our growth will create **sustainable economic and social opportunities** for our local businesses and communities.



# OBJECTIVES

**1.**

## **RECOVER**

to pre-pandemic levels by 2024/25 – £1.5bn spend, 17,000 jobs.

**2.**

## **ENSURE**

that our tourism growth is sustainable, and benefits are spread across the Borough.

**3.**

## **POSITION**

Greenwich Waterfront as our number one place-shaping priority.

**4.**

## **DEMONSTRATE**

the value and opportunities that our visitor economy presents to local people, businesses and communities – £1.7bn spend, supporting 18,000 jobs by 2028.

**5.**

## **BUILD**

the Greenwich brand around “heritage, culture and entertainment” and focus on projecting “an eventful destination”.

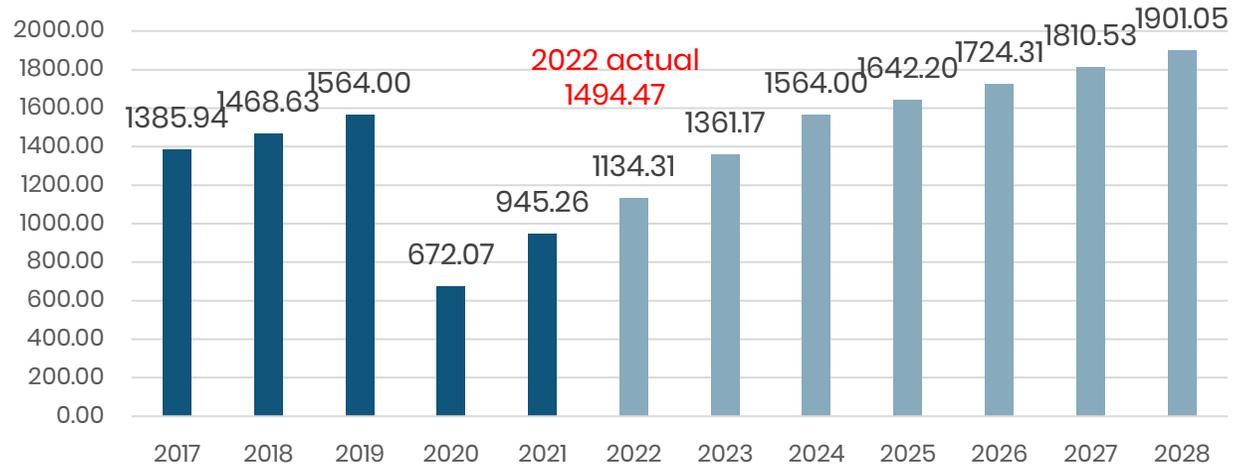
# KPIs

## Destination annual value and volume

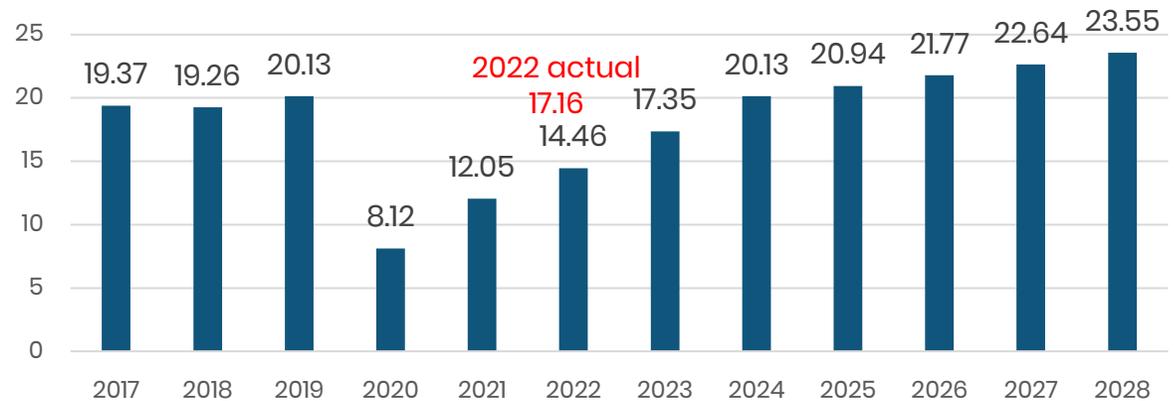
Pre-pandemic, Greenwich attracted 20.13 million visitors each year, spending £1.56 billion (STEAM 2019). In 2021, Greenwich began to see recovery, attracting 12.05 million visitors (48% increase on 2020). For 2022, it has increased to 17 million visitors, spending £1.49bn.

We have the objective to recover to 2019 levels by 2024, in line with VisitBritain forecasts.

Economic impact £m  
Actuals to 2021. Projection 2022 to 2028



Visitor numbers ('000)  
Actuals to 2021. Projection 2022 to 2028



## KPIs

INPUTS	OUTPUTS	OUTCOMES
Campaign reach Social media Website Partner audits	<ul style="list-style-type: none"> <li>Digital reach</li> <li>Engagements</li> <li>Conversion to visits</li> </ul>	<ul style="list-style-type: none"> <li>Increased spend in the local economy</li> <li>Increased revenue to local businesses, leading to growth and recruitment of more staff</li> <li>Local engagement / spreading the benefits to local businesses</li> </ul>
Improved welcome and public realm, experiences, place shaping	<ul style="list-style-type: none"> <li>Improved visitor experience, increased positive reviews</li> </ul>	<ul style="list-style-type: none"> <li>As above</li> </ul>
Encouraging visitor reviews	<ul style="list-style-type: none"> <li>Increased word of mouth, raised awareness</li> </ul>	<ul style="list-style-type: none"> <li>Increase in repeat visits</li> </ul>
Entering appropriate industry awards	<ul style="list-style-type: none"> <li>Industry recognition</li> </ul>	<ul style="list-style-type: none"> <li>Higher profile and reputation of VG/ partners and the destination</li> </ul>
Businesses supported	<ul style="list-style-type: none"> <li>VG membership</li> </ul>	<ul style="list-style-type: none"> <li>Business confidence</li> </ul>
Working groups supported	<ul style="list-style-type: none"> <li>VG membership</li> <li>Local employment and recruitment</li> </ul>	<ul style="list-style-type: none"> <li>Business confidence</li> <li>Spread of benefits for locals and communities</li> </ul>

OVERALL  
**47:1**  
ROI



OVER 23  
MILLION  
QTS

**6.5**  
MILLION  
REACH



ACROSS ALL  
CHANNELS  
(ON AND OFFLINE)

**SOCIAL:**



**14k**

REACTIONS



**323**

COMMENTS



**2.5k**

SAVES



**735**

SHARES

OVER INTERACTIONS &  
**520k** ENGAGEMENTS

ENGAGEMENT  
RATE **2.27%**

vs 0.5%



**OVER  
65k**

**LEADS**

**E.G OUTBOUND  
LINKS CLICKED**



**275k**

**CLICKS**

**PAID DIGITAL MARKETING**



**FACEBOOK**

**23.1%**

**PAGE REACH**

**PAGE VISITS**

**UP 705%**

**FOLLOWERS**

**88 UP 131.6%**



**INSTAGRAM**

**282.7%**

**PAGE REACH**

**PAGE VISITS**

**UP 7.4%**

**FOLLOWERS**

**638 UP 8.3%**



**315k** **USERS**

**TO VISIT GREENWICH**

**UP 20% 311 NEW USERS**

**COMPETITION:**

**1,037 ENTRIES**

**WITH** A white envelope icon on a green background.

**552 SIGN-UPS  
TO MAILING LIST**

## LONDON CONTEXT

As a key destination within London experience, it is important that the Greenwich DMP aligns with the overall tourism strategy for London.

London & Partners' London 2030 Tourism Vision:

**“London will be a brilliant experience for visitors and Londoners alike. To experience London will be to feel our values and to live our brand – it is at the heart of who we are as a city.”**

Four key pillars to underpin **experience**:

### **1. Managing the destination**

Expand the offer, improve data sharing and visitor knowledge.

### **2. Maximising the impact for Londoners**

How our industry drives positive change for London and Londoners.

### **3. Leading in sustainability**

How tourism plays its part in supporting London and the UK's goals.

### **4. Redefining its measure of success**

Measuring the impact and shaping future growth.

Read the full London 2030 Tourism Vision [here](#).





# TARGET MARKETS

**1.**

## **LOCAL PEOPLE**

People that live, work  
and learn in the Borough

**4.**

## **REST OF THE UK**

Aspirational Family Fun,  
Country Loving Traditionalists,  
Free & Easy Mini Breakers

**2.**

## **LONDONERS**

Pre-nesters & Families

**5.**

## **NORTH AMERICA**

Experience Seekers

**3.**

## **SOUTH-EAST ENGLAND**

Pre-nesters & Families

**6.**

## **WESTERN EUROPE**

France, Germany, Spain  
Experience Seekers

# STRATEGIC PROGRAMMES

The image shows the exterior of The O2 arena at night. The building's distinctive white, cable-stayed roof is visible against a dark blue sky. A large, illuminated sign with the 'O2' logo is mounted on a tall pole to the left. The main entrance is a large glass and metal structure with a prominent circular archway. The archway features the text 'The O2' in a large, white font. Inside the arena, various signs and lights are visible, including one that says 'The O2 Store'. In the foreground, several people are walking, their figures slightly blurred, suggesting movement. The ground is paved with light-colored tiles. The overall atmosphere is modern and vibrant.



## **EXECUTIVE SUMMARY: DMP STRUCTURE**

We have designed our DMP from a customer perspective – the visitor journey. It examines each stage of the visitor journey to lay out key priorities and actions that are needed to manage and develop the destination as well as influence the visitor experience.

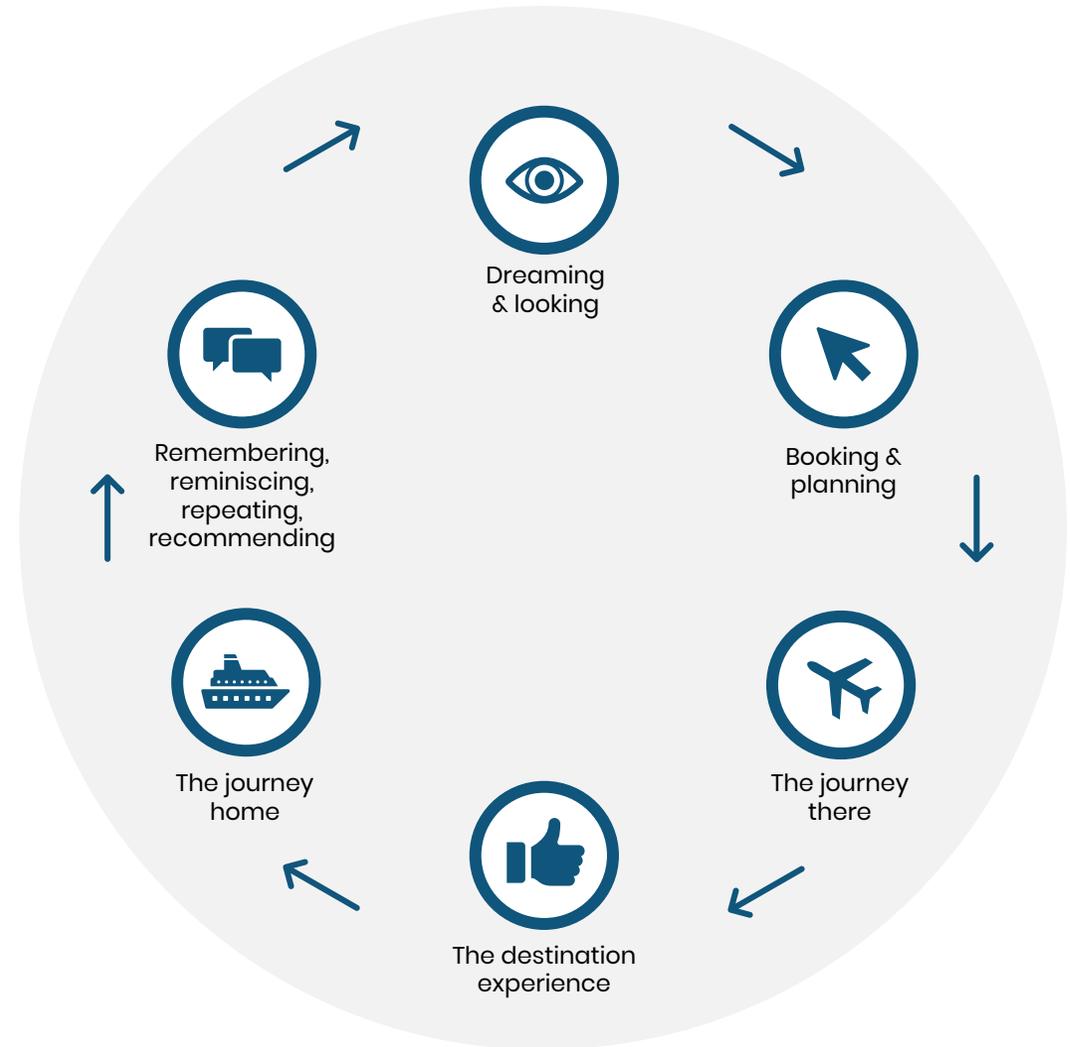
- 1. Stimulating, planning, anticipation**
- 2. Managing the booking process**
- 3. Managing access to the destination**
- 4. Managing the destination experience**
- 5. Managing the visitor exit**
- 6. Managing the visitor memory**

## STRATEGIC PROGRAMMES

We will manage and enhance the visitor experience at every touch point on the visitor journey.

1. Inspiration, planning information, building anticipation
2. Planning and booking
3. Getting here: ease of travel and accessibility
4. Managing the destination experience (on visit - sense of arrival, public realm, customer care, place shaping)
5. The journey home (managing the exit, ensuring the visitor goodbye is as good as the welcome and sense of arrival)
6. Managing the visitor memory (encouraging reviews, repeat visits)

Traditional destination management categories of place shaping, sustainability, accessibility, marketing, employment and training and so on will factor into each of the above.



# 1 INSPIRATION, PLANNING & ANTICIPATION

We will continue to promote Greenwich as a “must-visit” destination in London. Visitors have not ‘done’ London until they’ve visited Greenwich.

In a world where people plan less and often arrive in the destination without up-to-date information about the breadth of offer, the priority is to position Greenwich as a city break destination in its own right, of at least a two- to three- day visit, and be a high quality, great value and alternative base for a break in the capital.

## PRIORITIES

- Focus on our four core visitor areas: Maritime Greenwich/WHS, Peninsula, Woolwich and rest of Borough
- Build our brand and raise our profile in UK and internationally.
- Develop the evening economy in Maritime Greenwich and Woolwich.
- Grow our local, loyal, repeat visitor market.
- Showcase the range of experiences to extend the visitor stay.



## 2 PLANNING & BOOKING

It is important that once potential visitors are inspired to want to visit Greenwich that we make it easy to do so. This will be done in four ways:

- Ensuring that the Visit Greenwich website continues to promote bookable products. We now have over 50 bookable products on our site.
- Work with the travel trade to ensure there are more bookable packages available in the B2B space.
- Support our partners (especially SMEs) to ensure they are using technology to the best level and that their channels are best practice
- Provide inspiration/ideas/itineraries showing how travel to Greenwich and within is part of an incredible experience.

### PRIORITIES

- Make the booking process easier
- Communicate the full Greenwich offer to allow people to plan and book for a longer, fuller visit.
- Audit/Benchmark our partners' booking channels



# 3 GETTING HERE: EASE OF TRAVEL & ACCESSIBILITY

We will promote the best and most sustainable ways to get to Greenwich and move around the area.

Our communications will give visitors confidence to choose from the variety of travel options for getting to Greenwich and want to explore further.

When visitors arrive, we want them to feel they have arrived in a welcoming, safe and enjoyable destination.

## PRIORITIES

- Improving the physical infrastructure at key gateways
- Enhancing the sense of arrival, welcome messaging and wayfinding.
- Provide better communication about getting to Greenwich and the destinations within it







# 4 MANAGING THE DESTINATION EXPERIENCE

Once in destination, whether the visit starts at Greenwich, Greenwich Peninsula, Woolwich or Eltham, the experience starts with the welcome. We will work with stakeholders and partners to enhance the quality of welcome, especially at key gateways. We will support partners in their quest to improve their products and services, including developments such as the ambitious Royal Observatory project.

We will provide visitors with clear and helpful information and inspiration to visit responsibly, get the most out of their visit, and have an experience they will remember, want to talk about and come back again.

From the host destination perspective, we will ensure that local people and businesses are connected and empowered to benefit.

## PRIORITIES

- Build on the Greenwich Welcome
- Greenwich Waterfront
- Improve visitor flows and town centre experience in the WHS
- Support major developments that benefit the destination experience
- Greenwich Peninsula visitor management/ wayfinding
- Enhance the Woolwich offer
- Build a sustainable destination
- Build an eventful destination



## 5 THE JOURNEY HOME: MANAGING THE VISITOR EXIT

It's important that we make it easy for our visitors to return home and in a way that provides a positive and lasting memory.

A substantial amount of effort is given to providing an excellent welcome and sense of arrival, and we will give equal attention to how the destination says goodbye to departing visitors as this is an opportunity to build our brand, encourage positive word spread and repeat visits.

With regard to physical infrastructure, we will work to make the exit route back to stations and piers as easy as coming in. We will communicate messages that encourage visitors to leave on a high note and want to come back soon.

### PRIORITIES

- Provide visitors with up-to-date information on best travel routes available
- Ensure staying visitors have a positive “check out” experience



## 6 MANAGING THE VISITOR MEMORY

It is particularly important these days to make it easy (and fun) for our visitors to share their amazing experiences.

The destination has so many iconic views and vistas that visitors want to take photos of. We will capitalise on this by providing free 'Visit Greenwich' frames and encourage sharing.

Returning visitors will help us build a more experienced visitor knowledge base and share experiences that represent the real and full Greenwich offer.

We will create a new 'Greenwich Goodbye' toolkit and campaign that targets visitors immediately following their visit, to encourage sharing of experiences, positive reviews and inspiration to plan for repeat visits and use word of mouth recommendations to generate visits.

### PRIORITIES

- Encourage more User Generated Content and create "official" opportunities
- Encourage reviews
- Growing the number of repeat visits and enhancing visitors' awareness and knowledge





## **VISIT GREENWICH EXECUTIVE ROLES & RESPONSIBILITIES**

Since its formation in 2014, Visit Greenwich's primary role is to lead the delivery of the Destination Management Plan influencing and engaging with stakeholders and partners and developing a 'destination first' mindset.

### **Visit Greenwich will focus on 6 areas of delivery. They include:**

1. Destination Marketing – inspiring people to visit
2. Visitor Services – creating a great welcome
3. Place Shaping – lobbying / fund raising / voice
4. Business Support – helping our partners to perform better
5. Intelligence – monitoring and measuring every aspect of our visitor economy
6. Skills – active brokerage between our employers and our skills providers

# HOW YOU CAN PLAY A ROLE



**ADOPT  
THE BRAND**



**THINK  
"DESTINATION"**



**SHARE  
BUSINESS LEADS**



**JOIN OUR  
WORKING GROUPS**



**LINK TO OUR  
WEBSITE**



**TAG @VISITGREENWICH  
ON SOCIAL MEDIA**



**EMPLOY  
LOCAL PEOPLE**



**PAY LONDON  
LIVING WAGE**



**PRIORITISE  
LOCALS**

**Q&A**

**JOIN AT  
SLIDO.COM**



**#VGDMP**

An aerial photograph of Heathrow Airport at dusk. The main terminal building is illuminated from within, showing its glass facade and structural details. The tarmac is filled with aircraft, ground support equipment, and service vehicles. The sky is a mix of deep blue and orange from the setting sun. The text 'HEATHROW AND TOURISM' is prominently displayed in the center, with 'JACOB TILLEY, PUBLIC AFFAIRS LEAD, HEATHROW' below it.

# HEATHROW AND TOURISM

JACOB TILLEY, PUBLIC AFFAIRS LEAD, HEATHROW

Heathrow

# General performance and recovery since the pandemic

*Heathrow CEO John Holland-Kaye said:*

*“2022 may have been a year of recovery, but 2023 is shaping up to be a year of renewal for Heathrow.”*

- Heathrow grew more than any other airport in the world last year
- Service is getting back to pre-pandemic levels

At year ended 31 December	2021	2022	Change (%)
(£m unless otherwise stated)			
Revenue	1,214	2,913	140.0
Cash generated from operations	613	1,719	180.4
(Loss)/Profit before tax	(1,792)	169	109.4
Adjusted loss before tax <sup>(2) (4)</sup>	(1,270)	(684)	46.1
Adjusted EBITDA <sup>(1) (4)</sup>	384	1,684	338.8
Heathrow (SP) Limited consolidated nominal net debt <sup>(3) (4)</sup>	13,332	14,579	9.4
Heathrow Finance plc consolidated nominal net debt <sup>(3) (4)</sup>	15,440	15,786	2.2
Regulatory Asset Base <sup>(5)(4)</sup>	17,474	19,182	9.8
Passengers (million) <sup>(6)</sup>	19.4	61.6	217.6

# General performance and recovery since the pandemic pt2

**Heathrow CEO John Holland-Kaye said:**

*“2023 has got off to a strong start, and I'm proud of the way colleagues are working together to deliver great passenger service every day. We are building our route network to connect all of Britain to the growing markets of the world – now we need the government to lure international visitors back to the UK by scrapping the ‘tourist tax’.”*

- Strong start to 2023
- Delivering excellent and consistent passenger service
- Heathrow remains loss-making, and we do not forecast any dividends in 2023
- Supporting the UK’s competitiveness
- Continued steady progress towards sustainability goals

At or for 3 months ended 31 March	2022	2023	Change (%)
<i>(£m unless otherwise stated)</i>			
Revenue	516	814	57.8
Cash generated from operations	278	374	34.5
Loss before tax	(191)	(60)	68.6
Adjusted EBITDA <sup>(1)</sup>	273	486	78.0
Adjusted loss before tax <sup>(2)</sup>	(223)	(139)	37.7
Heathrow (SP) Limited consolidated nominal net debt <sup>(3)</sup>	14,579	14,681	0.7
Heathrow Finance plc consolidated nominal net debt <sup>(3)</sup>	15,786	15,881	0.6
Regulatory Asset Base <sup>(4)</sup>	19,182	19,591	2.1
Passengers (million) <sup>(5)</sup>	9.7	16.9	74.2

# Plans for the next few years

*Ready for a decade of difference: At the beginning of last year, Heathrow refreshed our sustainability strategy, Heathrow 2.0: Connecting People and Planet*

- Heathrow 2.0: Connecting People and Planet
- Ten strategic goals
- Two focused carbon goals
- Heathrow already delivering against the plan



# About this strategy

We have structured this strategy refresh around two pillars:

- **Net zero aviation** to work towards our vision of sustainable aviation at Heathrow and across our industry.
- A **great place to live and work** to improve the quality of life of our colleagues and our neighbours and make a positive impact in our community.
- These are supported by our responsible business foundations, which show how Heathrow addresses a range of key issues, including safety, security, and governance through its strategies and policies.

## NET ZERO AVIATION

### Net zero in the air

GOAL BY 2030:  
Up to 15% cut in carbon compared to 2019

### Net zero on the ground

GOAL BY 2030:  
At least 45% cut in carbon compared to 2019



## GREAT PLACE TO LIVE AND WORK

### Clean air at and around the airport

GOAL BY 2030:  
Reduce NOx airside by 18% compared to 2019

### Quieter nights, quieter flights

GOAL BY 2030:  
Limit and where possible reduce the number of people highly sleep disturbed and highly annoyed compared to 2019

### Nature positive airport

GOAL BY 2030:  
Work with partners to support a nature network around Heathrow

### Zero waste airport

GOAL BY 2030:  
Maximise reuse, recycling and recovery of materials used at Heathrow

### Thriving sustainable supply chain

GOAL BY 2030:  
Maximise suppliers achieving gold standard against our Balanced Scorecard

### Better quality of life in Heathrow's neighbouring communities

GOAL BY 2030:  
Give back to 1 million people in our local communities

### Inclusive employer of choice for local diverse talent

GOAL BY 2030:  
Reflect the diversity of our local community at all levels

### Inclusive employer of choice for local diverse talent

GOAL BY 2030:  
10,000 external jobs, apprenticeships and early career opportunities



# The American market and the role Heathrow plays

- 40% of US-UK trade in goods through Heathrow
- US visitors account for 23% of total spending (£3.74bn).
- Passengers travelling from and to the USA
- 34% of all UK domestic connecting passengers
- A flight every 10mins
- 3.8m pax in Q1 2023 - Better pandemic recovery



# Will China demand come back over the next few years

Yes, as demand and demographics remain strong for Aviation to continue to boom



- The recovery in air travel to and from China is increasing in momentum, as the Chinese and other governments this year have reduced COVID-19-related restrictions.
- Chinese government resumed issuing visas for all inbound visitor categories from 15-Mar-2023.
- Airlines are now responding by resuming more of their pre-pandemic flights to mainland China.
- Increase in restarted routes to China.

# How the Elizabeth Line has changed the dynamics in terms of passengers coming to the airport/getting into central London

- Sustainable Public Transport
- Passenger Public Transport Target
- Reduction in carbon
- Increased options for east London and international business travel
- 21st May completion of the Elizabeth line



# How we can build a proactive relationship in helping people get in to London easier

- Sustainable Travel Zone
- Raising awareness
- Publicising what is available
- Using technology
- New projects





Thank you for listening

Heathrow

**Q&A**

**JOIN AT  
SLIDO.COM**



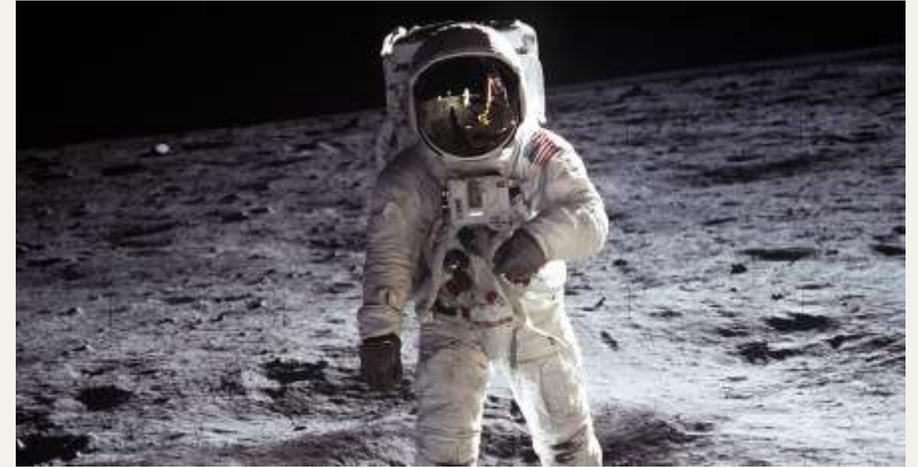
**#VGDMP**



# LATEST INSIGHTS & TRENDS

ROSS MURRAY, PRINCIPAL CLIENT PARTNER, TRIPADVISOR





But first a quick intro...





# Outlook for travel this summer

01	Partner	Qualtrics
02	Sample	n= 2,444
03	Sample Ages	18-75
04	Fielded	03/17/23 - 03/27/23
05	Countries	Australia, Italy, Japan, Singapore, United States, United Kingdom



# Despite global concerns, travel is a top priority this summer



# 78%

of respondents plan on travelling for leisure this summer

**14%** of respondents are undecided about summer travel

**8%** of respondents don't plan on summer travel

Gen Z and millennials are more likely than other age groups to travel this summer



In fact, 95% of travellers are planning at least **as much travel** (42%) this summer, if not **more**, (53%) compared to last summer

**By age:** Millennials are more likely to travel more this upcoming summer



53%

Plan to travel for leisure this upcoming summer more frequently than last summer

42%

Plan to travel for leisure this upcoming summer at about the same frequency as last summer



5%

Plan to travel for leisure this upcoming summer less frequently than last summer



# Despite the economic crisis, travellers are preparing to cut back on other luxuries before travel

# 95%

of respondents would decrease spend in other categories to save for their next vacation

**By age:** Younger respondents in particular are more willing to prioritise saving for travel over other purchases

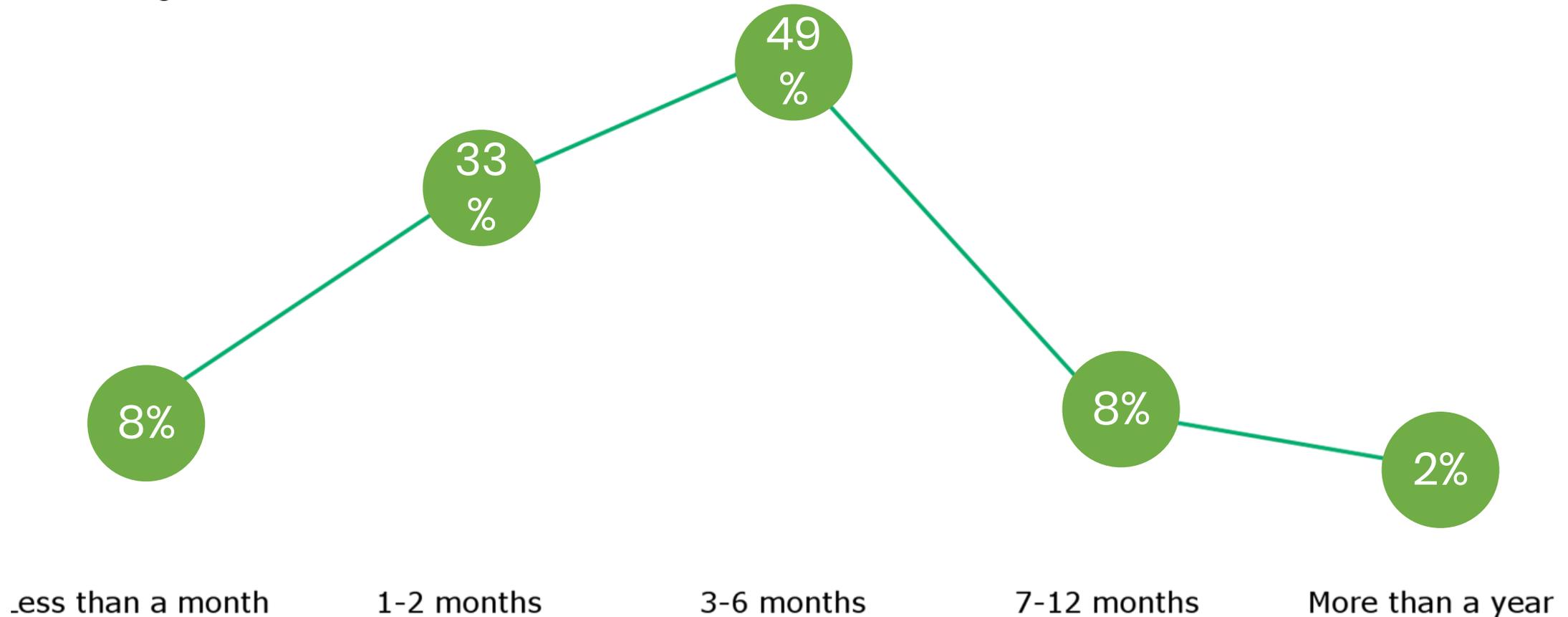




How are travellers  
planning trips?

# About half of advance planning for summer travel happens 3-6 months before

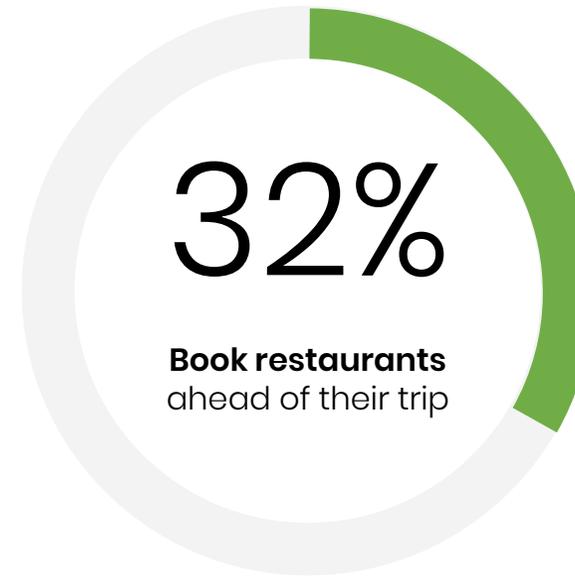
Destinations need to be live with marketing early in the planning cycle to maximise their influence on bookings



56% have booked or will book on-trip activities ahead of upcoming summer trip; 32% have booked or will book restaurants ahead

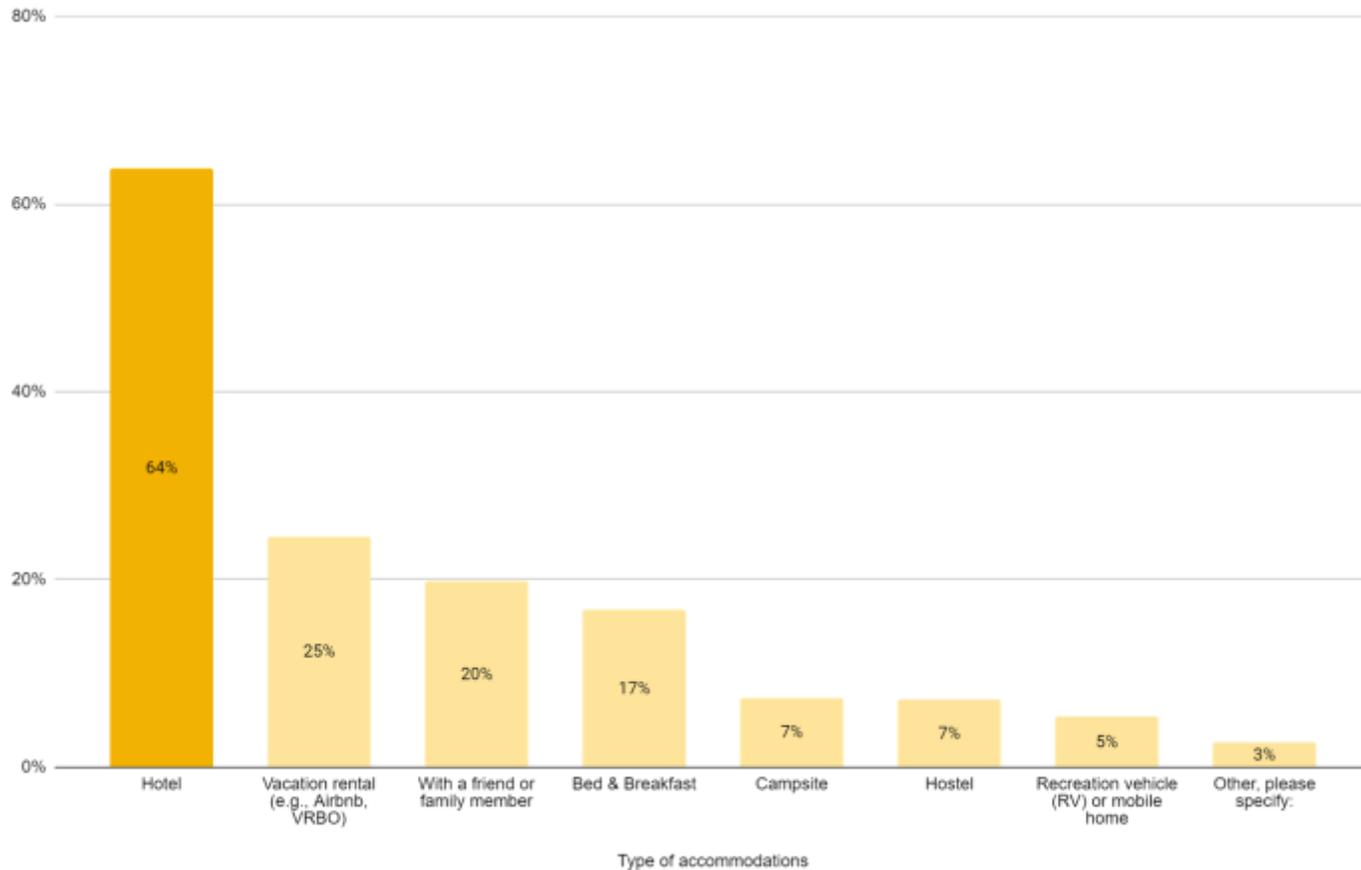


**Gen Z and millennials** are 66% more likely to book on-trip activities in advance of their trip (68% vs 41% older age groups)



**Gen Z respondents** are over twice as likely to have booked restaurant reservations in advance (42% vs. 18% older age groups)





## Hotels are the preferred accommodations for two thirds of respondents, followed by vacation rentals

Hotels are most popular with Japanese respondents (83% vs. the 64% average; U.S. respondents over index on staying with friends and family (28% vs. the 20% average)

Japanese respondents are the least likely to stay in vacation rentals

Younger respondents (Gen Z and millennials) are more likely to stay in vacation rentals than older respondents (Gen X and boomers)





What are they  
interested in?

# London is one of the top destinations in the world this summer, a great opportunity for Visit Greenwich

Rank	International Destinations
1	Paris, FR
2	London, UK
3	Rome, Italy
4	Cancun, MX
5	Barcelona, ES
6	Punta Cana, DR
7	Antalya, TR
8	Amsterdam, NL
9	New York City, US
10	Singapore, SG

Rank	Domestic Destinations
1	Orlando, US
2	Myrtle Beach, US
3	Las Vegas, US
4	Honolulu, US
5	London, UK
6	New York City, US
7	Benidorm, ES
8	Key West, US
9	Lahaina, US
10	Ocean City, US



# What are travellers most interested in doing this summer?

By age: Boomers are less likely to prioritise health/wellness and outdoor activities/sports during their upcoming travel, while millennials are more likely to prioritise both



Source: Tripadvisor Summer Travel Beats Report 4/2023, N=2,444; AU, IT, JP, SG, UK, US

Q: What types of on-trip activities or experiences are you prioritizing for your upcoming trip? Select all that apply





Travellers x  
sustainability?



Sustainability is top of mind for our  
Tripadvisor travellers:

66%

Travellers say they are  
willing to pay more for  
sustainable travel

62%

Travellers would pay  
more for an eco-friendly  
product

72%

Say we need to act now  
and make sustainable  
travel choices



---

Our community are altering travel plans and transportation:

56%

worry about their carbon footprint say it affects the amount of road trips they take, followed by the amount of flights.

---

47%

of respondents would like some help in choosing more sustainable travel options when future planning



# Appendix

# Reviews On Tripadvisor

- Travellers submitted over **26,000,000 reviews to the site in 2020**.
- The **average rating** submitted by reviewers was **4.30**, up from 4.22 out of 5.0 in 2018.
- In 2020, more than **2m review submissions were rejected** or removed by Tripadvisor, either by our advanced **review analysis system** or **manually** by a member of our content moderation team
- This represents just **8.6% of all submissions that year**. There are a number of reasons why Tripadvisor rejects or removes reviews, ranging from community standards violations (such as the **use of profanity**) to **fake review activity**.
- **33.9% were removed or rejected by our review analysis system before being posted**, without the need for human intervention. The rest were removed following intervention by our team of content moderators.
- Looking specifically at fake reviews, only a very small fraction of all review submissions — **3.6% — were determined to be fraudulent, totaling 943,205 reviews**.
- Of those, Tripadvisor **prevented 67.1% of all fake review submissions from ever making it onto the platform**.
- **Travelers or businesses flagged only 1.0% of reviews** for potentially violating Tripadvisor guidelines. **85% of those community reports were assessed by our moderation team within four hours** of being submitted, and **43% of all reviews reported by the community were removed following that assessment**.



**Q&A**

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**#VGDMP**



# **GREENWICH WATERFRONT**

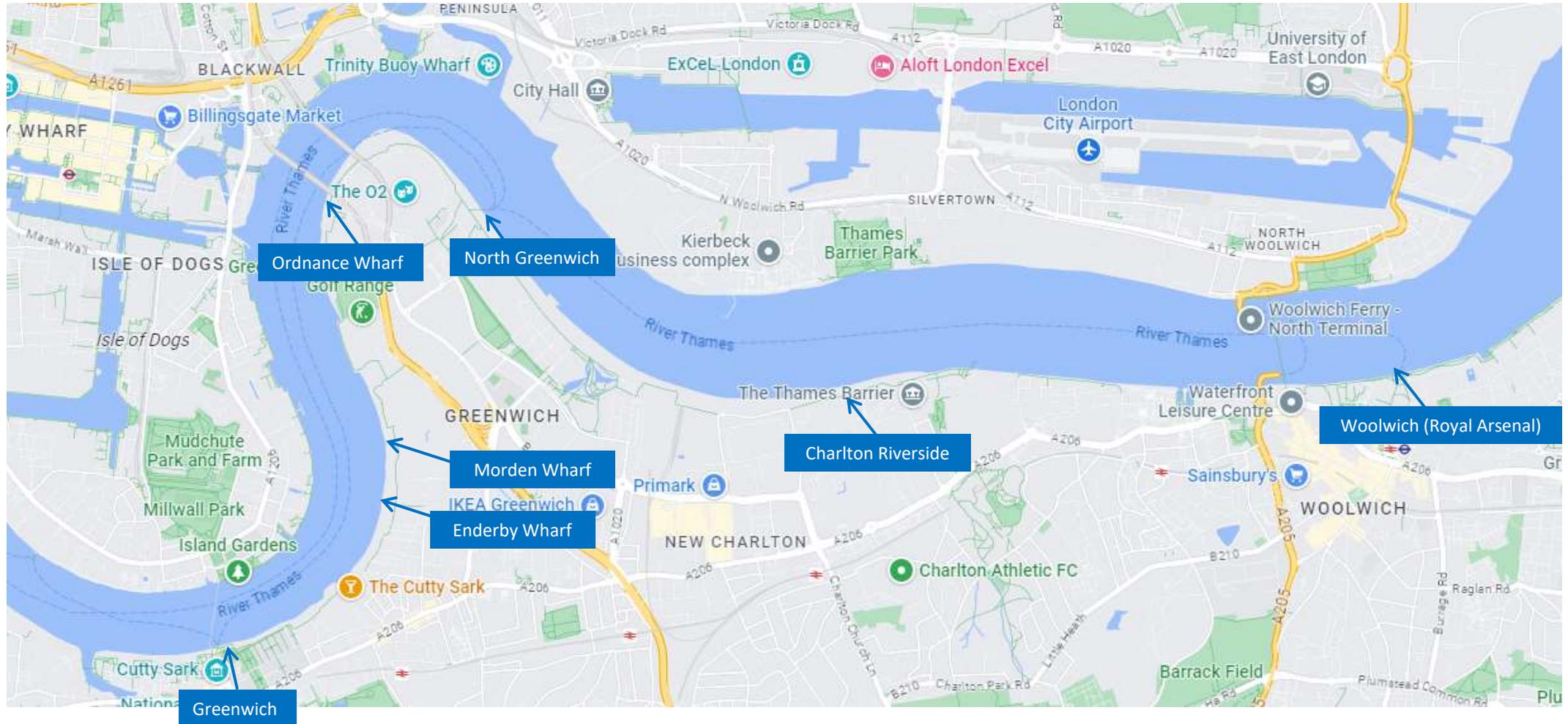
SEAN COLLINS

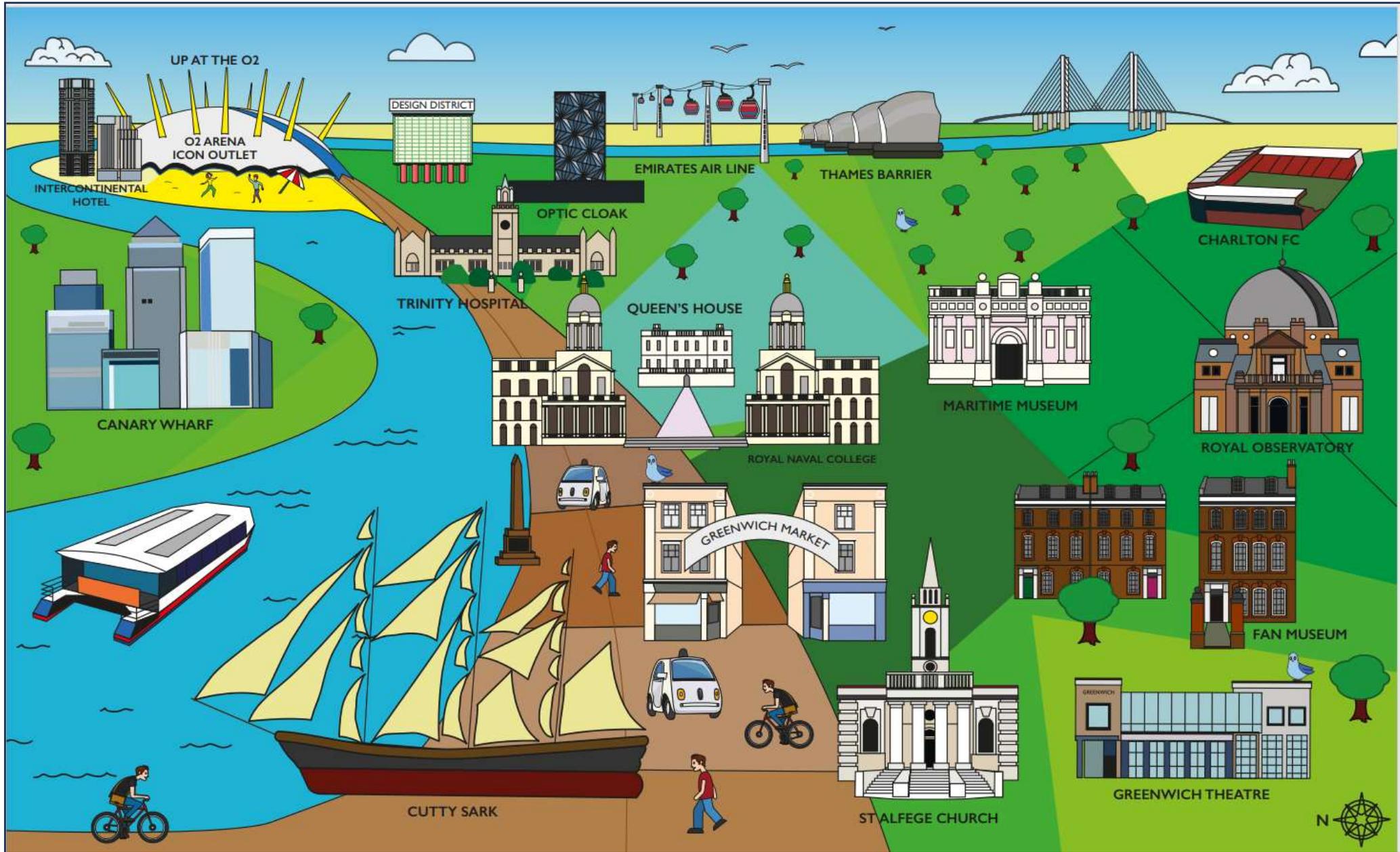
CEO, UBER BOAT BY THAMES CLIPPERS

Greenwich Waterfront

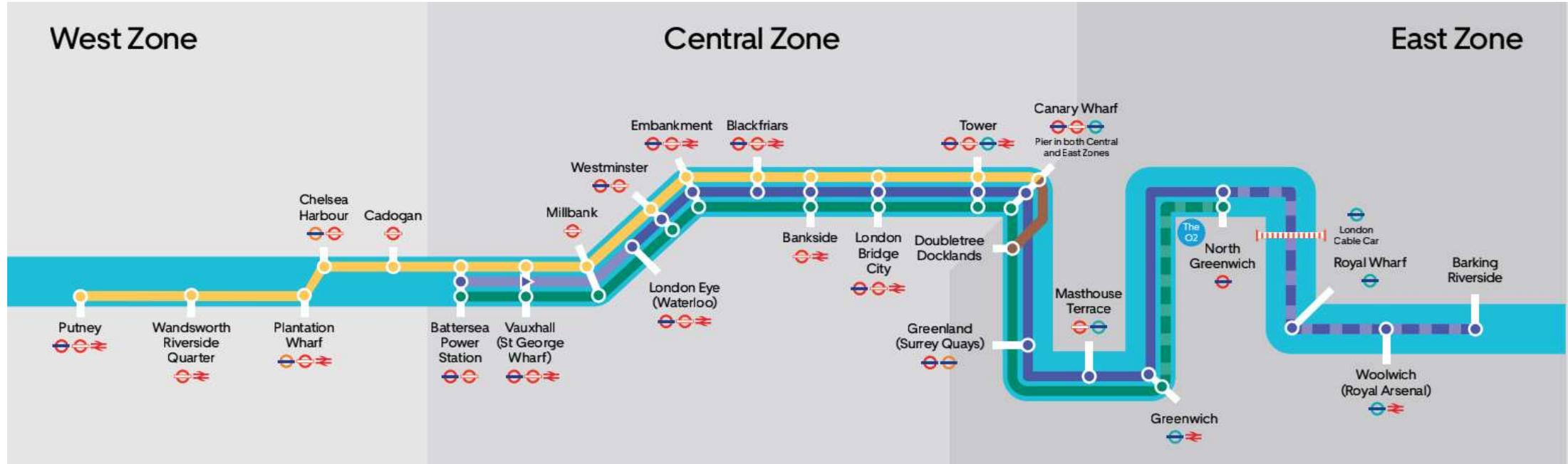
**visitgreenwich**  
time after time

# Greenwich Waterfront





# Connectivity with Central London



Journey times from Greenwich

- 10 minutes to Canary Wharf
- 20 minutes to Tower Hill
- 40 minutes to Embankment

Promoting carbon neutral travel

- Reducing congestion and pollution in the Borough

Intermodal connections

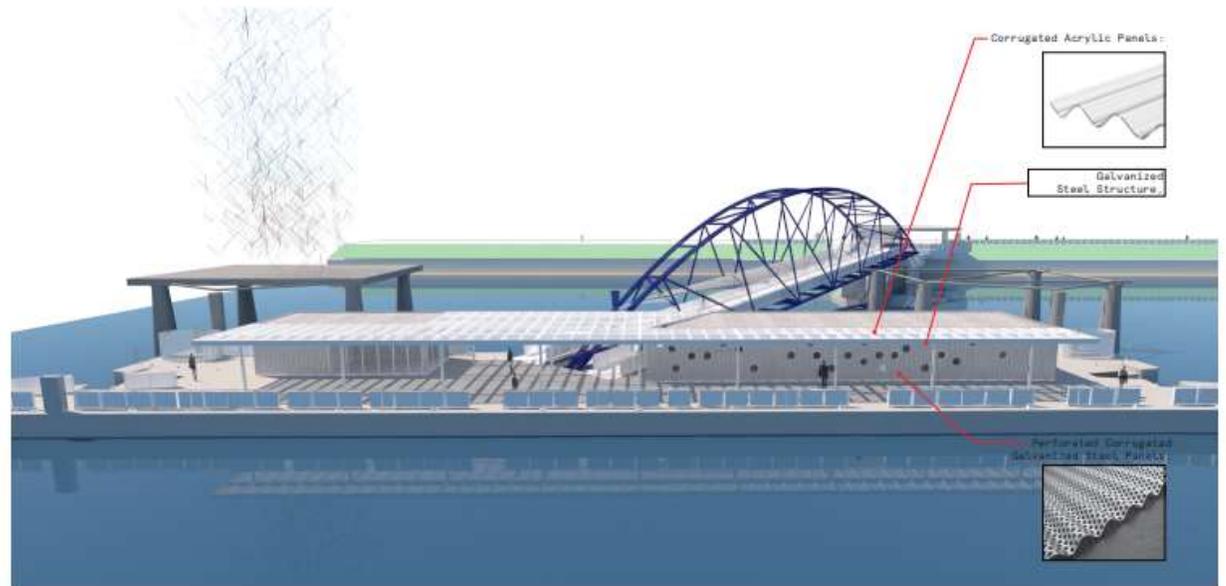
- Elizabeth Line – Woolwich
- Jubilee Line – North Greenwich
- DLR - Greenwich

# Greenwich Pier

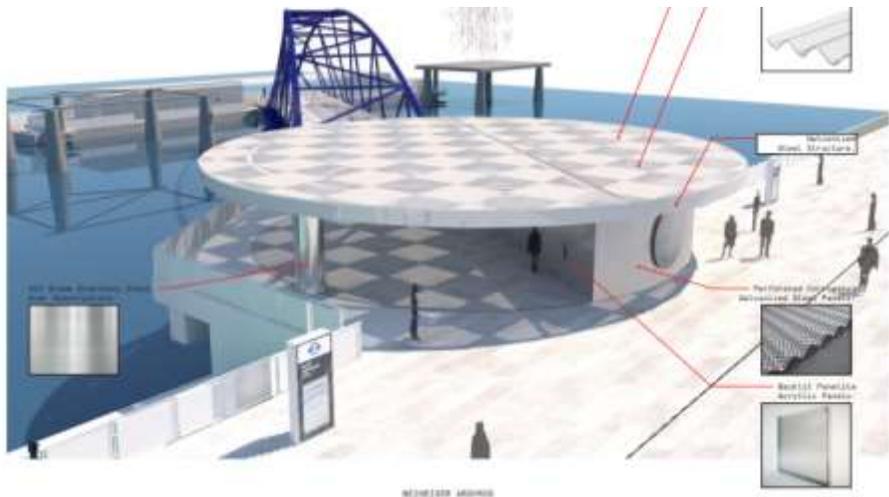
- Critical to the pier strategy
- Owned by TfL
- 1,245,000 visitors per annum
- Need for redevelopment



# Urban design to the riverside



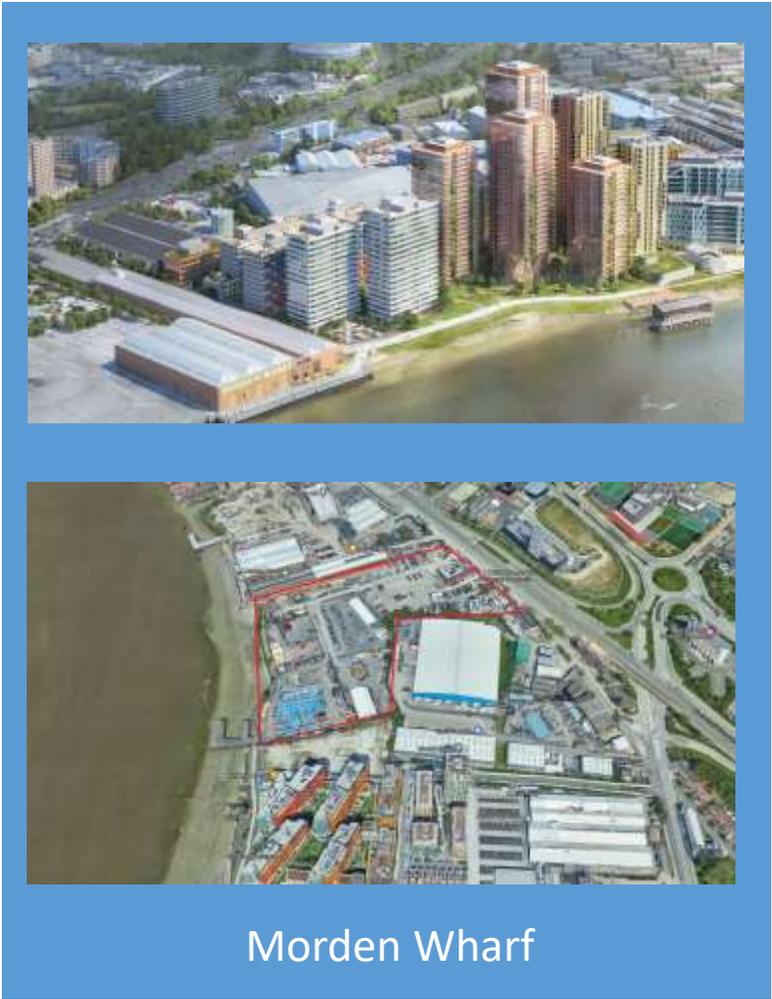
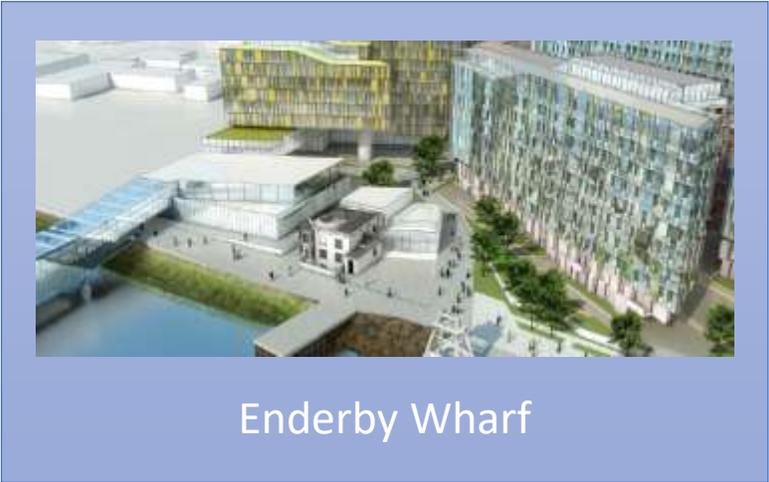
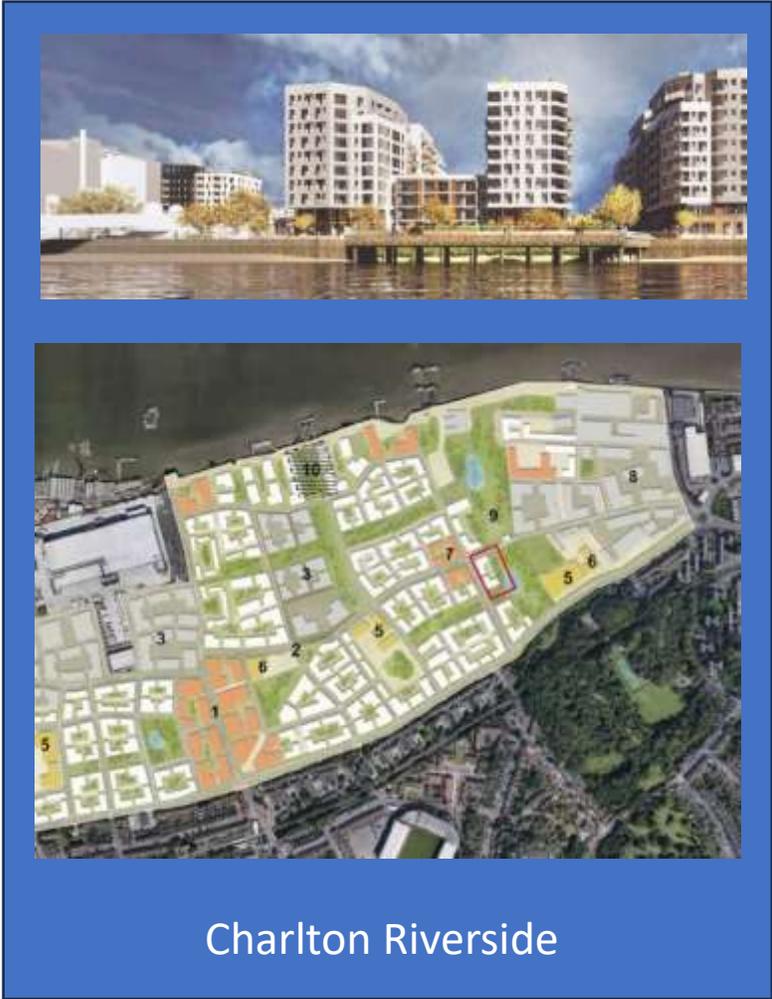
North Greenwich Pier



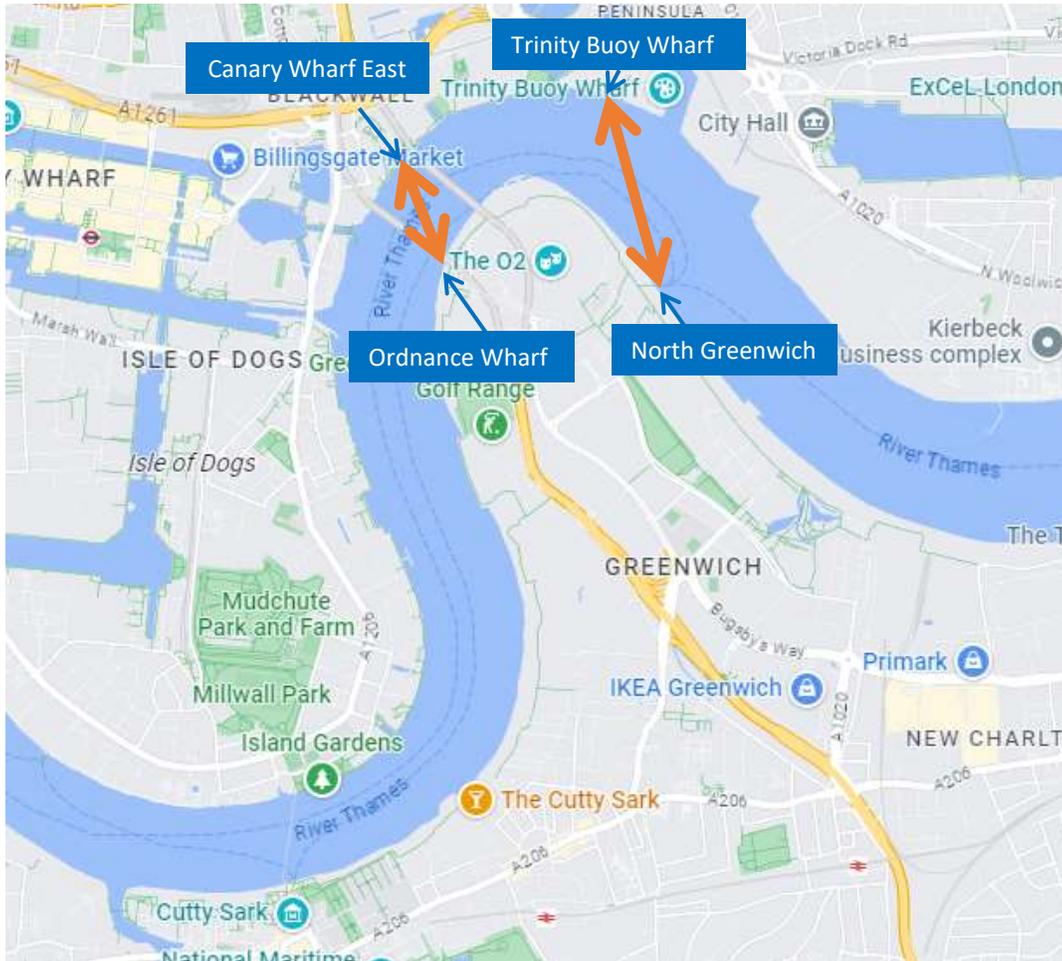
# Improving the riverside walk



# New riverside developments



# Cross River connection opportunities



- 150 passengers / cycles – ‘roll on - roll off’
- Fully electric
- Full day operation on single overnight charge
- Tailpipe zero, true zero emissions with power from green source
- Hull optimised for manoeuvrability vs minimum energy requirement
- Stability optimised considering boarding operations
- Rigid link automated mooring system





Uber Boat

by thames clippers

**Q&A**

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**READ MORE AT**  
**[visitgreenwich.org.uk/about-us](https://visitgreenwich.org.uk/about-us)**

# **THANK YOU**

- **Tour of Design District**
- **Canteen for networking**