





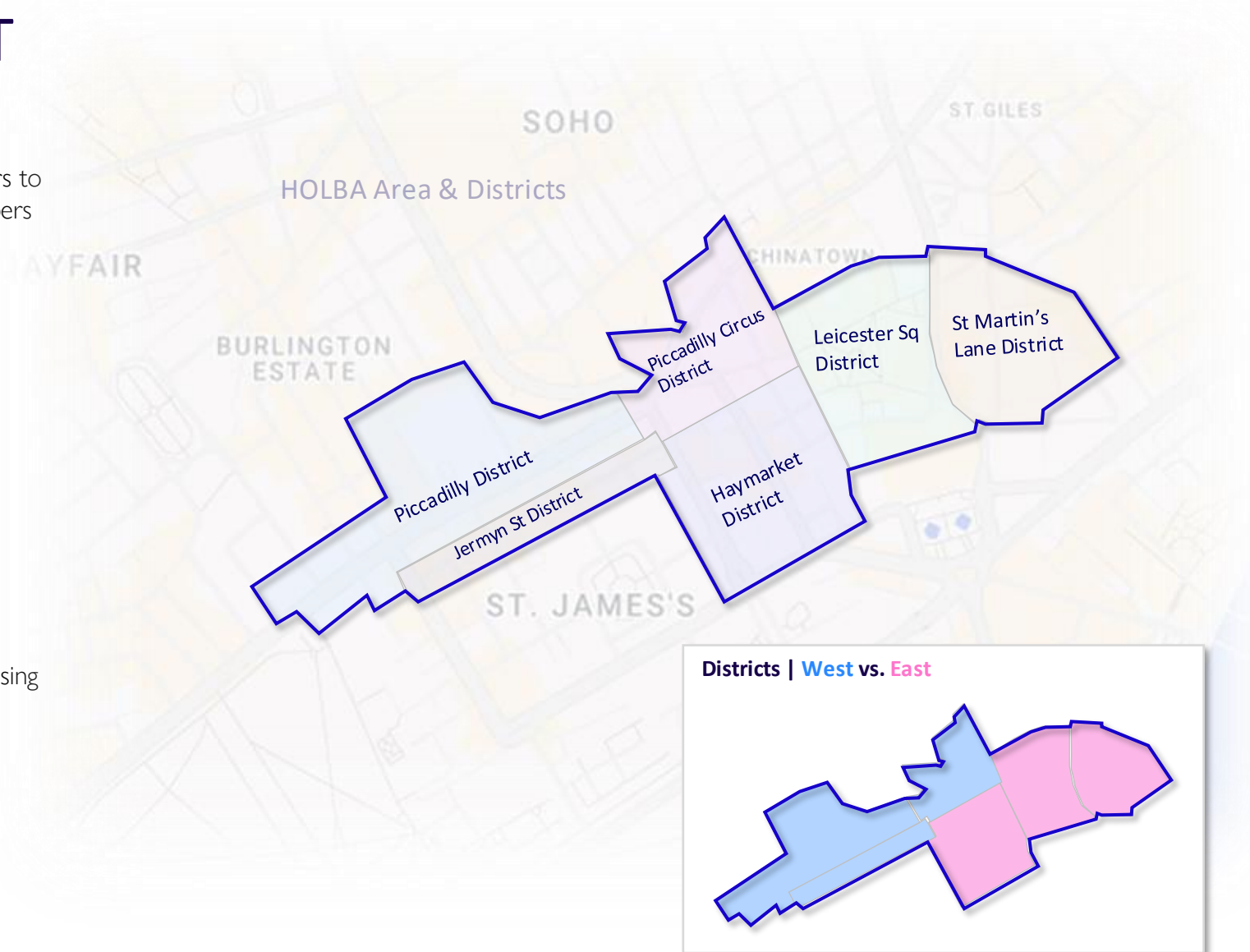
INTRODUCTION & CONTEXT

Heart of London Business Alliance (HOLBA) has partnered with Colliers to provide data and insights on visitors to the HOL area to support members and HOLBA management with trading and strategic decision making.

This monthly report provides key insights from the preceding calendar month, including information about:

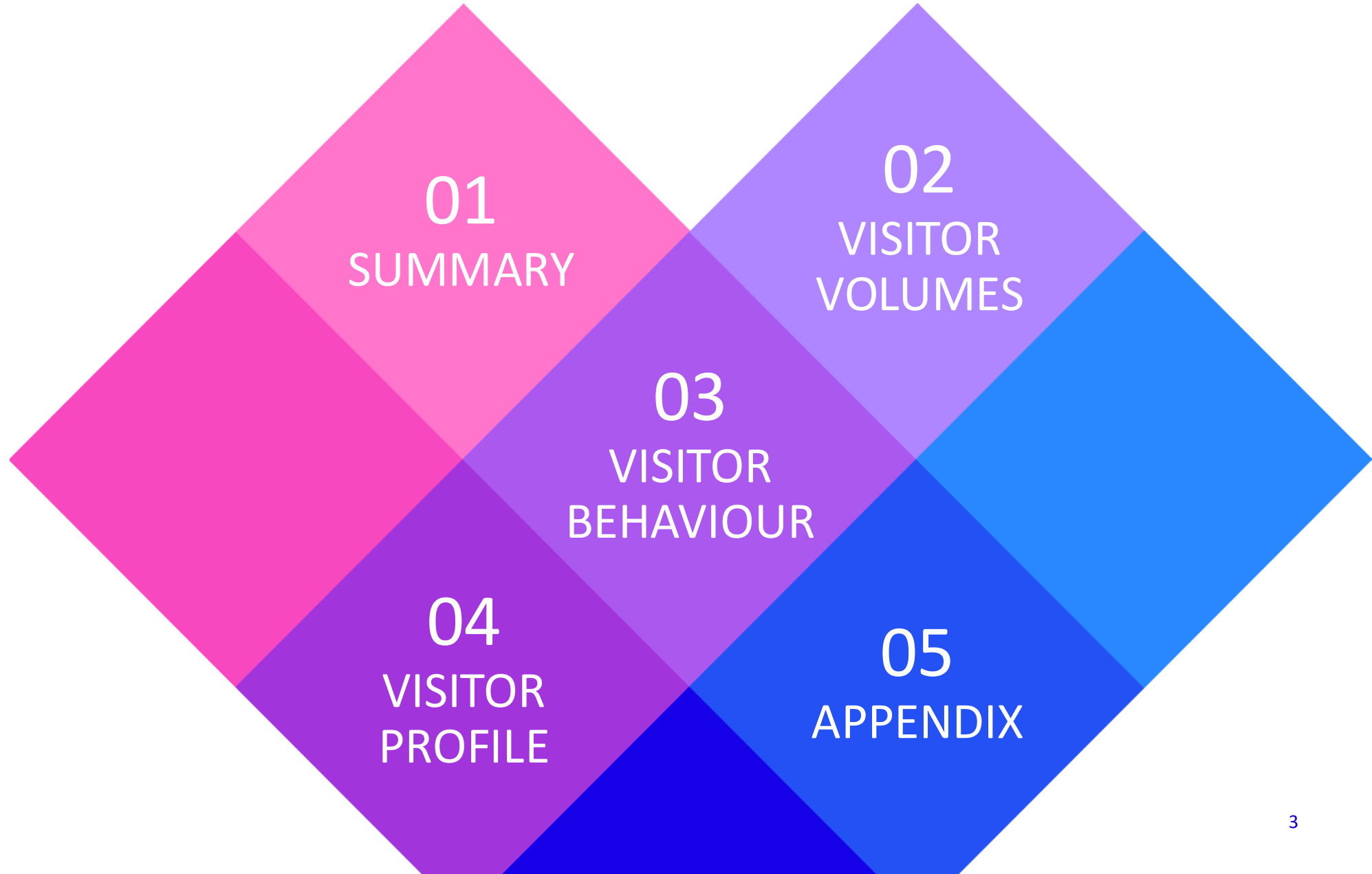
- Visitor footfall & profile
- Visitor behaviour
- Visitor catchment
- TfL station usage

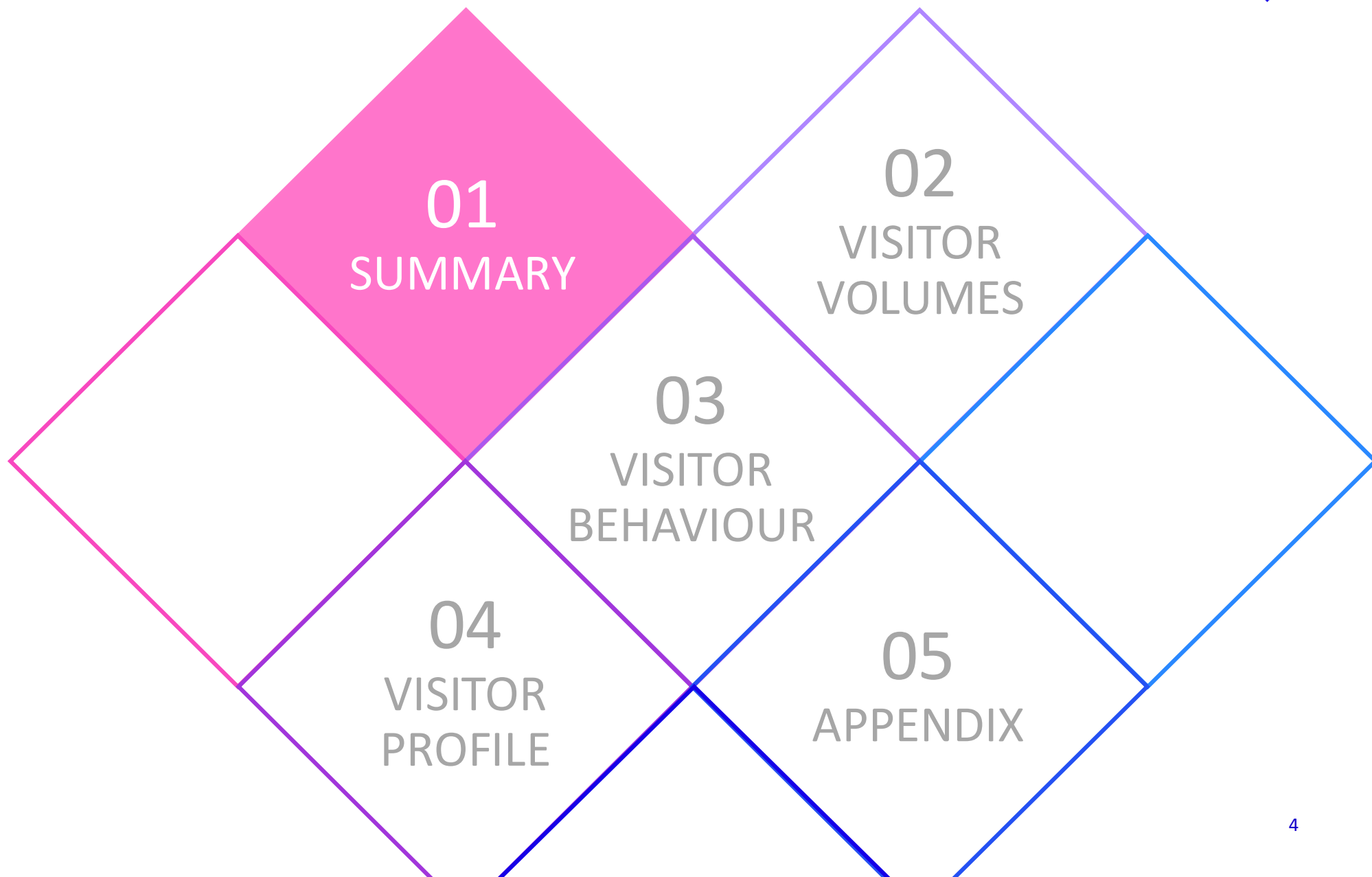
Raw visitor data is sourced from Huq, a leading mobility data provider using mobile phone movements to provide near real-time data on consumer activity across the world.





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EXECUTIVE SUMMARY

March 2026



THE CUMULATIVE VOLUME OF VISITORS IS AHEAD OF LAST YEAR, DESPITE MONTH-ON-MONTH DECLINE

2026 is off to a strong start. At the end of Q4 (Jan – Mar), visit volumes were +0.7% higher than last year, representing the highest visit volumes in Q4 across the last six years. March did see a decline in visitor volumes compared to the previous month (-5%), in part due to February's half term. Despite March's overall month-on-month decline, visitor volume performance varied, with peaks of footfall a result of St Patrick's Day activities & parades; volumes up +23% and +40% on Saturday 14th & Sunday 15th respectively vs. average.



MORE LOCALISED DOMESTIC VISITOR IN MARCH, REFLECTING INCREASED WORKER PRESENCE

HOL area's domestic catchment in March reflected a much more localised visitor base, reflecting return of workers and reduced share of social/leisure visitors from afar during February half-term. HOL area's core catchment saw a +7.5% increase in share of visits originating from within this area, with the area's 'pull-in' from outside of the base catchment reducing 3.3% MoM.



DOMESTIC VISITOR PROFILE MUCH MORE FOCUSED AROUND DOMINANT MOSAIC GROUPS

Alongside catchment dynamic changes, March's domestic visitor profile became much more focussed and centred around the top 5 dominant MOSAIC groups, which accounted for 6% higher share of domestic visitors in March MoM. 81% of the HOL area's domestic visitors were within the top 5 dominant groups, reflecting an affluent, urban-centric visitor across the area, while contributing a greater share of the visitor profile relative to wider Core West End profile (76%).



INCREASED SHARE OF INTERNATIONAL VISITORS MONTH-ON-MONTH, WITH MORE DISTRIBUTED ORIGIN MIX

Internationally, the HOL area's visitor mix from outside of the UK saw growth MoM (+6%) while being largely consistent YoY (-0.1%). There was a more distributed overseas origin mix; European share of international visitors reduced (-15% MoM), while there was modest growth in share of visitors from Middle East (+1% MoM & YoY) amid geopolitical tensions in the region, perhaps influenced by travel disruptions as well as seeking an alternative destinations.

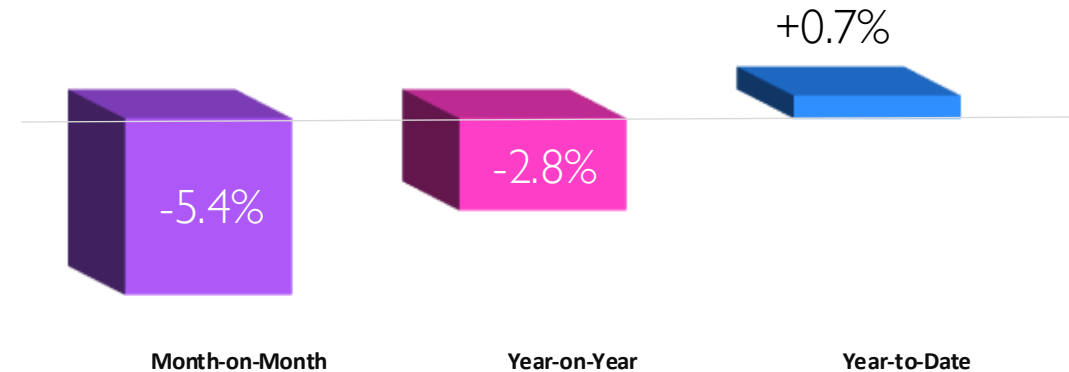




SUMMARY - VISIT VOLUMES

March 2026

Slight decline YoY (-2.8%) in March, while higher decline MoM (-5.4%) with comparison to February half-term influencing social & leisure visits.

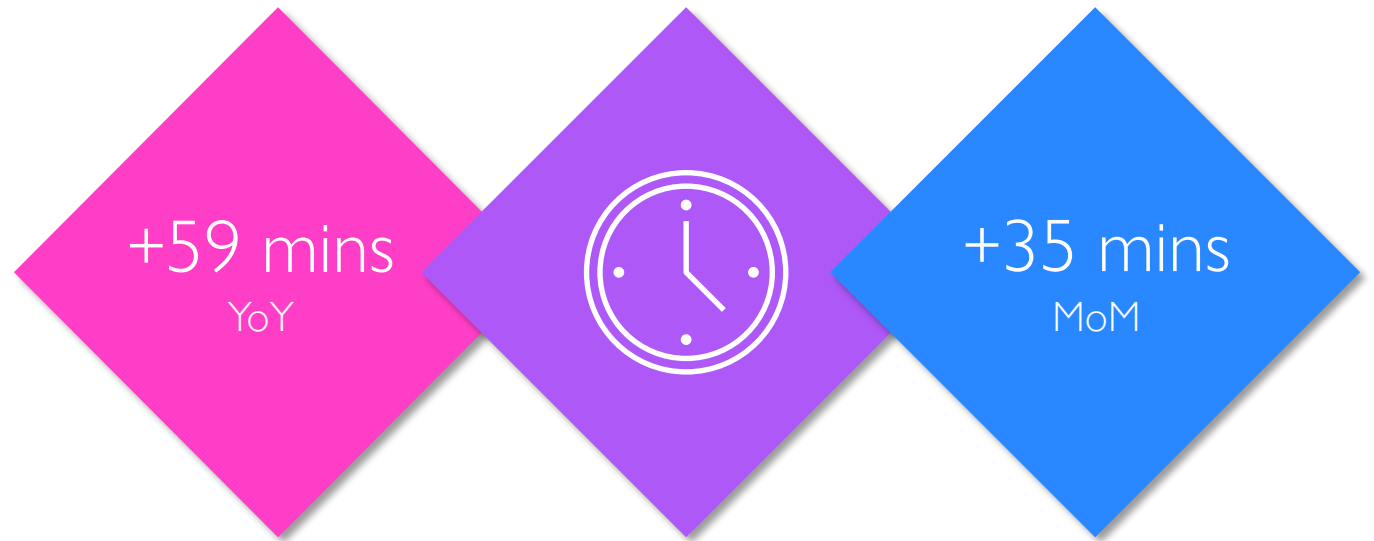




SUMMARY - VISIT DWELL

March 2026

Visitor dwell up **~1hr**
YoY, with visitors
typically spending **3
hrs 26 mins** in the
HOL area.





SUMMARY - DOMESTIC VISITOR ORIGIN

March 2026

Higher share of visits from within HOL areas core catchment (+7.5%), particularly driven by +10% increase in primary catchment, reflecting a much more local visitor base in March.

Total Catchment | 94.9% visitors

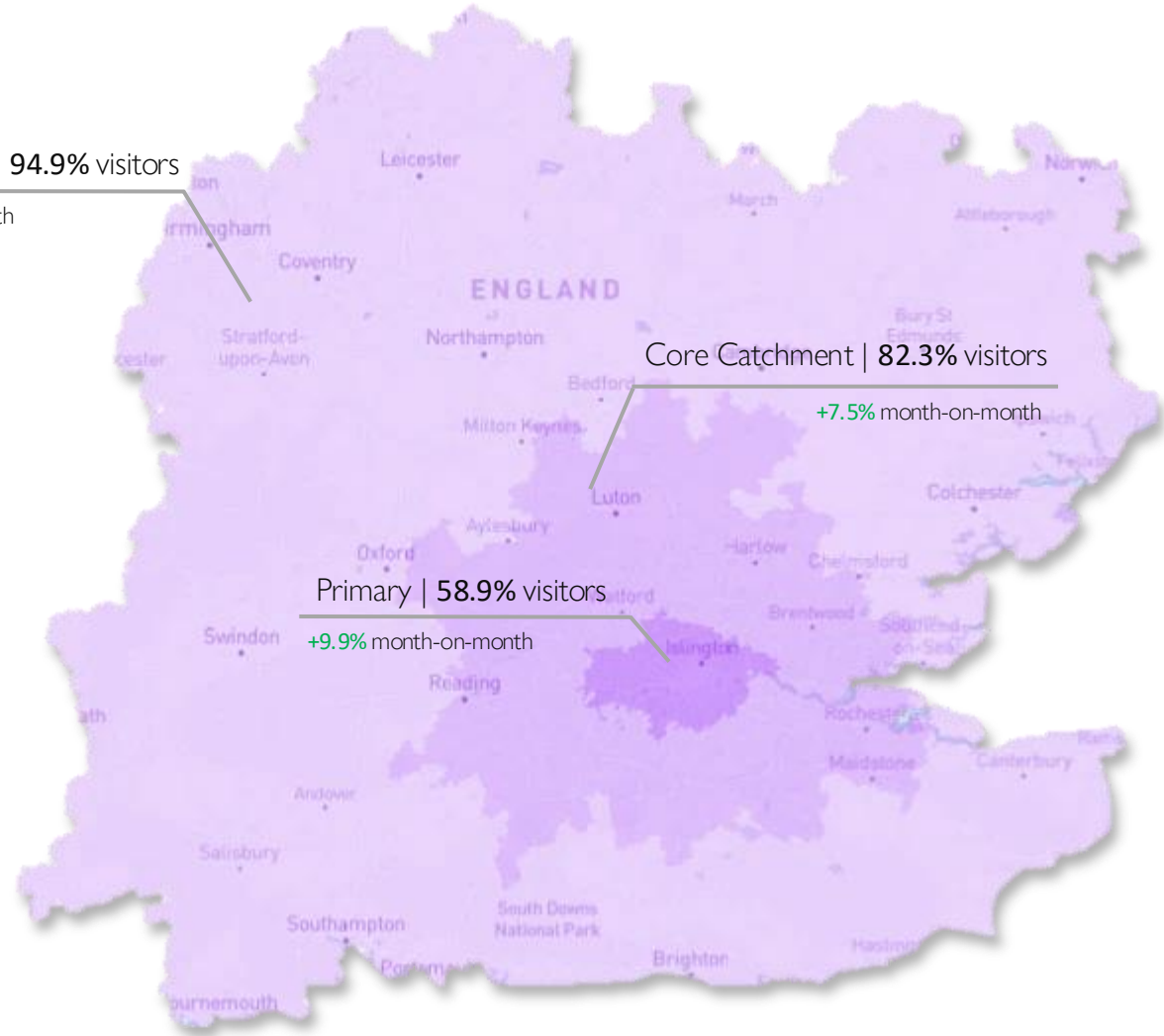
+3.3% month-on-month

Core Catchment | 82.3% visitors

+7.5% month-on-month

Primary | 58.9% visitors

+9.9% month-on-month



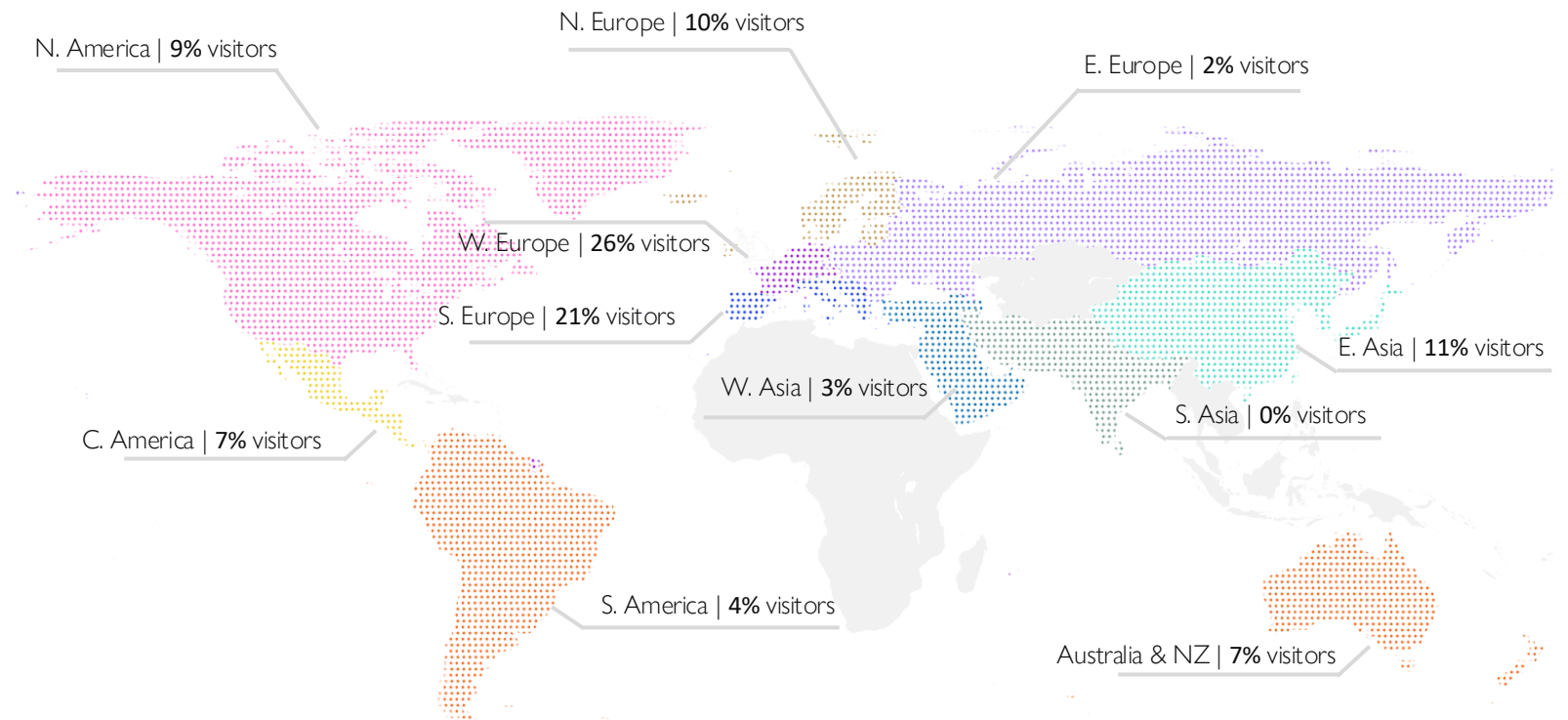


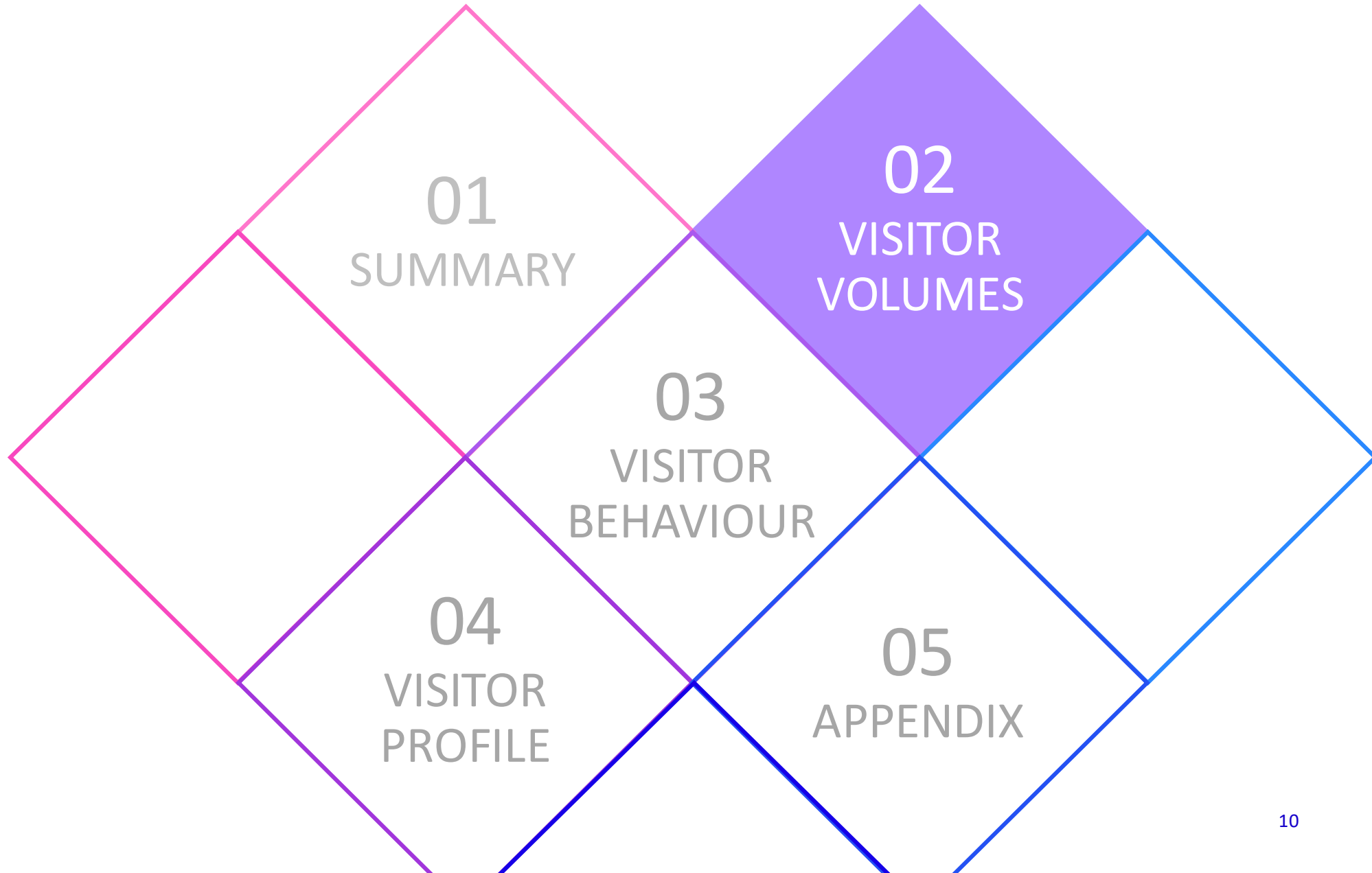
SUMMARY - INTERNATIONAL VISITATION

March 2026

International visitors accounted for 13% of total HOL area footfall, a **+6% MoM** increase and **-0.1% YoY**. The area saw a decline in share of European visitors in March.

Share of International Visits (%)

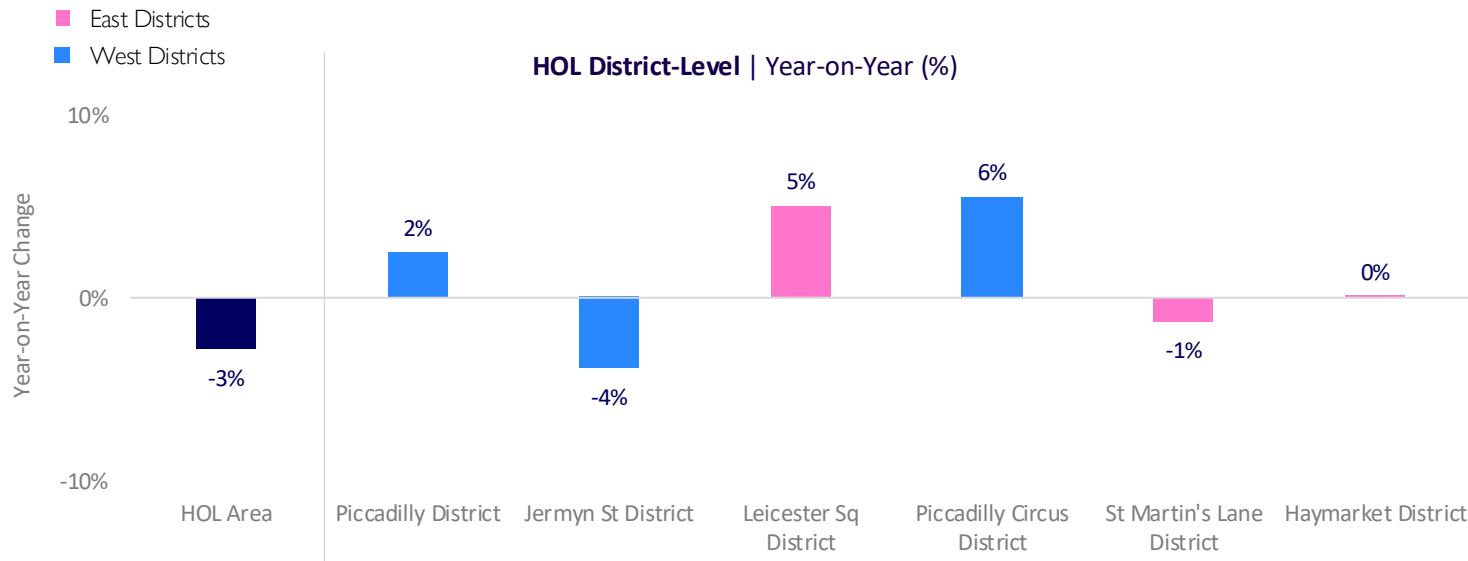




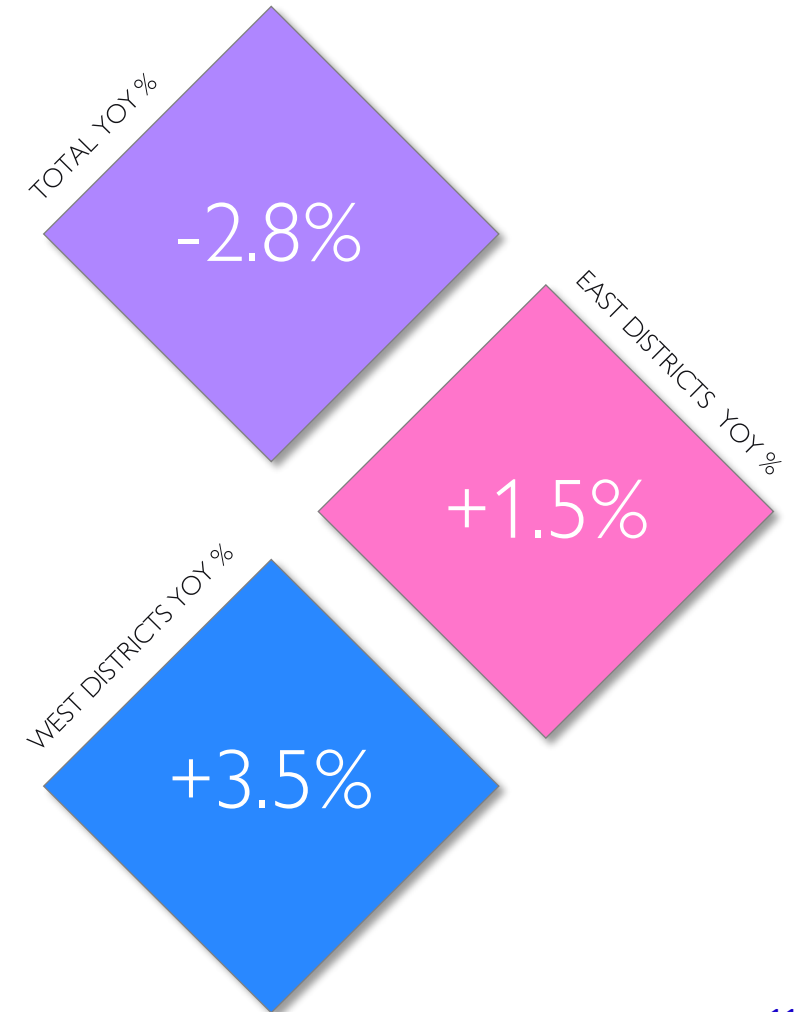


VISIT VOLUMES ACROSS THE HOL AREA DOWN -2.8% YOY, DESPITE GROWTH IN BOTH WORKER & TOURIST-LED AREAS AS A WHOLE

- Overall, visits to the HOL area were slightly down in March 2026, falling 2.8% compared to last year, even though some parts of the area, particularly tourist areas in the east and work focused areas in the west, saw small increases.
- Across individual districts, changes were fairly modest, with most areas up or down by around 6%, indicating relatively steady performance overall. The gap between the overall decline and growth in tourist and worker areas likely reflects people visiting multiple districts more often within a single trip.
- Looking at specific locations, Piccadilly Circus rose by 6% and Leicester Square by 5%, while Jermyn Street experienced the largest decline at 4%.



Eastern Districts include St Martin's Lane, Leicester Sq, Haymarket District



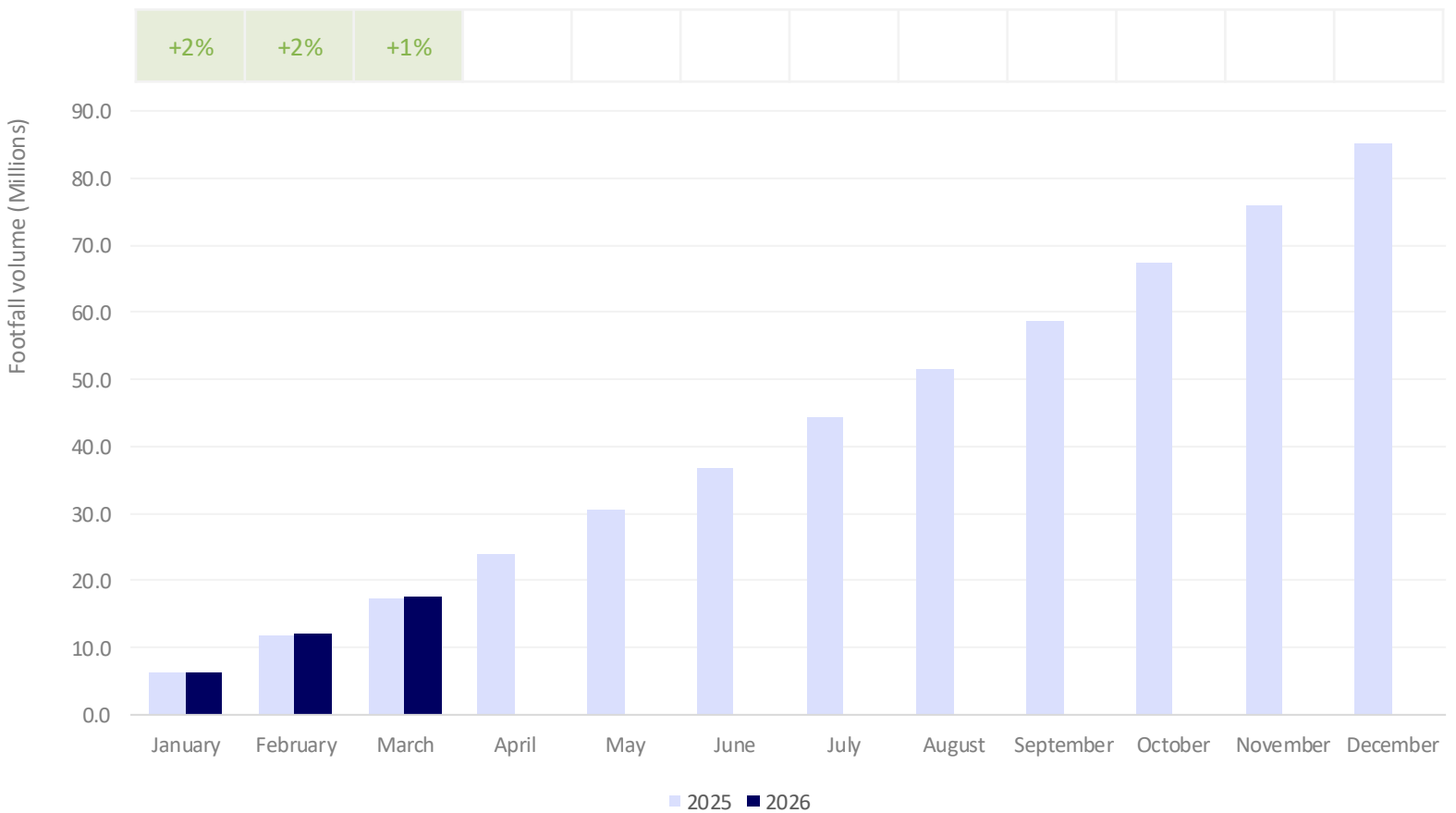


YEAR-TO-DATE VISITS UP +0.7% AT THE END OF THE FIRST QUARTER (JAN-MAR) IN 2026



- Visitor volumes across the HOL area after the first calendar quarter (Jan-Mar) are up 0.7% YoY.
- This continued the strong performance from the end of 2025 and seeing highest Q4 (Jan-Mar) over the last six years.
- Leicester Square District has experienced strongest growth YtD, with visit volumes +9% higher across the first calendar quarter in 2026.

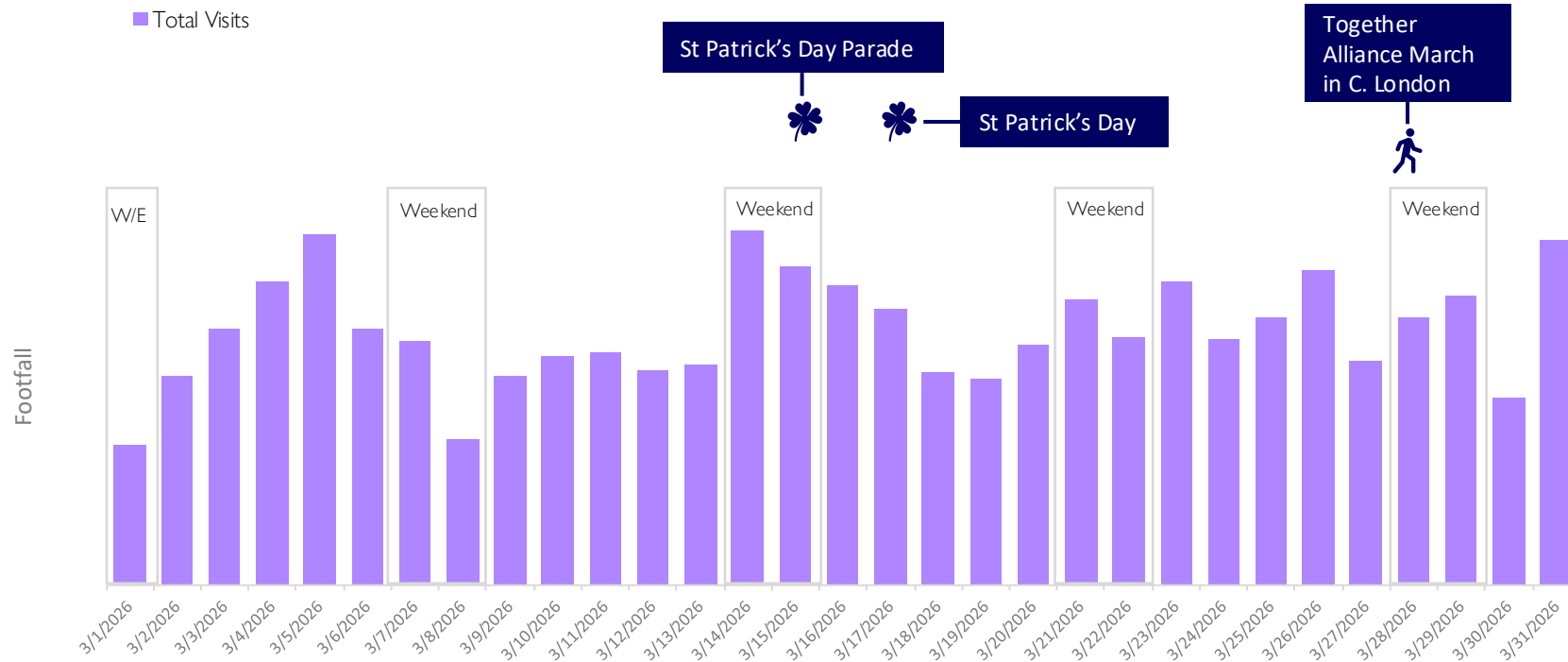
HOL Area | Year-to-Date Visit Performance





PEAK VISITS ACROSS HOL AREA ON WEEKEND OF 14TH / 15TH MARCH, COINCIDING WITH CELEBRATIONS

HOL Area | Monthly Footfall



- Visit volumes peaked across the HOL area on the weekend of Sat 14th and Sun 15th March, coinciding with St Patrick's Day celebrations including the *St Patrick's Day Parade & Festival* which passed through Piccadilly.
- Visit volumes saw a significant increase across both days; Saturday +23% and Sunday +40% ahead of average day volumes.
- At a week-level, Week 12 (w/c 16th March) saw the highest average daily visit volumes with stable, dry weather throughout the week.

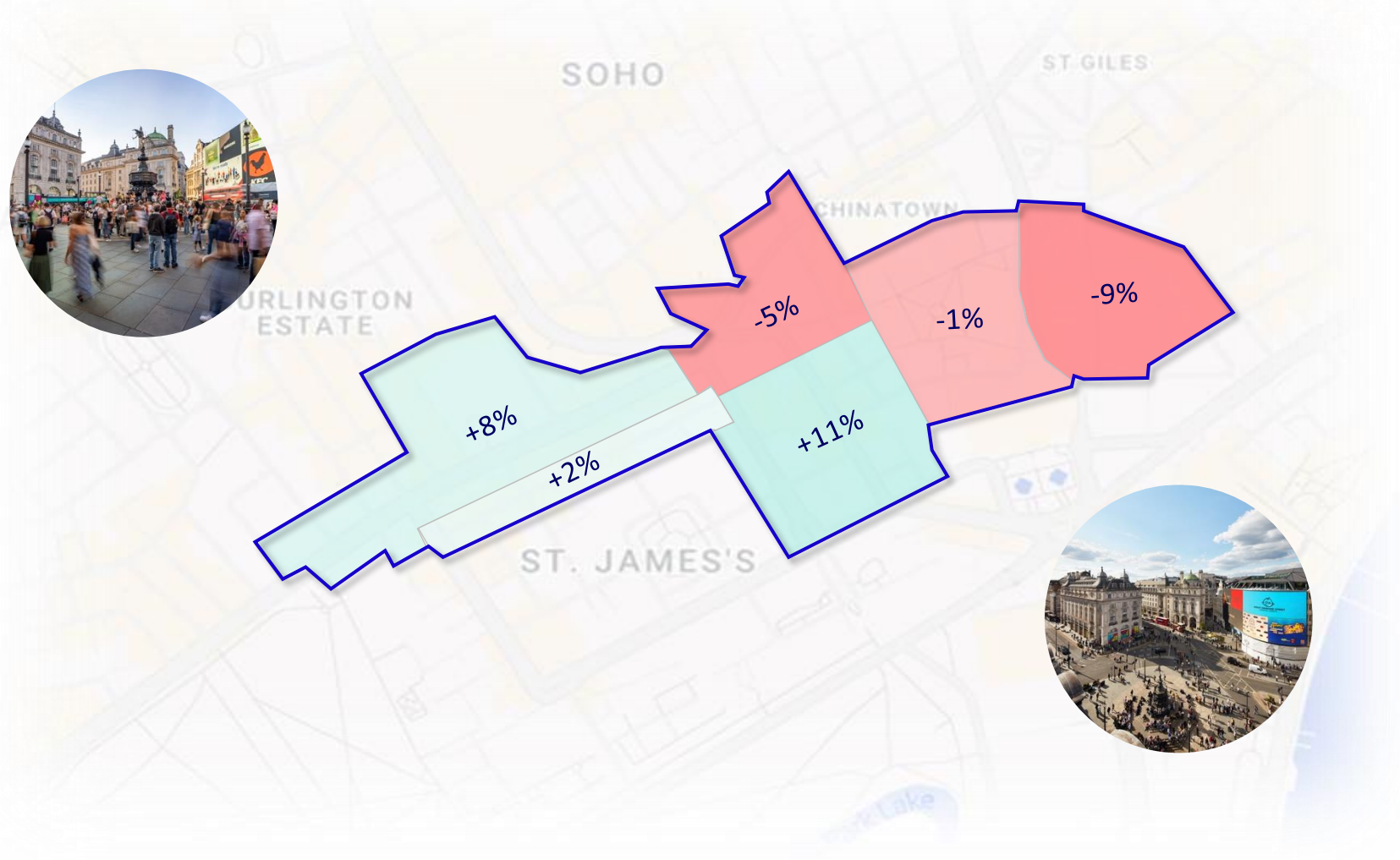
	Week 10	Week 11	Week 12	Week 13
Avg. Daily Visits	174,251	178,423	190,927	161,286
Avg. Daily Rain (mm)	0.7	1.5	0.0	0.2



MONTH-ON-MONTH DECLINE DRIVEN BY EASTERN TOURIST-LED DISTRICTS SEEING LOWER VISITS VS. HALF-TERM IN FEBRUARY



- Overall, HOL area performance down 5% vs. February.
- A greater rate of MoM decline was seen across eastern tourist-led districts (-1%), with comparisons to February half-term influencing visitor trends.
- In contrast, worker-led western districts saw uplift MoM (+1%), with return of workers throughout March.





15.9M PEOPLE IN HOL AREA'S DOMESTIC CORE CATCHMENT

15.9m

core catchment
population

32.0m

total catchment
population

Catchment Band

Population (millions)

Primary

6.9m

Secondary

8.9m

Core Catchment

(75% of visitors)

15.9m

Tertiary

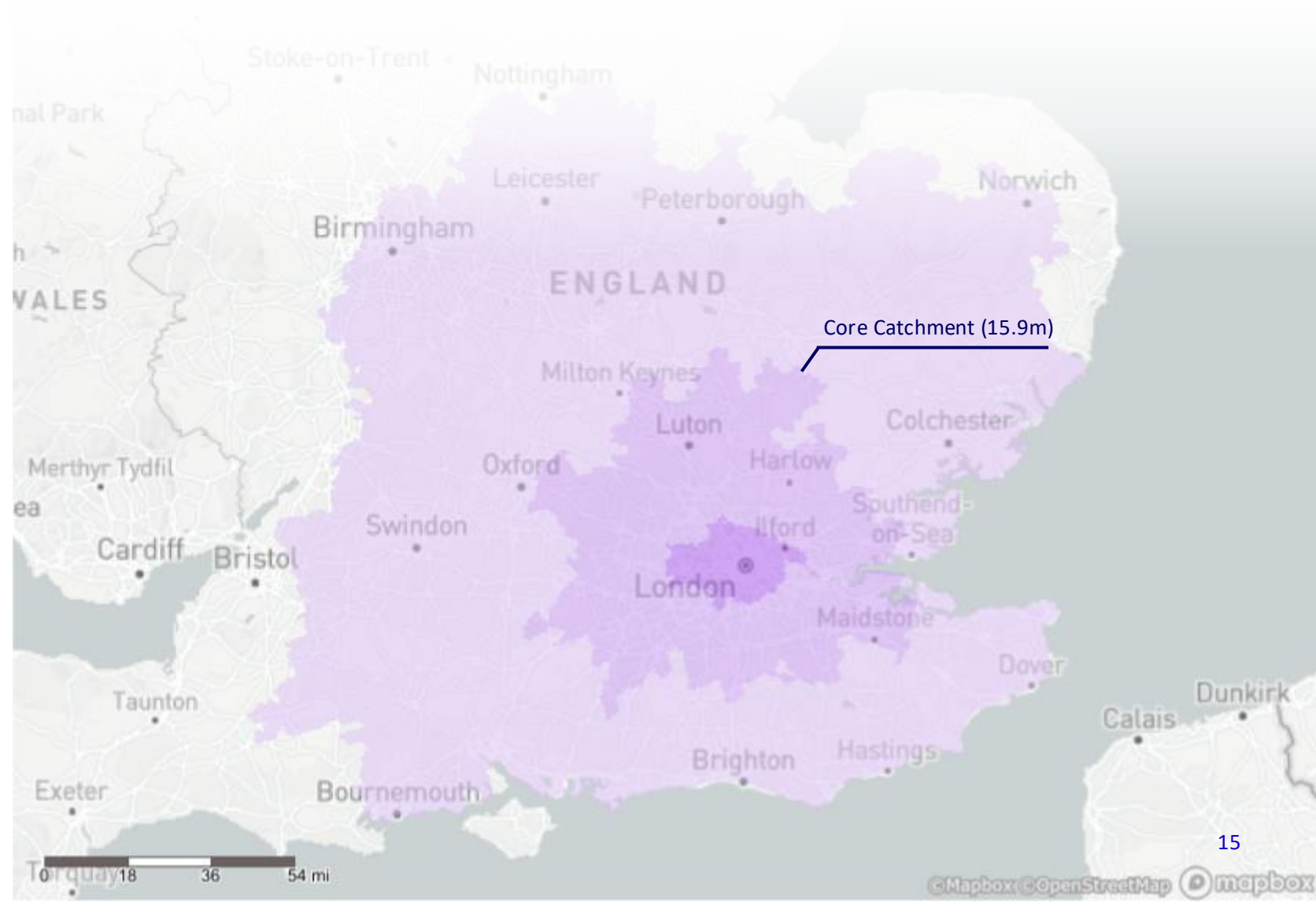
16.2m

Total Catchment

(90% of visitors)

32.0m

Catchment defined from FY24 (April 24 – Mar 25) visitor behavior





HIGH PENETRATION FROM RESIDENTS WITHIN LONDON IN MARCH, REPRESENTING HIGH WORKER PRESENCE

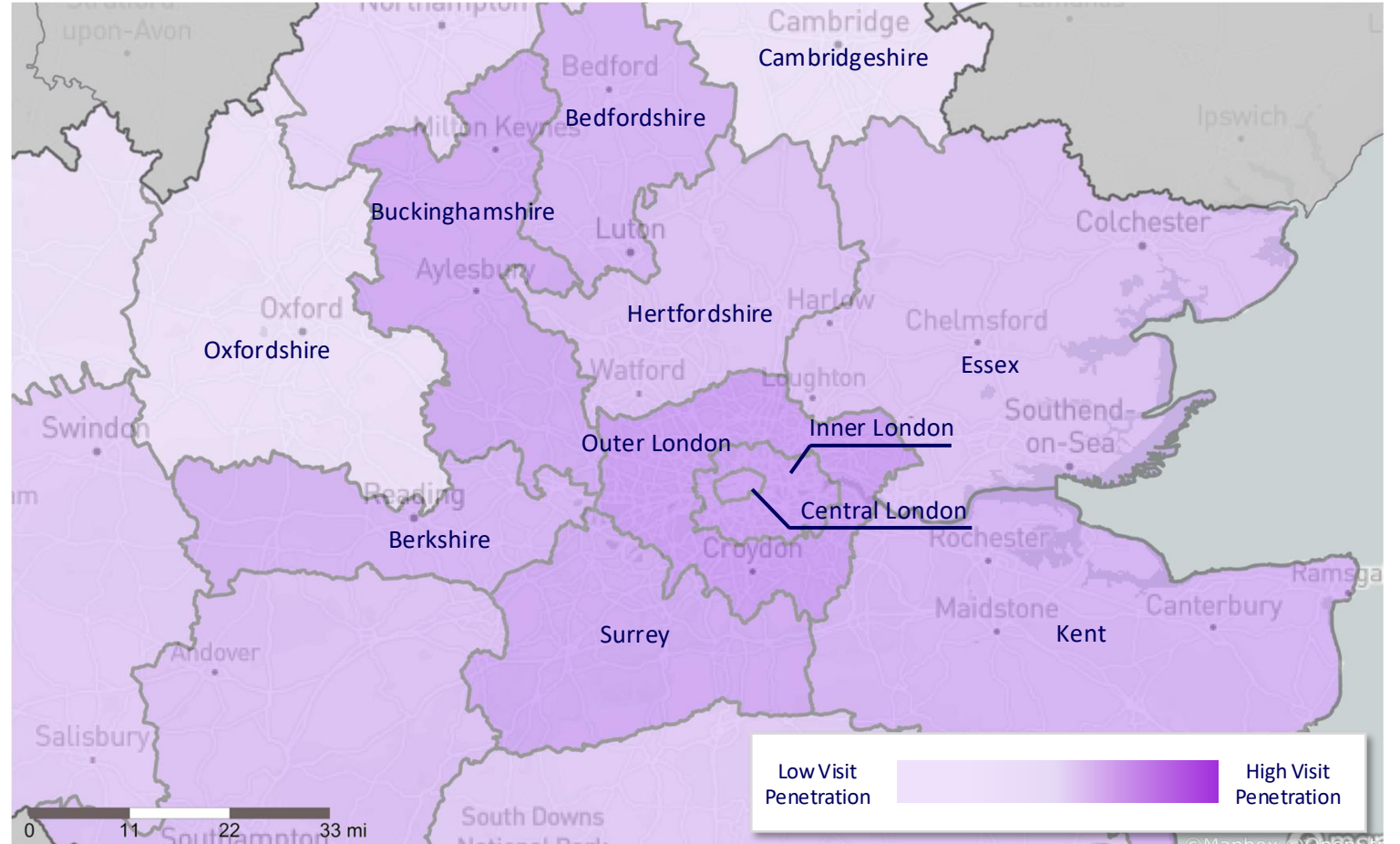
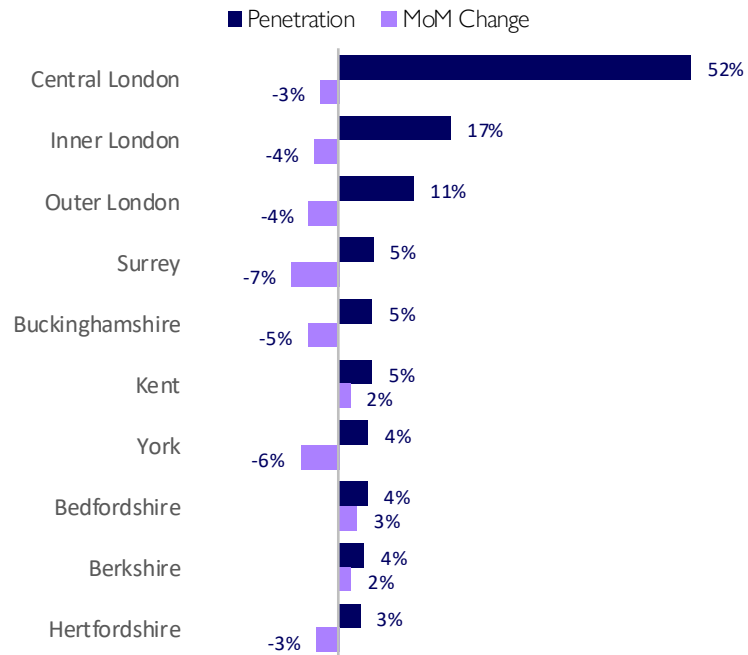
+52%

visit penetration within Central London

-3%

Decreased penetration from Central London month-on-month

Visit Penetration | Top 10 Counties

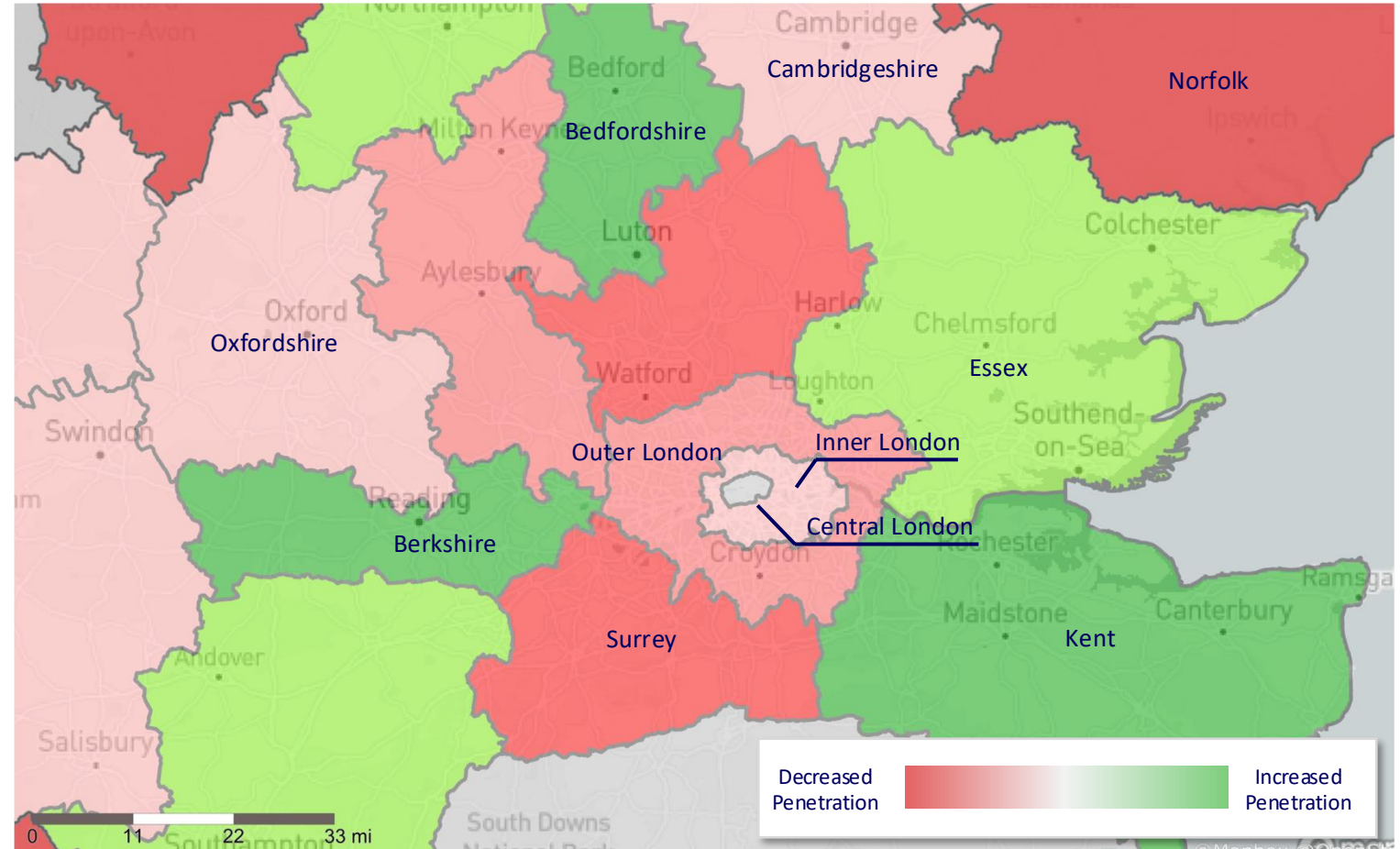




HIGHER SHARE OF VISITORS FROM WITHIN PRIMARY CATCHMENT (+10%) IN MARCH

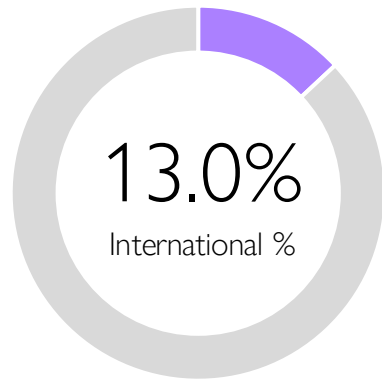
- Share of visits to the HOL area from within its core catchment saw **7.5%** increase in March MoM, driven by comparisons to half-term in February influencing visitor profile on social/leisure visits from further afield.
- Visitors to the HOL area disproportionately came from within its primary catchment in March relative to overall 'base-catchment', 8.9% higher share relative to annual catchment.

Catchment Band	Mar-26 Visit %	Percentage Point change vs. previous month
Primary	58.9%	+9.9%
Secondary	23.3%	-2.3%
Core Catchment (75% of visitors)	82.3%	+7.5%
Tertiary	12.6%	-4.2%
Total Catchment (90% of visitors)	94.9%	+3.3%
Pull-In	5.1%	-3.3%





INTERNATIONAL VISITOR SHARE SAW GROWTH ACROSS ALL DISTRICTS MOM, WITH OVERALL HOL SHARE CONSISTENT YOY



+6.2%
MoM

-0.1%
YoY

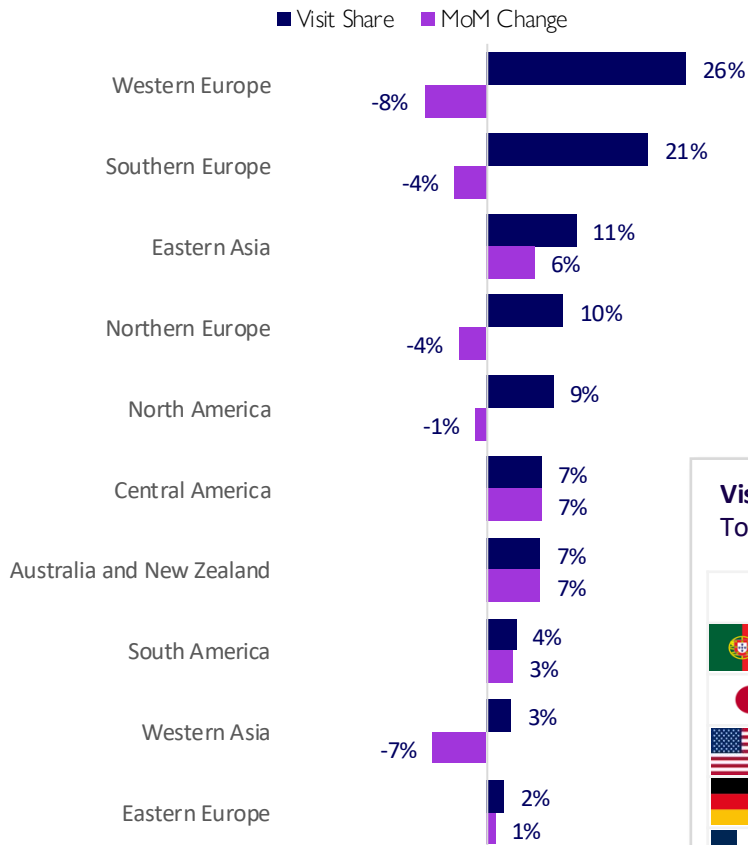
- International visitors contributed **13%** of all March visits across HOL area – a 6.2% increase MoM and a consistent share YoY (-0.1%).
- More tourist-focused districts, e.g. Haymarket District, Leicester Square & St Martin's Lane, saw the highest proportion of its visitors from overseas, while also seeing some of the highest month-on-month & year-on-year growth rates.
- All districts saw an increase in international mix month-on-month, with overall HOL area international mix up 6.2%.

Area	International Mix (%)	Month-on-Month	Year-on-Year
HOL Area	13.0%	+6.2%	-0.1%
Piccadilly District	8.6%	+3.5%	-5.2%
Jermyn St District	16.7%	+8.6%	+1.7%
Leicester Sq District	18.8%	+8.1%	+4.6%
Piccadilly Circus District	17.6%	+6.6%	+1.3%
St Martin's Lane District	18.9%	+10.9%	+5.5%
Haymarket District	22.7%	+13.6%	+7.9%
<i>Core West End</i>	8.7%	+3.2%	+0.1%



MORE DISTRIBUTED INTERNATIONAL PROFILE, WITH A REDUCTION IN EUROPEAN VISITORS WHILE GROWTH IN SHARE OF MIDDLE EAST

Visit Share | Top 10 Regions



58.4% Europe
-15.1% MoM -4.2% YoY

8.6% N. America
-1.5% MoM -0.2% YoY

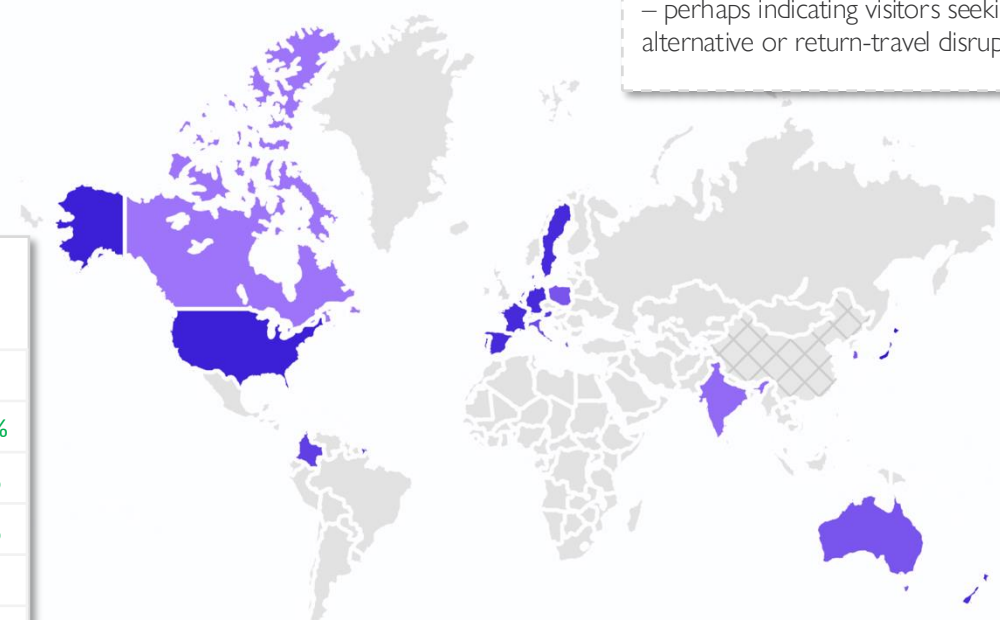
3.2% Middle East
+1.2% MoM +0.7% YoY

Share of International Visits (%)

With ongoing geopolitical tensions in the Middle East, share of visitors from the region across HOL area saw a modest MoM increase in March – perhaps indicating visitors seeking a safe-haven alternative or return-travel disruptions.

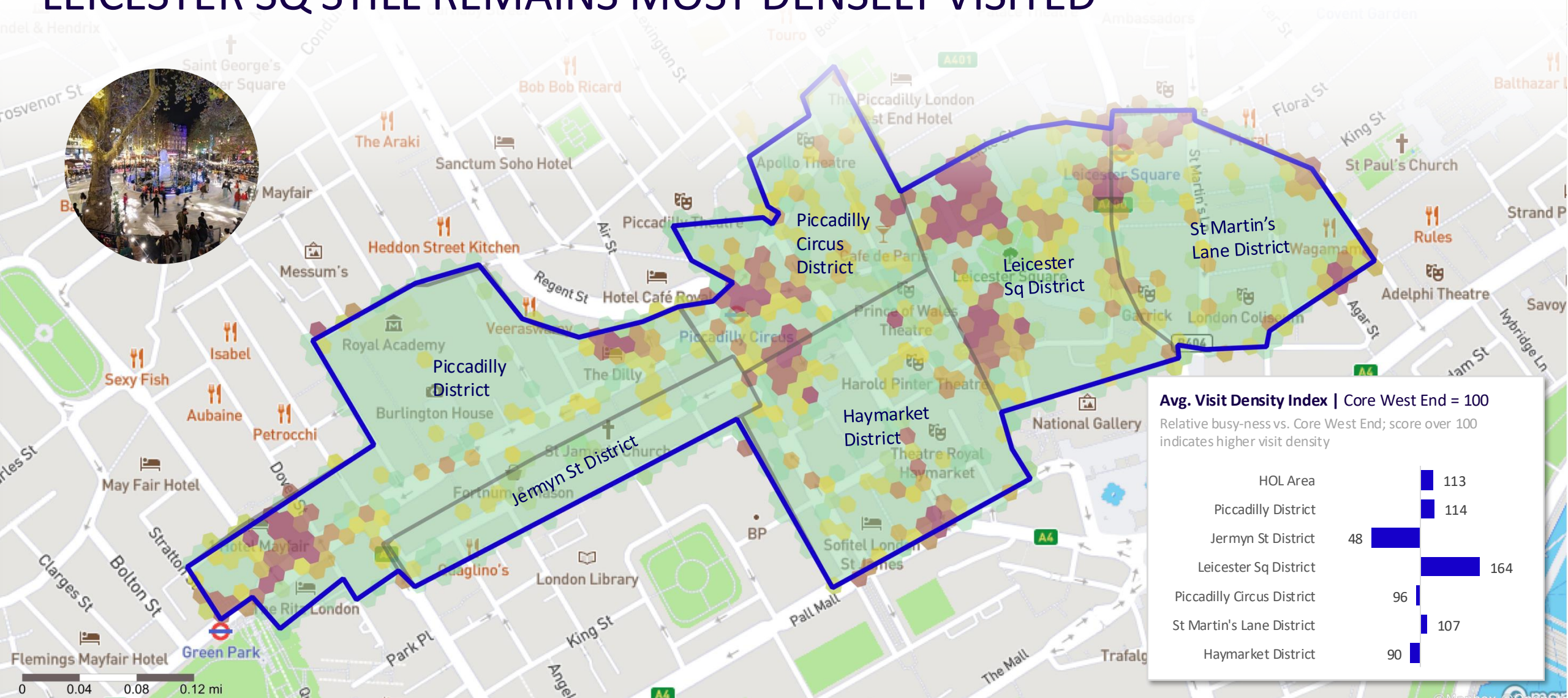
Visit Share Top 5 Countries (% of Intl)

Country	%	MoM
Portugal	11.3%	+11.3%
Japan	10.4%	+7.9%
United States	8.6%	+2.0%
Germany	7.3%	-5.5%
France	7.2%	-7.7%





MORE DISTRIBUTED VISIT DENSITY DUE TO HIGH CROSS-VISITATION, WHILE LEICESTER SQ STILL REMAINS MOST DENSELY VISITED



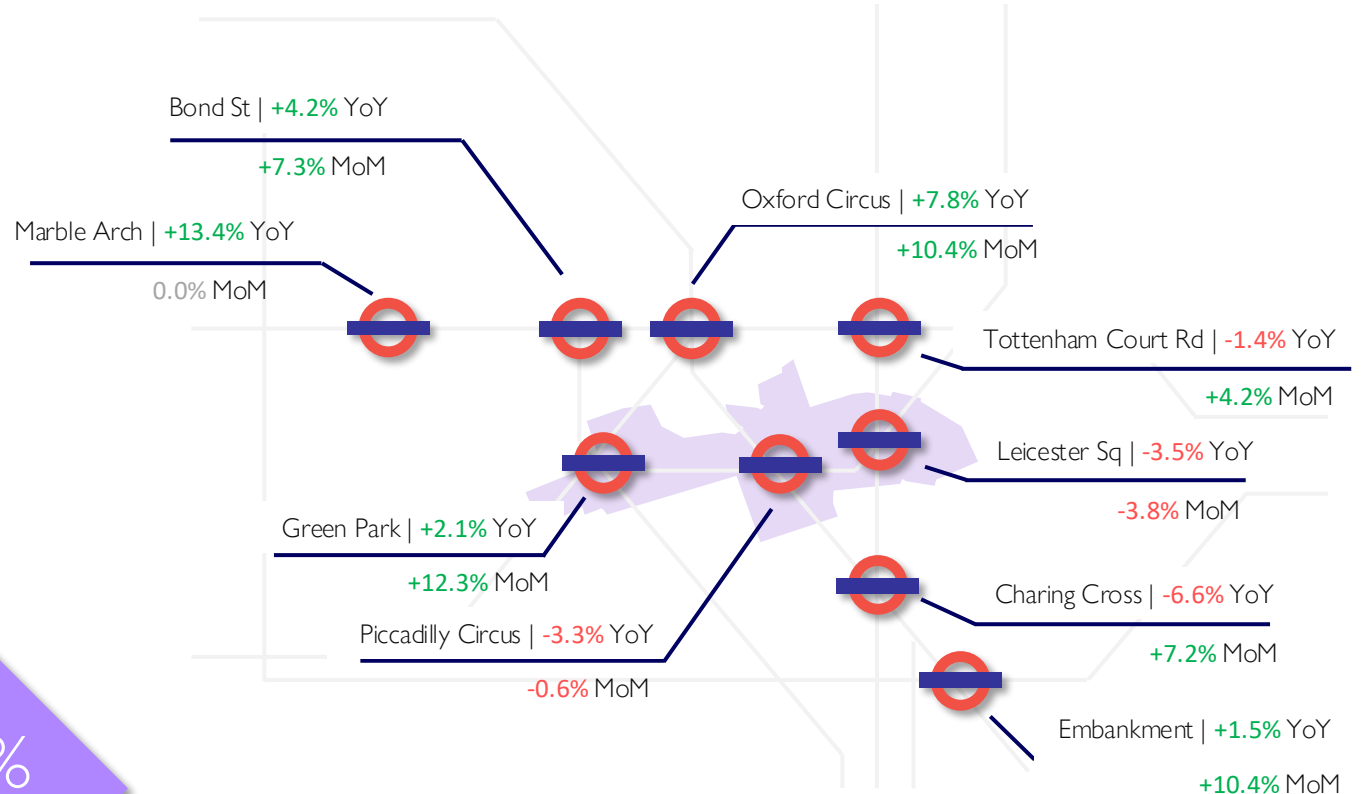
Avg. Visit Density Index | Core West End = 100
 Relative busy-ness vs. Core West End; score over 100 indicates higher visit density

District	Avg. Visit Density Index
HOL Area	113
Piccadilly District	114
Jermyn St District	48
Leicester Sq District	164
Piccadilly Circus District	96
St Martin's Lane District	107
Haymarket District	90



DECLINE IN HOL AREA STATION USAGE IN MARCH, REFLECTING TREND IN VISIT VOLUMES ALBEIT AT A LESSER RATE OF DECLINE

- In line with overall visit performance to HOL area (-2.8%), TfL usage across HOL stations saw decline YoY (-1.4%); albeit at slightly more robust performance.
- Despite overall decline, strong performance in station usage at Oxford Circus throughout March; entries/exits saw +8% YoY and +10% MoM growth.
- Stations across HOL area saw lower performance relative to wider West End stations, which experienced +0.9% growth year-on-year.



Decrease in usage from stations within HOL area in March 2026 vs. March 2025¹

-1.4%
YoY

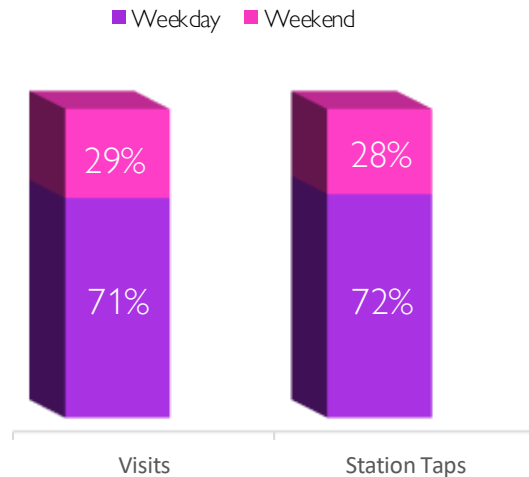
¹ Stations within HOL Area: Leicester Sq, Piccadilly Circus, Green Park
Source: Transport for London



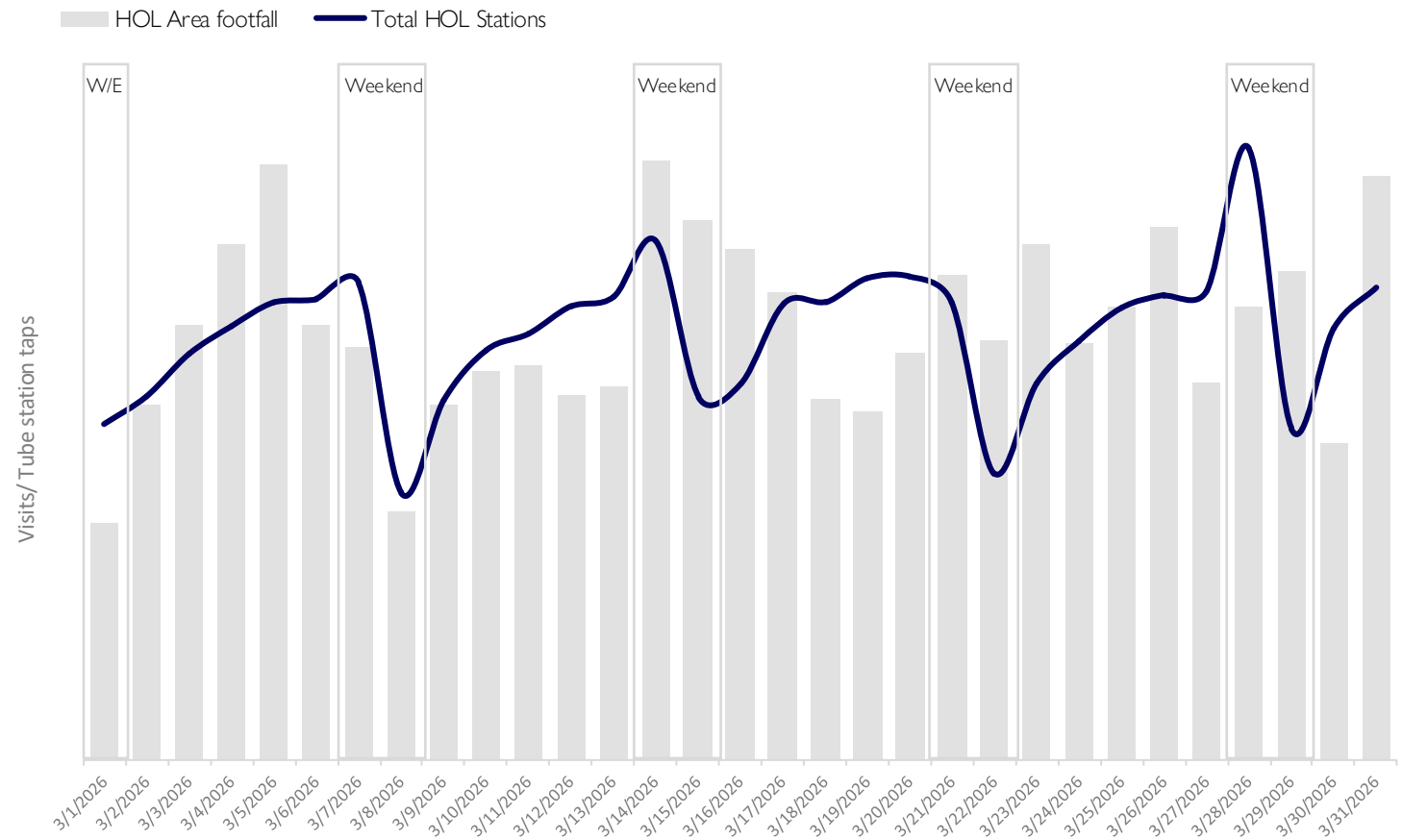
UPLIFT IN HOL VISITS REFLECTED IN GREATER USAGE ACROSS STATIONS IN MARCH

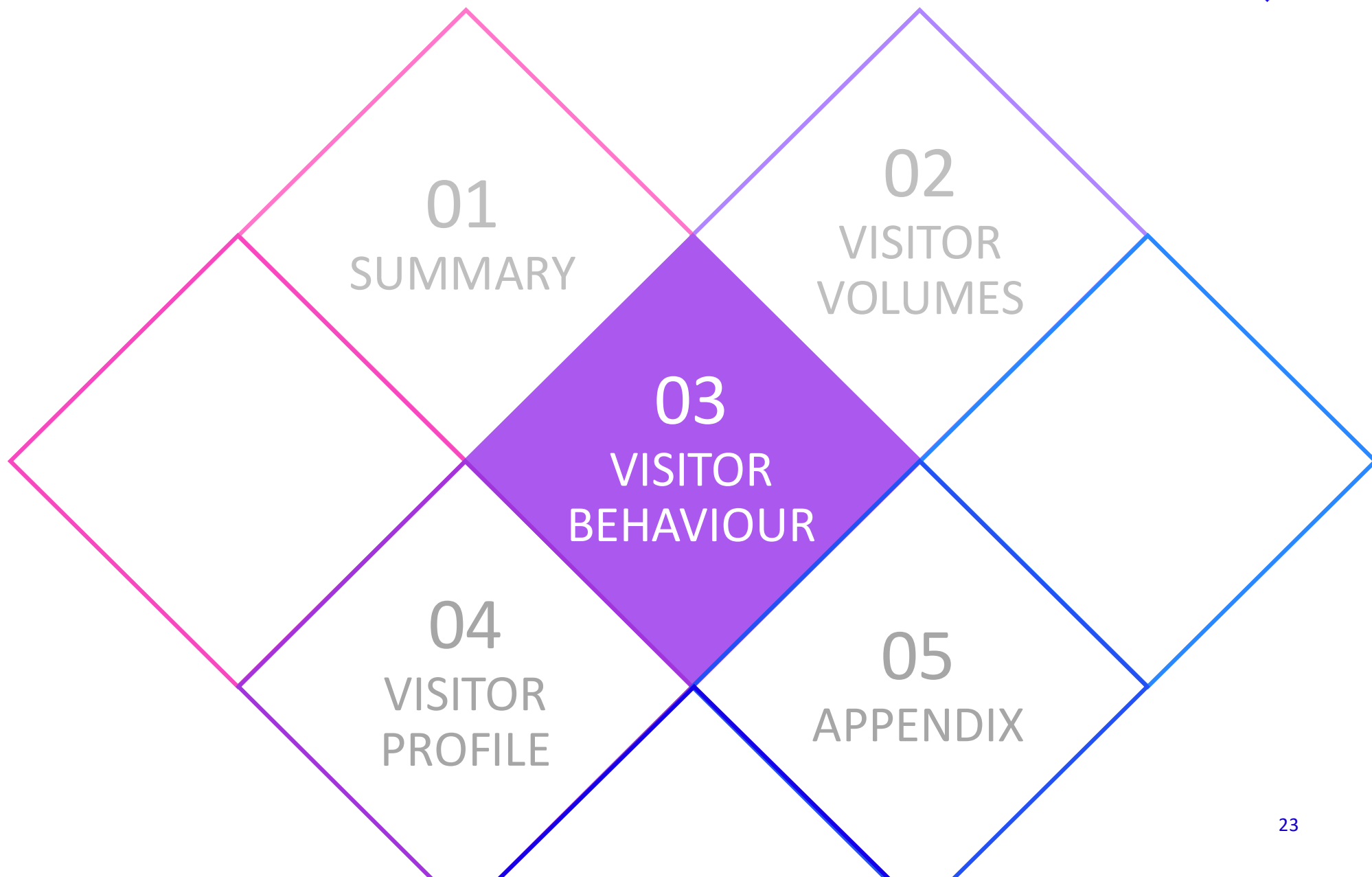
- Visit performance showed alignment with TfL station usage across HOL area, with peak usage across the week on Saturdays, coinciding with uplift in HOL area visits – facilitating social & leisure visitors entering and exiting the area.
- Weekday vs. Weekend distribution of HOL area visits & station usage trends saw similar trends, further reflecting strong influence of station usage in supporting visits to the area.

Visit & TfL Usage | Weekday vs Weekend



Footfall vs. TfL Usage | March 2026

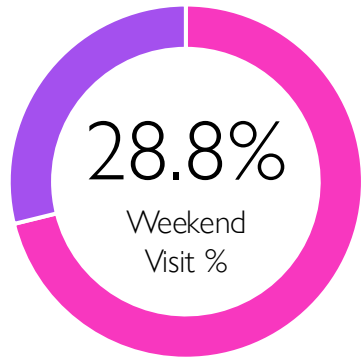




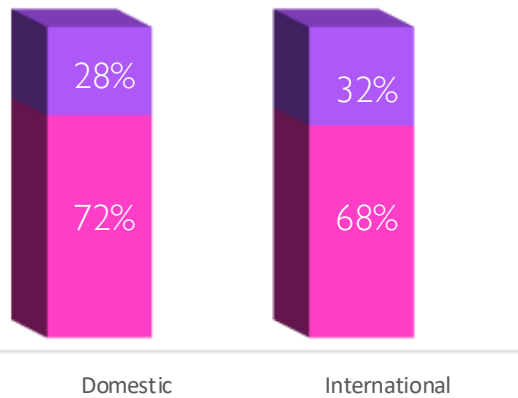


MORE DISTRIBUTED DAILY VISIT TRENDS IN MARCH WITH RETURN OF WORKERS FOLLOWING HALF-TERM IN FEBRUARY

HOL Area | Weekday vs Weekend



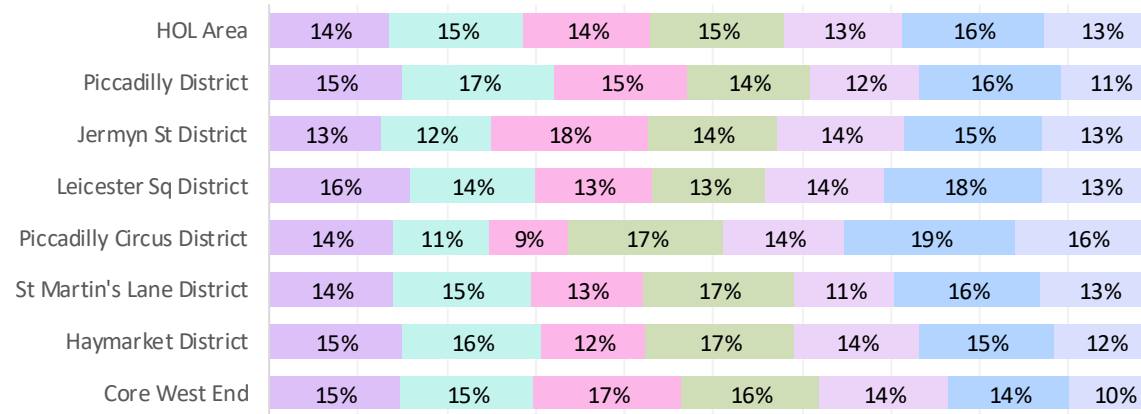
Visitor Origin | Weekday vs Weekend



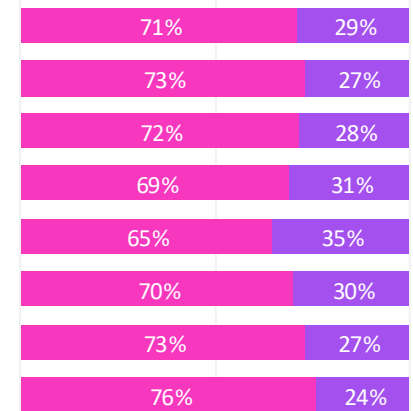
- Decline in share of weekend visits MoM (-2%), while still contributing ~29% of total HOL area visits in March.
- HOL area continued to see a higher share of weekend visitors than wider Core West End, **5-percentage points** higher, reflecting the area's considerable leisure provision.



Daily Visit Distribution | District-Level



Weekday vs Weekend

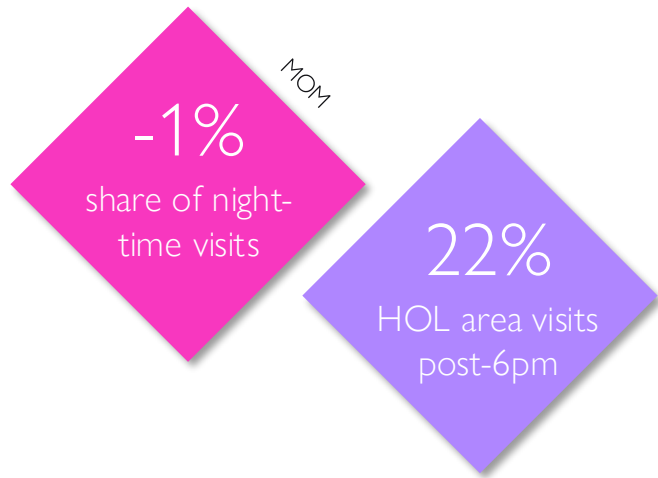
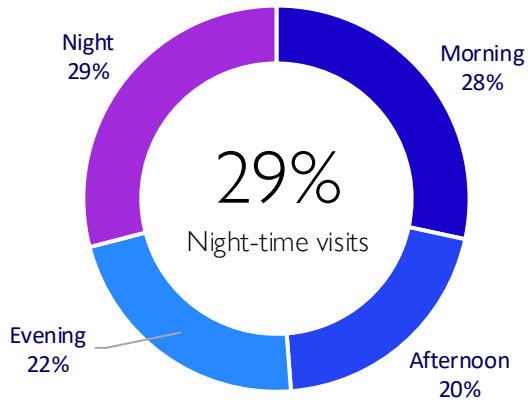


Mon Tues Weds Thurs Fri Sat Sun

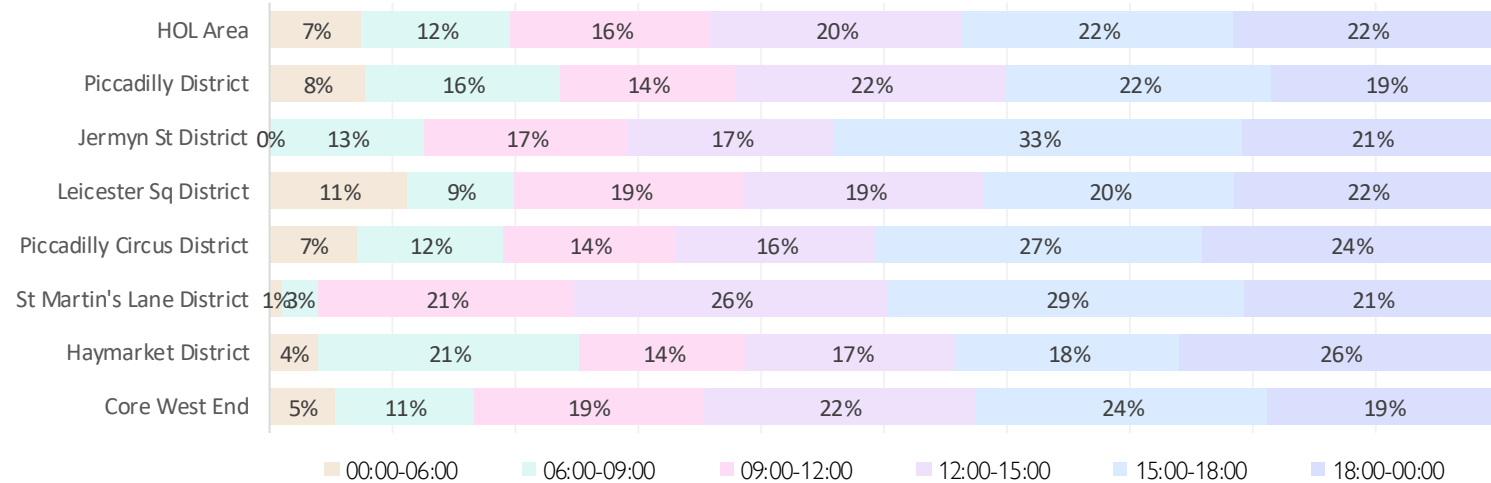


ALONGSIDE GREATER WEEKEND ACTIVITY, HOL AREA SEES INCREASED VISIT VOLUMES POST 6PM VS. WIDER CORE WEST END

HOL Area | Visitors by Time Band



Hourly Visit Distribution | District-Level



- Slight decline in share of night-time visits month-on-month (-1%), however still representing high share of total visits; 29% of HOL area visits in March between 6pm – 6am.
- More leisure-focused districts, e.g. Haymarket District & Piccadilly Circus district, saw a greater proportion of evening visits; however, these districts also saw some of the highest decline MoM reflecting comparison to school half-term in February, e.g. Piccadilly Circus evening visits down -8%.

Ramadan Lights London @ Coventry Street

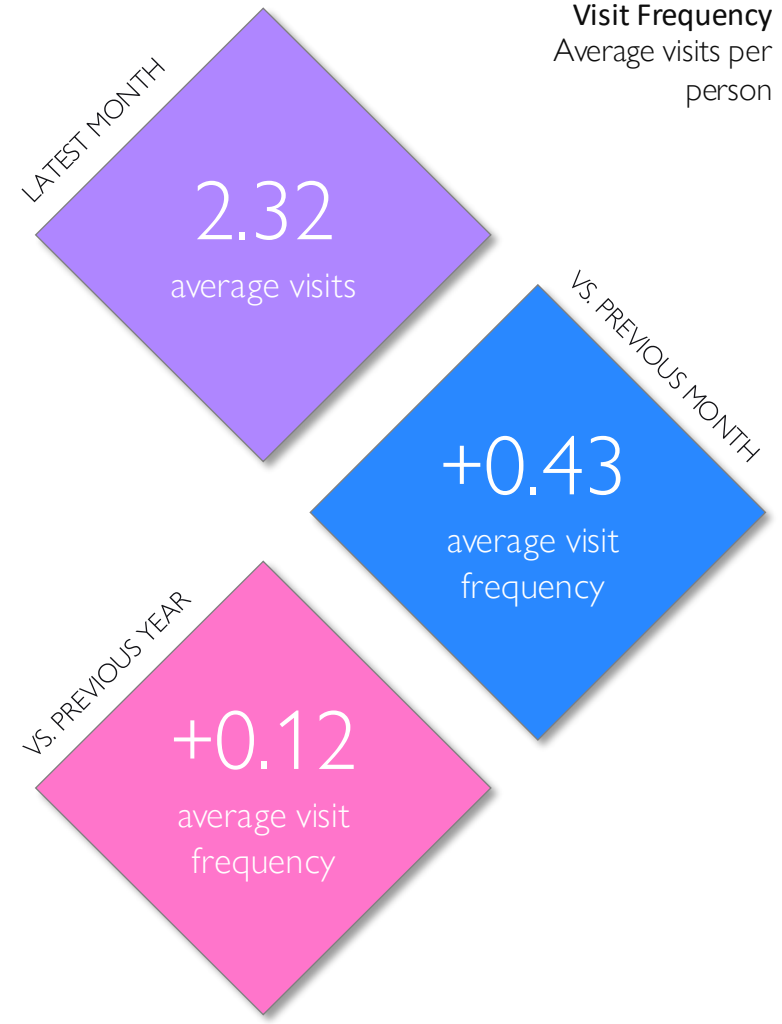
The UK's first and largest annual celebration of Ramadan returned to London's West End throughout February & March, with *Ramadan Lights London* transforming Coventry Street with over 30,000 lights.

This was reflected in a greater share of evening visits across Piccadilly Circus District (24%) & Haymarket District (26%), with lights running from 5pm – 5am throughout the month around these districts.



HIGHER VISIT FREQUENCY IN MARCH, REFLECTING MORE LOCAL VISITOR FROM WITHIN CORE CATCHMENT

- The average visitor visited HOL area 2.32 times during March, up from 1.89 times in February 2026 and 2.17 times YTD.
- Increase in visit frequency represents return of workers and reduced social and leisure visitors relative to February, which saw a greater pull-in of visitors from further afield who typically visit less often during half-term.



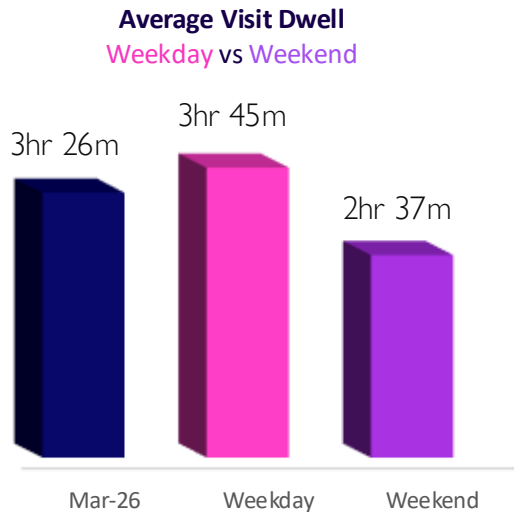
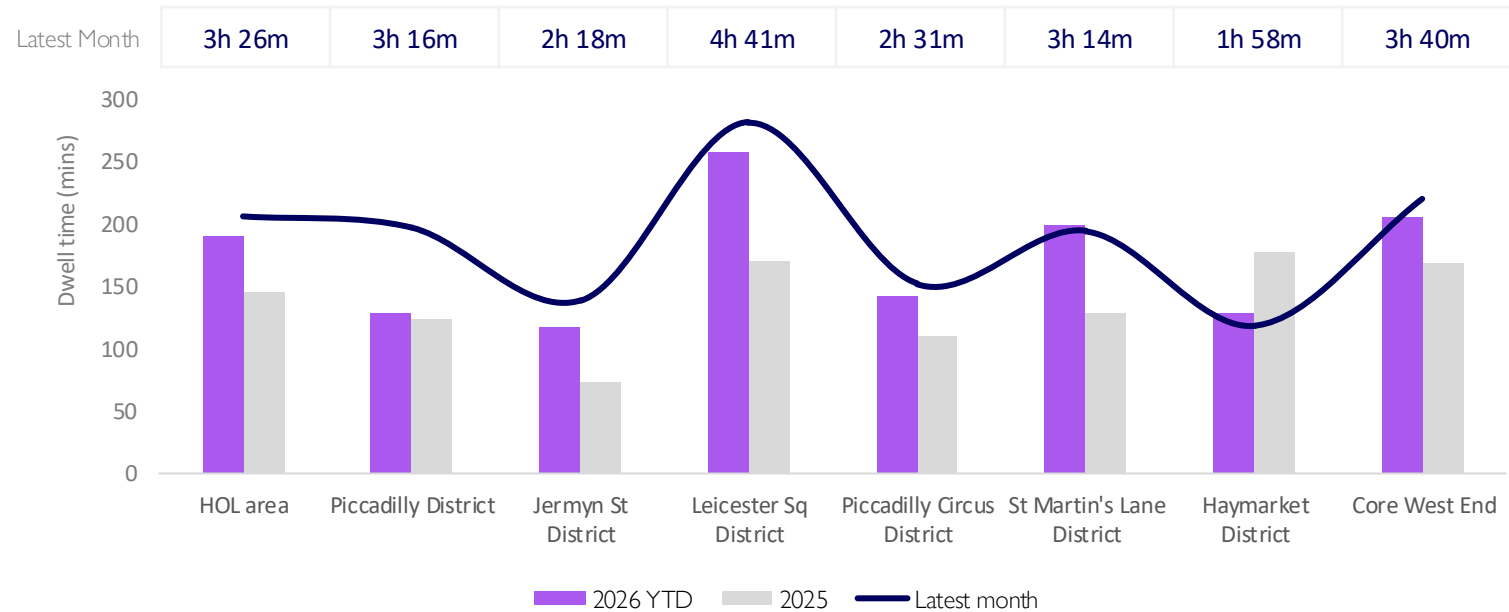


AVERAGE VISITOR DWELL SAW CONSIDERABLE GROWTH IN MARCH, FURTHER REFLECTING WORKER PRESENCE

- Average visitor dwell time in March saw strong growth YoY (+59 mins) and MoM (+35 mins).
- As discussed through the context of visit frequency and time of day / day of week behaviours, a return of workers & reduced social/leisure visitor profile vs. February, contributed to greater average visitor dwell across the area.



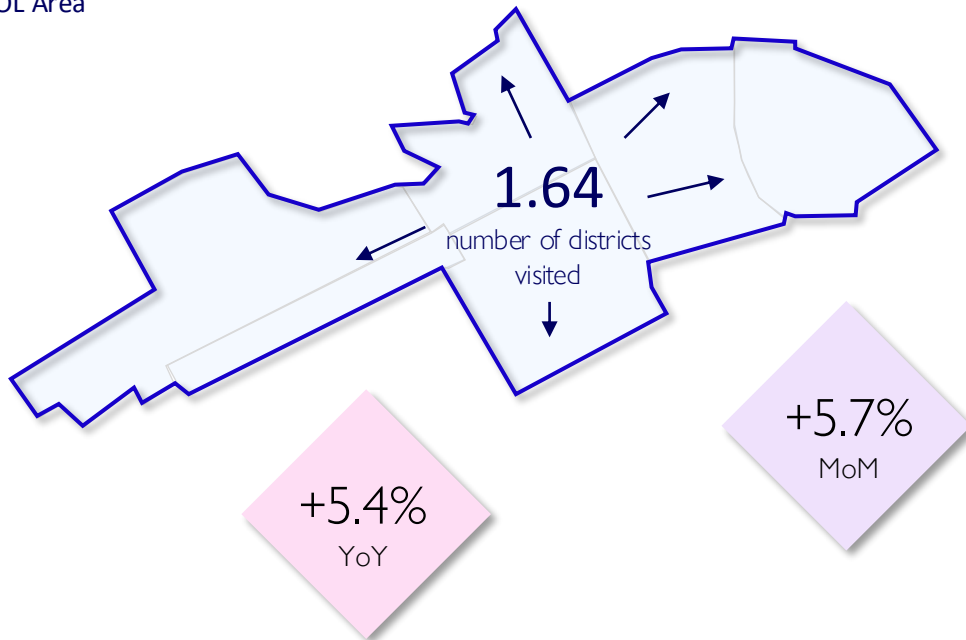
Average Dwell | District-Level





GROWTH IN CROSS-VISITATION BETWEEN DISTRICTS IN MARCH, ACROSS BOTH DOMESTIC & INTERNATIONAL VISITORS

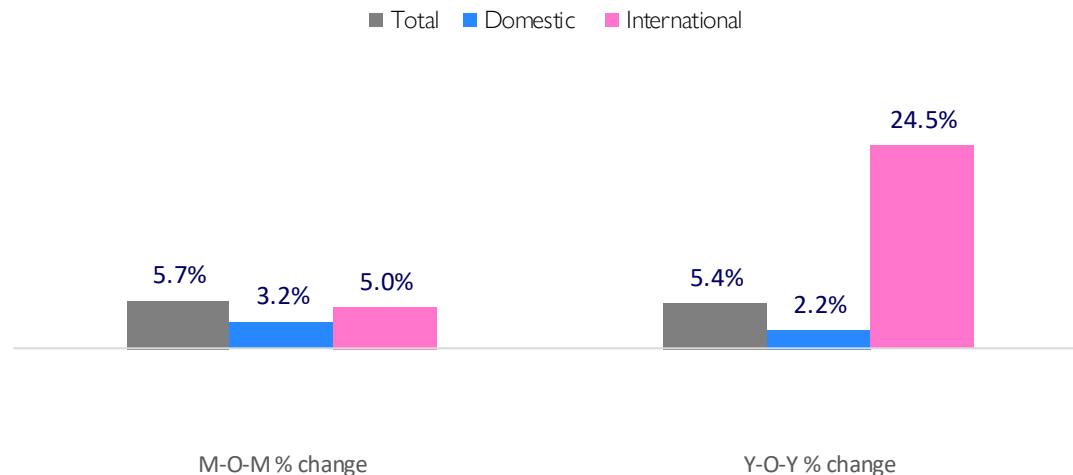
HOL Area

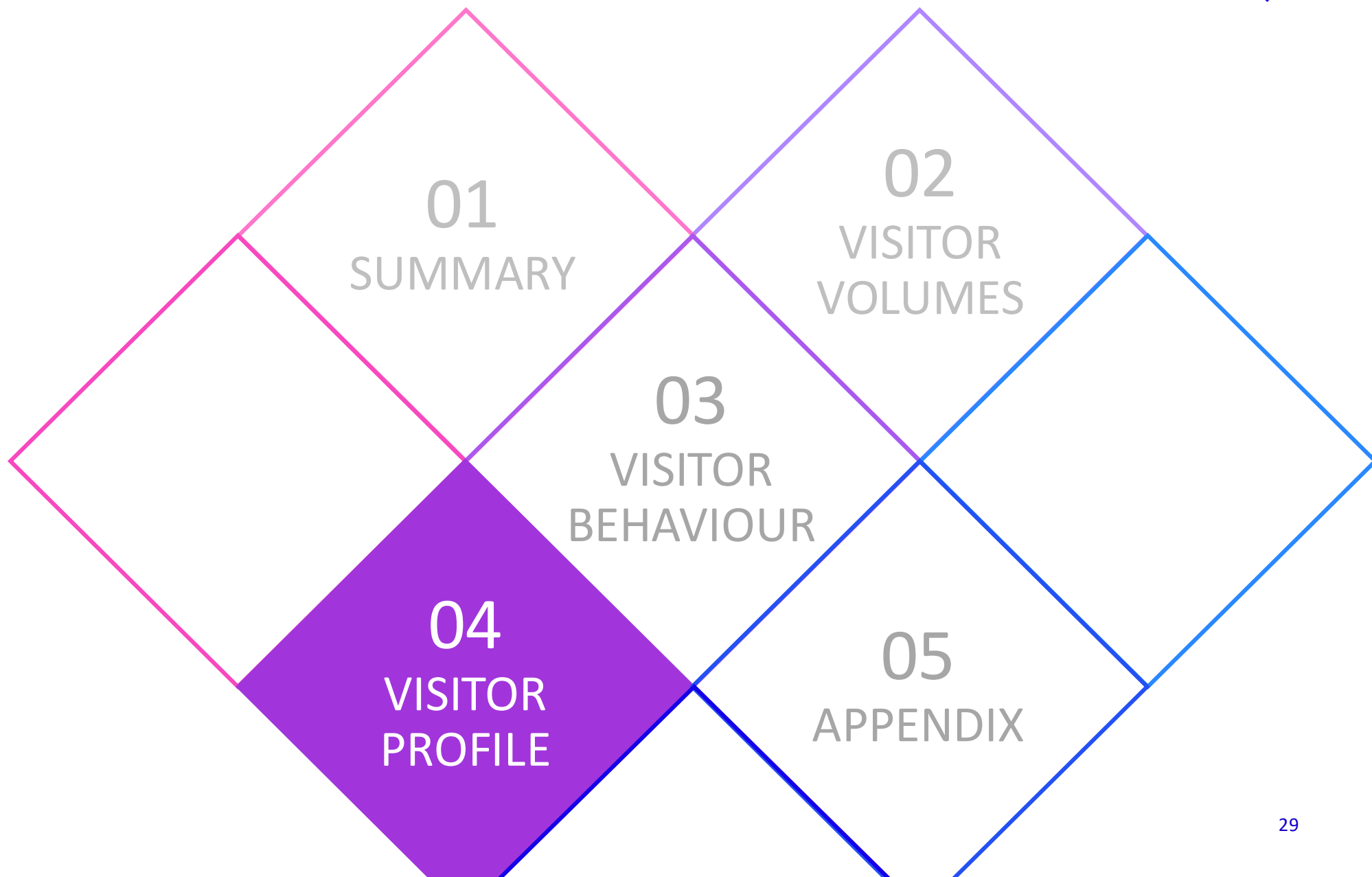


- Cross visitation helps understand the **number of visitors visiting multiple districts per trip** across the HOL area.
- Average visitor to HOL area visited **1.64 districts** during their trip in March 2026.

- Growth in cross-visitation between districts in the HOL area influenced wider visitor volume trends; total HOL area visit volumes saw greater rate of decline than either eastern tourist-led districts or western worker-led districts with visitors more likely to visit multiple areas during their trip.
- International visitors saw the greatest rate of increase in cross-visitation, both MoM (+5.0%) and YoY (+24.5%).

Change in Cross Visitation | HOL Area

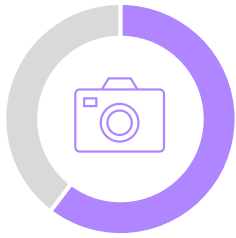
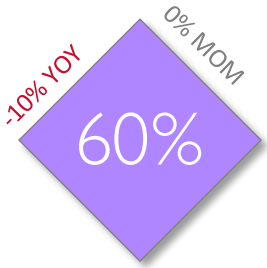




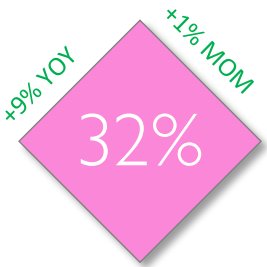


SIMILAR HOL AREA VISITOR PROFILE MONTH-ON-MONTH, DESPITE HIGH INCREASE IN WORKER MIX YEAR-ON-YEAR

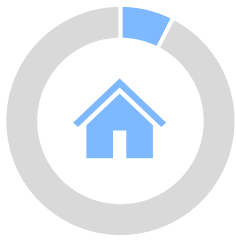
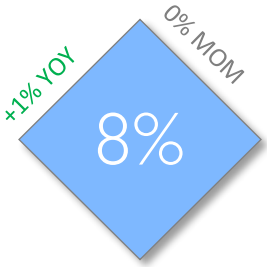
Visitor



Worker



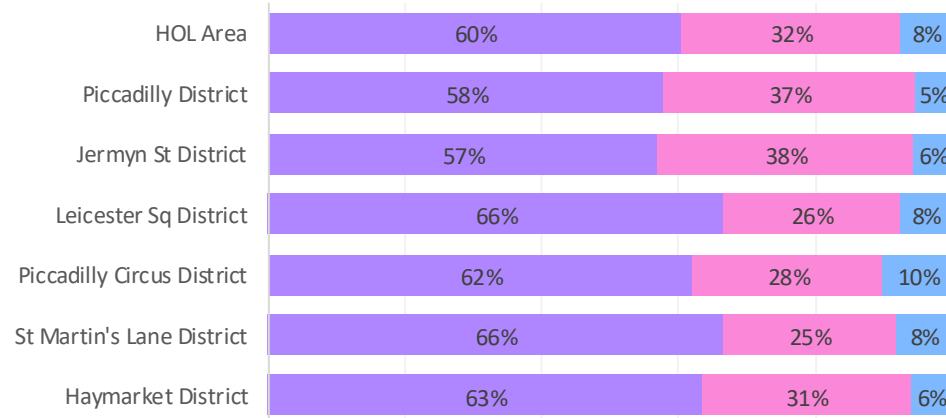
Resident



- Relatively consistent domestic visitor profile across the HOL area MoM, with high share of domestic social visitors, representing 60% of total March visitors.
- Eastern tourist-focused districts continue to capture a high share of domestic visitors; 66% of Leicester Sq District visitors, up 2% MoM.
- See [page 37](#) for visitor group definitions.

Visitor Mix | District-Level

Visitor Worker Resident



Year-on-Year			Month-on-Month		
Vis.	Wrk.	Res.	Vis.	Wrk.	Res.
-10%	+9%	+1%	0%	+1%	0%
-9%	+8%	+1%	+1%	0%	0%
-9%	+9%	0%	-1%	+1%	0%
-10%	+8%	+2%	+2%	-1%	-1%
-9%	+7%	+2%	0%	0%	0%
-10%	+8%	+2%	+1%	0%	-1%
-11%	+9%	+1%	0%	+1%	0%



TOP 5 DOMINANT MOSAIC GROUPS ACCOUNTED FOR OVER 80% OF VISITORS TO HOL AREA IN MARCH

- More focussed visitor profile in March, centred around top 5 dominant groups.
- Five main MOSAIC groups, contributed **81%** of visits to the area; up 6% month-on-month.
- See [page 39](#) for mosaic group definitions.

Top 3 segments this month



Urban Cohesion | 22% visitors
Residents of settled urban communities with a strong sense of identity

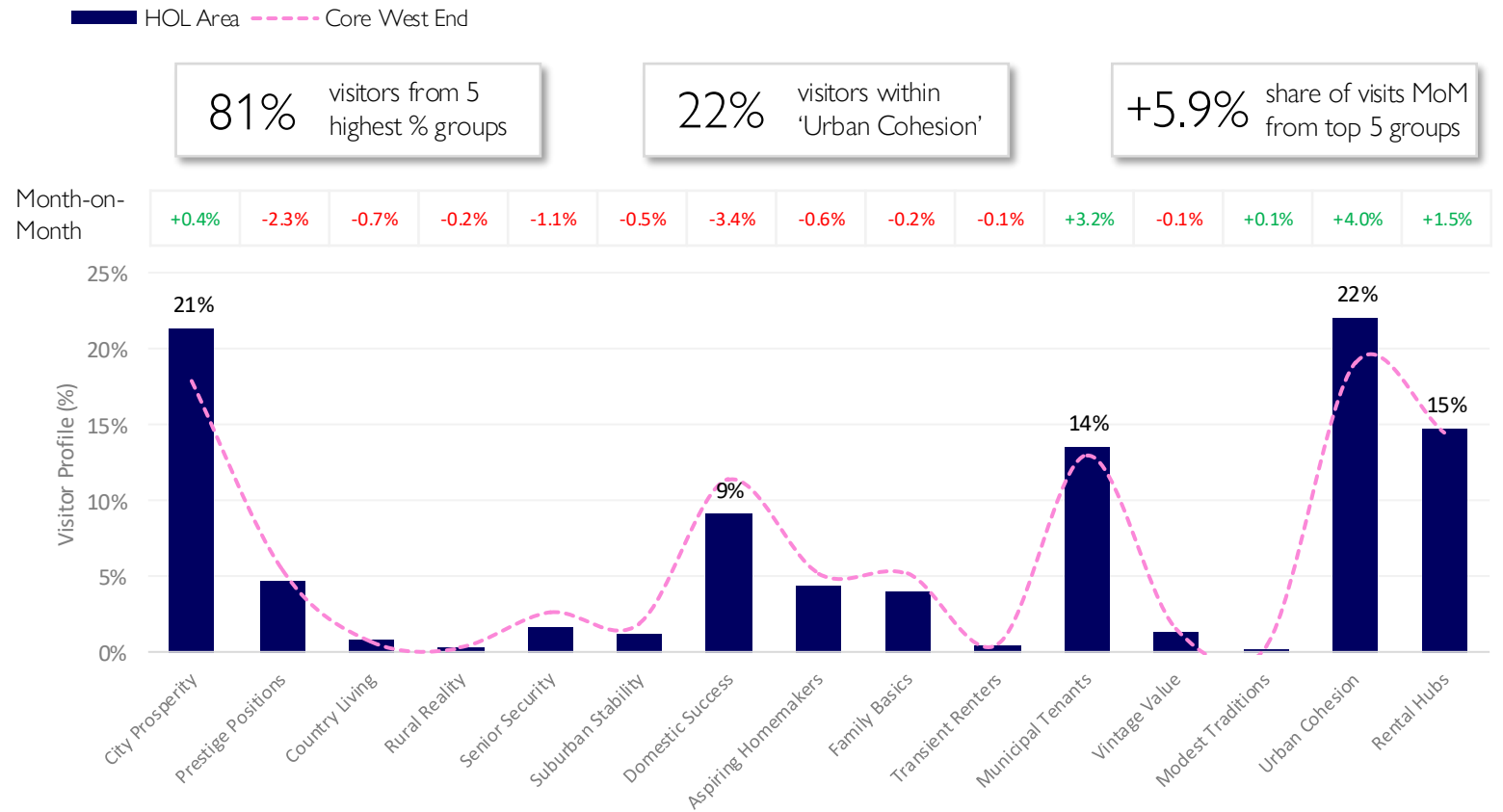


City Prosperity | 21% visitors
High status city dwellers living in central locations, pursuing careers with high rewards



Rental Hubs | 15% visitors
Educated young people privately renting in urban neighbourhoods

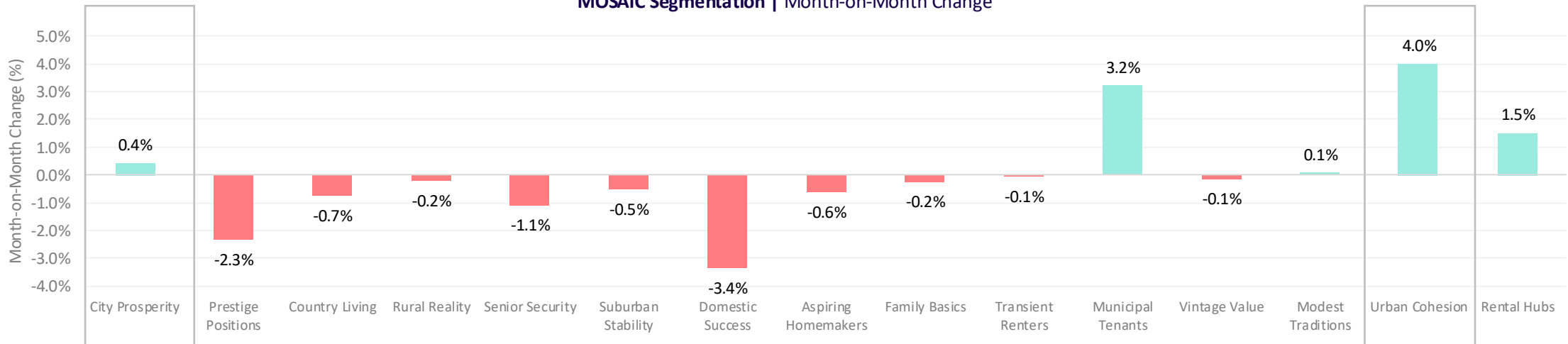
MOSAIC Segmentation | HOL Area



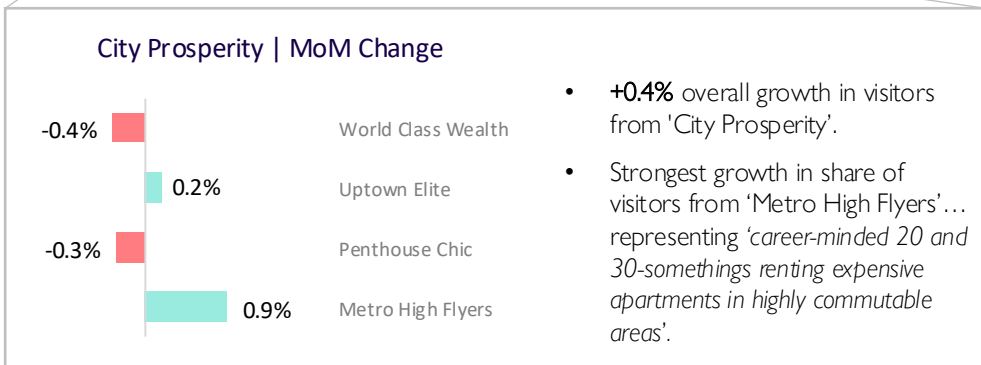


LARGE CHANGE IN VISITOR PROFILE VS. FEBRUARY, REPRESENTING A MORE FOCUSSED PROFILE AROUND DOMINANT GROUPS

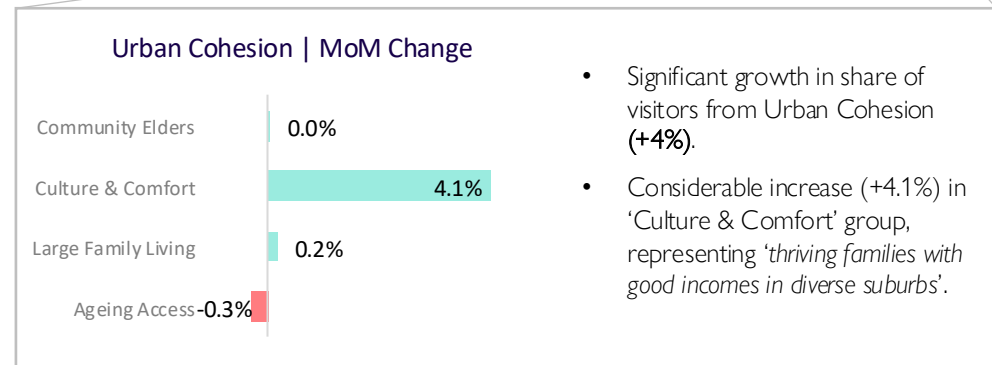
MOSAIC Segmentation | Month-on-Month Change



2nd Highest Visitor Share Group



1st Highest Visitor Share Group

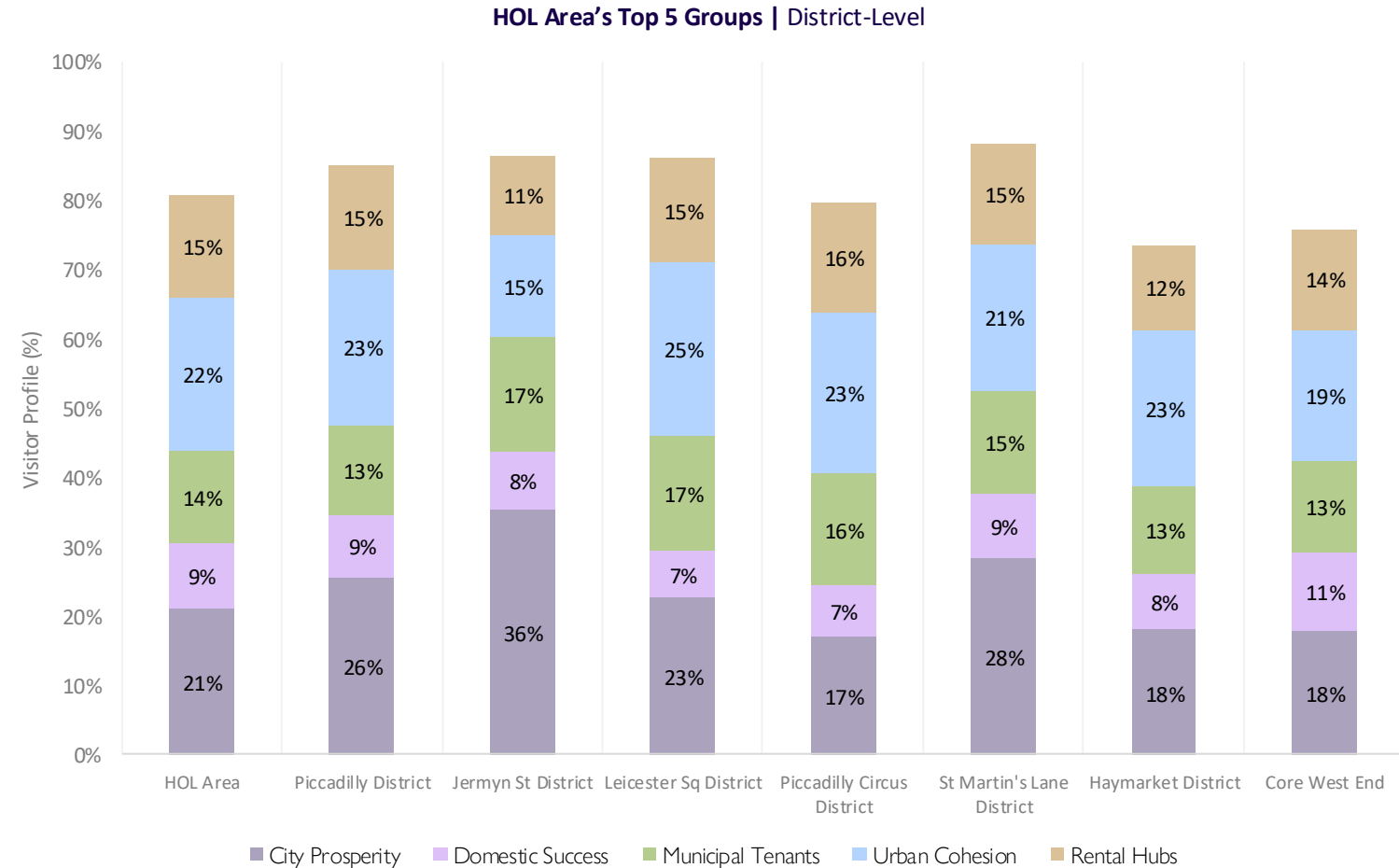




+5.9% INCREASE IN TOP 5 SEGMENT GROUPS ACROSS HOL AREA, REPRESENTING MUCH MORE FOCUSSED DEMOGRAPHIC PROFILE

- Increase in share of visitors from Top 5 segment groups across most districts in HOL area, representing a more **focussed demographic base**.
- This reflects higher share of visits from within HOL area's primary catchment in March.

Area	Visitors from HOL Area's Top 5 Groups	Month-on-Month
HOL Area	80.8%	+5.9%
Piccadilly District	85.1%	-6.5%
Jermyn St District	86.5%	+19.9%
Leicester Sq District	86.1%	+12.3%
Piccadilly Circus District	79.7%	+0.1%
St Martin's Lane District	88.2%	+14.2%
Haymarket District	73.6%	-0.2%
Core West End	75.9%	+2.9%





OVER TWO-THIRDS OF VISITORS WERE HIGH-INCOME VISITORS

- **68%** of HOL area visitors in March from within high-income segment types, consistent month-on-month.
- March's visitor base represented a high affluent visitor, with the return of workers contributing a higher share of HOL area visitors.

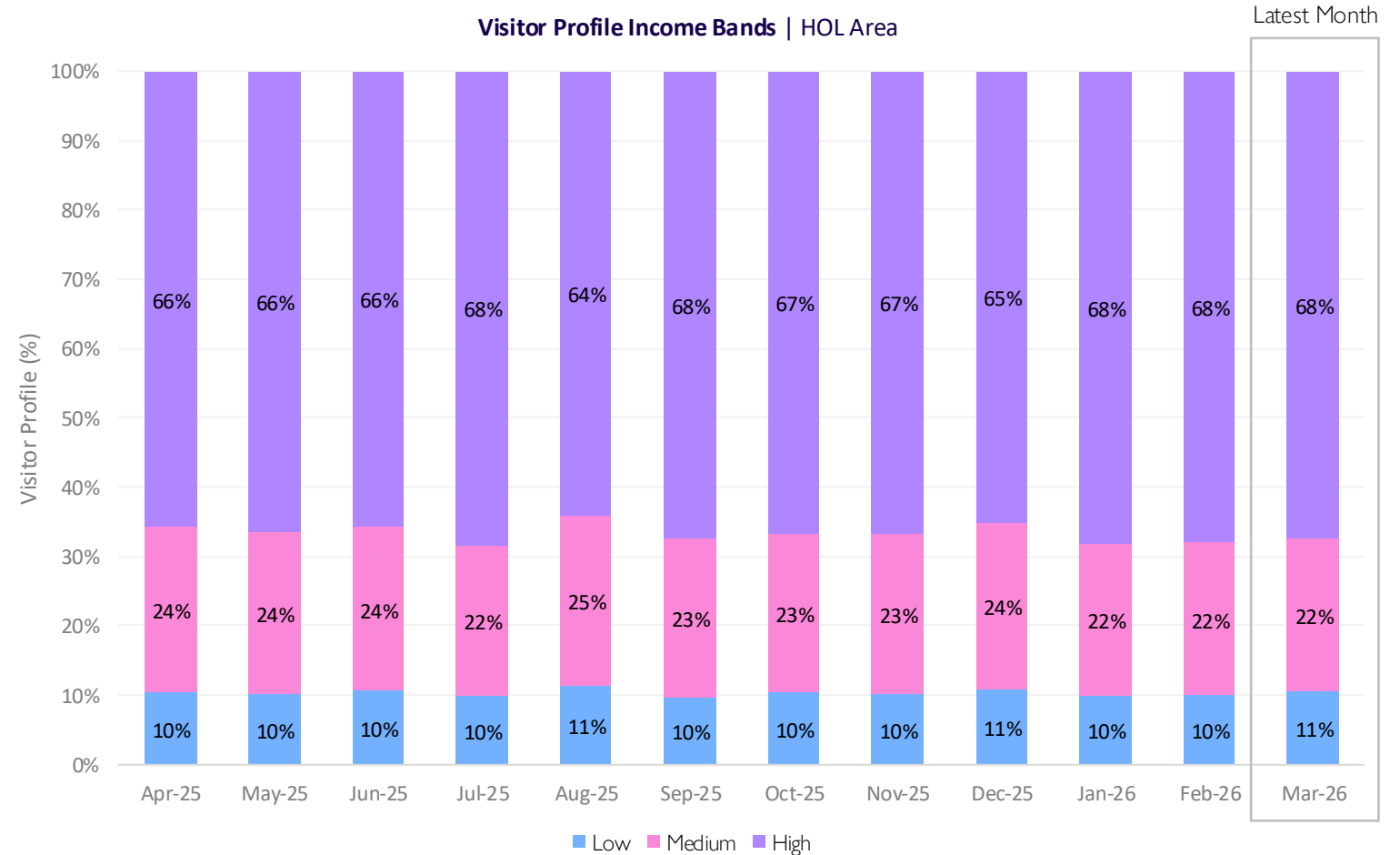
68%

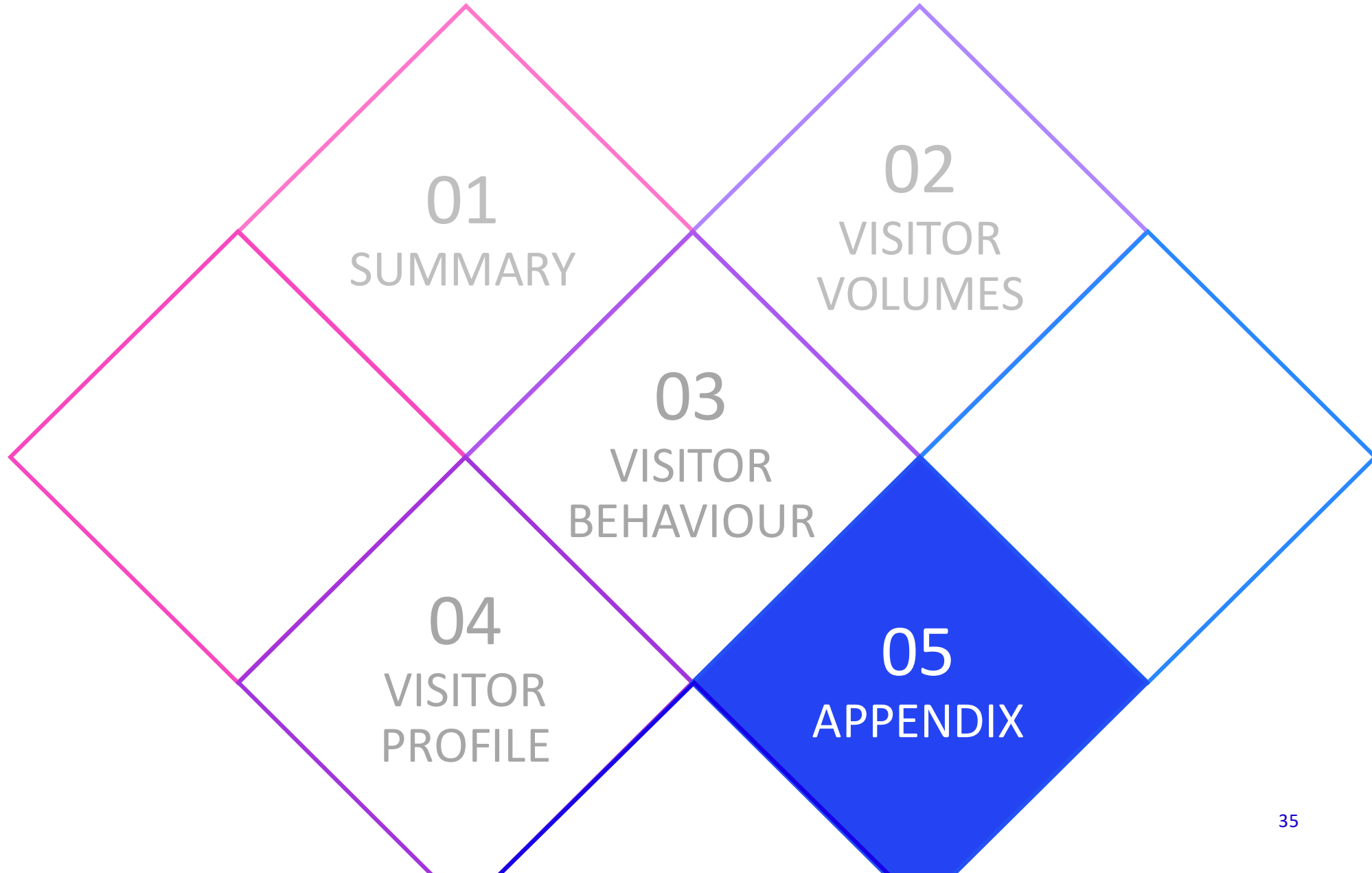
of visitors from
'high-income'
segment

+0%

month-on-month
change in 'high-
income' segment

Visitor Profile Income Bands | HOL Area





01
SUMMARY

02
VISITOR
VOLUMES

03
VISITOR
BEHAVIOUR

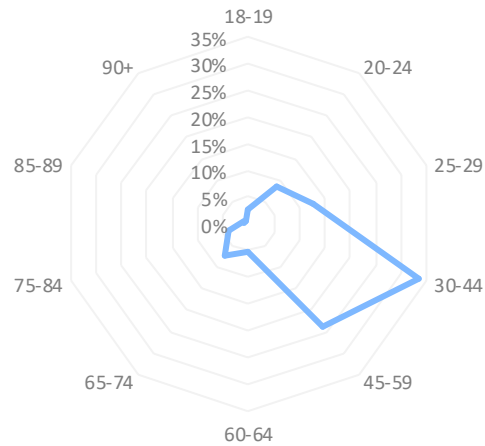
04
VISITOR
PROFILE

05
APPENDIX



HOL AREA PROFILE SKEWED TOWARDS PROFESSIONAL, MID-AGED VISITOR

Age & Gender Profile



- Visitor profile skewed towards visitors aged 30-59 years old (57.3%)



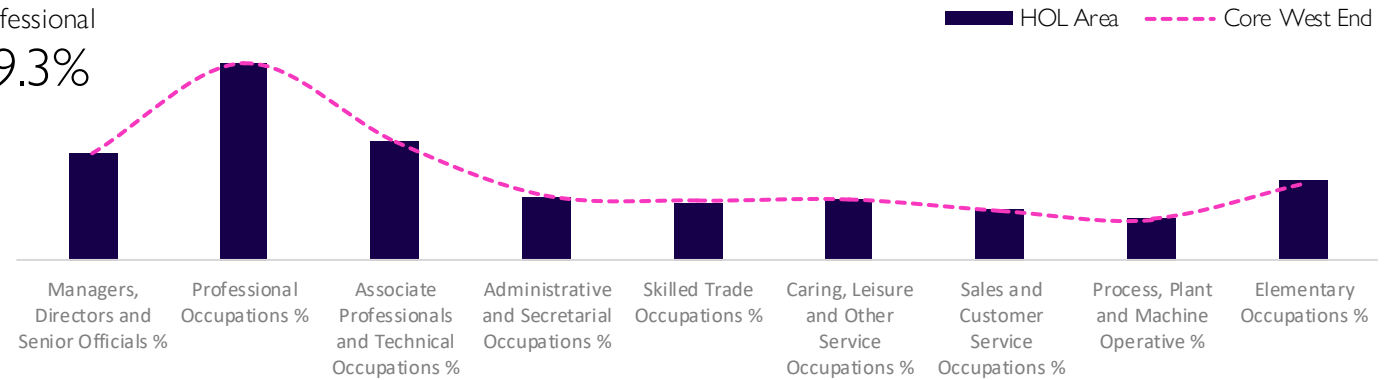
Female
51.3%



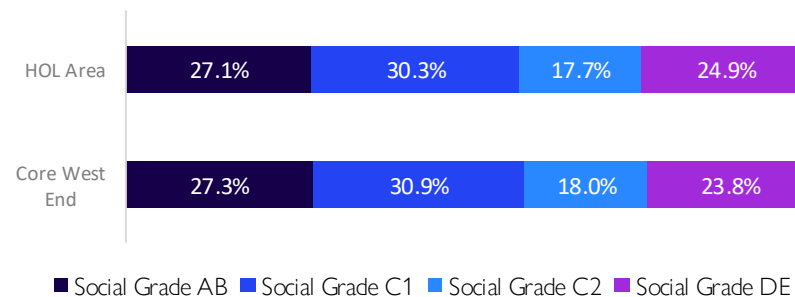
Male
48.7%

Occupation

Managers & Professional
39.3%



Social Grade

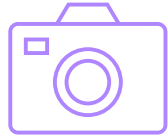


- Social Grade profile of those visiting HOL area vs. Core West End very similar
- 27.1% of visitors to HOL area within most-affluent social grade (AB), relatively consistent with wider Core West End profile (-0.2%).



BT VISITOR MIX DEFINITIONS

3 key visitor types used within BT data...



Visitor

The number of non-residents and non-workers who spend at least 10 minutes in that MSOA / HEX in the specified time period.



Worker

The number of workers of that MSOA / HEX who spend more than 10 minutes in the location in the specified time period. A person's work location is based on where they have spent most of their working hours based on latest available calendar month.



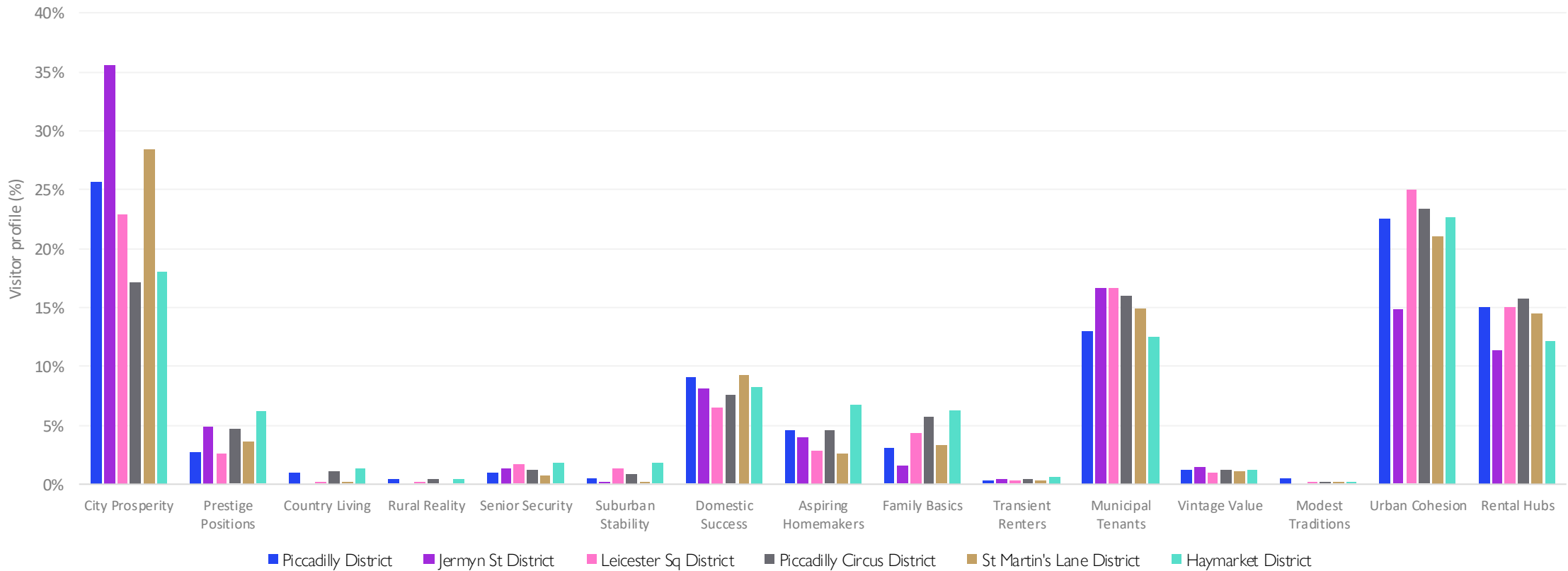
Resident

The number of residents of that MSOA / HEX who spend more than 10 minutes in the location in the specified time period. A person's residential location is determined by where they have spent most of their evening and night-time in the latest calendar month.



SLIGHT VARIATION BETWEEN DISTRICTS WITH HIGH SHARE OF CITY PROSPERITY & URBAN COHESION WITHIN EACH DISTRICT

MOSAIC Segmentation | District-Level





MOSAIC GROUP DESCRIPTIONS

Type	Name	Description
A	City Prosperity	High status city dwellers living in central locations and pursuing careers with high rewards
B	Prestige Positions	Established families in large detached homes living upmarket lifestyles
C	Country Living	Well-off owners in rural locations enjoying the benefits of country life.
D	Rural Reality	Householders living in less expensive homes in village communities
E	Senior Security	Elderly people with assets who are enjoying a comfortable retirement
F	Suburban Stability	Mature suburban owners living settled lives in midrange housing
G	Domestic Success	Thriving families who are busy bringing up children and following careers
H	Aspiring Homemakers	Younger households settling down in housing priced within their means
I	Family Basics	Families with limited resources who budget to make ends meet
J	Transient Renters	Single people renting low-cost homes for the short term
K	Municipal Tenants	Urban residents renting high density housing from social landlords
L	Vintage Value	Elderly people with limited pension income, mostly living alone
M	Modest Traditions	Mature homeowners of value homes enjoying stable lifestyles
N	Urban Cohesion	Residents of settled urban communities with a strong sense of identity
O	Rental Hubs	Educated young people privately renting in urban neighbourhoods



MOSAIC DEFINITION

Experian's MOSAIC Customer Segmentation divides a consumer base into groups of individuals that are similar in specific ways, such as:

- Age
- Interests
- Life Stage
- Spending habits

UK Adult
Population



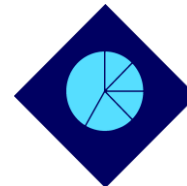
51m individuals



Mosaic



15 groups



A02 Uptown Elite



Uptown Elite are affluent, older families who live in desirable neighbourhoods within inner suburbs



MOSAIC SEGMENTS INCOME BANDING

Experian's MOSAIC Customer Segmentation types have been grouped into three income bands to aggregate performance across types:

- Low Income
- Medium Income
- High Income

60 segmentation types have been classified into the three income bands, with examples displayed to the right.

MOSAIC Types Income Band Examples...





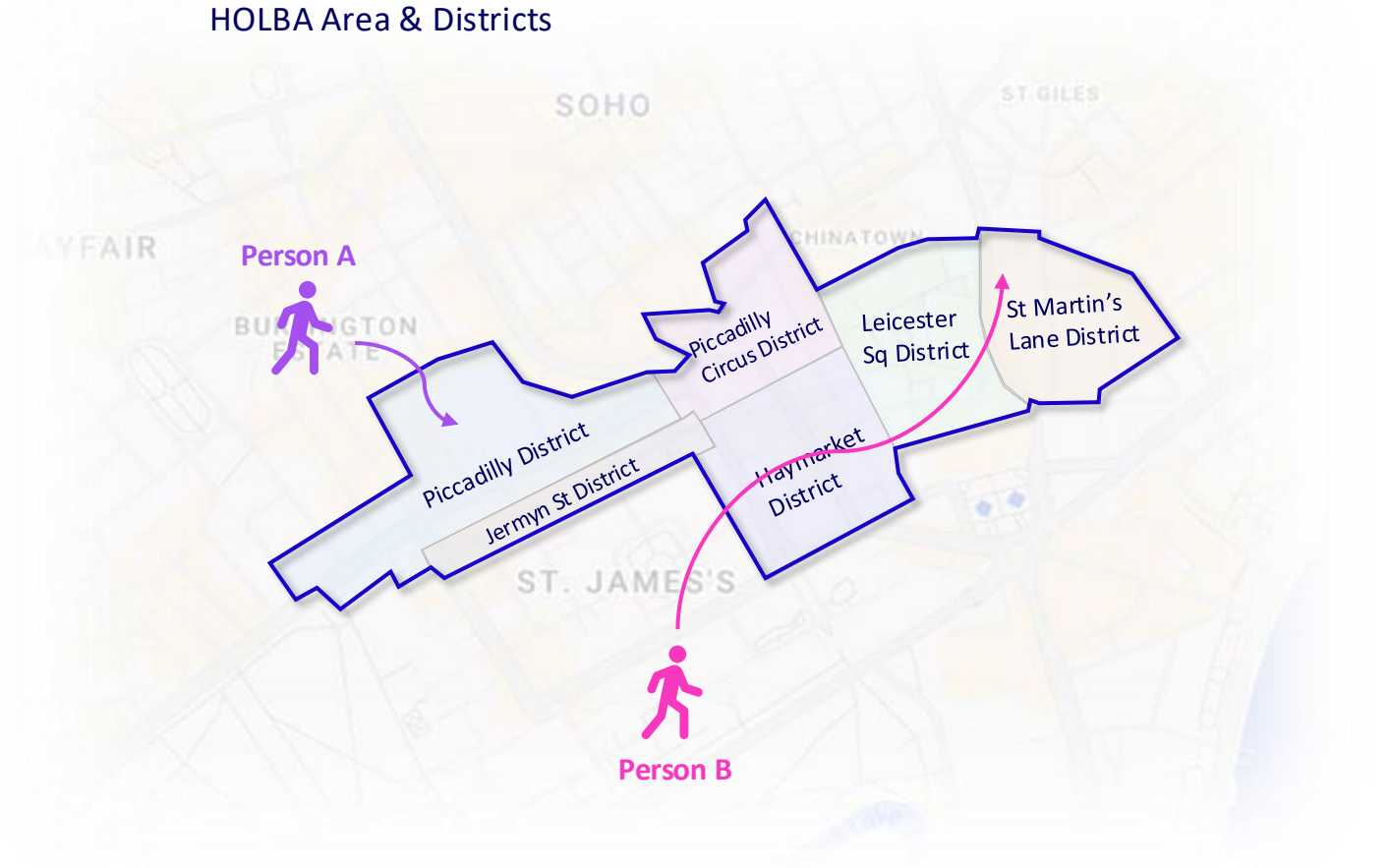
CROSS VISITATION EXAMPLE

Person A

- Only visits Piccadilly District
- Counts as 1 visit to Piccadilly District, and 1 visit to HOL Area
- Cross Visitation Index = 100

Person B

- Walks through 3 districts – Haymarket District, Leicester Sq District & St Martin's Lane District
- Counts as 1 visit to each of the 3 districts, but only 1 visit to HOL Area
- Cross Visitation Index = 300





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