Visitor Insights
Annual Report 2024/25

Shaping a
world-class
West End

Issued:
July 2025

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HEART OF LONDON BUSINESS ALLIANCE

Colliers

Background
Introduction and context

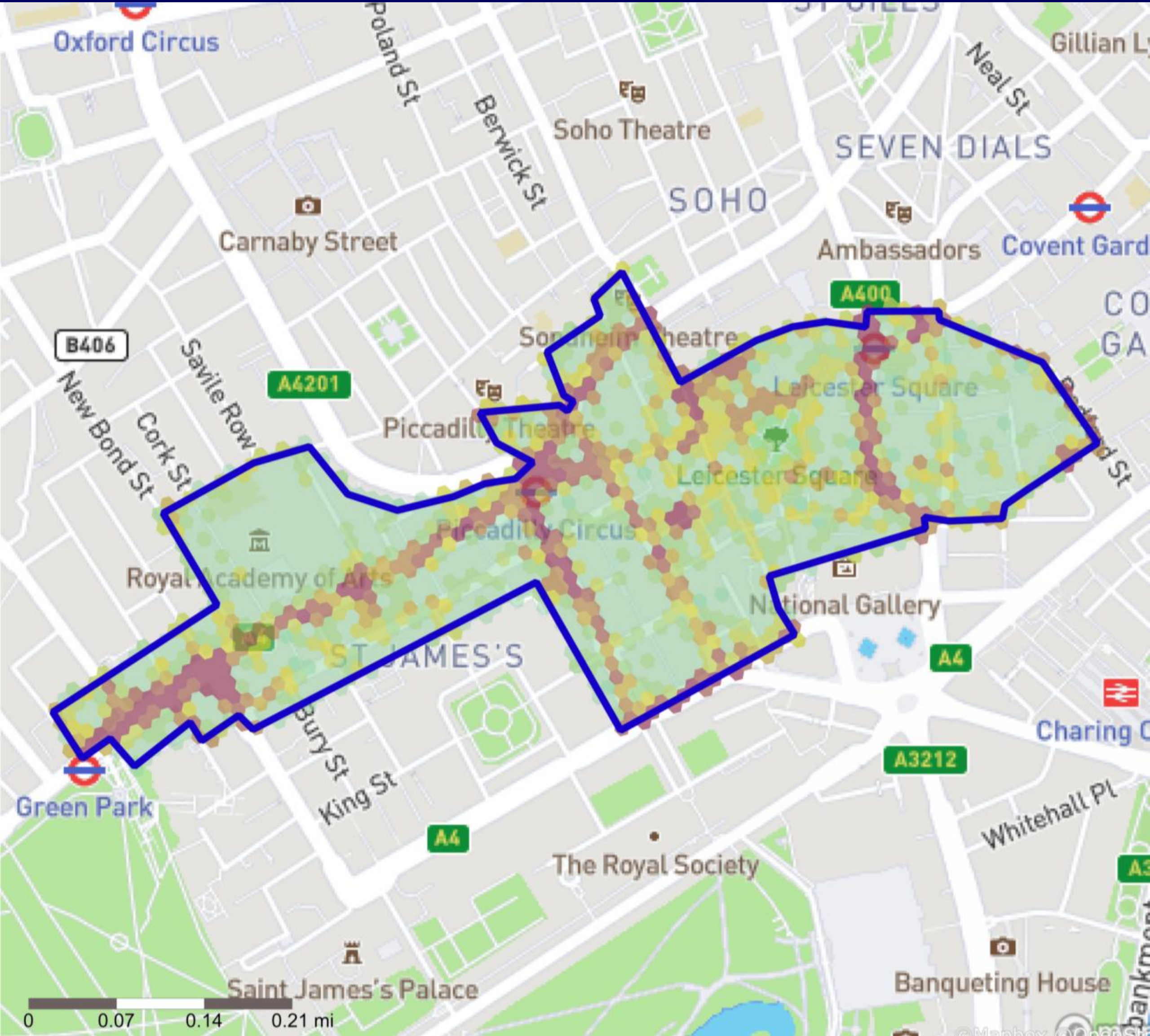
Heart of London Business Alliance (HOLBA) has partnered with Colliers to deliver data and insights on visitors to the area.

This report provides key insights and findings from the previous financial year, with a focus on:

- Visitor footfall and profile
- Visitor behaviour

Insights presented in this report are powered by Colliers' LocateFootfall mobility data platform.

Please note: As of April 2024, the source of raw mobility data has transitioned to Huq, a leading provider in the field.



Locate Footfall *powered by:* huq

Contents

01 Summary

Summary 2024/25

TOTAL YOY %

+7%

83m visits

DWELL YOY %

+28%

2 hours and 5 minutes

CORE CATCHMENT SHARE OF VISITS YOY %

+1%

77% of visits

7% increase in visits year-on-year (YoY) driven largely by significant YoY increases in visits in **early 2025**, with January visits to the HOL area up +20% YoY and February visits up 21%. **Leicester Sq District** was the best performing district throughout the financial year (FY), with visits up +20%.

Dwell time in the HOL area increased +28% YoY, with the largest increases in dwell time seen in **Piccadilly District** (up 56 minutes) and **Leicester Sq District** (up 60 minutes). Only St Martin's Lane District experienced a notable decrease in dwell YoY (-37 minutes).

Proportion of visits to the HOL area from the Core Catchment increased +1% YoY, meaning a higher proportion of visitors came from nearby areas than last year - the result of increased visits by residents and workers.

Summary
2024/25

International mix

37.0% of visitors from overseas in 2024/25 financial year, vs. 35.5% in 2023/24.

Day of week

Peak visits occur towards the end of the week, with **32%** of visits on Fridays & Saturdays.

Time of day

Visiting peaks in the **afternoon**; Leicester Sq and St Martin's Lane most evening focused districts despite a YOY decrease.

TfL taps

86.9m entries/exits to stations in the HOL area in 2024/25 (-3%).

Mosaic profile

Urban Cohesion visitors most common. These are *residents of settled urban communities with strong sense of identity*

Visitor profile

Visitors skewed towards middle-income profile, **33%** in social grade C1.

Spend summary
2024/25

Spend volume

Spend down **-5%** in FY2024/25 vs. previous financial year.

Spend by day of Week

Saturday is highest spend day: **1.35x** above daily average.

Spend by time of Day

Greatest proportion of spend between 12pm–3pm, around twice the daily average.

Transactions

Numbers of transactions are up **+2%** in 2024/25 financial year vs. previous financial year.

Top spend category

'Eating' spend shown greatest YoY growth, up **+3%** at weekends.

International spend

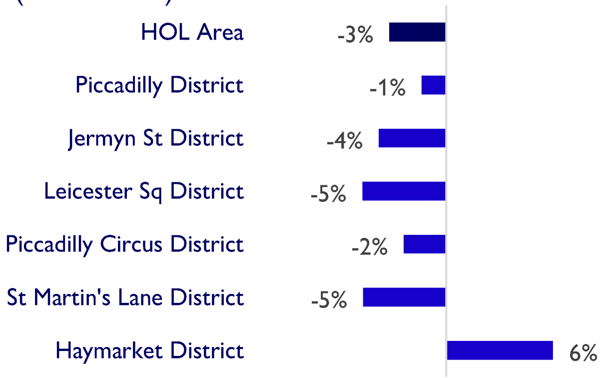
International spend down **-7%** in FY2024/25 vs. previous financial year.

Summary
2024/25

Evening visits

Evening visit share declined across HOL Area over the last 12 months, with Leicester Sq and St Martin's Lane Districts seeing the most significant reductions. Counterbalanced by a greater proportion of visitors coming between 06:00-09:00.

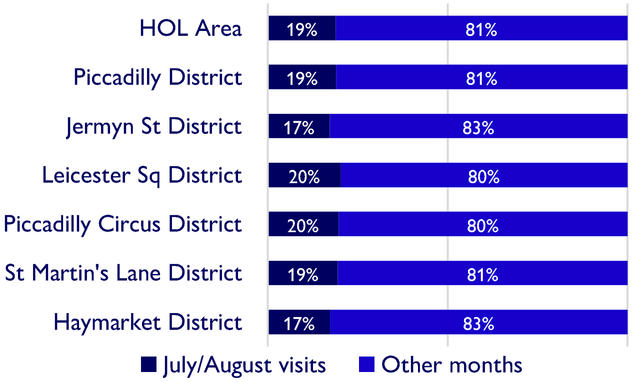
YoY % point change in share of evening visits (18:00-00:00)



Summer peak in visits

Visits peaked in August in 2024/25 vs. December in 2023/24. The Core Catchment increased in the summer months as more people came from further afield, and an increase in visits vs. the monthly average for the FY was seen in July/August. Socially focused districts experienced greatest share of visits in these months.

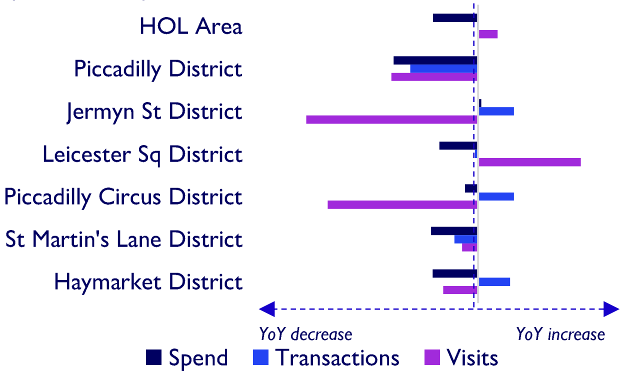
Summer visit mix by district



Christmas trade

Whilst visits increased by +3% in December 24 vs. December 2023, spend decreased by -6%, driven by a decline in average transaction value (with transaction volumes remaining stable).

YoY change in spend, visits & transactions (December)



02 Visitor Volumes

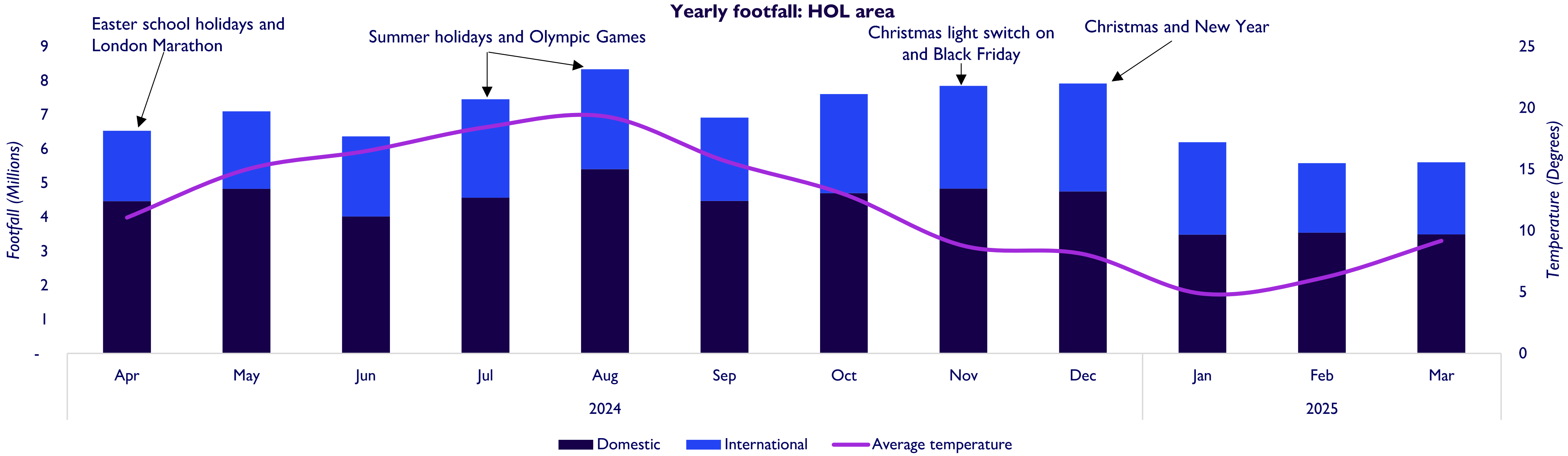
Visitor Volumes
Visits to HOL area up 7% year-on-year

Footfall up 7% YoY (vs. 2023/24).

International visits up 12% vs. previous year as recovery continues post-Covid.

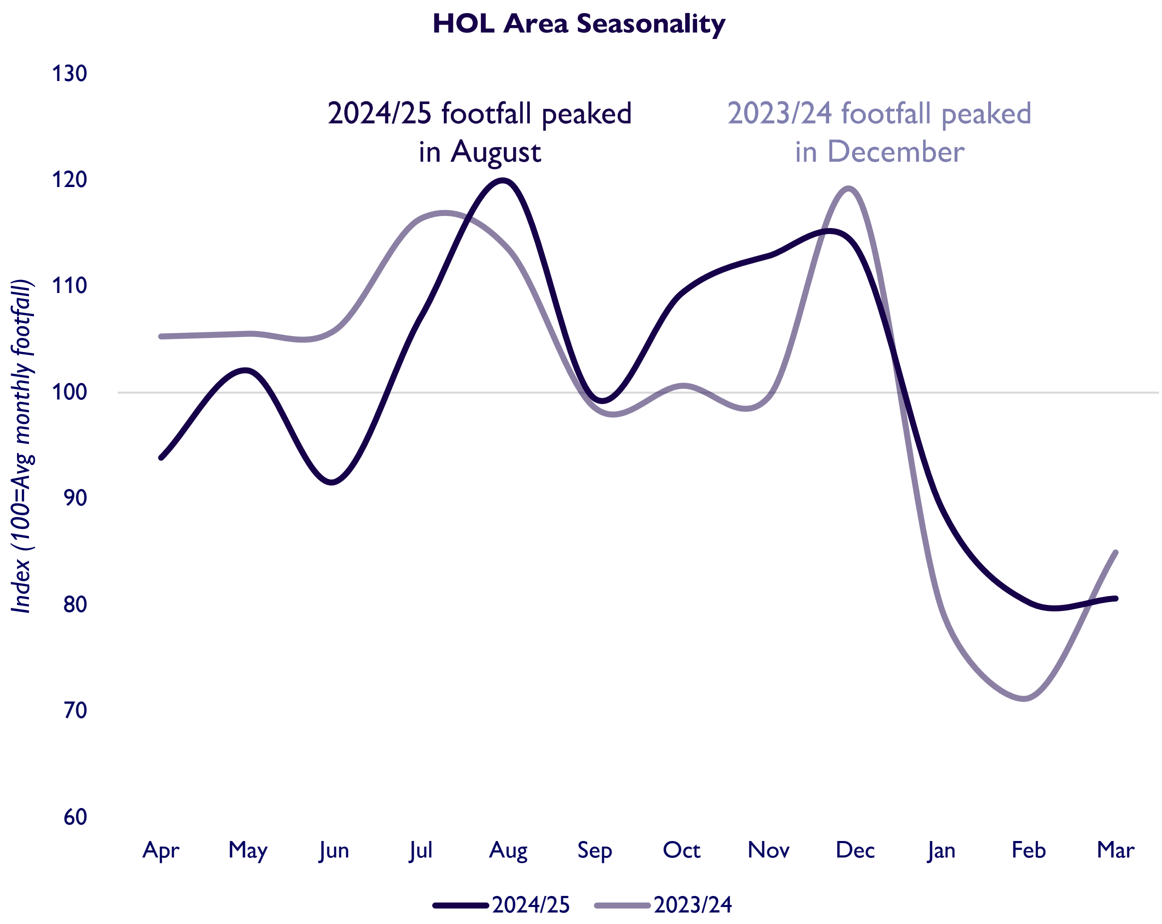
District	Year-on-year		
	Total	*Domestic*	*International*
HOL Area	7%	5%	12%
Piccadilly District	-9%	-1%	-22%
Jermyn St District	-10%	3%	-29%
Leicester Sq District	20%	25%	14%
Piccadilly Circus District	-12%	-20%	-1%
St Martin's Lane District	10%	8%	13%
Haymarket District	-10%	-9%	-12%
Core West End	17%	6%	45%

Visit Volumes
Footfall peaks seen in August, November and December



- Visitor distribution similar by district, with four out of the six districts peaking in August 2024. Jermyn St District was the most significant outlier with a distinct autumn peak as workers returned to the office after the summer holidays through to Christmas – consistent with the previous FY.
- The Christmas season also saw a secondary peak in visits in most districts (November/December) with an influx of tourists to the area for seasonal festivities.

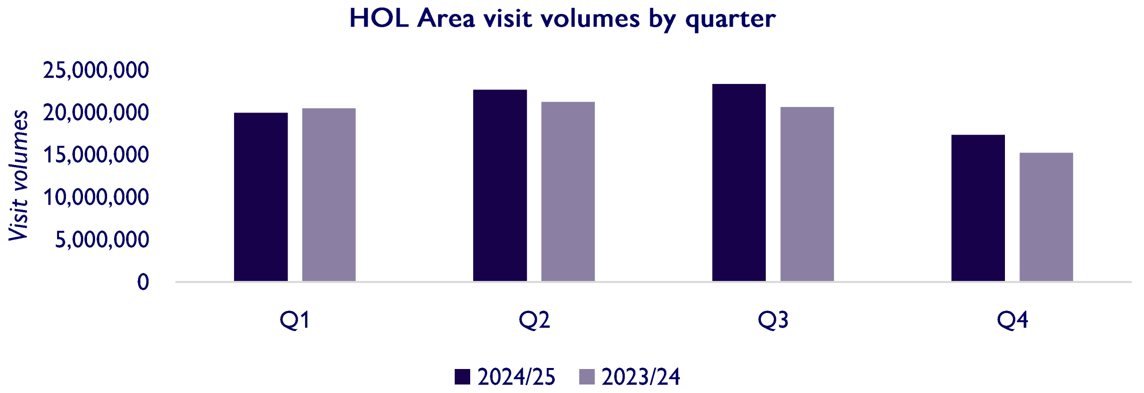
Visitor Volumes
Higher share of visits between August and November than in 2023/24



2024/25 VISIT VOLUMES **83m**

YOY GROWTH **+7%**

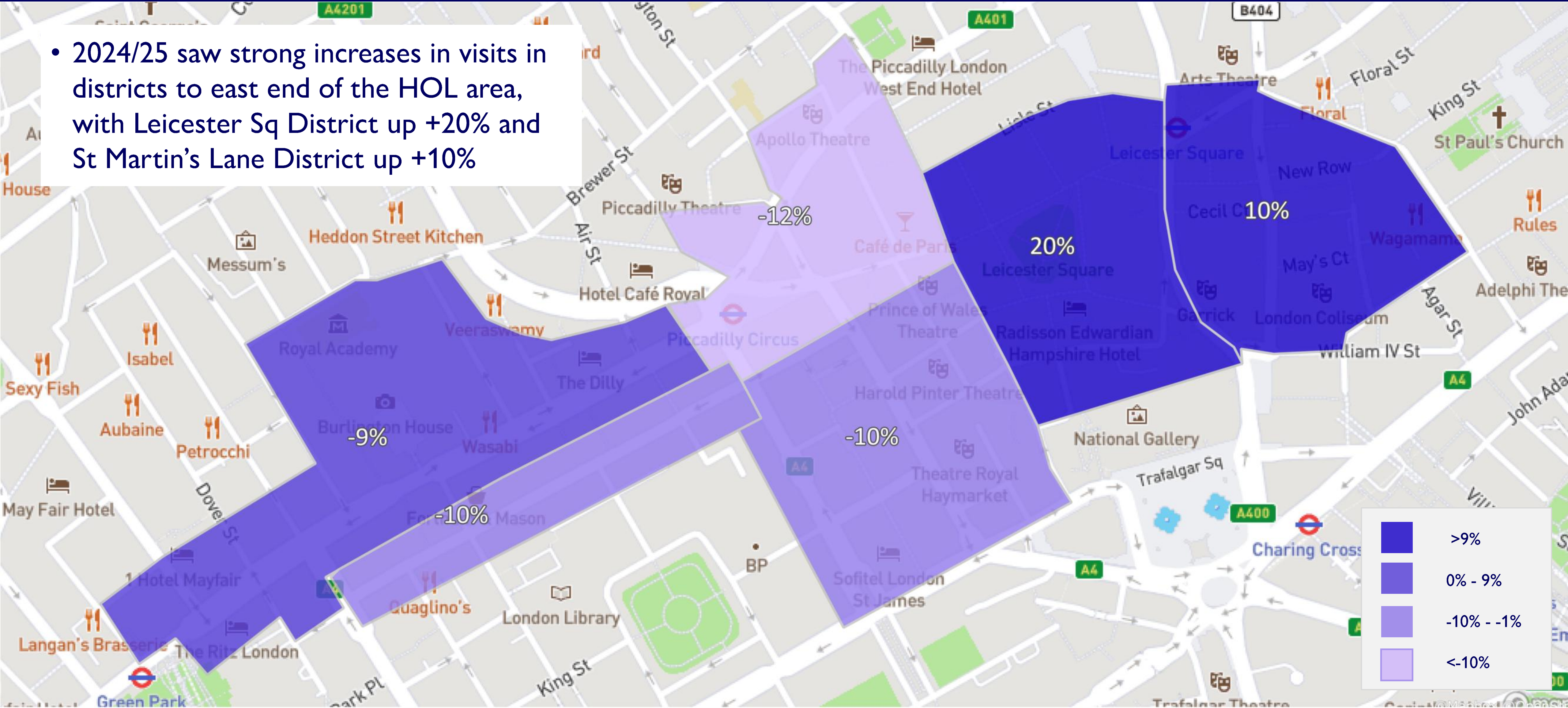
Q4 GROWTH **+14%**



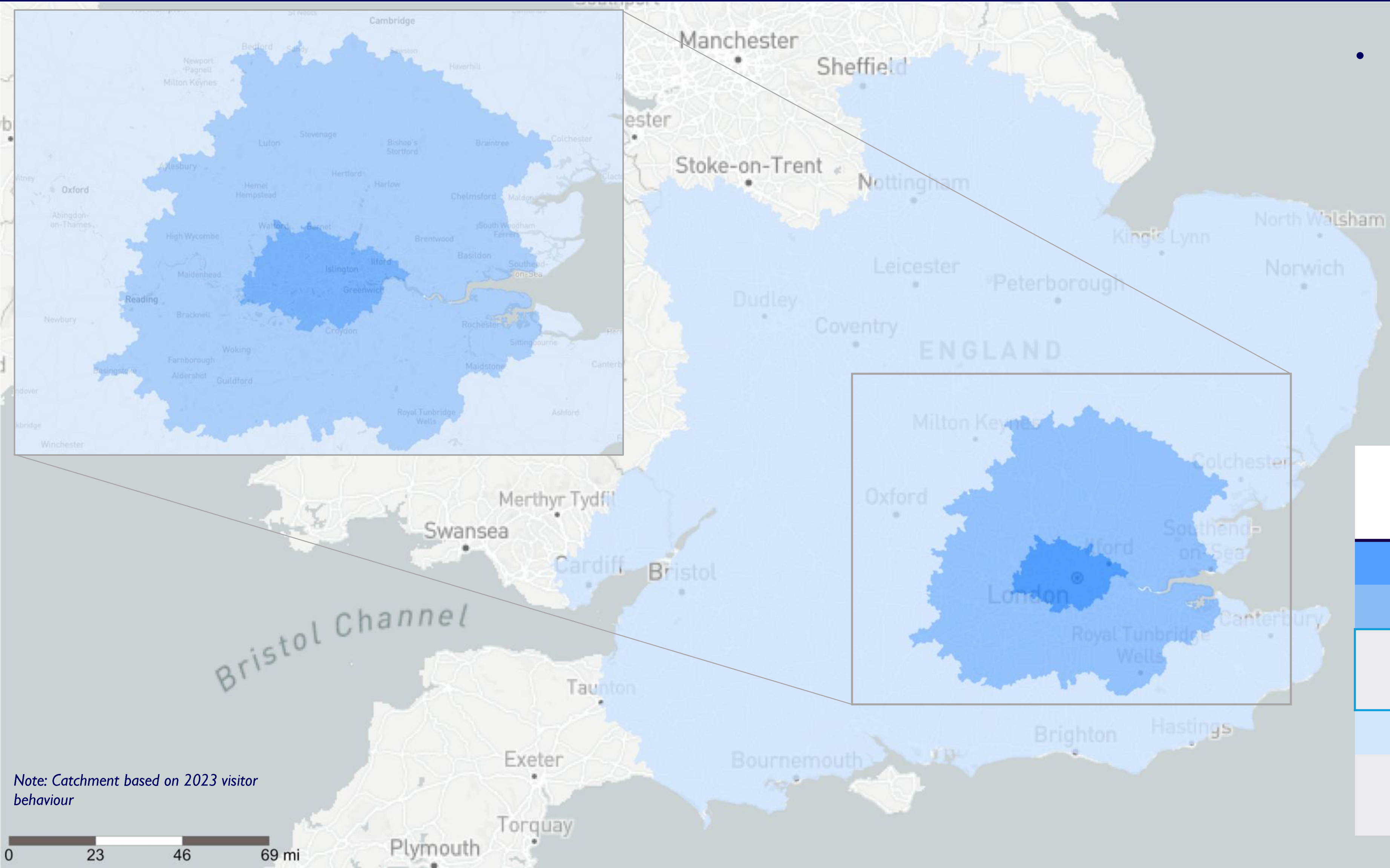
- Visits peaked in August in 2024/25 vs. December in the previous financial year.
- Slight YoY decline in visits in Q1 (April – June 2024), followed by three consecutive quarters of YoY growth, with Q4 (January – March 2025) showing strongest performance, up +14% YoY.

Visitor Volumes
2024/25 vs. 2023/24

- 2024/25 saw strong increases in visits in districts to east end of the HOL area, with Leicester Sq District up +20% and St Martin's Lane District up +10%



Visitor Volumes
HOL's Core catchment has a population of 16.2 million



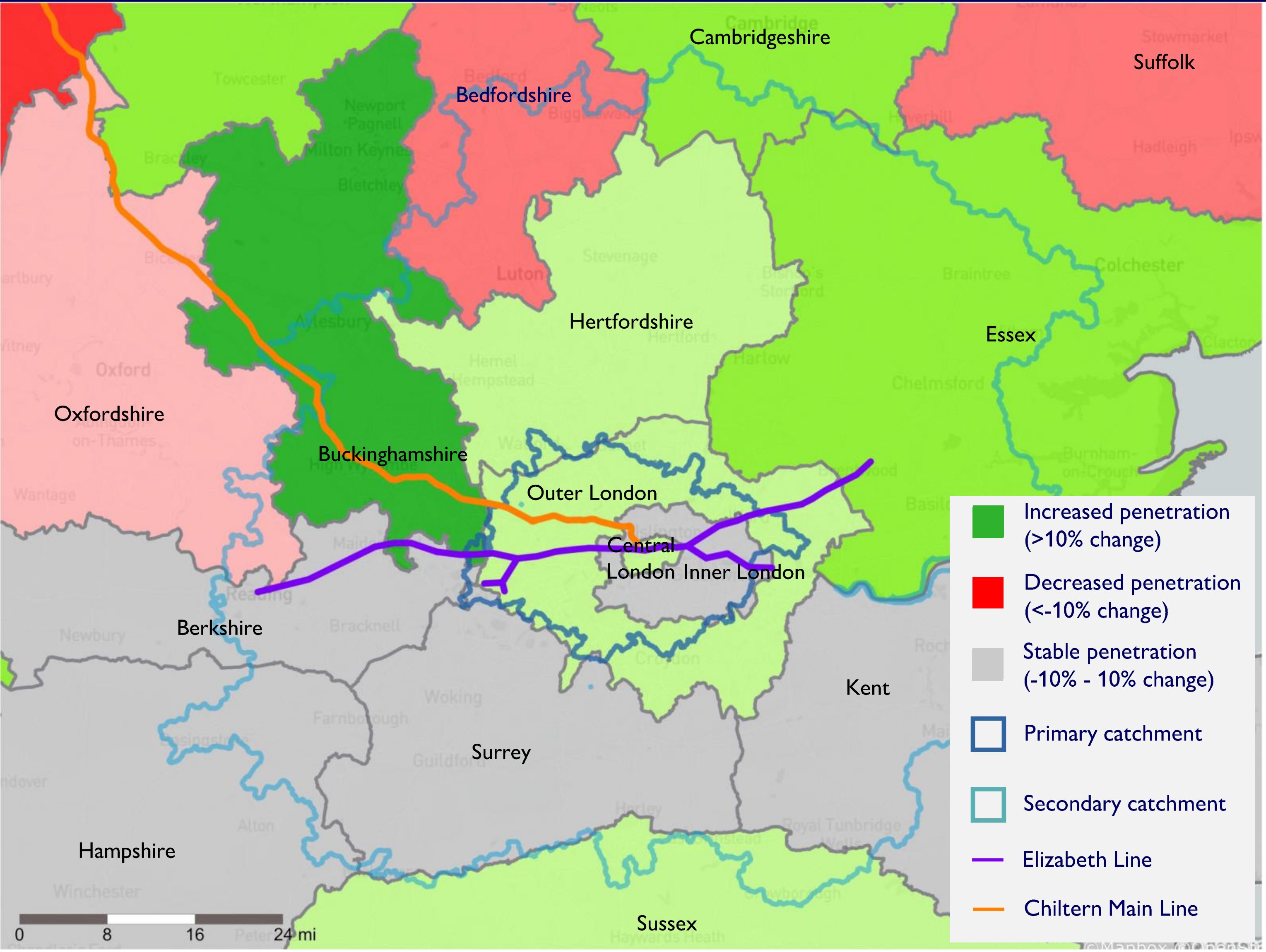
Note: *Catchment based on 2023 visitor behaviour*

- +0.5% increase in YoY share of visits from Core catchment in 2024/25 vs. 2023/24, due to increase in share of visits from Secondary catchment.

	Catchment band	Population (Millions)
	-Primary	7.0
	-Secondary	9.2
	Core ***(Primary + Secondary)*** *75% of regular visitors*	**16.2**
	-Tertiary	24.1
	Total ***(Core+ Tertiary)*** *90% of regular visitors*	**40.3**

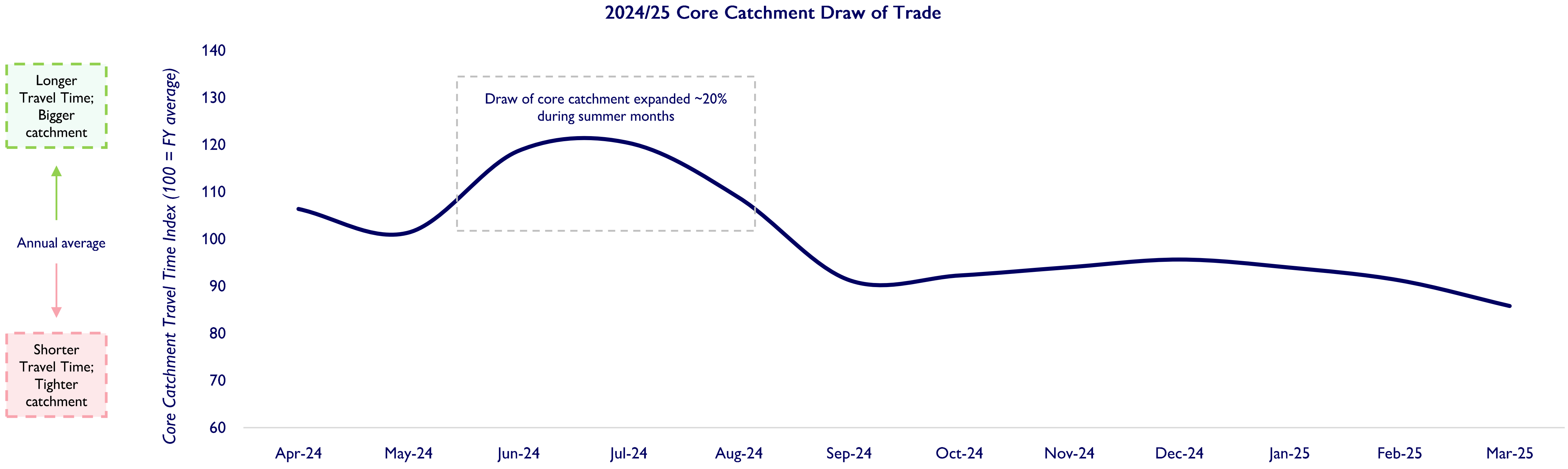
Visitor Volumes: change in catchment penetration

Increase in visitor penetration in counties to southwest of HOL area



- Map represents the YoY change in penetration by county in FY 2024/25.
  - Red areas represent counties which contributed fewer visits, while green areas represent counties that contributed more.
- Largest increases in penetration seen in Buckinghamshire, Cambridgeshire and Essex as well as smaller increases seen in Hertfordshire, Central London and Outer London.
  - Notable increase in HOL area penetration from counties served by the Chiltern Main Line (e.g. Buckinghamshire), likely reflecting a shift in visitor travel patterns during prolonged disruption at Euston, which may have diverted more travellers onto this line.
- Conversely, decreases in penetration from several counties in the tertiary catchment to the north of HOL, such as Suffolk, Bedfordshire and Oxfordshire.
- Less of a notable impact of the Elizabeth Line on changes in visitor penetration than in FY 2023/24 as commuters settled into regular travel patterns.

Visitor Volumes
Catchment draw of trade had distinct summer bias in 2024/25



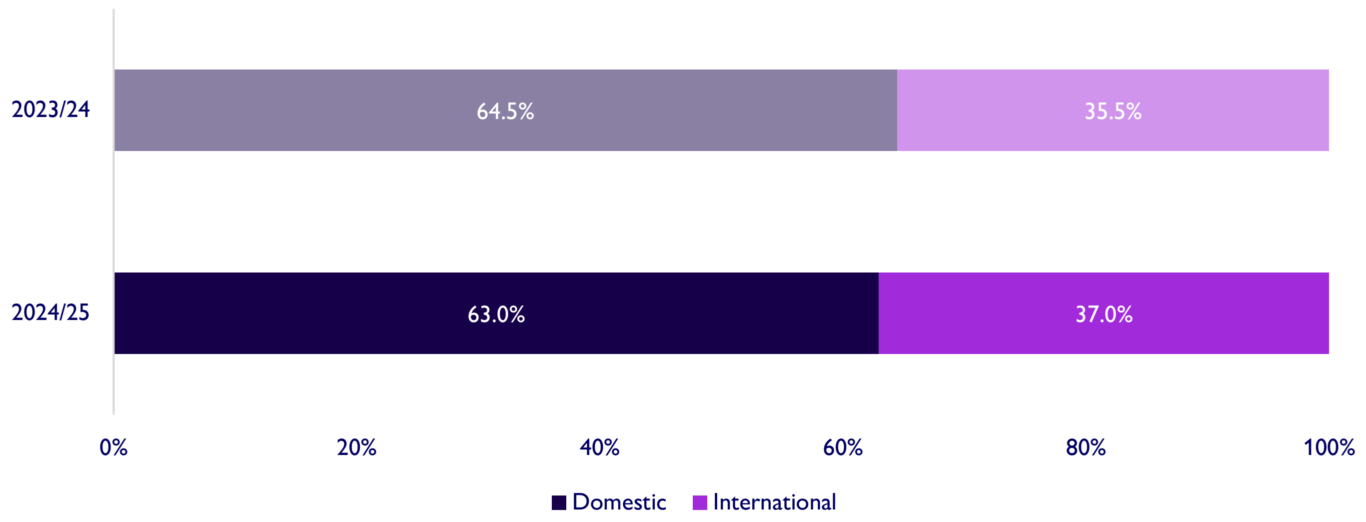
- Seasonal variations exist in relation to geographic reach and performance of the HOL area core catchment over the last twelve months.
- Core Catchment, i.e. the geographic area from which 75% of domestic visitors come, draws from a greater travel time (+20%) during the summer holidays than the 2024/25 average. This is indicative of capturing a less frequent social visitor from further afield.
- In the Autumn and during January/February, the top 75% of visits come from a smaller travel time (contracted by ~10%), as more local visitors/workers dominate the visitor mix.

Visitor Volumes: Visit mix
International visitor volumes up 11.9% versus 2023/24

Street	International mix (%)	+/- change in volume Year-on-year
HOL Area	37.0%	**11.9%**
Piccadilly District	35.2%	**-21.5%**
Jermyn St District	33.5%	**-28.6%**
Leicester Sq District	38.4%	**13.6%**
Piccadilly Circus District	43.1%	**-0.9%**
St Martin's Lane District	38.5%	**12.7%**
Haymarket District	38.5%	**-12.3%**
Core West End	35.2%	**45.3%**

- International visits to HOL are up 11.9% on previous year as recovery post-Covid continues (correlating with increasing hotel occupancy rates).

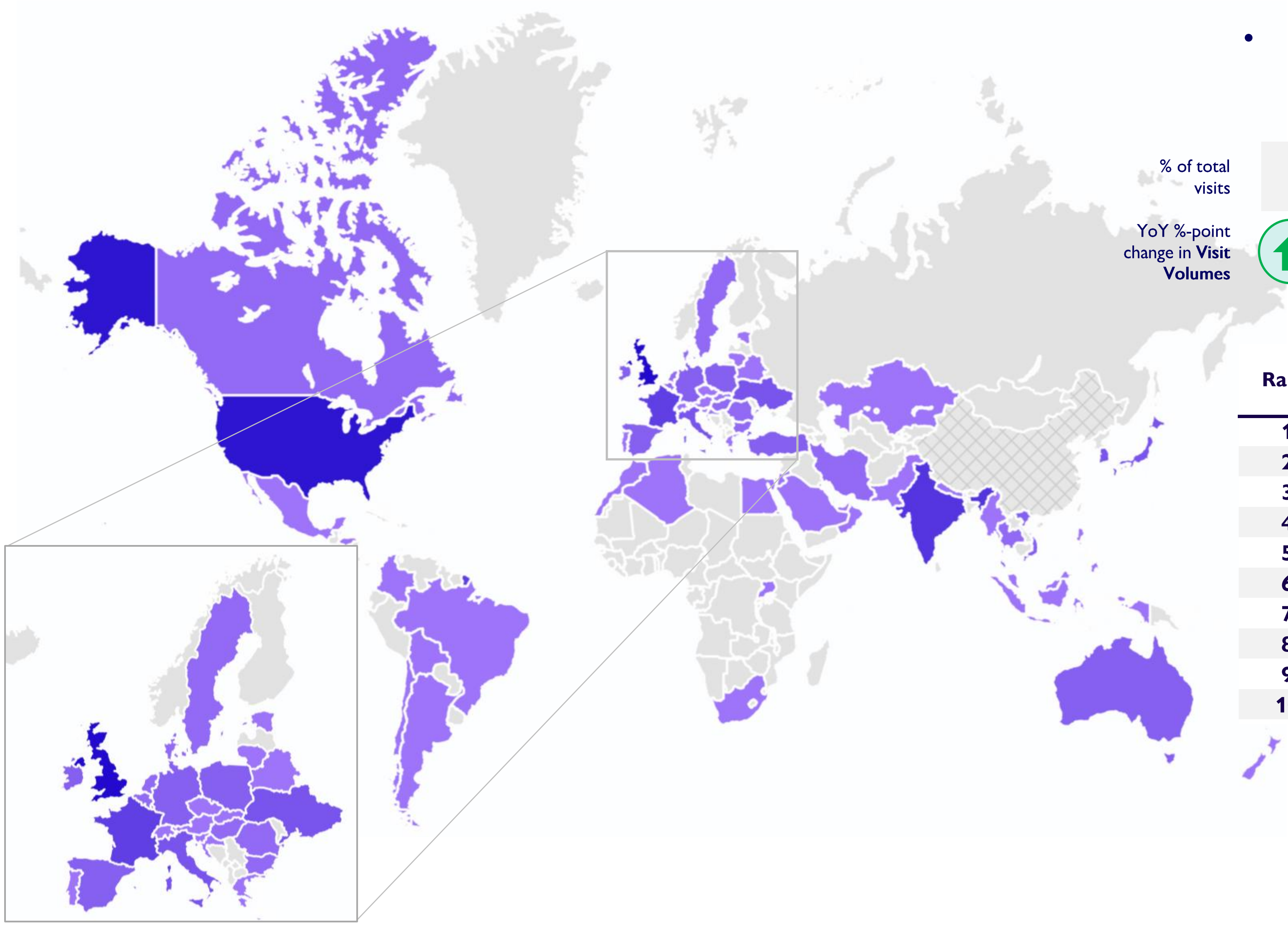
Visitor Origin Mix (Latest Year vs. Last Year)



- International visitors accounted for 37.0% of visits in 2024/25, vs. 35.5% for 2023/24. An increase of 1.5%.

Visitor Volumes: Visitor origin

Visitors to the HOL area from outside the UK up +1.5% vs. previous FY



- Increase in YoY international mix in 2024/25 driven primarily by increase from European countries (particularly France).

	Europe	Rest of World	Non-UK
% of total visits	Europe: 14.9%	Rest of World: 22.2%	Non-UK: 37.0%
YoY %-point change in **Visit Volumes**	+1.9% year-on-year	-0.4% year-on-year	+1.5% year-on-year

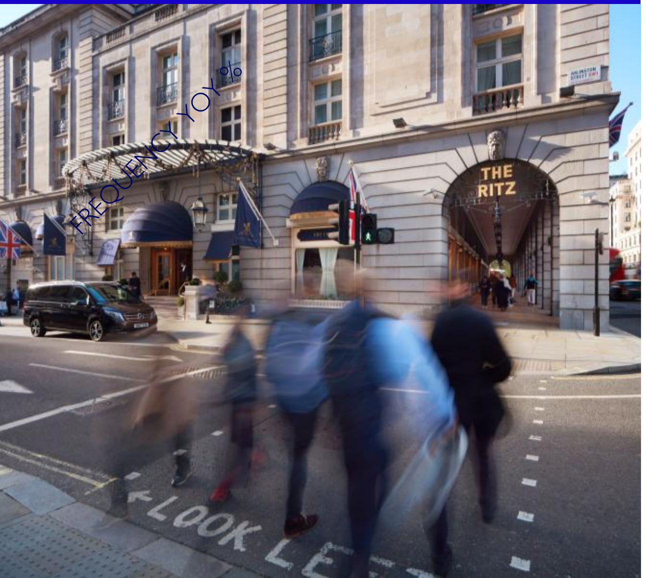
Rank	Region	%	+/- percentage point change	Top contributing country
1	United Kingdom	63.0%	-1.5	
2	Northern America	10.9%	-3.7	United States
3	Eastern Europe	5.4%	-0.2	Ukraine
4	Western Europe	4.7%	0.3	France
5	Southern Asia	4.6%	1.7	India
6	Eastern Asia	3.3%	1.4	Republic of Korea
7	Southern Europe	2.5%	0.6	Italy
8	Northern Europe	1.4%	0.4	Ireland
9	South-eastern Asia	1.3%	0.4	Vietnam
10	Western Asia	1.1%	0.4	Turkey

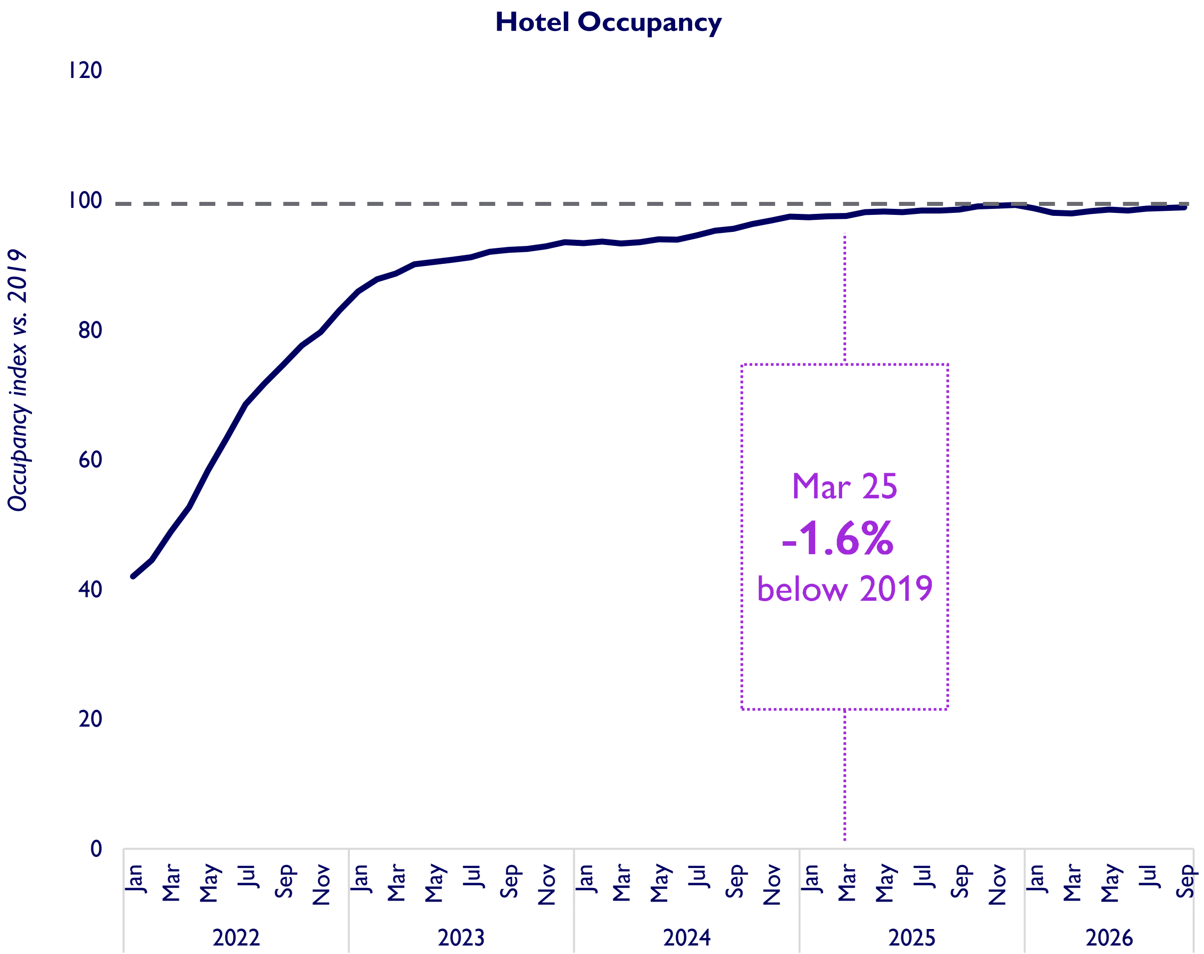
Note: Data unavailable for visitors from China

Visitor Volumes: Hotel occupancy
Hotel occupancy recovered to near 2019 levels in 2024/25

79% hotel occupancy over last 12 months, vs. average of 76% during 2023/24.

Occupancy is forecast to reach 2019 levels in late 2025.





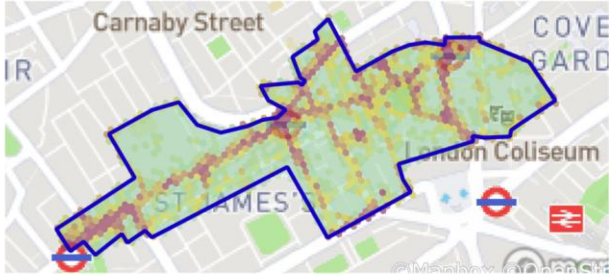
2024/25 OCCUPANCY
79%

2023/34 OCCUPANCY
76%

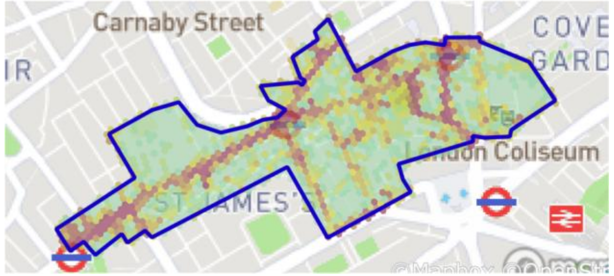
2019 OCCUPANCY
82%

LATEST MONTH OCCUPANCY
80%

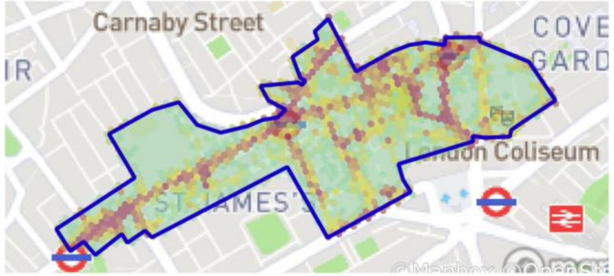
Visitor Volumes
Larger Leicester Sq peak towards start of FY



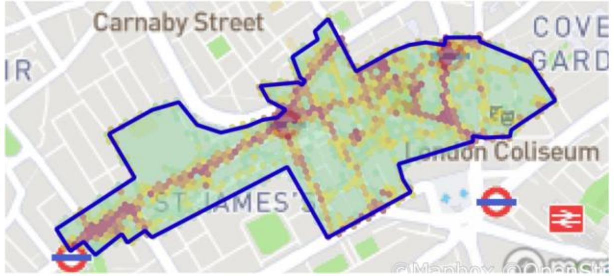
April



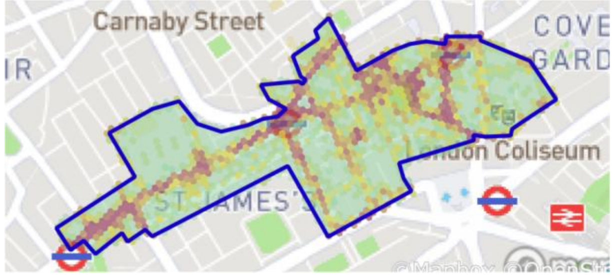
May



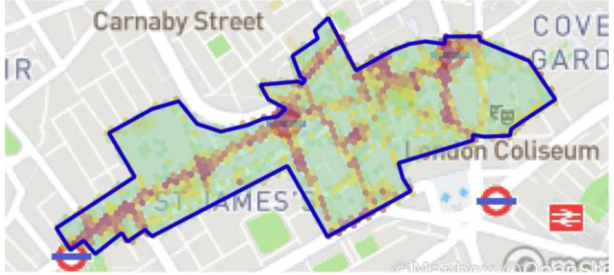
June



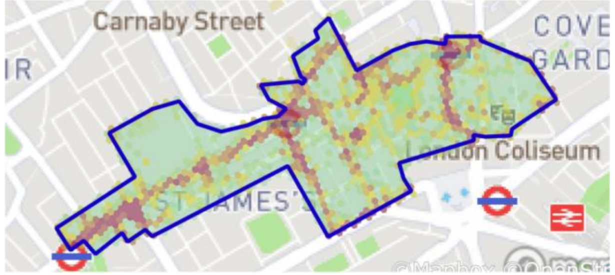
July



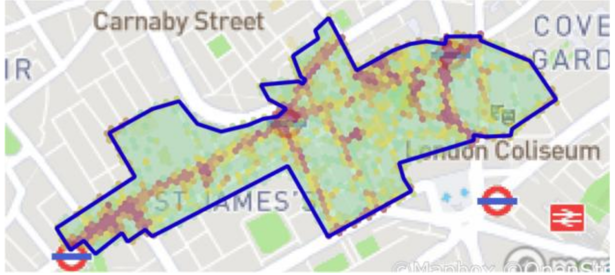
August



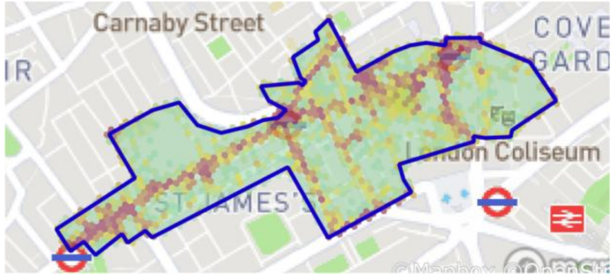
September



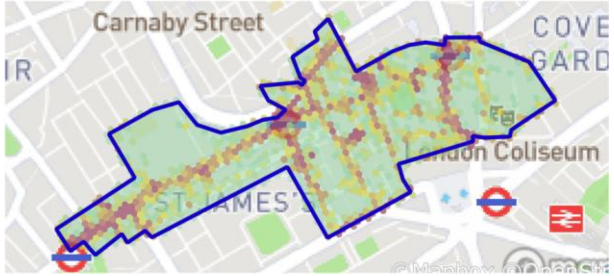
October



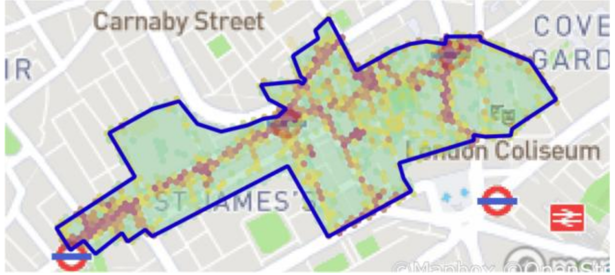
November



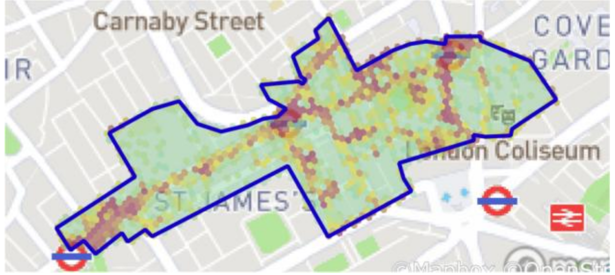
December



January



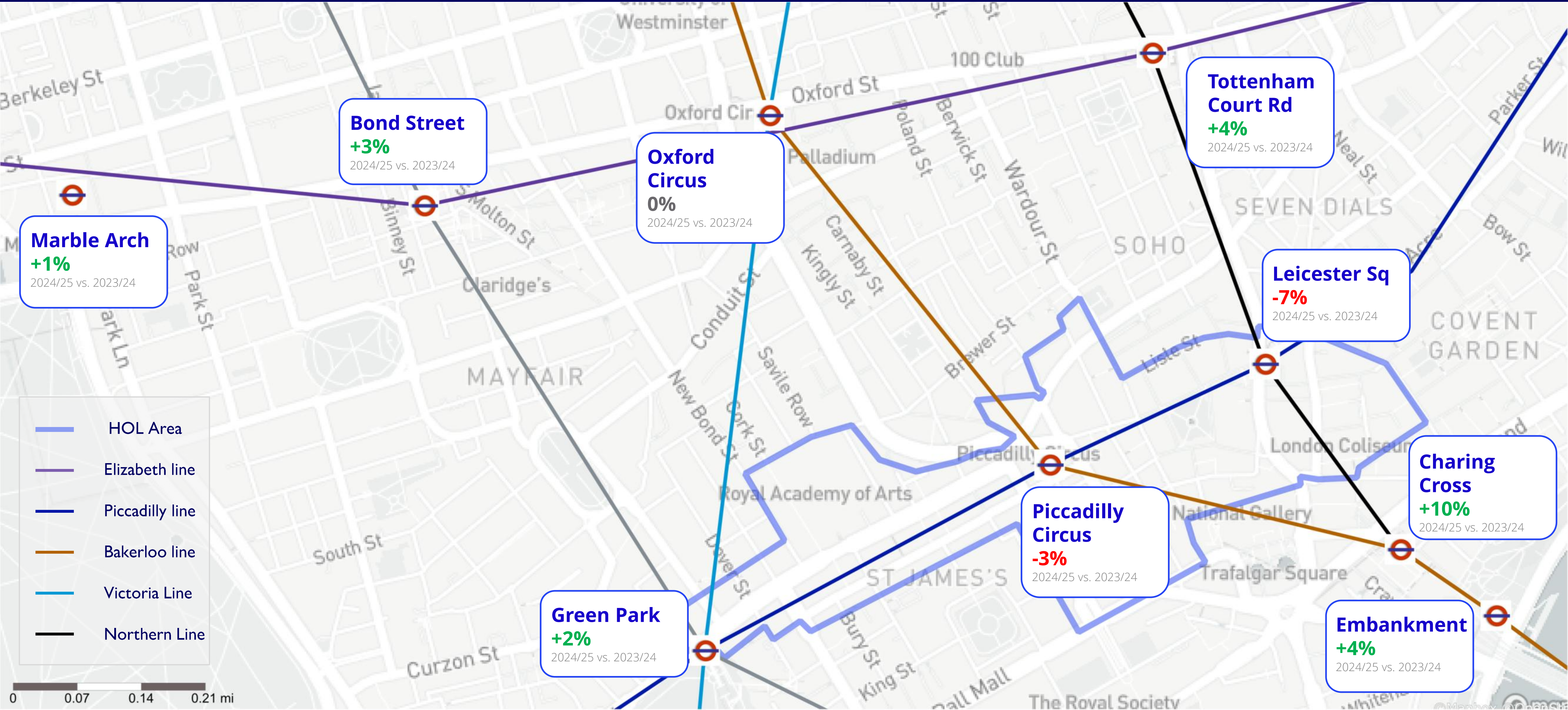
February



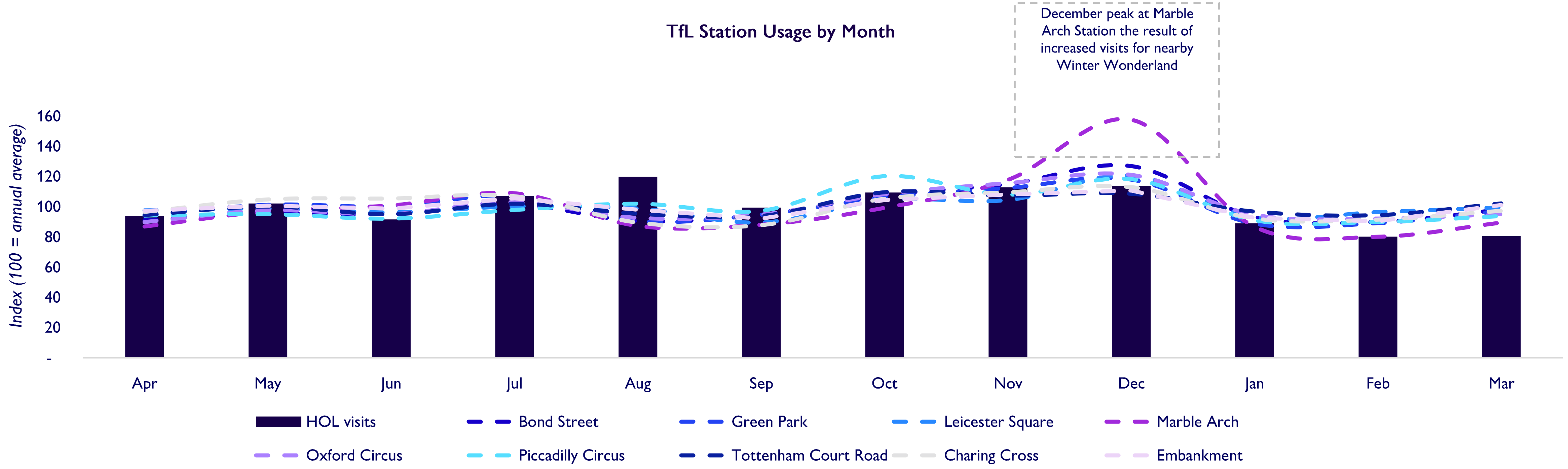
March

Red= more dense
Green = less dense

Visitor Volumes: TfL station usage
Year-on-year TfL station usage

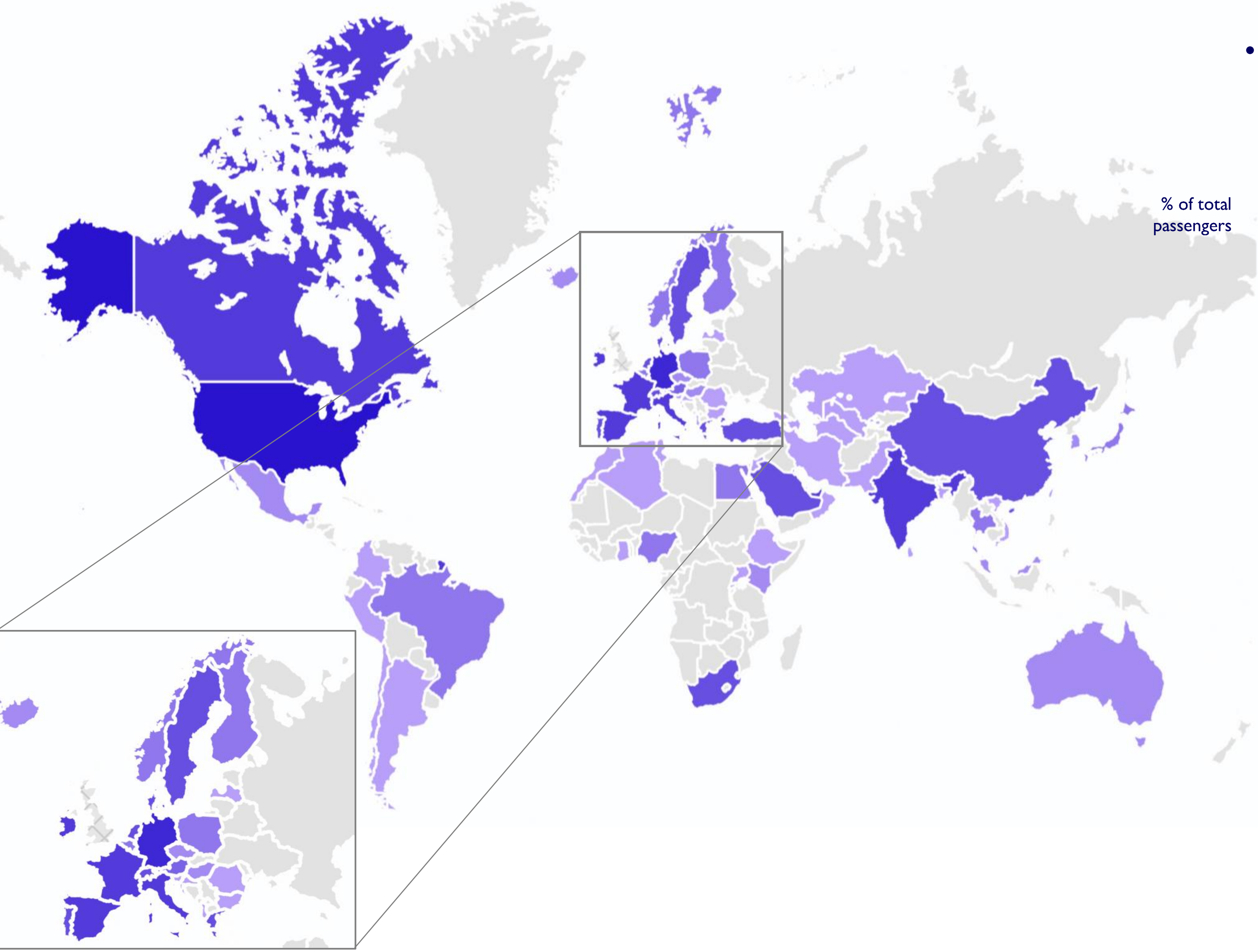


Visitor Volumes: TfL station usage
HOL area visit pattern across the year broadly mirrored station usage



- Alignment between the HOL area visit patterns across 2024/25 vs. TfL station usage.
- As a gateway to Winter Wonderland in Hyde Park, Marble Arch station sees significant peak in usage in December, consistent with previous FY.

Visitor Volumes: Heathrow Airport usage
~18m passengers coming from USA – top origin/destination country

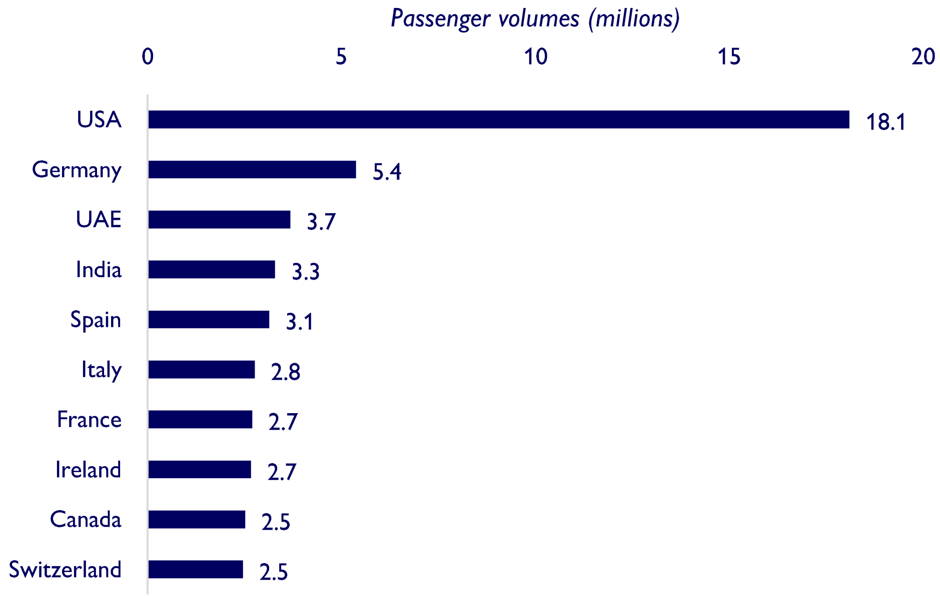


- Heathrow accounted for ~3x more passenger movements from the USA than any other international destination in FY24/25 – primarily from New York JFK and Los Angeles International

% of total passengers

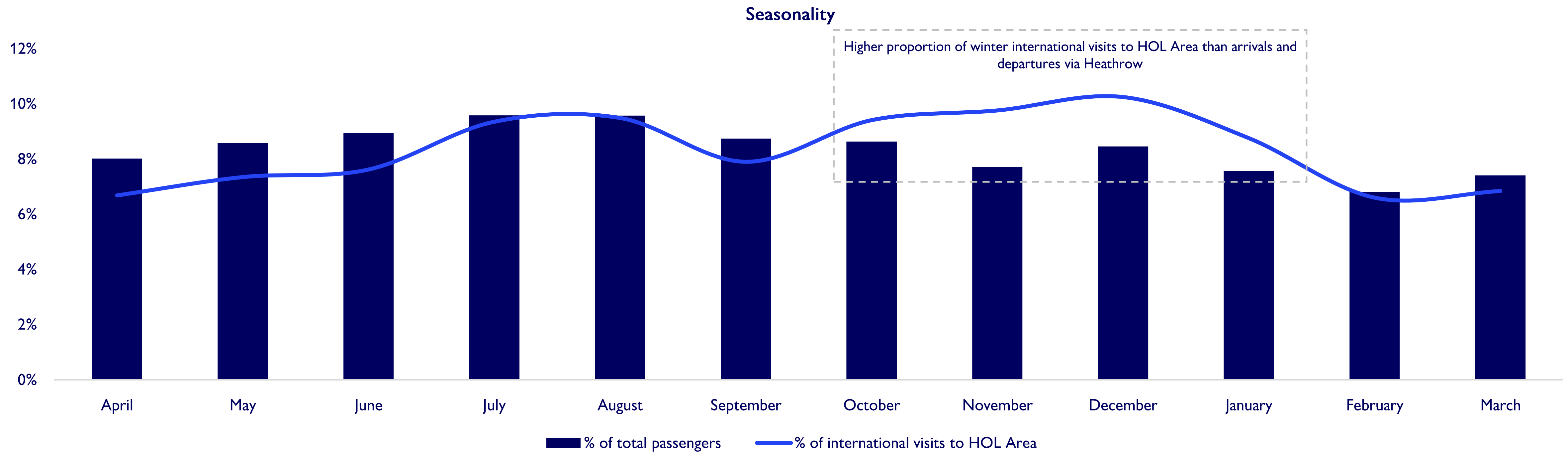
Europe: 39.7%	North America: 26.6%	Rest of World: 33.7%

Top 10 total arrivals/departures by country



Visitor Volumes: Heathrow Airport Usage

HOL area visit pattern across the year broadly mirrored Heathrow usage

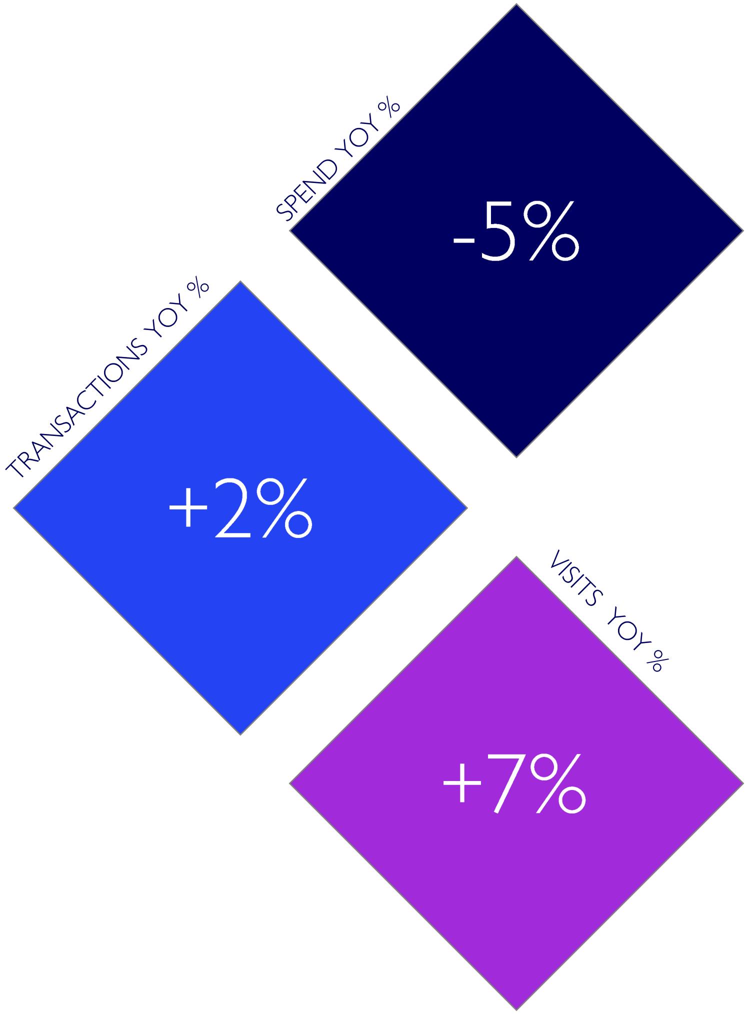


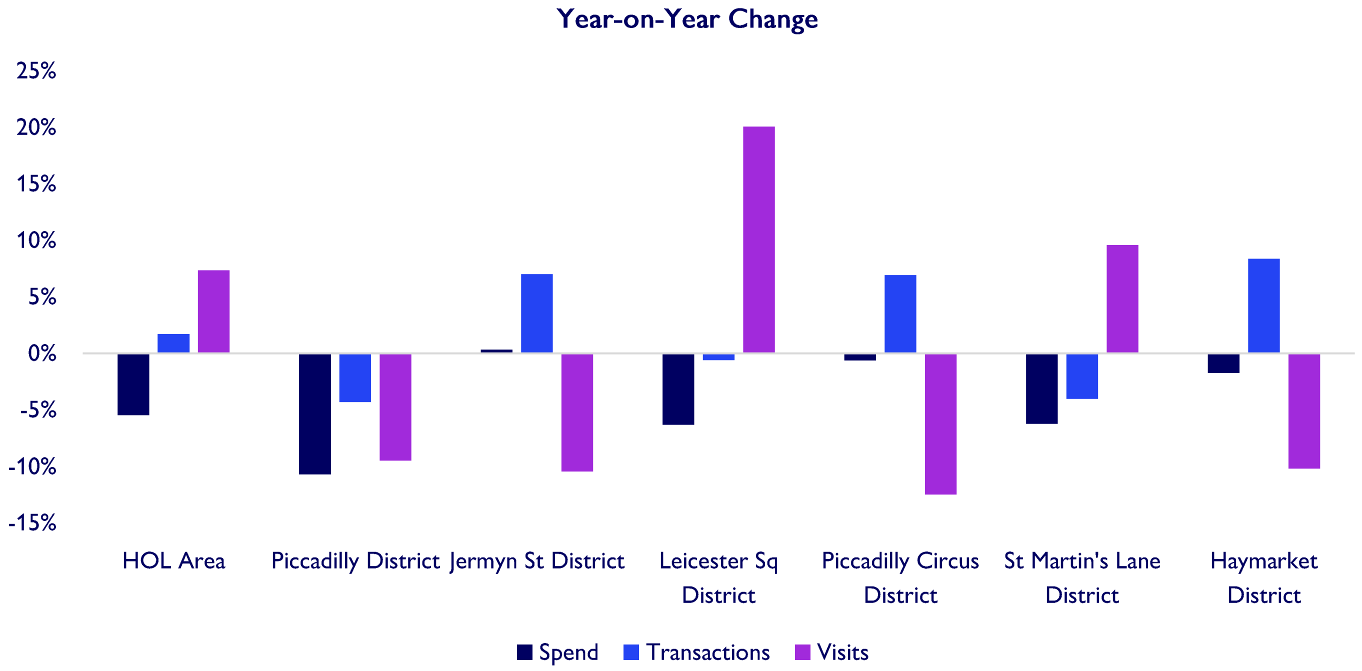
- Alignment between the HOL area visit patterns across 2024/25 vs. Heathrow Airport usage.
- However, a higher proportion of international visits were recorded in the HOL Area than arrivals and departures via Heathrow between October and January, highlighting the area's strong appeal as a winter and Christmas destination.

03

Visitor spend

Visitor spend
Spending down in majority of districts vs. last year

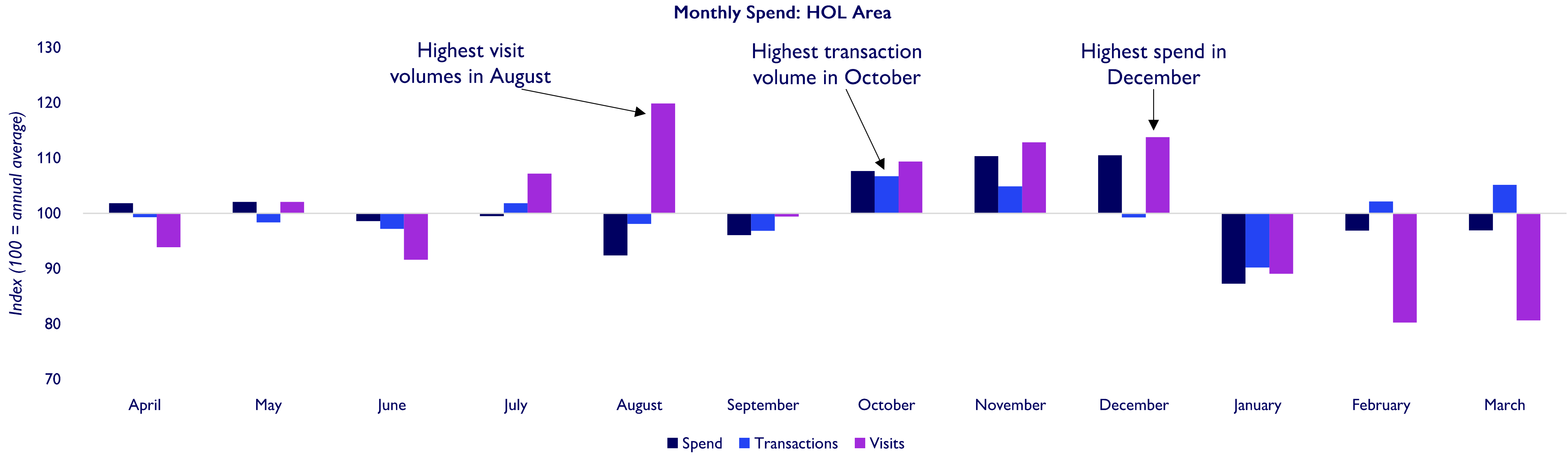




- Spending down -5% in the HOL area in 2024/25 vs. 2023/24, despite visits being +7% up over same period.
- Increase in transactions (+2%), however, implying that spend decrease is due to decrease in average transaction value rather than the volume of transactions taking place.

Note: Historic MasterCard figures have been adjusted for inflation
Anonymised and aggregated by MasterCard, via the High Streets Data Partnership
Spend = value of purchases. Transactions = number of sales irrespective of the amount spent

Visitor spend
More activity in the lead up to Christmas



- Build-up of spend during October, November and December in the lead up to Christmas, consistent with previous financial year.
- Lower spend during early part of 2025 when less international visitors were in the area.

Note: Historic MasterCard figures have been adjusted for inflation
Anonymised and aggregated by MasterCard, via the High Streets Data Partnership

Visitor spend

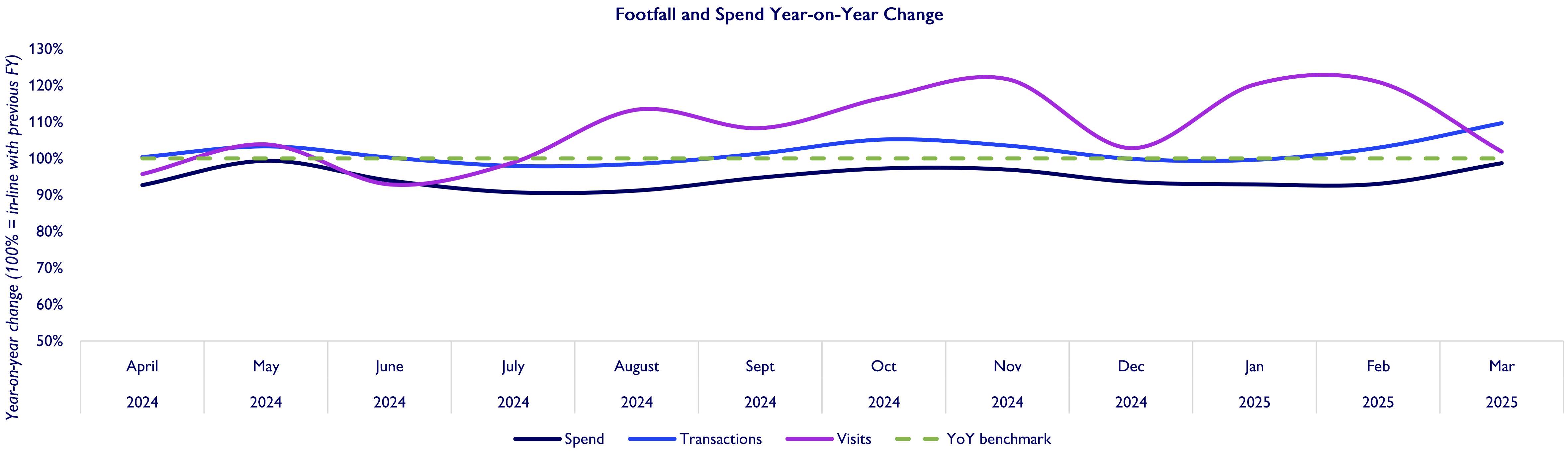
‘Eating’ spend up whilst decrease in Apparel spend

WEEKDAY RETAIL	WEEKEND RETAIL	WEEKDAY EATING	WEEKEND EATING	WEEKDAY APPAREL	WEEKEND APPAREL
-8%	-6%	+1%	+3%	-30%	-26%
YEAR-ON-YEAR	YEAR-ON-YEAR	YEAR-ON-YEAR	YEAR-ON-YEAR	YEAR-ON-YEAR	YEAR-ON-YEAR

- Differing performance experienced across categories throughout FY 2024/25, with ‘Eating’ experiencing a slight year-on-year increase in spend whilst ‘Apparel’ experienced quarter-on-quarter decline.
- Apparel spend significantly underperformed versus the previous financial year as spend reflected a preference amongst visitors for social and leisure visits over retail purchases.
- Spend performance more resilient on weekends, down -6% year-on-year vs. -8% in weekday spend across the financial year, further indicating the role of social visitors across the HOL area.

Note: Historic MasterCard figures have been adjusted for inflation
Anonymised and aggregated by MasterCard, via the High Streets Data Partnership

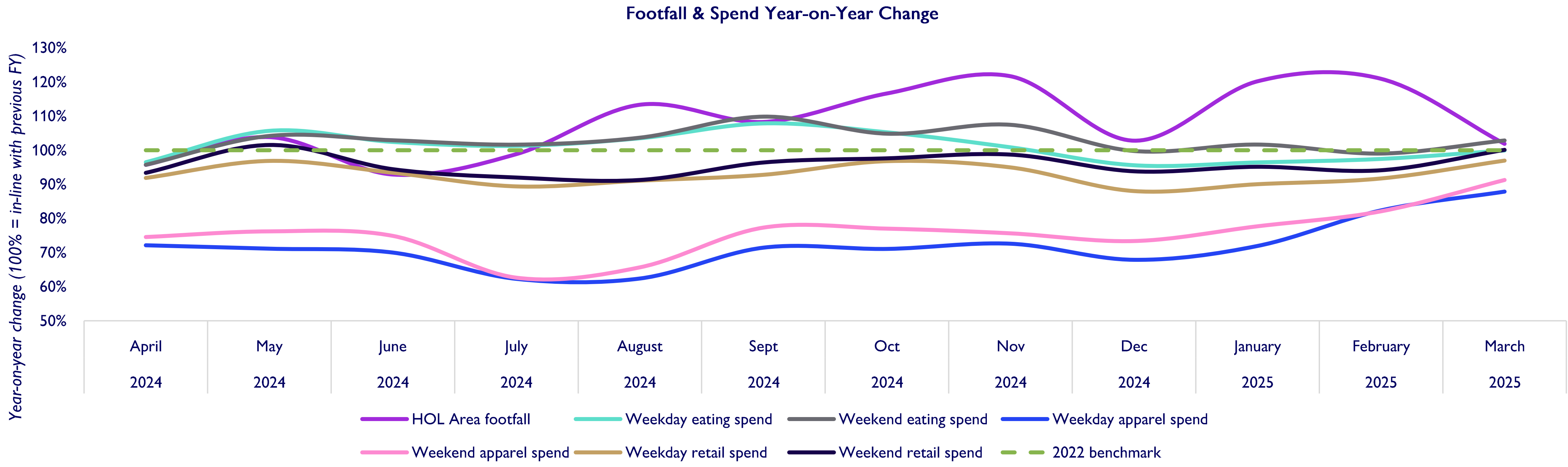
Visitor spend
Spend and transaction improvement seen in February & March



- Considerable growth in visit performance throughout much of 2024/25 financial year, despite decline in spend.
- Transaction volume performance relatively stable over the last twelve months, despite overall spend decline, indicating a reduction in average transaction values when visitors spend.

Note: Historic MasterCard figures have been adjusted for inflation
Anonymised and aggregated by MasterCard, via the High Streets Data Partnership

Visitor spend
Visits have been consistently outperforming spend throughout FY



- Visits vs. 2023/24 have consistently outperformed spend in all categories in second half of FY, as more visitors came to HOL Area but spent less whilst in the area.
- ‘Eating’ spend has been relatively consistent with previous FY throughout 2024/25 FY, whilst ‘Apparel’ spend on both weekends and weekdays has been significantly behind 2023/24 all year, although has shown signs of improvement in February and March.

Note: Historic MasterCard figures have been adjusted for inflation
Anonymised and aggregated by MasterCard, via the High Streets Data Partnership

Visitor spend
Saturdays saw largest volume of spend in the HOL area

Spend Volume Hotspots

District	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
HOL Area	78	86	93	104	118	135	85
Piccadilly District	85	90	97	105	117	128	78
Jermyn St District	86	94	99	109	117	124	70
Leicester Sq District	73	78	87	98	118	146	100
Piccadilly Circus District	73	80	87	103	119	144	94
St Martin's Lane District	75	84	93	104	115	141	88
Haymarket District	79	89	96	104	119	130	83

Year-on-Year Change in Spend (volume)

District	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
HOL Area	1%	0%	-4%	-2%	-1%	2%	1%
Piccadilly District	-5%	-10%	-12%	-10%	-6%	-4%	-4%
Jermyn St District	7%	7%	2%	4%	6%	8%	11%
Leicester Sq District	0%	1%	-2%	-3%	-3%	0%	-2%
Piccadilly Circus District	6%	5%	1%	4%	2%	6%	5%
St Martin's Lane District	0%	-1%	-4%	-4%	-4%	1%	0%
Haymarket District	6%	5%	2%	3%	3%	4%	4%

Note: Historic MasterCard figures have been adjusted for inflation
Anonymised and aggregated by MasterCard, via the High Streets Data Partnership

- Fridays and Saturdays saw largest volume of spend across HOL Area and in all districts, consistent with previous FY.
- Jermyn St and Haymarket Districts saw an increase in spend on every day of week vs. previous FY, likely due to a return to the office. Whilst Piccadilly District experienced consistent decrease throughout the week, this maybe In part due to the large amount of building work occurring in the area.
- Top table represents an index based on the spend in each day vs. the district average.

Visitor spend

Afternoons saw largest volume of spend in the HOL area

Spend volume hotspots

District	12am - 3am	3am - 6am	6am - 9am	9am - 12pm	12pm - 3pm	3pm - 6pm	6pm - 9pm	9pm - 12am
HOL Area	31	6	10	53	203	194	184	118
Piccadilly District	31	4	9	65	248	234	116	93
Jermyn St District	34	7	12	85	249	227	110	76
Leicester Sq District	32	5	6	36	167	171	244	139
Piccadilly Circus District	43	6	6	36	163	167	230	149
St Martin's Lane District	20	5	12	46	190	182	229	116
Haymarket District	20	10	16	59	195	183	203	113

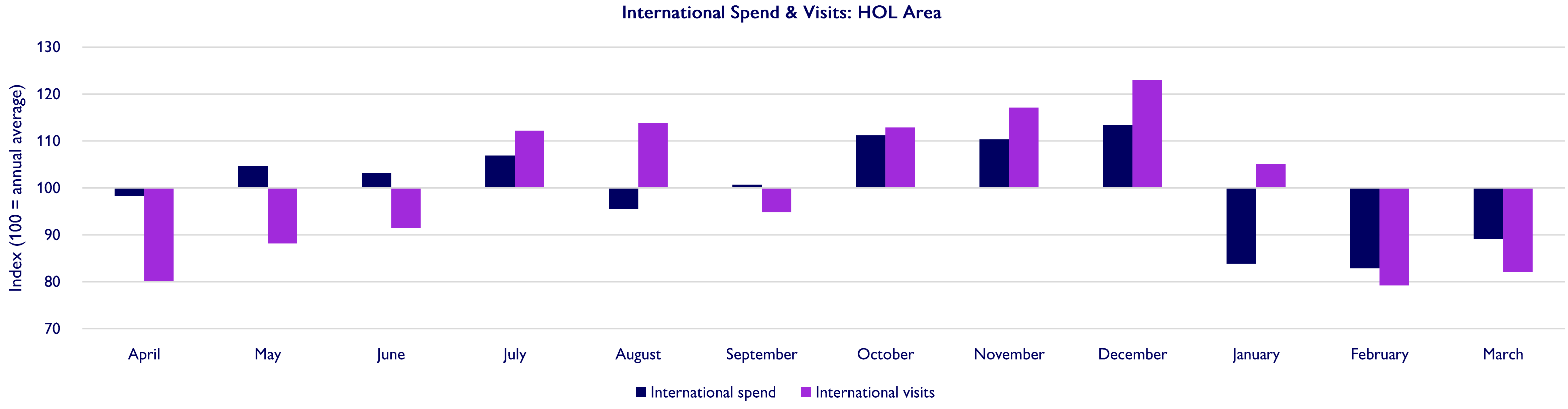
Year-on-year change in spend (volume)

District	12am - 3am	3am - 6am	6am - 9am	9am - 12pm	12pm - 3pm	3pm - 6pm	6pm - 9pm	9pm - 12am
HOL Area	-14%	19%	-9%	-12%	1%	6%	-1%	-1%
Piccadilly District	-4%	41%	-22%	-19%	-4%	3%	-17%	-1%
Jermyn St District	13%	30%	16%	-1%	6%	11%	-3%	13%
Leicester Sq District	-23%	-32%	-18%	-6%	4%	4%	0%	-7%
Piccadilly Circus District	-21%	-25%	-11%	-5%	8%	12%	9%	1%
St Martin's Lane District	-22%	48%	-7%	-10%	0%	3%	-1%	-6%
Haymarket District	-34%	53%	6%	-14%	5%	12%	9%	0%

Note: Historic MasterCard figures have been adjusted for inflation
Anonymised and aggregated by MasterCard, via the High Streets Data Partnership

- 12pm-6pm experienced the greatest proportion of spend across the HOL area.
- All districts saw an increase in YoY spend in late afternoon (3pm-6pm), whilst 9am-12pm saw a decrease in all districts.
- Several districts saw spend peak in the evening, with Leicester Sq District recording the highest share of spend between 6pm - 9pm, driven by its strong social and leisure offering.
- Top table represents an index based on the spend in each day vs. the district average

Visitor spend
International spend and visits both peaked in December

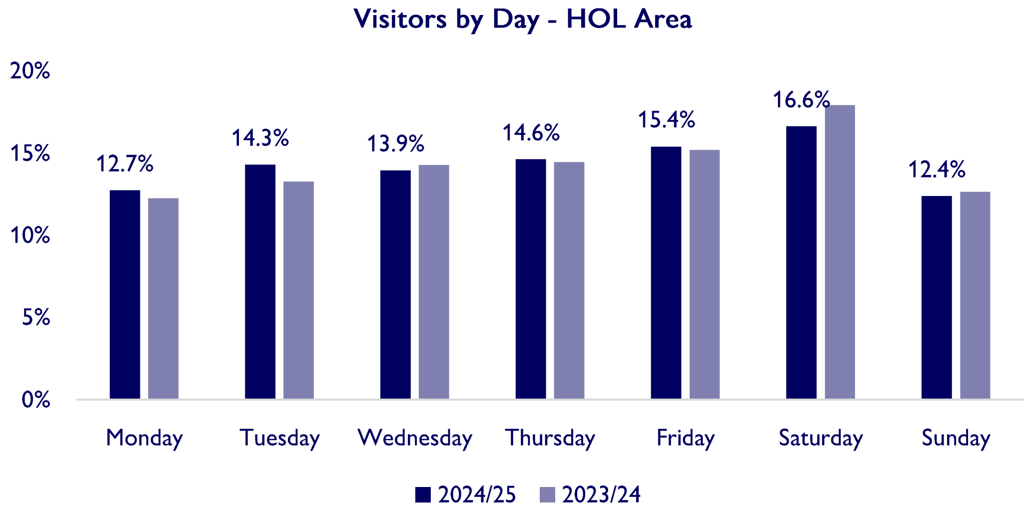


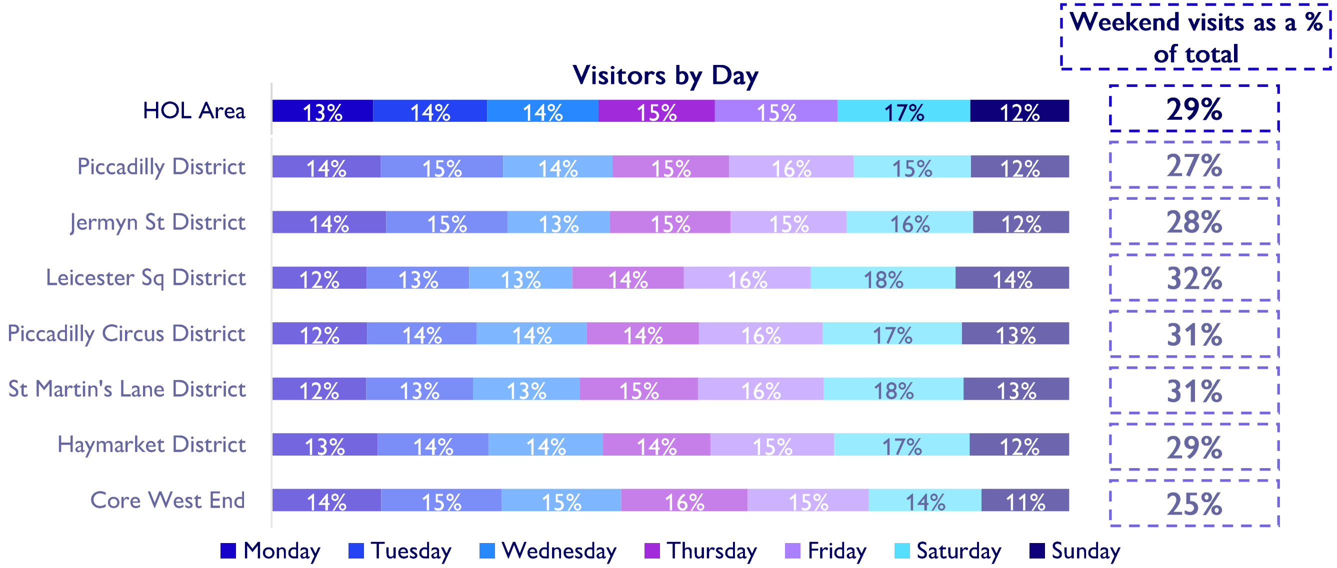
- International spend volumes peaked in December during the lead-up to Christmas, consistent with the previous financial year. In contrast, early 2025 saw the lowest spend of the financial year, with above-average visit volumes in January before dropping off in February and March, reflecting a slow start to the calendar year.
- Visits broadly increased throughout Q2 (July – September) and Q3 (October – December), with influx of tourists in build up to Christmas correlating with increase in spend.

Note: Historic MasterCard figures have been adjusted for inflation
Anonymised and aggregated by MasterCard, via the High Streets Data Partnership
International visit method methodology currently undergoing refinement

04 Visitor Behaviour

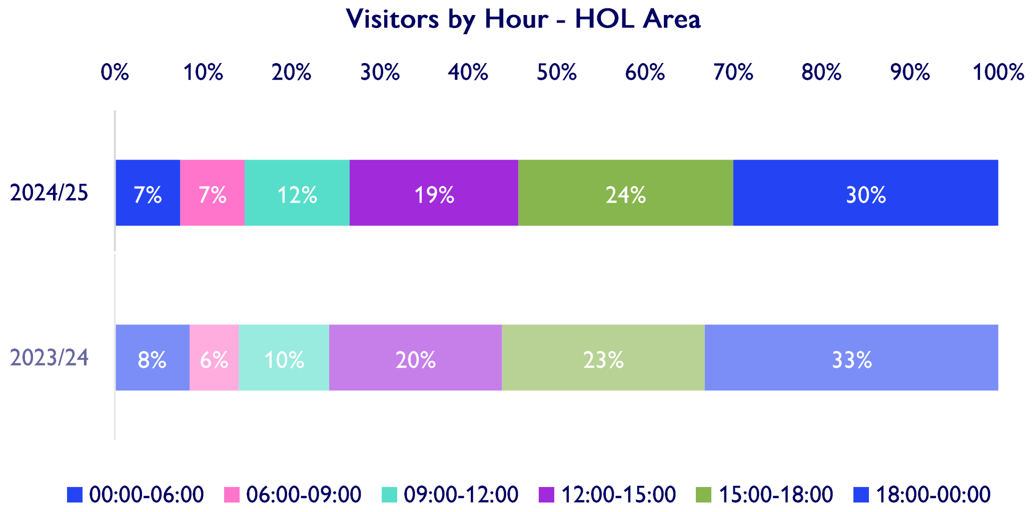
Visitor Behaviour: Visits by day and hour
Friday and Saturday visits continue to be most popular

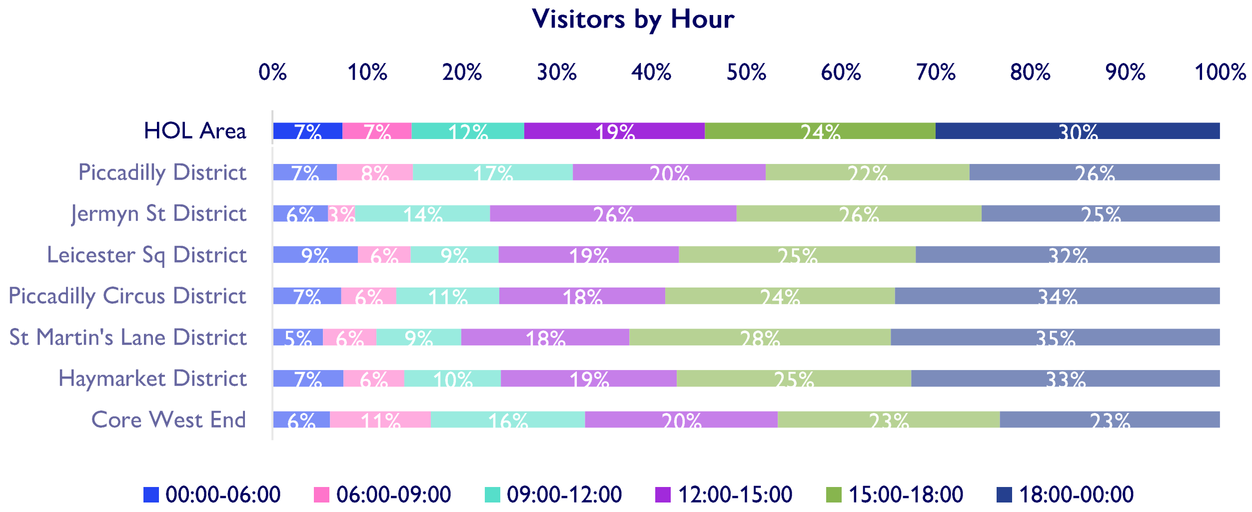




- Fridays and Saturdays typically saw the highest proportion of visitors (15.4% and 16.6% respectively), whilst Sundays saw the lowest (12.4%), as is to be expected in a heavily leisure-focused area with a strong evening economy.
- All months followed similar trends, but December 2024 saw the most significant Saturday focus whilst August saw the highest Tuesday-Thursday focus.
- Slight increase in Monday and Tuesday visits versus previous financial year as workers continue to adjust their commuting behaviours.
- Leicester Sq District has largest weekend share of visits due to strong leisure focus.

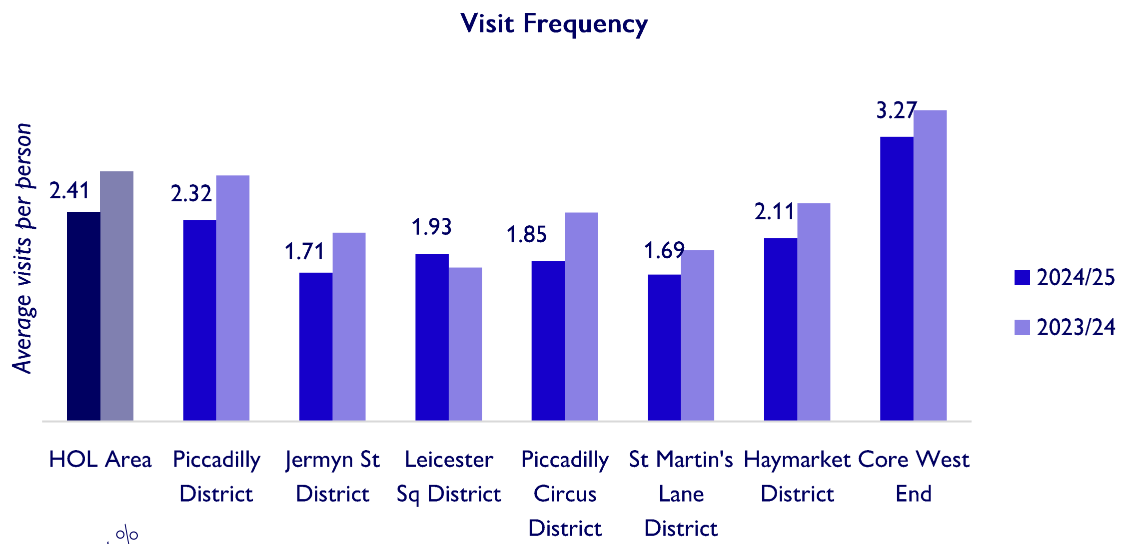
Visitor Behaviour: Visits by day and hour
54% of visitors to the HOL area visit after 3pm

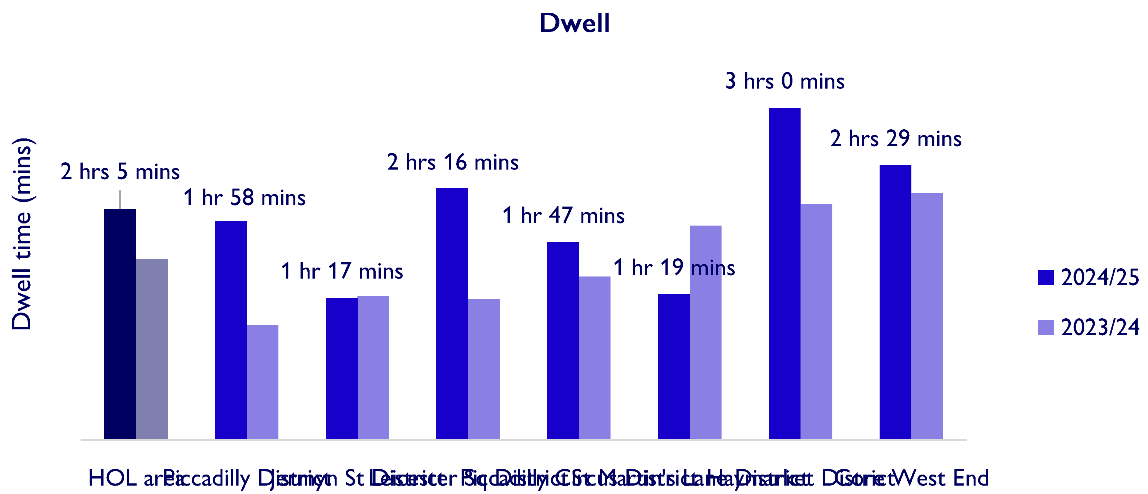




- Visitor volumes typically peak during lunchtime and into the afternoon, with 54% of visits to the HOL area occurring after 3pm.
- Districts with a focus on leisure typically peak in the evening e.g. Leicester Sq and St Martin’s Lane, whilst retail focused districts have a larger lunchtime peak.
- Slight shift in visit mix by time of day, with a greater proportion of visits occurring in the morning (evening visits decreased by -3 %-points whilst morning visits (09:00 – 12:00) increased +2 % points), consistent with YoY change seen in Core West End.

Visitor Behaviour: Frequency
Visitors coming less frequently but staying for a longer





FREQUENCY YOY %

-16%

2.41 times per year

- Decrease in visit frequency across all districts apart from Leicester Square District, which rose from 1.77 visits per year to 1.93.
- Decrease seen in the HOL area in-line with Core West End, down from 3.58 visits per year to 3.27 (-9%).

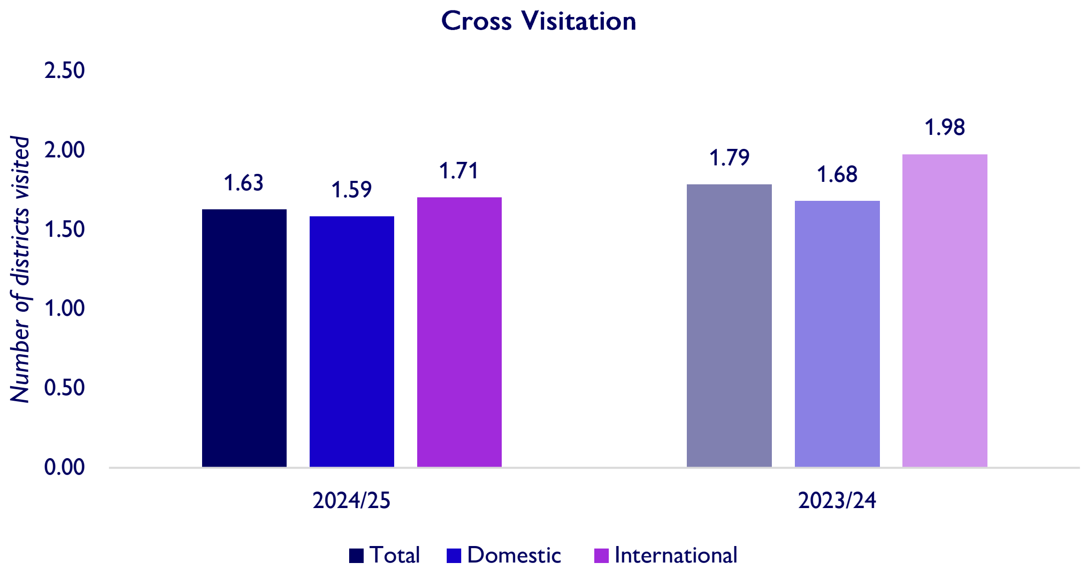
DWELL YOY %

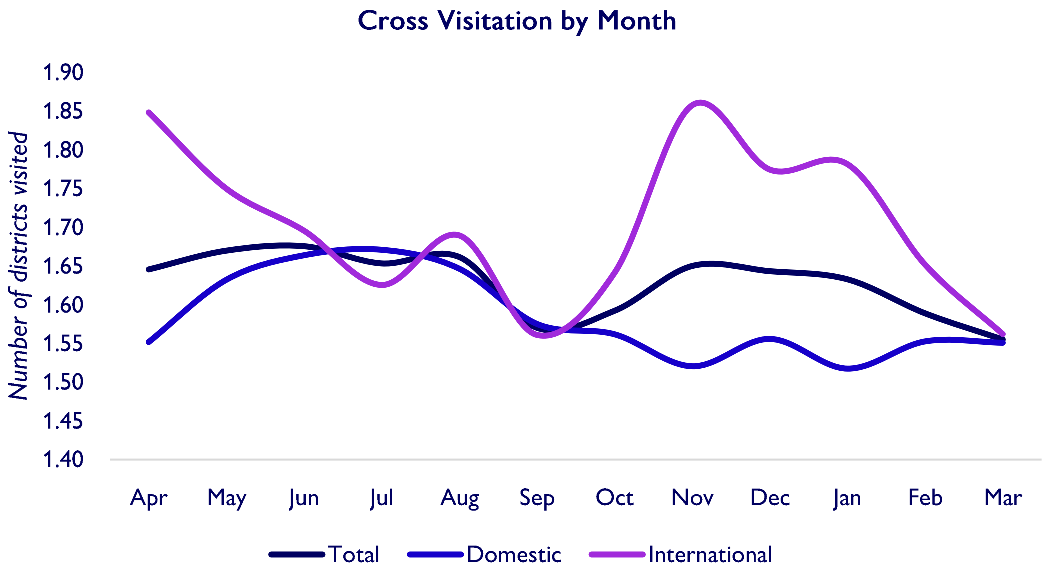
+28%

2 hours and 5 minutes

- Dwell time increased in latest FY vs. previous FY, now at 2 hours 5 minutes vs. 1 hour 38 minutes.
- Haymarket District has the longest dwell time at 3 hours, ~40 minutes higher than in previous FY.

Visitor Behaviour: Cross visitation
Increase in focused visits versus 2023/24





- Cross visitation looks to help understand the number of visitors visiting multiple districts per trip.
- Average number of districts visited in 2024/25 (1.63) marks a slight decrease YoY (-0.16 districts visited), with cross visitation decreasing amongst both domestic and international visitors.

- Cross visitation decreased slightly throughout the 2024/25 financial year after peaking in June, with an average of 1.68 districts visited per trip.
- Both domestic and international cross visitation followed a similar trend from June-September 2024, before differentiating over the Christmas period and into 2025, where international cross visitation increased (likely due to increase in tourists), whilst domestic cross visitation decreased.

Visitor behaviour: Cross visitation
Elizabeth Line continues to have an impact on cross visitation

CROSS VISITATION YOY %
-9%

HOL AREA TFL ENTRIES/EXITS YOY %
-3%

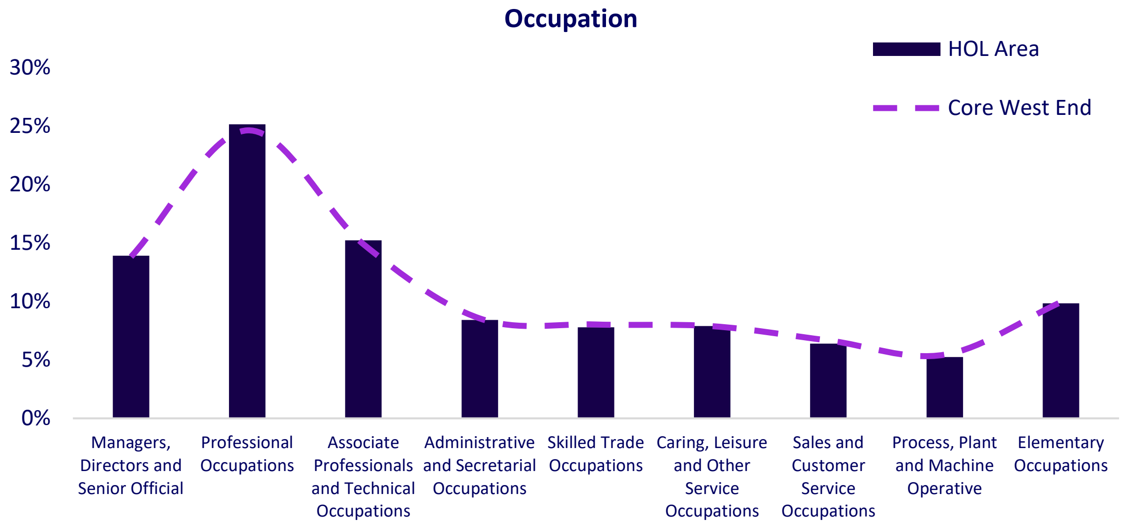
NEARBY ELIZABETH LINE ENTRIES/EXITS YOY %
+4%

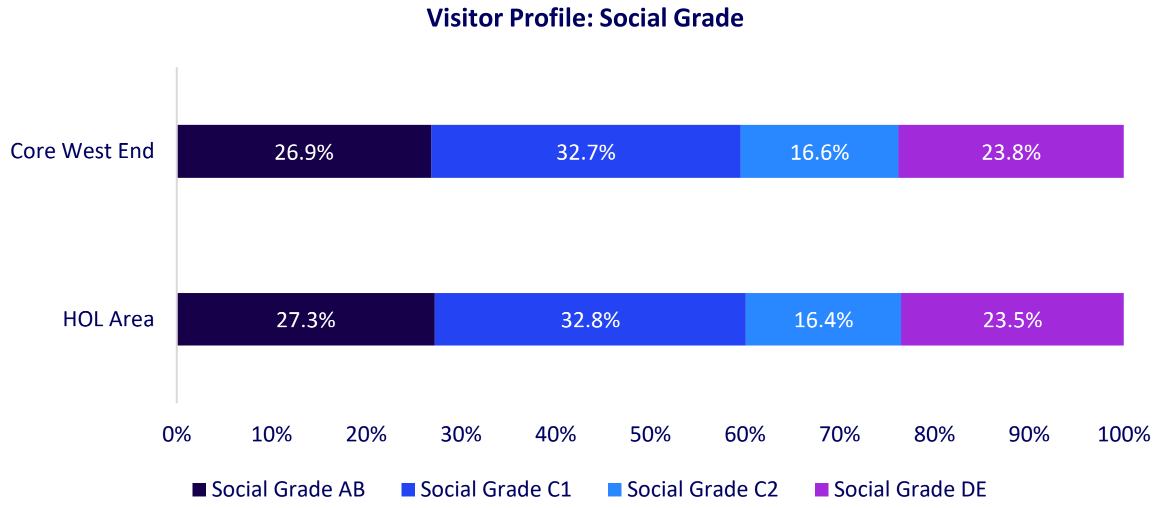
- Cross-visitation within the HOL area has fallen -9% YoY (average districts per trip down from 1.79 to 1.63), whilst entries/exits at the HOL area tube stations are -3% lower over the same period.
- This decline is likely driven by a permanent shift in commuting patterns since the Elizabeth line opened: workers now ride the Elizabeth line to Bond Street or Tottenham Court Road and go straight to their offices, bypassing HOL stations and eliminating the need to walk through multiple sub-districts.

Note: HOL Area tube stations = Leicester Square, Piccadilly Circus, Green Park
Nearby Elizabeth Line stations = Bond Stret, Tottenham Court Road

05 Visitor Profile

Visitor Profile: Occupation & Social Grade
Catchment biased towards white collar workers

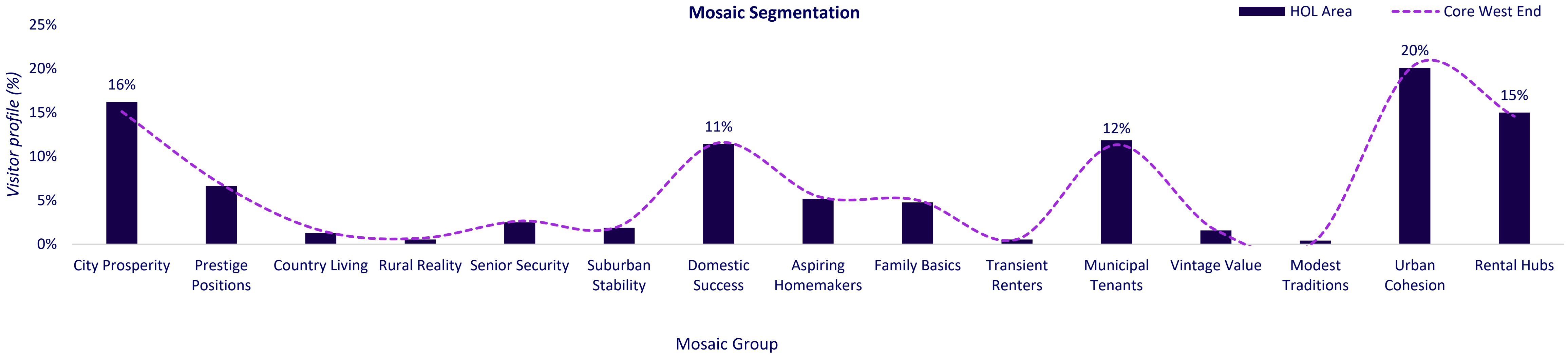




- Visitor catchment profile biased towards 'white collar' occupations, in line with Core West End and other major cities dominated by service industries.

- Limited variation to affluence profile of the HOL area vs. Core West End.
- The highest percentage of Social Grade AB visitors was seen St Martin's Lane District, whilst the lowest was seen in Haymarket District.

Visitor Profile: Mosaic profile
'Urban Cohesion' was the most dominant Mosaic group in 2024/25



- Visitor profile biased towards 3 Mosaic groups; 'City Prosperity', 'Urban Cohesion' and 'Rental Hubs'.

- City Prosperity are high income residents who have expensive homes in desirable metropolitan locations.
- Urban Cohesion are residents of settled urban communities with a strong sense of identity.
- Rental Hubs are educated young people privately renting in urban neighbourhoods.
- Profile very similar to Core West End visitors.

SOURCE: MOSAIC - EXPERIAN

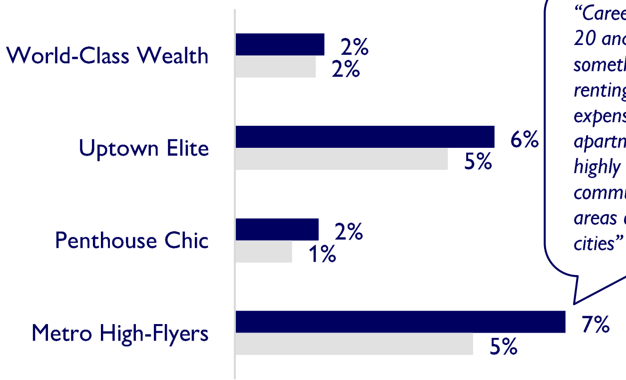
Visitor Profile: Mosaic profile
Top three Mosaic groups account for 51% of total visits in 2024/25

Urban Cohesion

20% visitor profile

Residents of settled urban communities with a strong sense of identity.

Urban Cohesion Types | Visitor vs Catchment



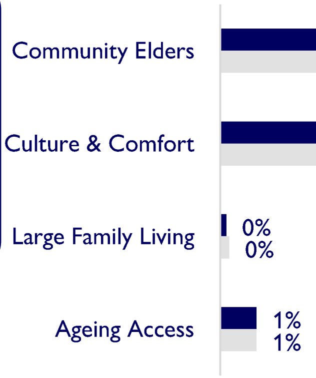
"Career-minded 20 and 30-somethings renting expensive apartments in highly commutable areas of major cities"

City Prosperity

16% visitor profile

High-income residents who have expensive homes in desirable metropolitan locations. Households range in type from successful young professionals to wealthy families.

City Prosperity Types | Visitor vs Catchment



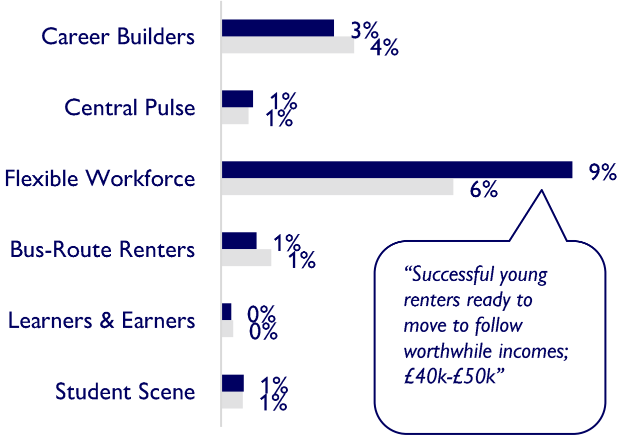
"Thriving families with good incomes in diverse suburbs"

Rental Hubs

15% visitor profile

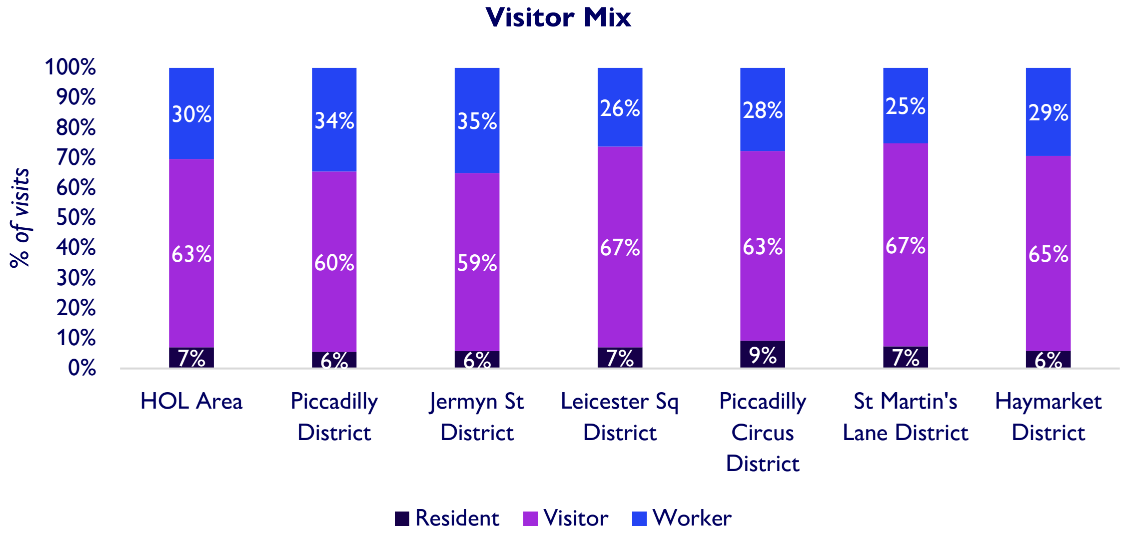
Educated young people privately renting in urban neighbourhoods.

Rental Hubs Types | Visitor vs Catchment



"Successful young renters ready to move to follow worthwhile incomes; £40k-£50k"

Visitor Profile
Increase in proportion of worker visits YoY

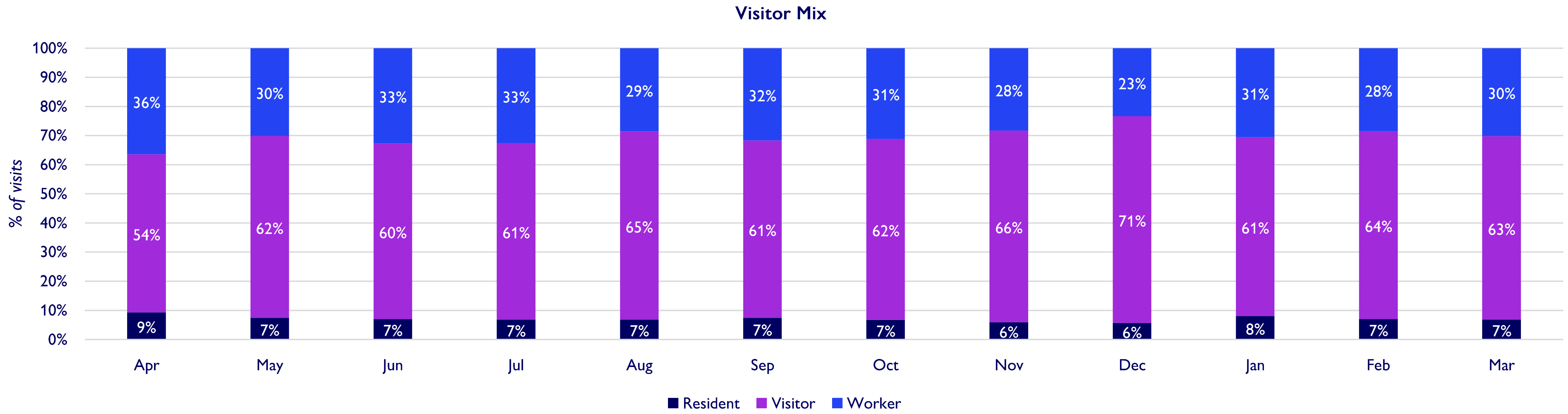


Change vs. 2023/24			
Area	**Resident**	**Visitor**	**Worker**
HOL Area	3.0%	-1.7%	2.9%
Piccadilly District	4.7%	-1.8%	2.6%
Jermyn St District	4.6%	-2.1%	3.0%
Leicester Sq District	3.0%	-1.7%	3.6%
Piccadilly Circus District	3.7%	-0.9%	0.9%
St Martin's Lane District	3.0%	-1.2%	2.5%
Haymarket District	5.1%	-2.0%	3.6%

- Exploring the domestic visitor base, 'visitors' continue to be the largest group in all districts (vs. workers and residents).
- Leicester Sq and St Martin's Lane District had the highest percentage of 'visitor' visits in 2024/25 (67%) due to strong tourism focus. Conversely Jermyn St District had the highest percentage of workers (35%).
- Decrease in 'visitors' in all districts vs. 2023/24, with a Piccadilly Circus District experiencing the smallest decrease, down just -0.9%.
- However, all districts saw an increase in workers in 2024/25 vs. 2023/24 as push for workers to return to the office post-Covid continued.

Anonymised and aggregated by BT, via the High Streets Data Partnership
Visitor mix definitions laid out in appendix

Visitor Profile
Visits by 'visitors' peaked in December



- Visits to the HOL area by 'visitors' peaked in December, as expected, due to increase in seasonal visitation to engage in festivities.
- Visits by 'workers' peaked in April 2024, with 36% of total visits, whilst 'residents' visits stayed fairly consistent throughout the year.

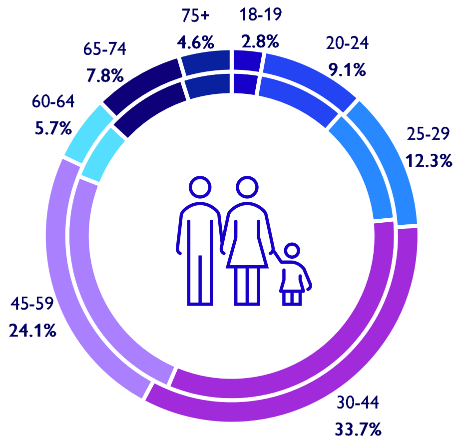
Anonymised and aggregated by BT, via the High Streets Data Partnership
Visitor mix definitions laid out in appendix

06

Appendix

Appendix
Piccadilly District

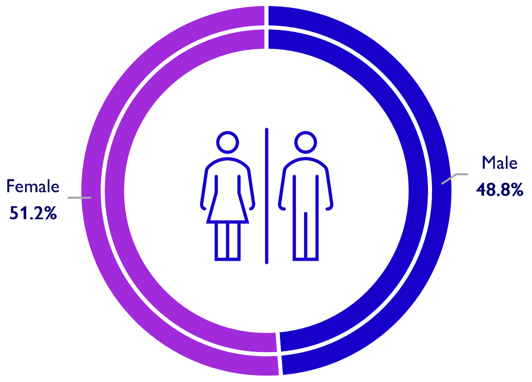
Age Profile



34% aged 30-44

Visitor age profile skewed between core working professional age demographic (30-59 years old).

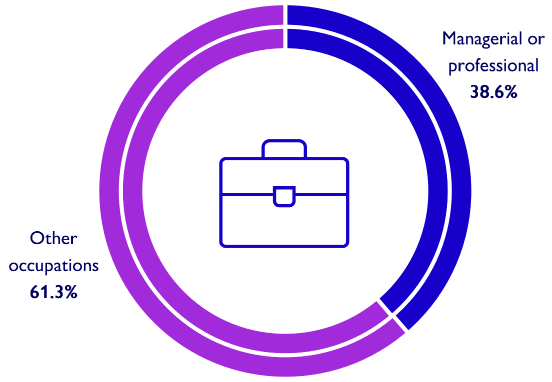
Gender Profile



51% female

Balanced visitor gender profile to Piccadilly District, with 51% of visitors being female, consistent with the HOL area.

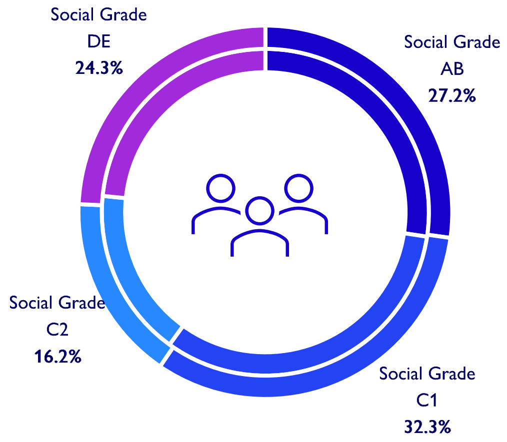
Occupation



39% managerial or professional occupations

Significant proportion of visitors within high-income, managerial or professional occupations, in-line with the HOL area.

Social Grade & Income



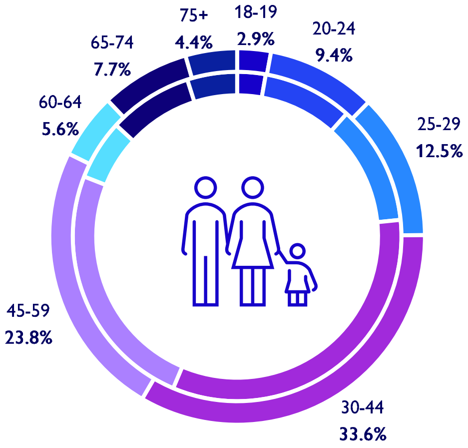
27% social grade AB

Slightly less affluent visitor profile than the HOL area, with 0.9%-points more Social Grade DE visitors and slightly less AB visitors.

Outer ring = Piccadilly District
Inner ring = HOL Area

Appendix
Jermyn St District

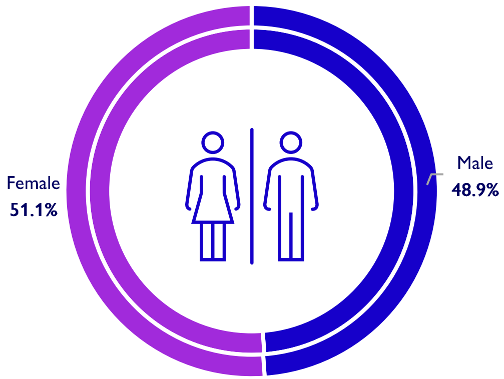
Age Profile



34% aged 30-44

Visitor age profile skewed between core working professional age demographic (30-59 years old).

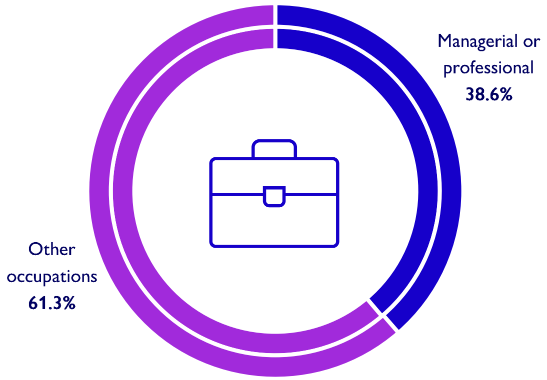
Gender Profile



51% female

Balanced visitor gender profile to Jermyn St District, with 51% of visitors being female, consistent with the HOL area.

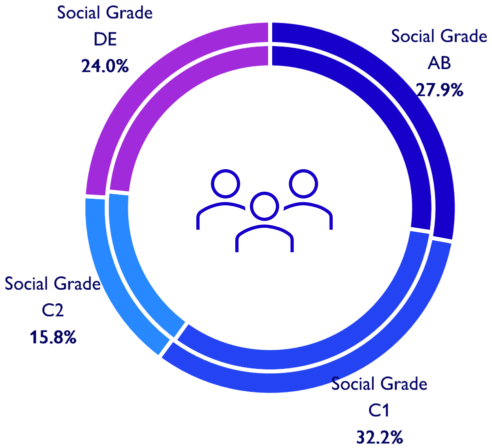
Occupation



39% managerial or professional occupations

Significant proportion of visitors within high-income, managerial or professional occupations, in-line with the HOL area.

Social Grade & Income



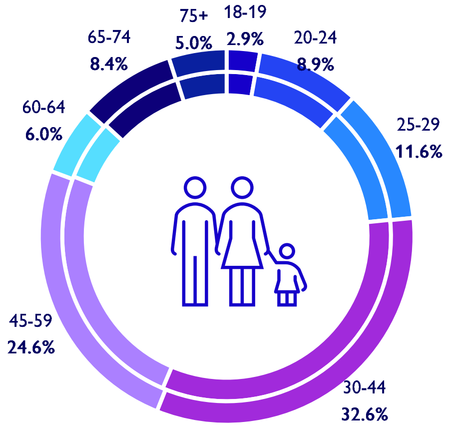
28% social grade AB

Slightly more affluent visitor profile than the HOL area due to high presence of workers in the area, with 0.5%-points more Social Grade AB visitors.

Outer ring = Jermyn St District
Inner ring = HOL Area

Appendix
Leicester Sq District

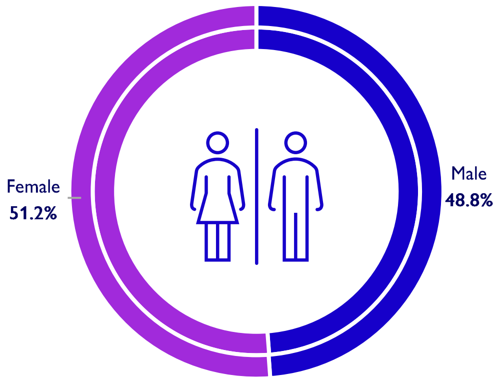
Age Profile



33% aged 30-44

Visitor age profile skewed between core working professional age demographic (30-59 years old).

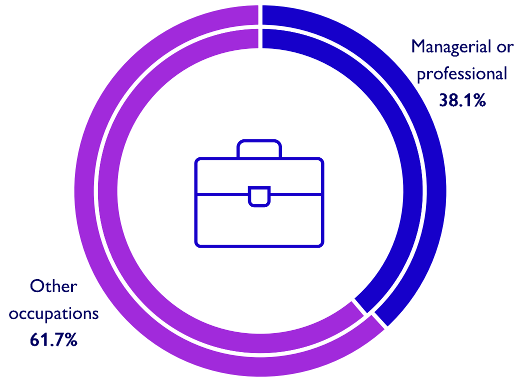
Gender Profile



51% female

Balanced visitor gender profile to Leicester Sq District, with 51% of visitors being female, consistent with the HOL area.

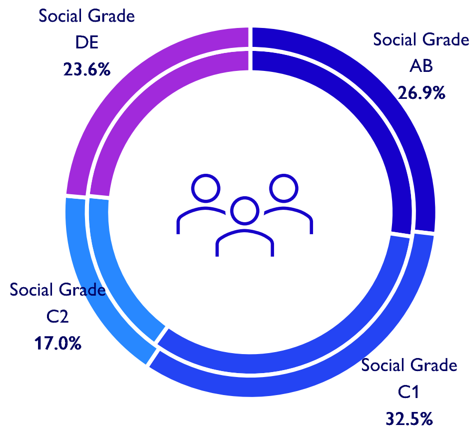
Occupation



38% managerial or professional occupations

Significant proportion of visitors within high-income, managerial or professional occupations, although slightly less than the HOL area.

Social Grade & Income



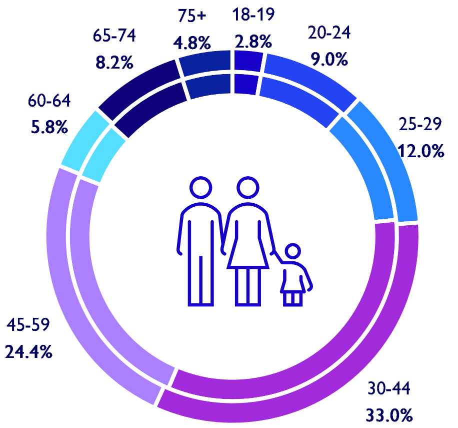
27% social grade AB

Slightly less affluent visitor profile than the HOL area, with 0.5%-points less Social Grade AB visitors.

Outer ring = Leicester Sq District
Inner ring = HOL Area

Appendix
Piccadilly Circus District

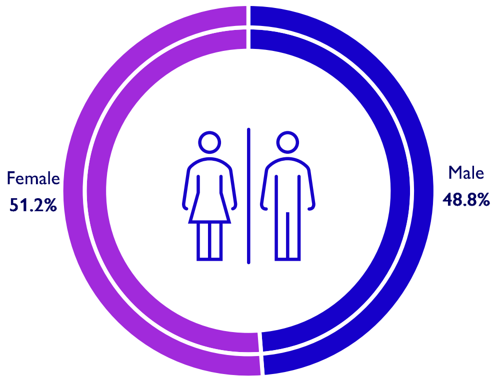
Age Profile



33% aged 30-44

Visitor age profile skewed between core working professional age demographic (30-59 years old).

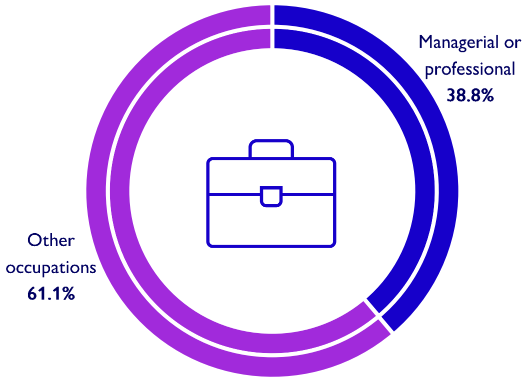
Gender Profile



51% female

Balanced visitor gender profile to Piccadilly Circus District, with 51% of visitors being female, consistent with the HOL area.

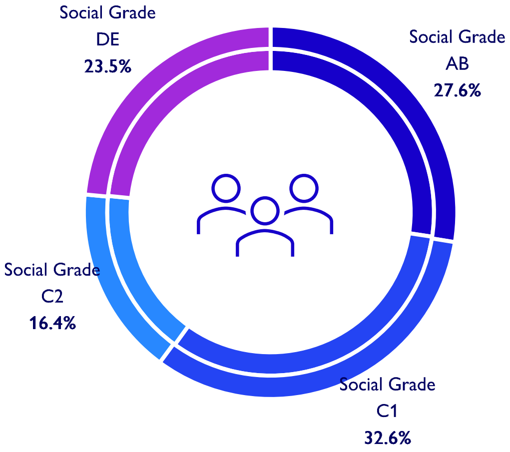
Occupation



39% managerial or professional occupations

Significant proportion of visitors within high-income, managerial or professional occupations, in-line with the HOL area.

Social Grade & Income



28% social grade AB

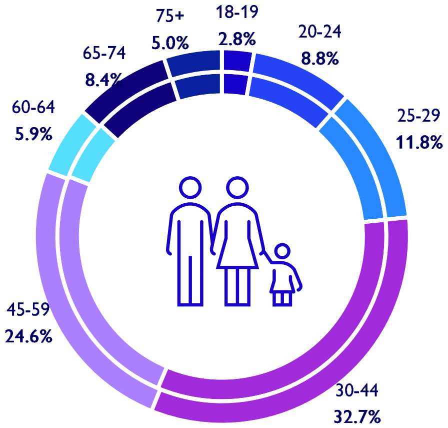
Consistent visitor profile when compared to the HOL area, with slightly under 28% of visitors in the highest social grade group (AB).

Outer ring = Piccadilly Circus District
Inner ring = HOL Area

Appendix
St Martin's Lane District

Age Profile	Gender Profile	Occupation	Social Grade & Income

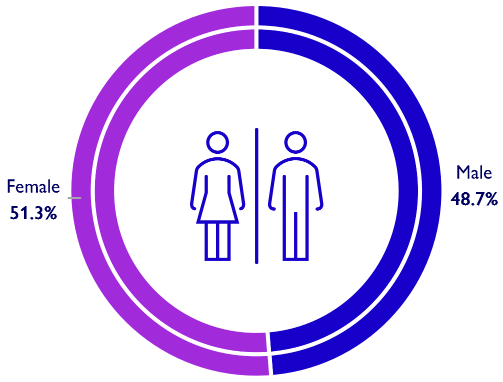
Age Profile



33% aged 30-44

Visitor age profile skewed between core working professional age demographic (30-59 years old).

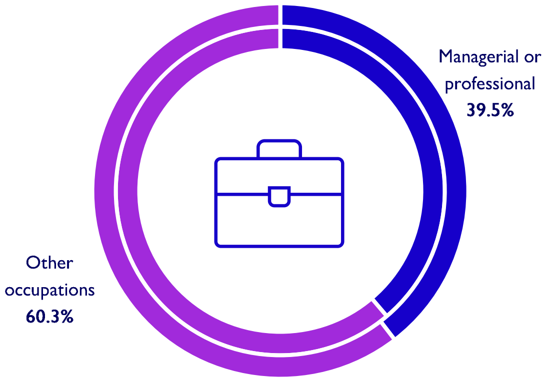
Gender Profile



51% female

Balanced visitor gender profile to St Martin's Lane District, with 51% of visitors being female, consistent with the HOL area.

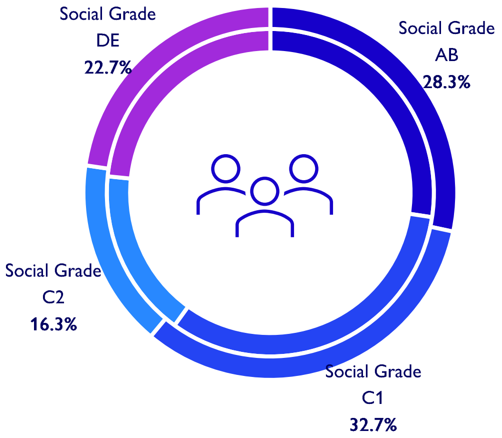
Occupation



40% managerial or professional occupations

Significant proportion of visitors within high-income, managerial or professional occupations, with a slightly higher percentage of these visitors seen than in the HOL area.

Social Grade & Income



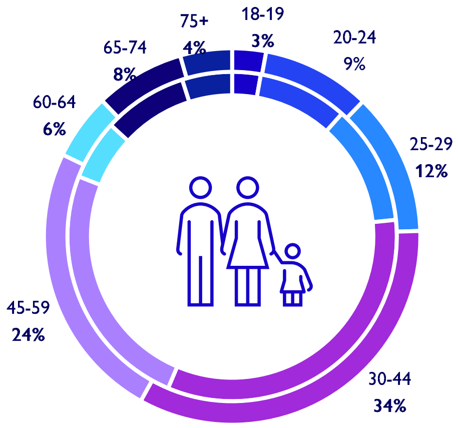
28% social grade AB

More affluent visitor profile than the HOL area, with 1.3%-points more Social Grade AB visitors and 0.7%-points less DE visitors.

Outer ring = St Martin's Lane District
Inner ring = HOL Area

Appendix
Haymarket District

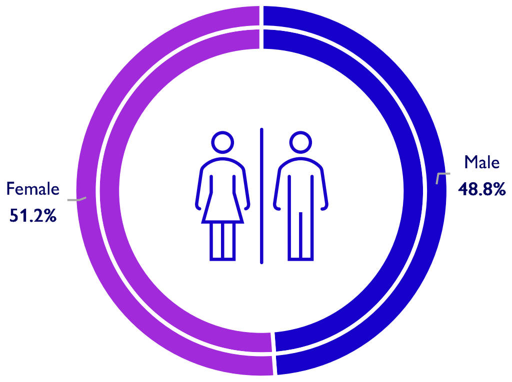
Age Profile



34% aged 30-44

Visitor age profile skewed between core working professional age demographic (30-59 years old).

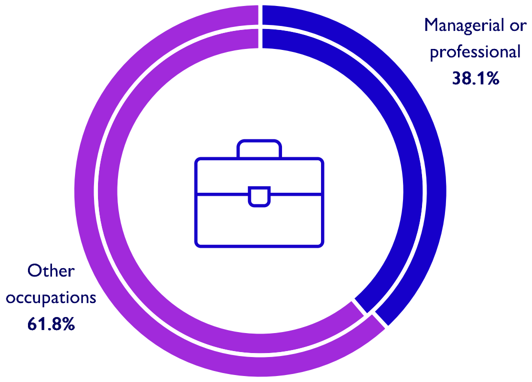
Gender Profile



51% female

Balanced visitor gender profile to Haymarket District, with 51% of visitors being female, consistent with the HOL area.

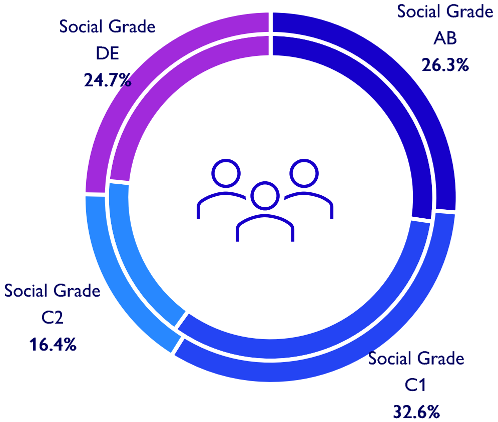
Occupation



38% managerial or professional occupations

Significant proportion of visitors within high-income, managerial or professional occupations, 0.6%-points less than in the HOL area.

Social Grade & Income



26% social grade AB

Slightly less affluent visitor profile than the HOL area, with 1.3%-points more Social Grade DE visitors and 1.1%-points less AB visitors.

Outer ring = Haymarket District
Inner ring = HOL Area

Footfall Density Index
Relative to Core West End

Month	HOL	Piccadilly district	Jermyn street	Leicester Square	piccadilly circus	St Martins Lane	Haymarket
April	125	132	69	145	158	132	108
May	137	154	75	176	162	146	102
June	133	134	65	169	156	154	105
July	138	148	67	169	158	165	107
August	139	140	72	181	166	157	105
September	130	146	79	145	143	153	121
October	122	137	85	118	150	136	120
November	133	146	87	164	141	172	105
December	130	139	74	154	145	160	103
January	121	120	66	138	152	146	115
February	120	133	73	122	139	136	113
March	121	109	59	151	148	149	105

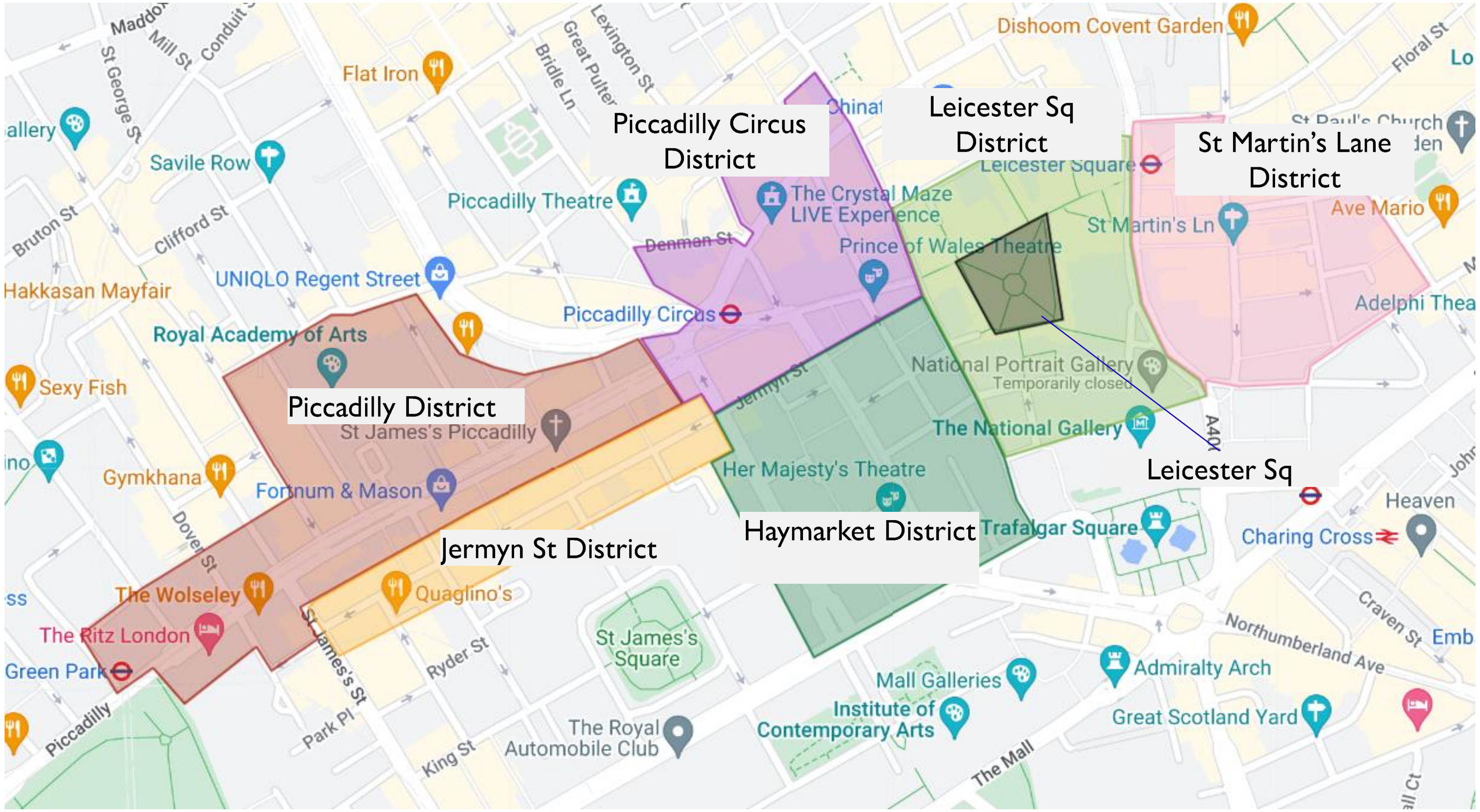
The higher the figure the denser the footfall. Core West end= 100 for any given month

Appendix
Location definition

- 7 key areas within the HOL area used for analysis:

– Piccadilly District
– Jermyn St District
– Piccadilly Circus District
– Haymarket District
– Leicester Sq District
– Leicester Sq
– St Martin’s Lane District

- In addition Core West End area has been defined as a benchmark location



Appendix
Location definition

Appendix
Mosaic Groups

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.

Appendix
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 Population	Mosaic	A02 Uptown Elite
51m individuals	15 groups	Uptown Elite are affluent, older families who live in desirable neighbourhoods within inner suburbs
25m households	66 types	

Appendix
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