HEART OF LONDON BUSINESS ALLIANCE

Visitor Insights
April 2025

Shaping a world-class West End

Issued: May 2025

Colliers

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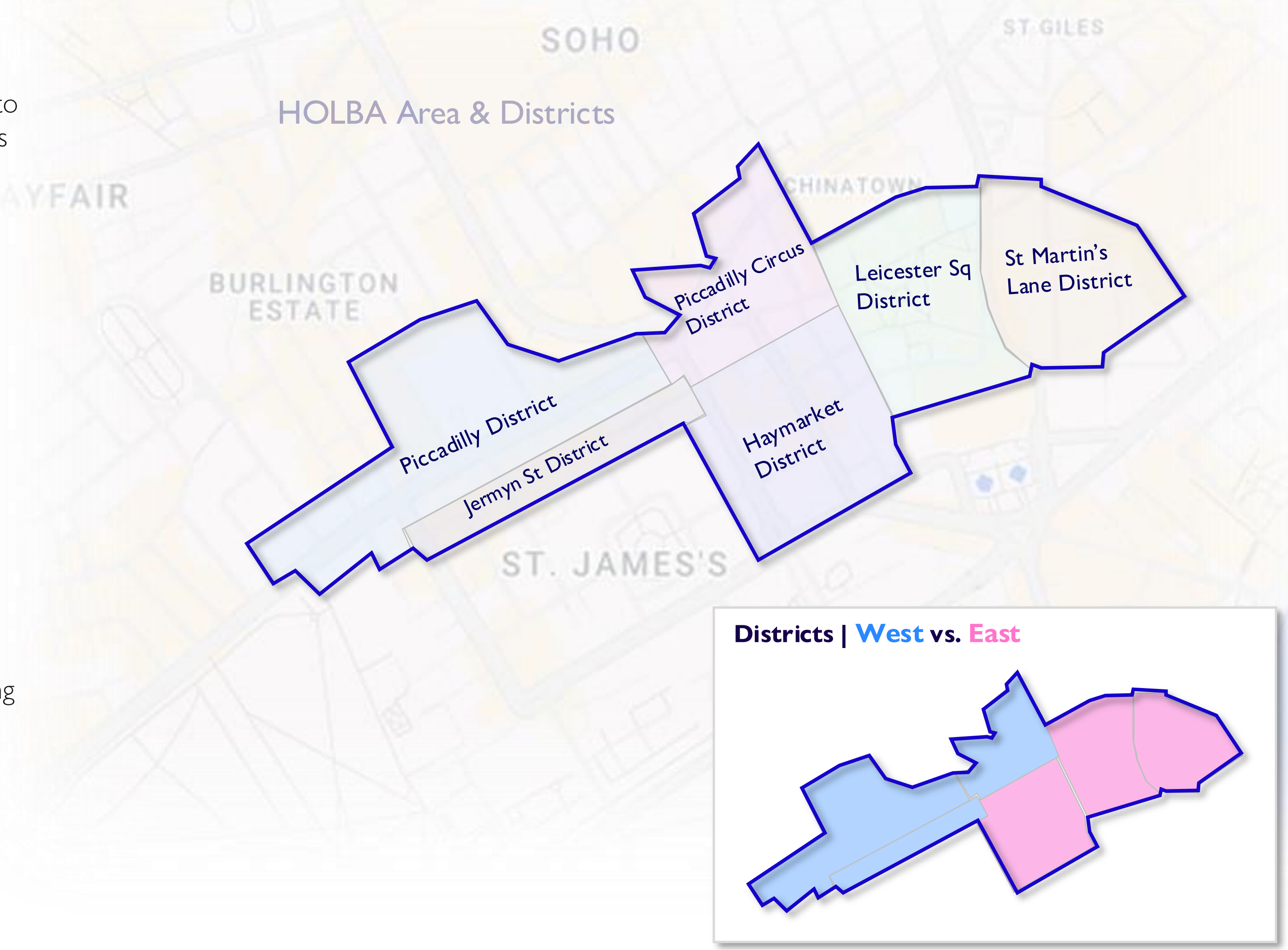
INTRODUCTION & CONTEXT

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
- Spend performance

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

April 2025

EASTER LED TO A STRONG UPLIFT IN SOCIAL & LEISURE VISITS

Easter helped increase visits to the Heart of London (HOL) area in April — up 18.9% from the previous month. More of these visitors came from outside the usual catchment area, suggesting the district attracted people from further away during the holiday.

SOCIAL VISITORS WERE MORE LIKELY TO EXPLORE MULTIPLE PARTS OF THE HOL AREA

April saw more people — both from the UK and abroad — visit several districts during their trip.

THE RISE IN SOCIAL & LEISURE VISITORS CHANGED THE MIX OF DEMOGRAPHICS

The number of UK visitors coming for leisure rose by 10% compared to last year, showing more people take trips during the Easter holidays. There was also a 6% rise in international visitors, mainly from Europe and the Middle East.

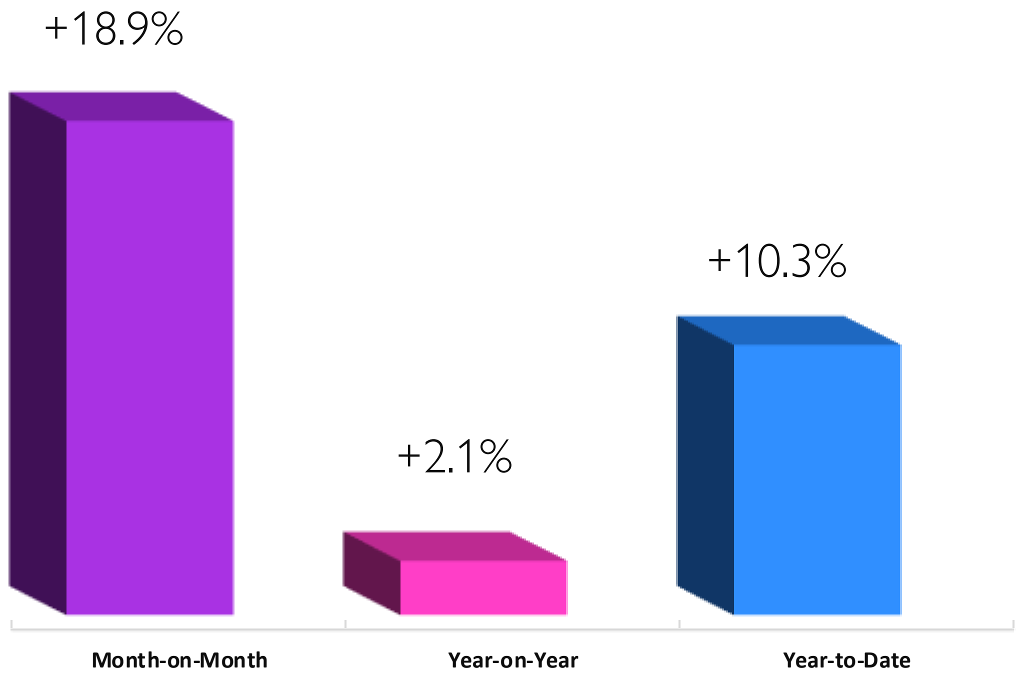
STRONG SPEND CONTINUED IN THE EVENING ECONOMY ACROSS THE AREA

Spend performance differed by district in Q4 24/25, indicating changing audiences throughout the day & week. Eastern districts (more leisure-orientated) captured high share of spend on weekends & evenings. Between 6pm and 9pm, Leicester Square saw spend 2.5x higher compared to the average daily segment.

SUMMARY - VISIT VOLUMES

April 2025

Impact of Easter holidays led to a significant uplift in visit volumes to the HOL area MoM, **+18.9%**, with **+2.1%** growth YoY.

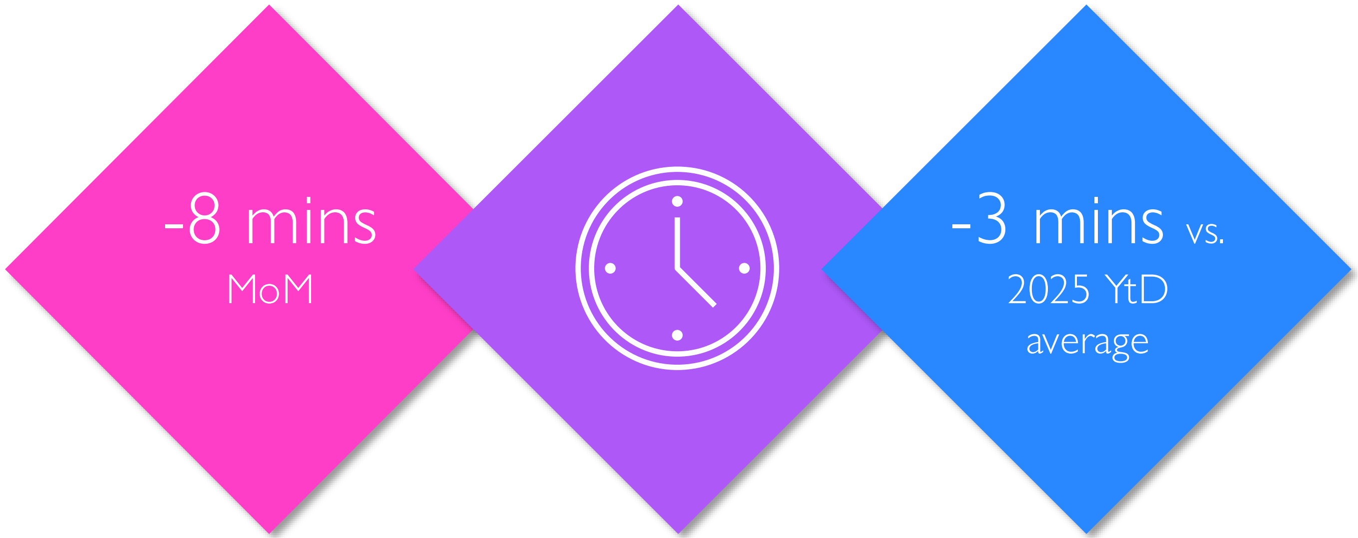


Further visit performance detail on Pages 12 - 15

SUMMARY - VISIT DWELL

April 2025

Visitors typically spent **2 hrs 19** mins in the HOL area, down **-3 mins** vs. 2025 average.

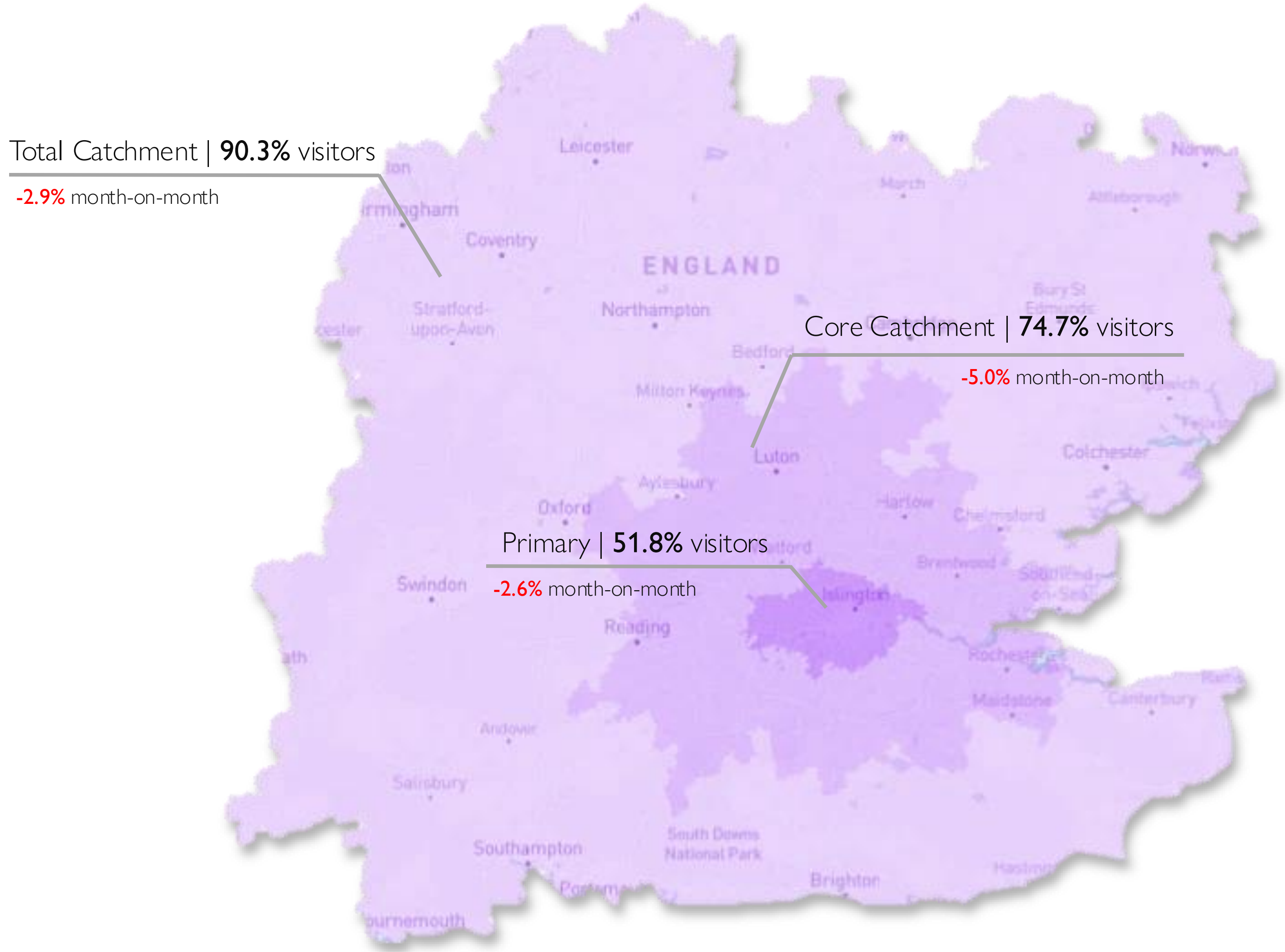


Further dwell performance detail on Page 28

SUMMARY - DOMESTIC VISITOR ORIGIN

April 2025

74.7% of visits from Core Catchment, down **-5.0%** vs. March, meaning more visitors came from further afield this month.



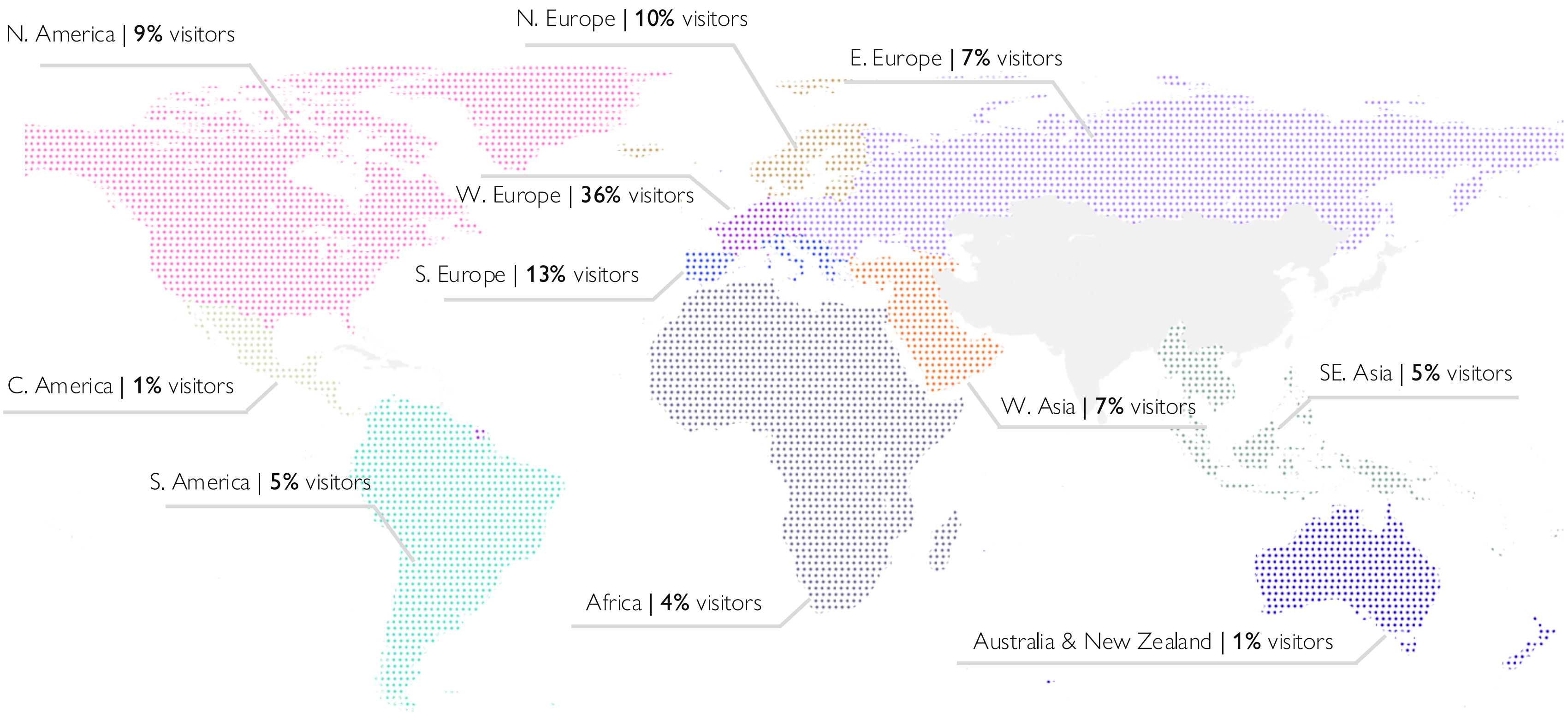
Further catchment performance detail on Pages 16 - 18

SUMMARY - INTERNATIONAL VISITATION

April 2025

14.6% of total visitors were from outside the UK, up **1.4%**. MoM, with **Western Europe** being the highest contributing region

Share of International Visits (%)



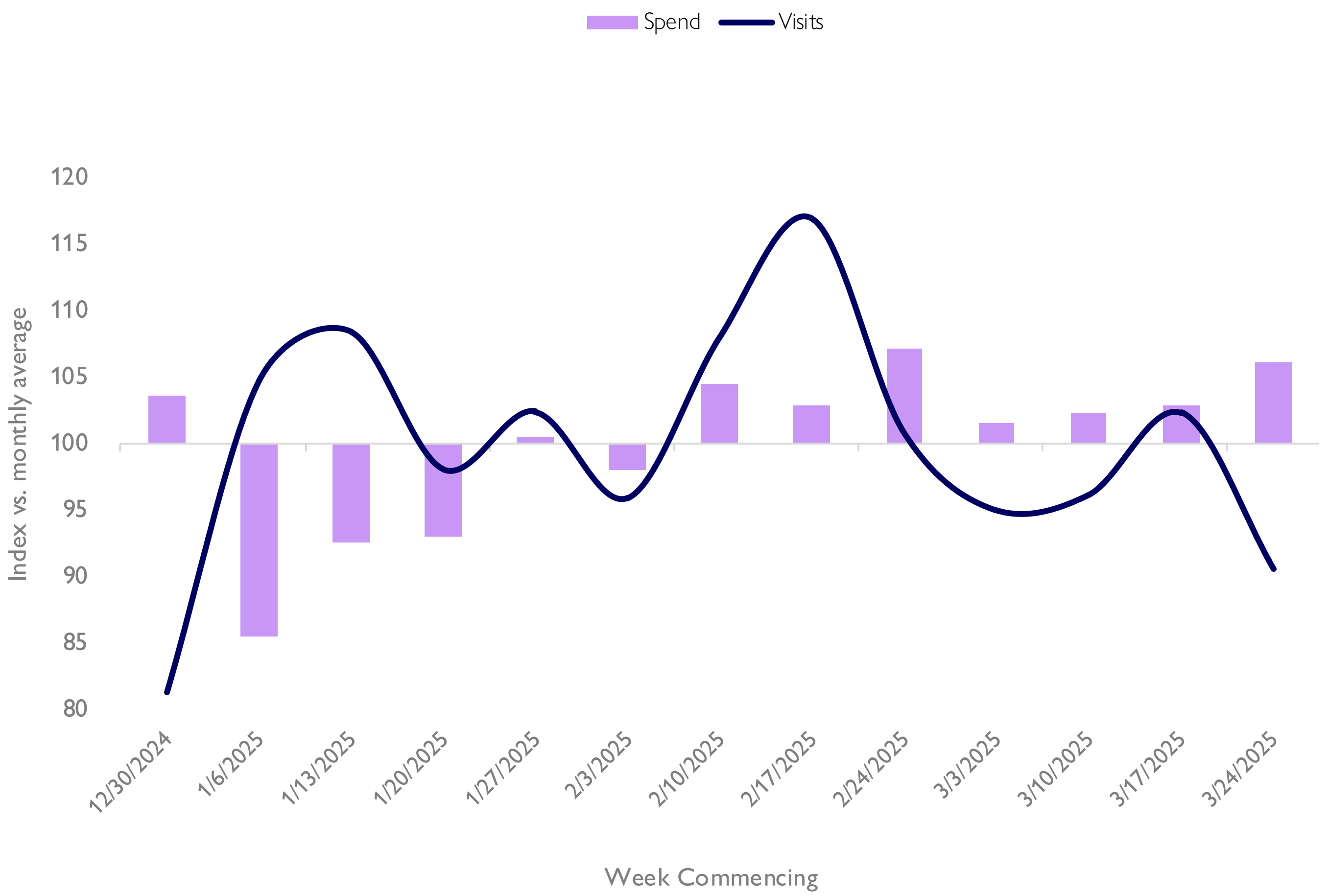
Further international performance detail on Pages 19 - 20

SUMMARY - VISIT & SPEND PERFORMANCE

Q4 2024 | January - March

More money was spent towards the end of the quarter, with **March** having a **3% increase** in spending compared to the average for the quarter.

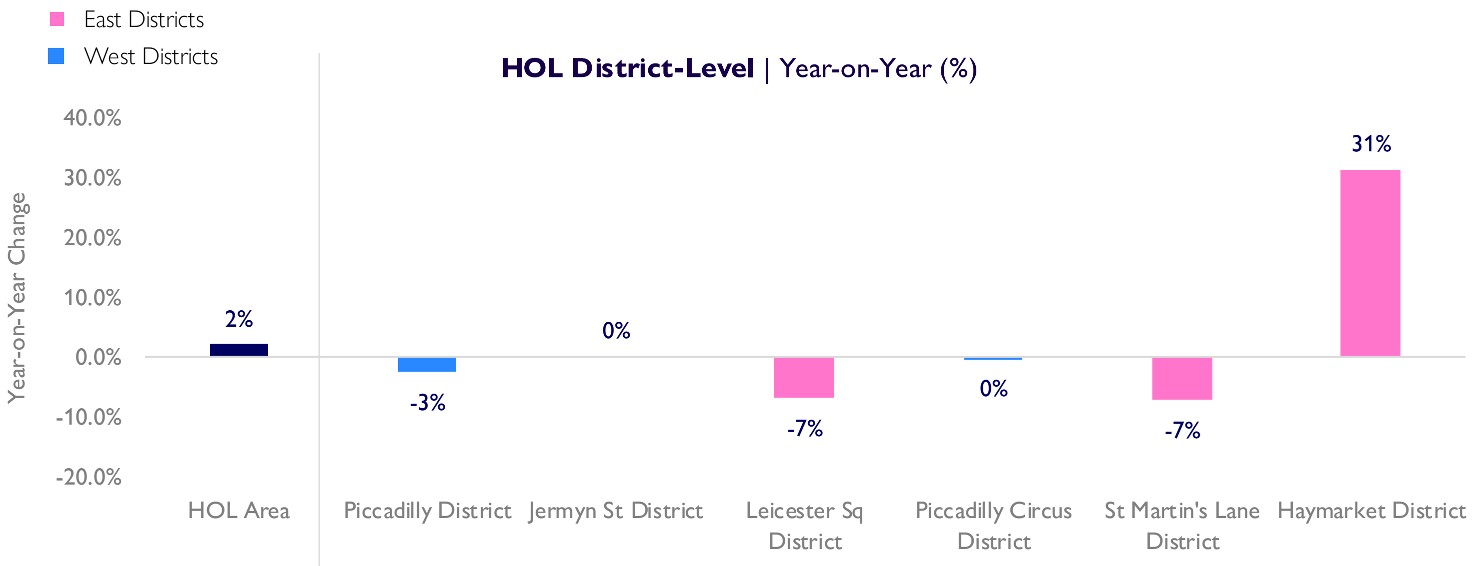
HOL area | Weekly spend vs. visit index

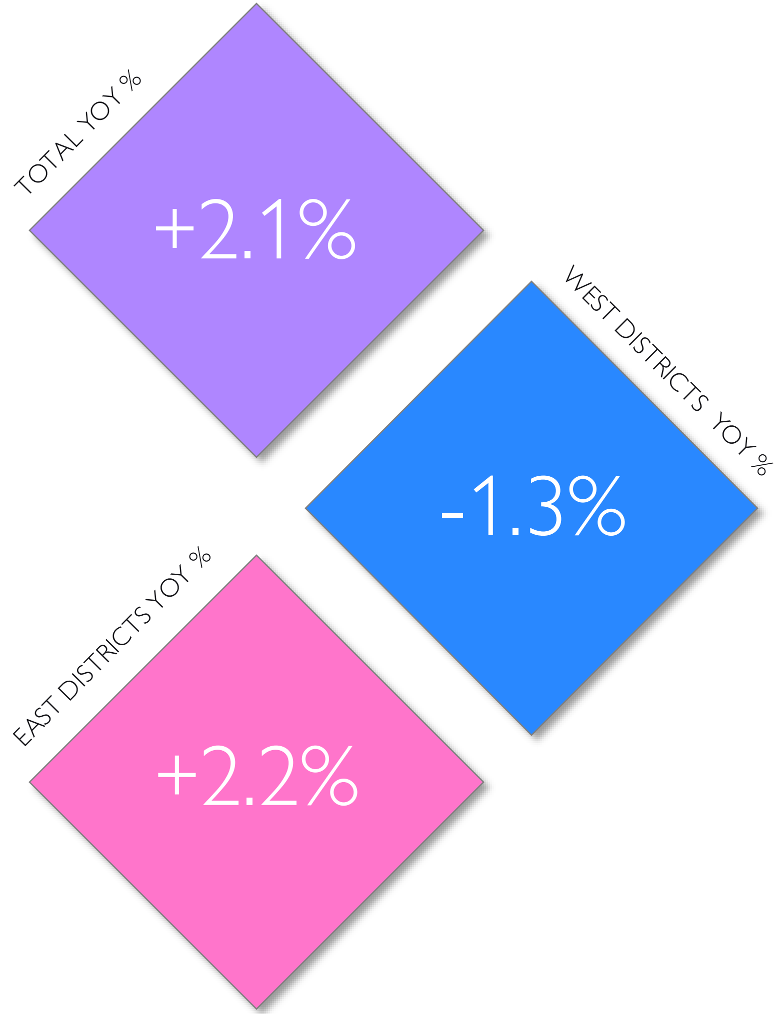


Further spend performance detail on Pages 36 - 42

VISIT VOLUMES UP +2.1% YEAR-ON-YEAR, WITH GROWTH IN DISTRICTS TO THE EAST OF THE HOL AREA

- Visits up 2.1% YoY, led by eastern districts in the HOL area (+2.2%).
- 31.4% surge in Haymarket, boosted by Easter holiday footfall.





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

More granular district-level visit performance can be found in Appendix

CONTINUED GROWTH THROUGHOUT APRIL LEADING TO +10% GROWTH YEAR-TO-DATE ACROSS HOL AREA

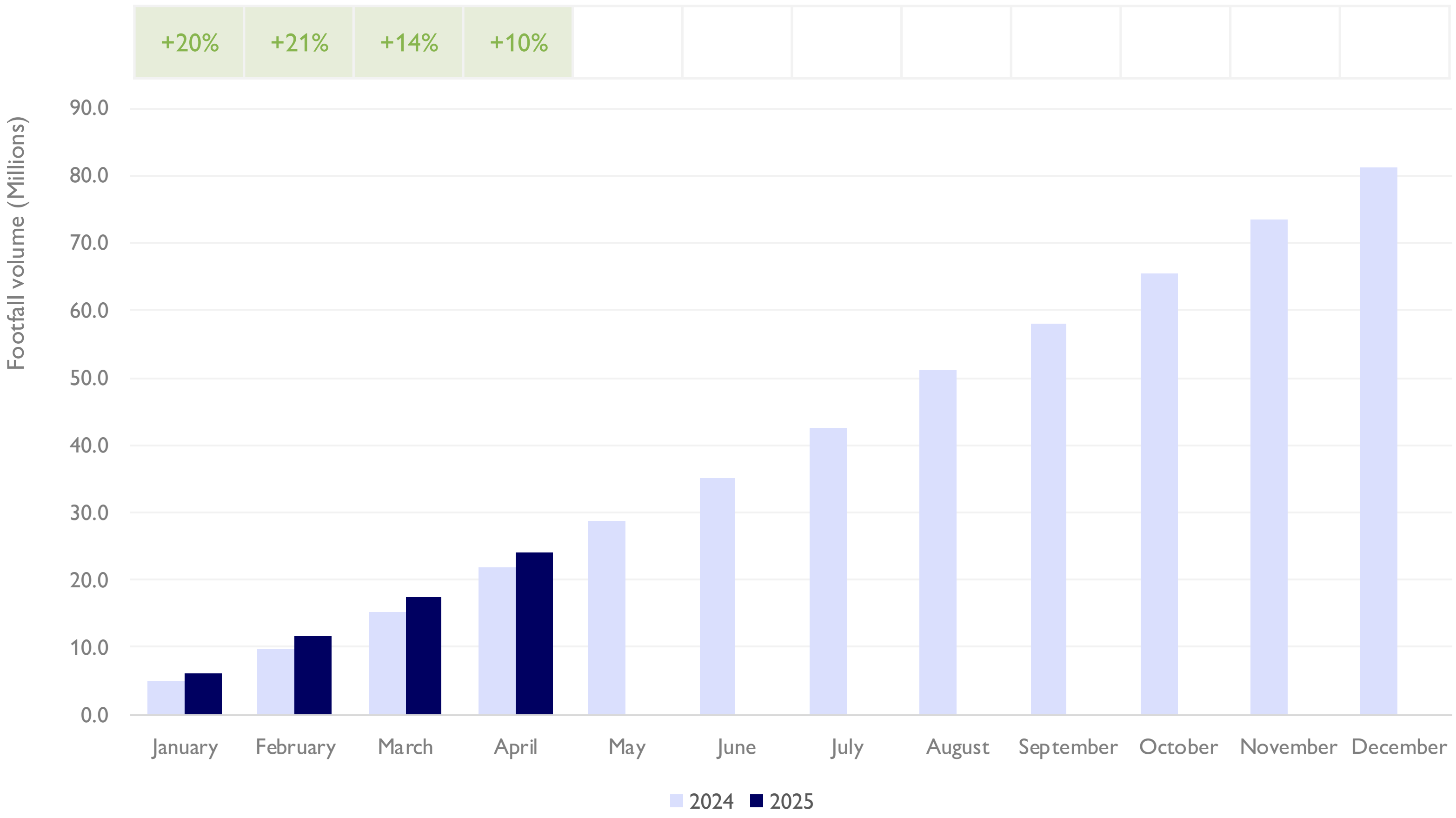
HOL AREA

+10%

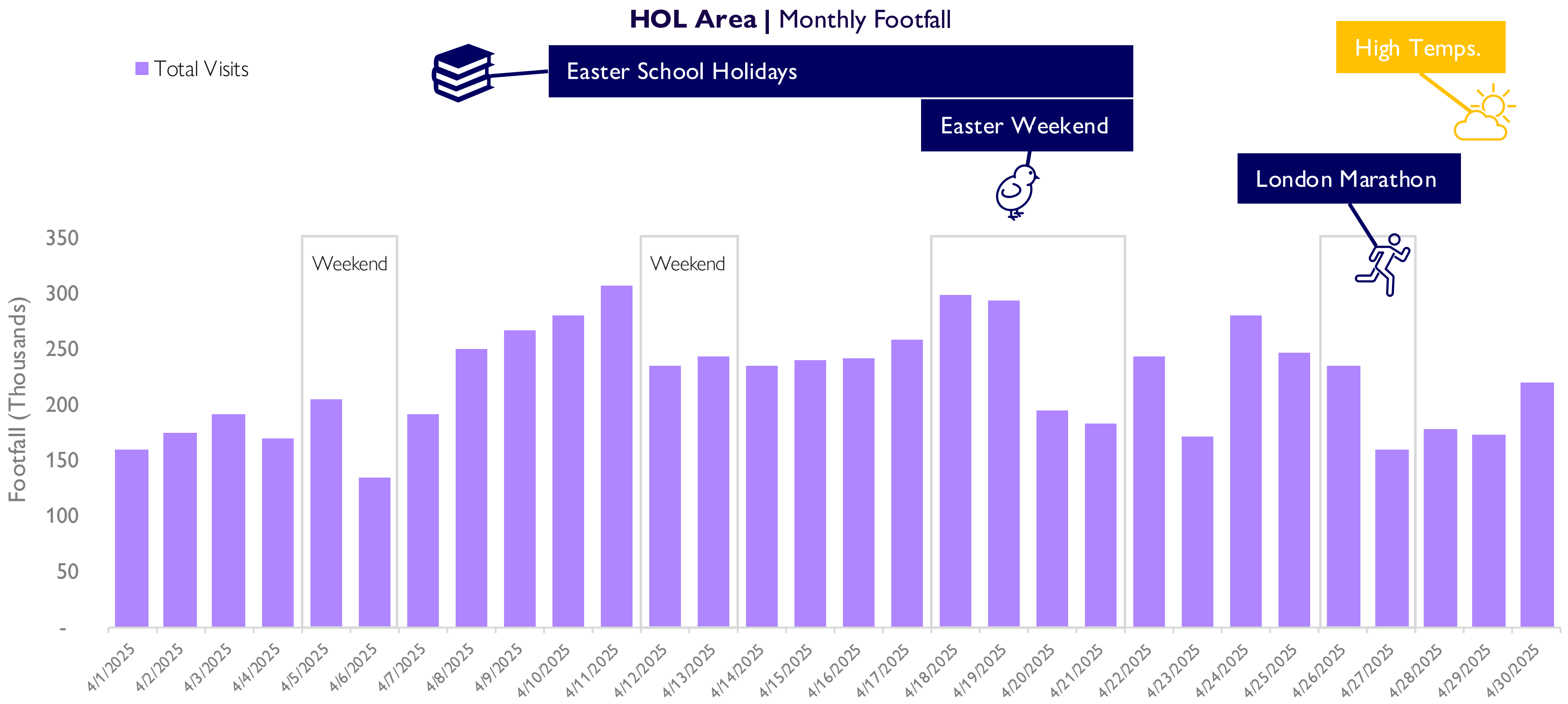
year-to-date

- April visits rose 2% YoY — a slower pace than earlier in the quarter.
- YtD visits are up 10% vs. 2024, showing steady performance across the first four months.
- Comparing YtD vs. same period in 2023, shows consistent performance across the first four months of the year.

HOL Area | Year-to-Date Visit Performance



UPLIFT IN VISIT VOLUMES DURING MIDDLE TWO WEEKS OF APRIL, COINCIDING WITH EASTER SCHOOL HOLIDAYS



	Week 14	Week 15	Week 16	Week 17	Week 18
Avg. Daily Visits	172,273	253,287	251,593	216,933	190,188
Avg. Daily Temps.	12.0°C	11.6°C	11.8°C	12.1°C	17.1°C

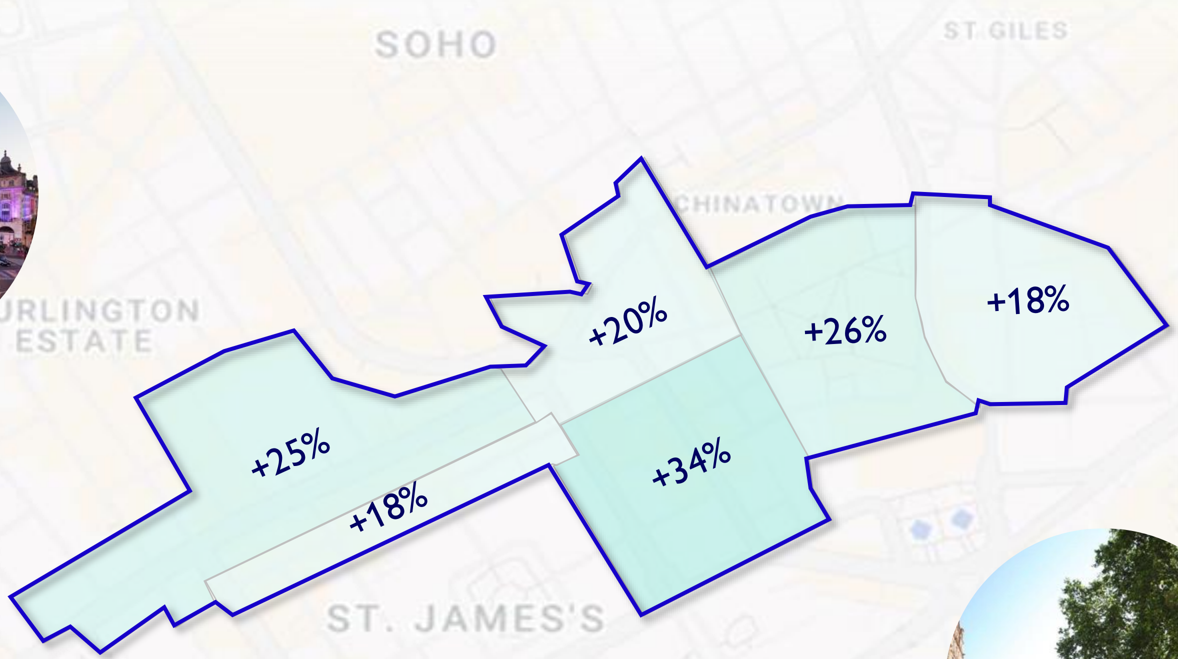
- Weeks 15–16 accounted for **53% of April visits**, reflecting the Easter school holiday impact.
- Warmer, drier weather began in late April (avg. 17.1°C in early Week 18), but had limited effect on visits due to steadier weekday patterns.
- This uplift had little initial impact on visit performance, due to more consistent visitor behaviour across the first half of the working week.

STRONG MONTH-ON-MONTH UPLIFT ACROSS ALL DISTRICTS, DRIVEN BY IMPROVED WEATHER & EASTER HOLIDAYS IN APRIL

HOL AREA

+19%
month-on-month

- All districts saw **strong MoM growth**, pushing overall visits up 19% vs. March.
- Haymarket led with a **34% rise**, while other districts grew by around 20%.



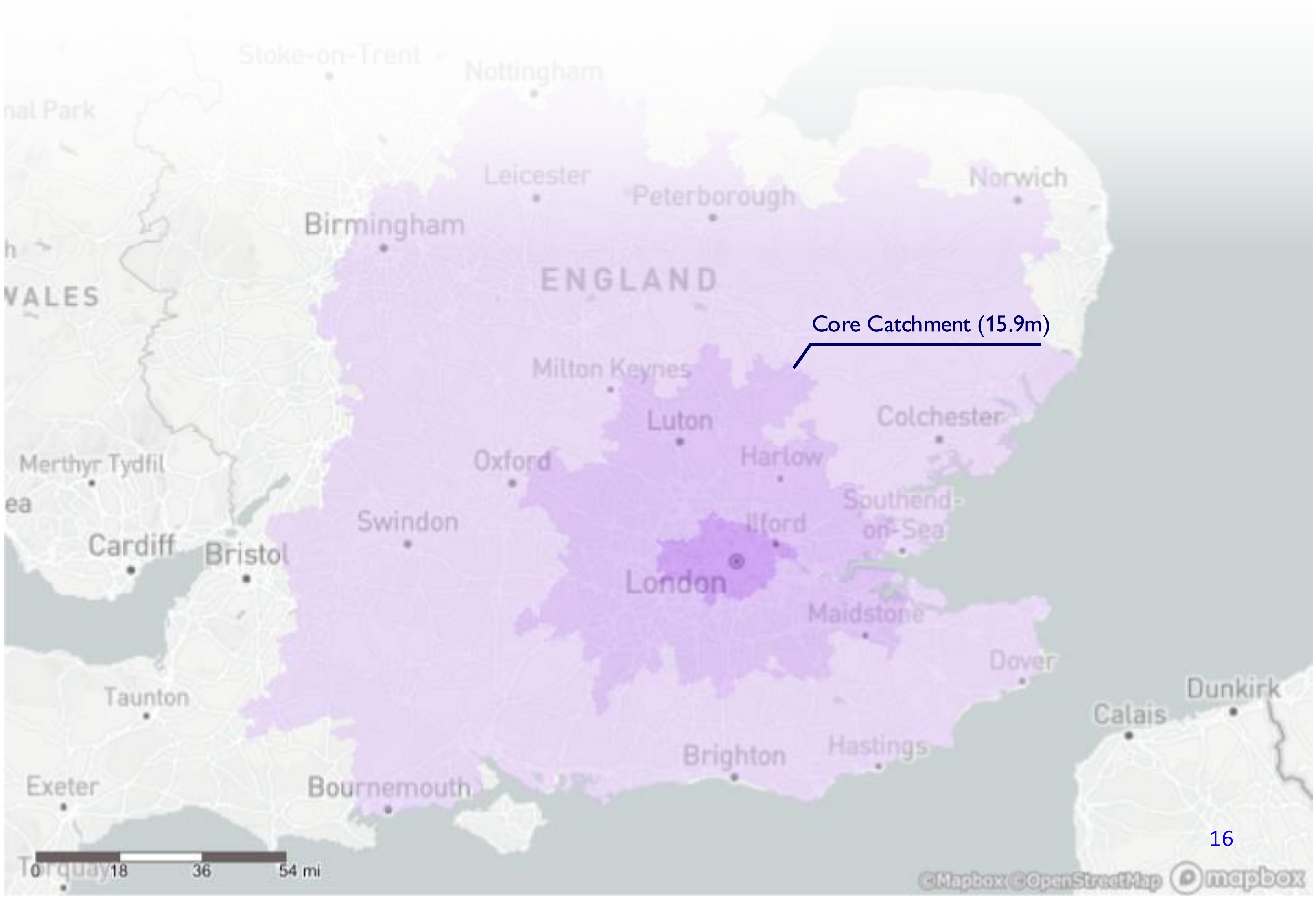
15.9M PEOPLE IN HOL AREA'S DOMESTIC CORE CATCHMENT

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 behaviour

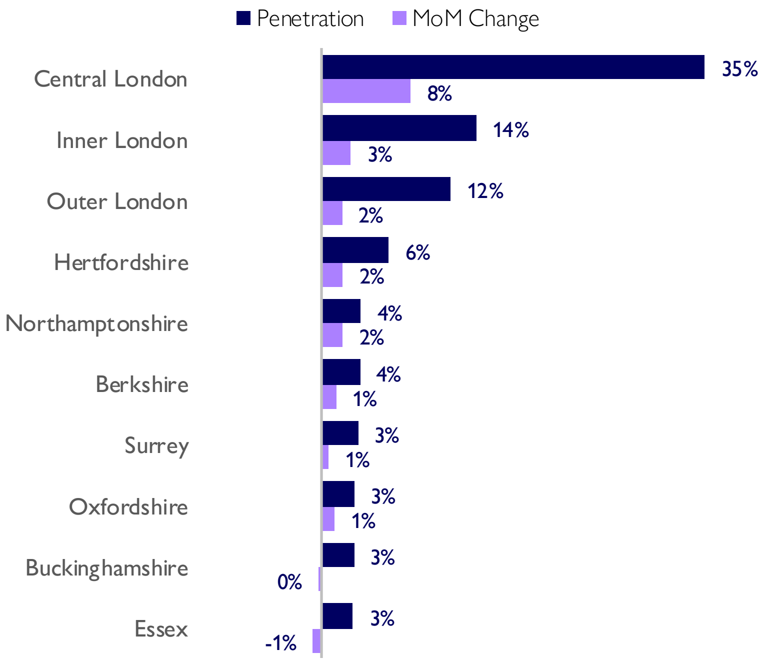


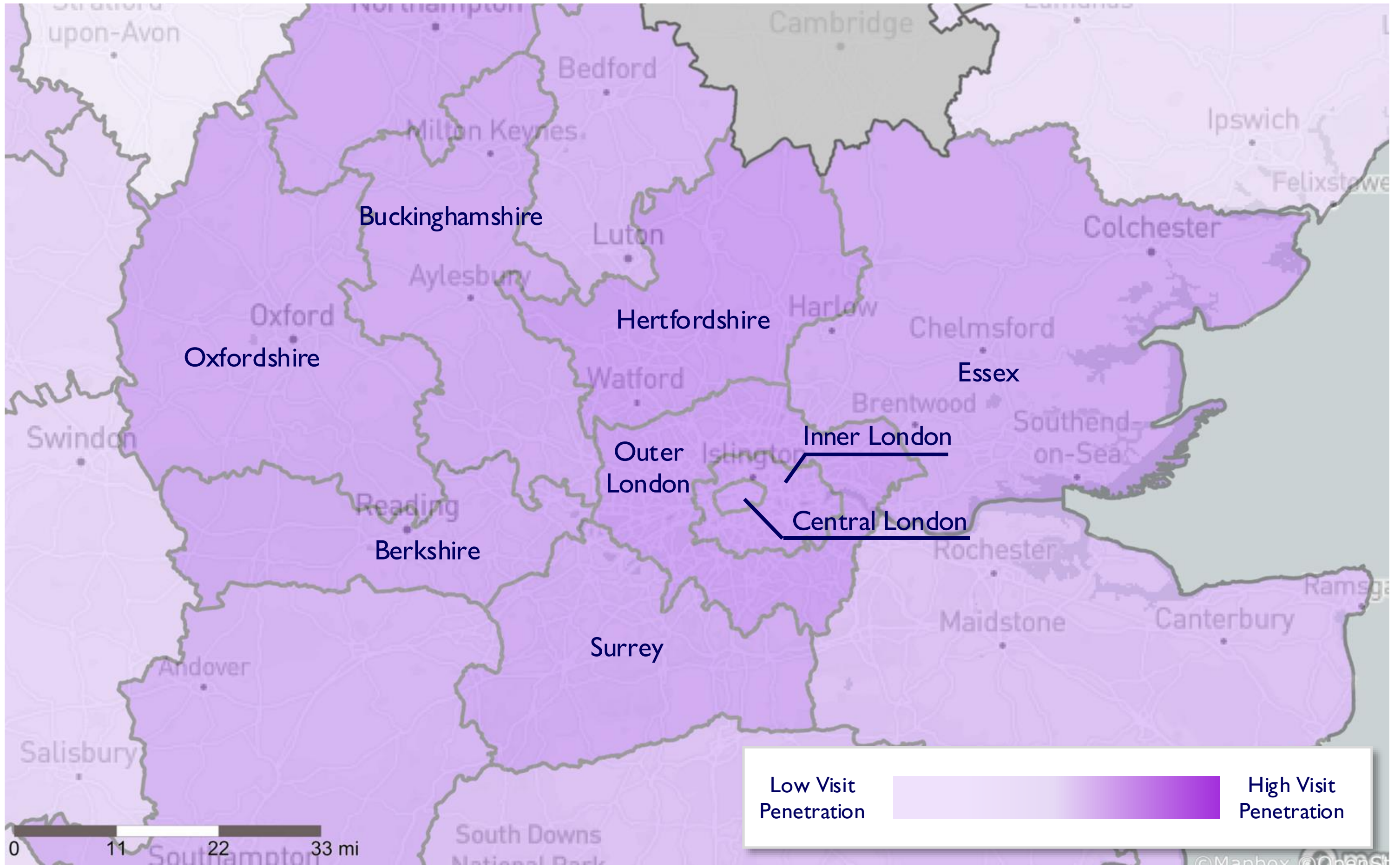
~50% OF VISITS TO HOL AREA FROM INNER & CENTRAL LONDON, WITH HOME COUNTIES SEEING HIGH PENETRATION

49% of visitors from Inner & Central London

+11% increased **penetration** from Inner & Central London MoM

Visit Penetration | Top 10 Counties



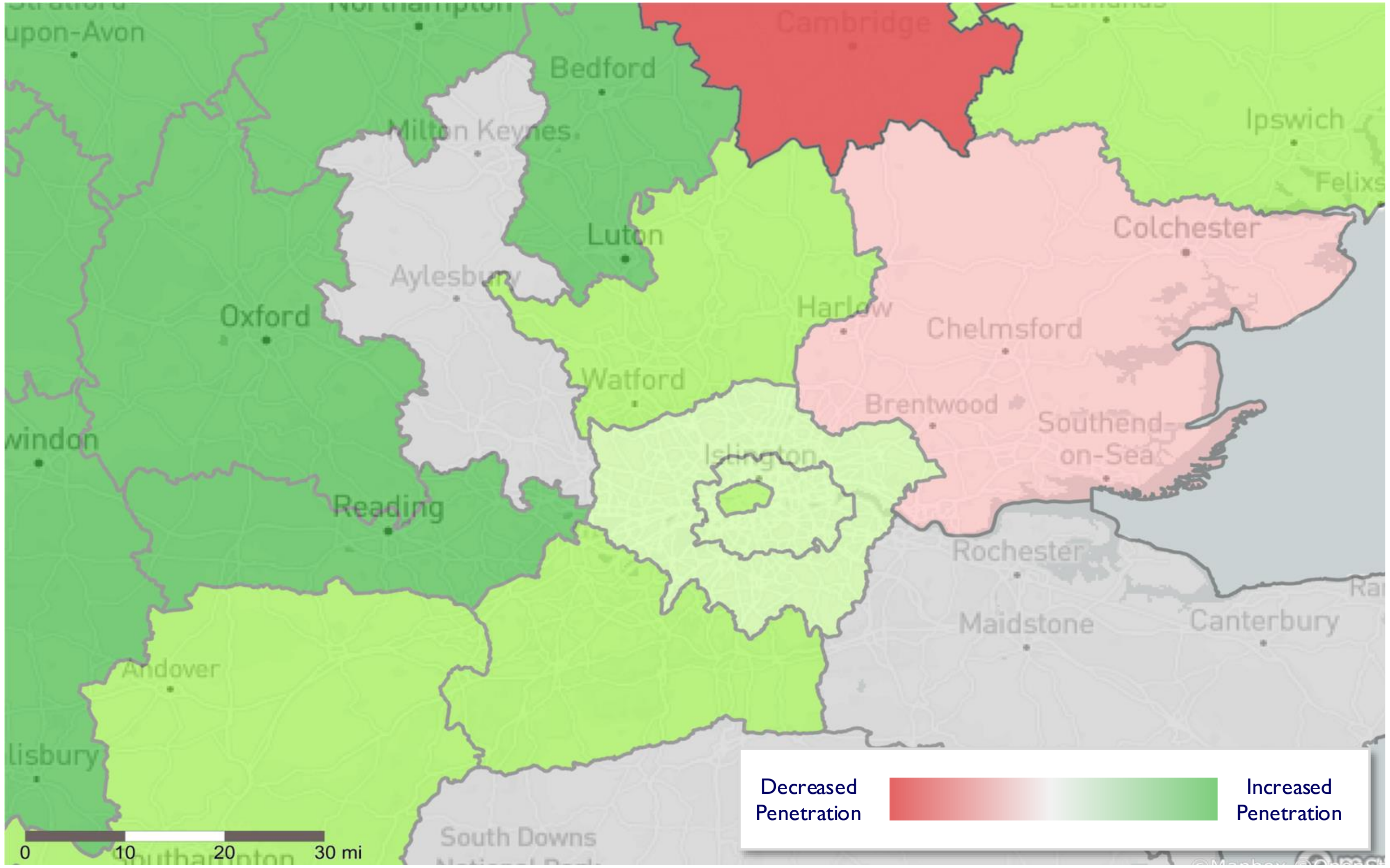


Penetration refers to % of population from a zone that visits HOL area

INCREASED SHARE OF VISITS FROM TERTIARY CATCHMENT REPRESENTING INFREQUENT, SOCIAL VISITORS

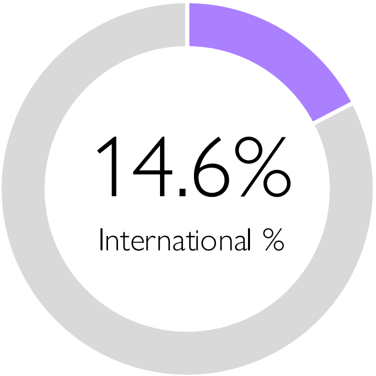
- Increase in share of visits from counties within **tertiary catchment** (+2.0%), representing greater propensity of **infrequent, social visitors** from further afield visiting HOL area during **Easter Holidays**.
- Conversely, **core catchment** saw a **-5.0%** decrease in share of visits, indicative of a **reduced worker-presence** during April.

Catchment Band	Apr-25 Visit %	Percentage Point change vs. previous month
Primary	51.8%	-2.6%
Secondary	22.9%	-2.3%
Core Catchment *(75% of visitors)*	**74.7%**	**-5.0%**
Tertiary	15.6%	+2.0%
Total Catchment *(90% of visitors)*	**90.3%**	**-2.9%**
Pull-In	9.7%	+2.9%



Penetration refers to % of population from a zone that visits HOL area

+6.2% INCREASE IN SHARE OF INTERNATIONAL VISITORS, WITH 14.6% OF VISITS IN APRIL 2025 FROM INTERNATIONAL TOURISTS



+1.4%
MoM

+6.2%
YoY

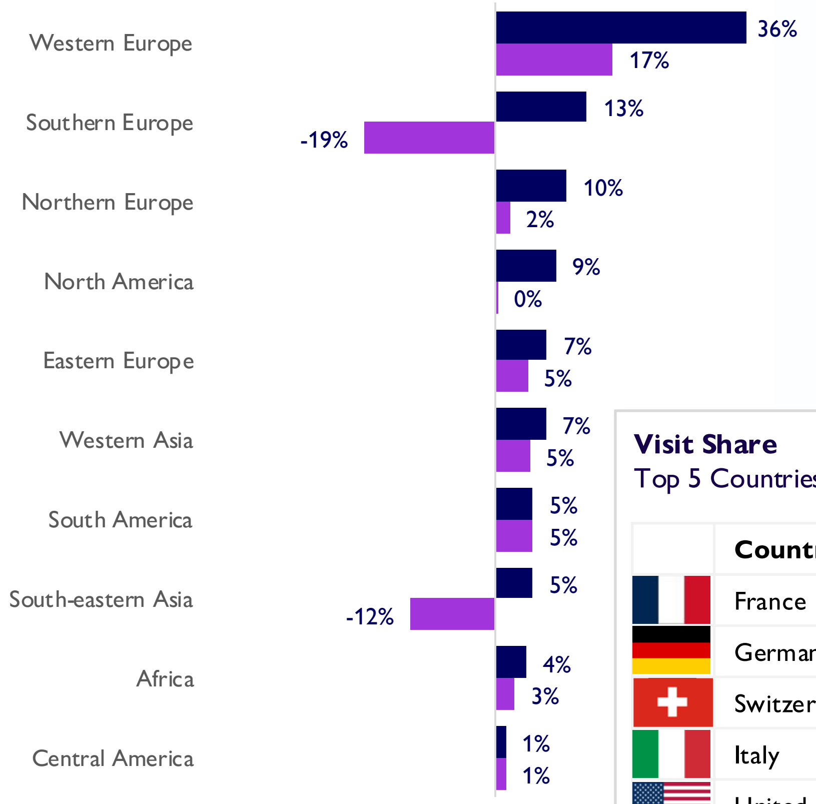
- International visitors made up **14.6%** of all April visits — a 6.2% increase YoY.
- All districts saw growth, with **St Martin's Lane** showing the largest **uplift**, reflecting stronger appeal to overseas leisure visitors over Easter.

Area	International Mix (%)	Month-on-Month	Year-on-Year
HOL Area	14.6%	+1.4%	+6.2%
Piccadilly District	11.7%	-2.1%	+4.8%
Jermyn St District	12.7%	-2.4%	+4.1%
Leicester St District	17.6%	+3.4%	+8.2%
Piccadilly Circus District	19.7%	+3.4%	+9.4%
St Martin's Lane District	18.2%	+4.8%	+9.5%
Haymarket District	17.4%	+2.7%	+7.8%
Core West End	11.4%	+2.8%	+4.7%

Change in mix is calculated via percentage point change
Please note, as of April 2025 Huq changed their methodology for calculating international visitation. For more info please contact HOLBA

EUROPE CONTRIBUTED TWO-THIRDS OF INTERNATIONAL VISITORS TO HOL AREA IN APRIL, WITH GROWTH DRIVEN BY EASTER HOLIDAYS

Visit Share | Top 10 Regions

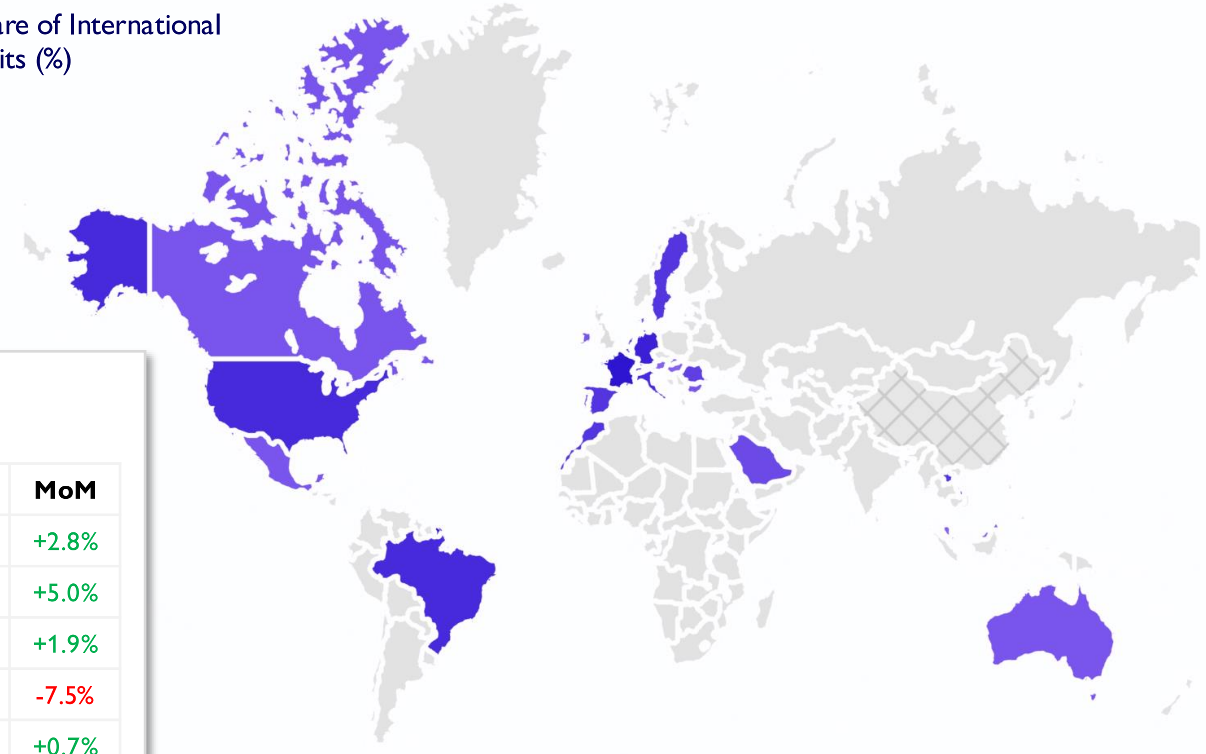


66.6% Europe
+4.4% MoM +0.2% YoY

7.1% USA
+0.7% MoM -9.4% YoY

7.2% Middle East
+5.7% MoM +2.0% YoY

Share of International Visits (%)



Visit Share
Top 5 Countries (% of Intl)

Country	%	MoM
France	10.2%	+2.8%
Germany	8.9%	+5.0%
Switzerland	7.3%	+1.9%
Italy	7.2%	-7.5%
United States	7.1%	+0.7%

International data unavailable for China

Change in mix is calculated via percentage point change

Please note, as of April 2025 Huq changed their methodology for calculating international visitation. For more info please contact HOLBA

LEICESTER SQ DISTRICT AVERAGE VISIT DENSITY 1.7 TIMES GREATER THAN CORE WEST END AVERAGE

GROWTH IN STATION USAGE IN SURROUNDING STATIONS, DESPITE -2.4% DECLINE FROM STATIONS WITHIN HOL AREA

- TfL station usage in the HOL area dropped **2.4% YoY**, despite growth in other West End stations.
- Likely explained by **Easter social visitors** more likely to explore on **foot.**
- **Elizabeth Line** stations continued strong **growth**, while Piccadilly Line stations saw slight declines, echoing trends from previous months.

Decline in usage from stations within HOL area in April 2025 vs. April 2024[1]

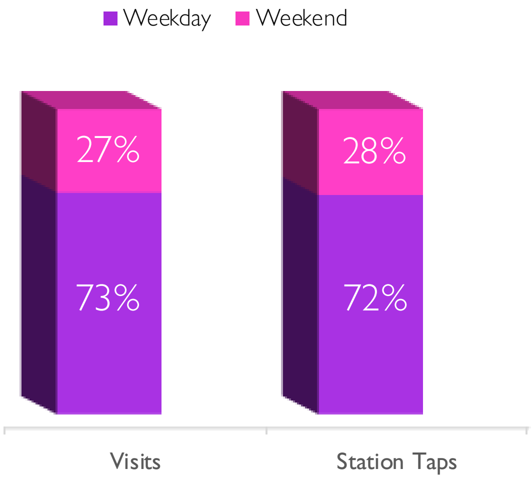
-2.4%
YoY

[1] Stations within HOL Area: Leicester Sq, Piccadilly Circus, Green Park

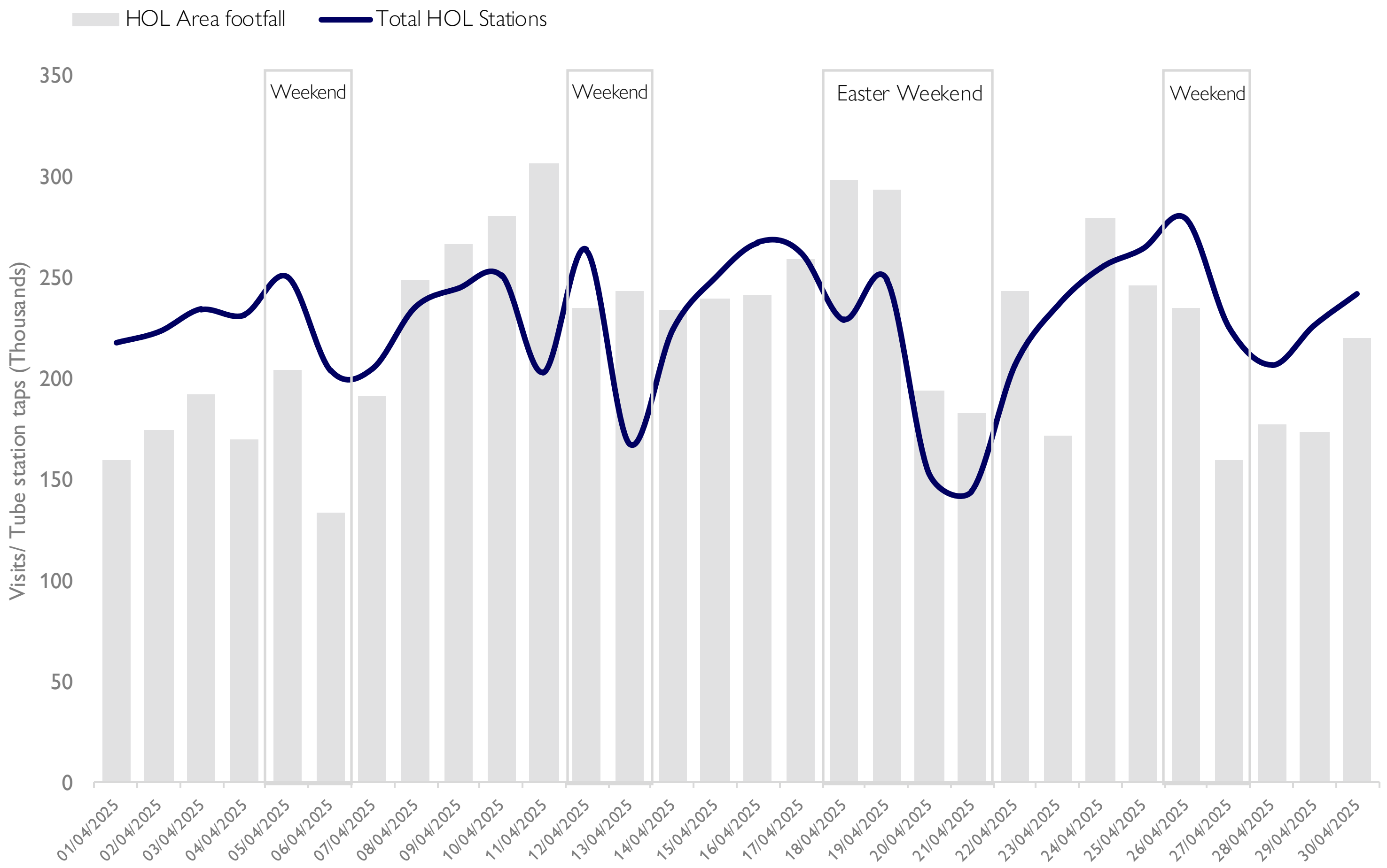
ALIGNMENT BETWEEN STATION USAGE & VISITS TO HOL AREA

- Weekday and weekend visit trends align closely with station usage.
- Daily station usage remained steadier than overall footfall, suggesting regular visitors like workers maintained consistent travel habits.

Visit & TfL Usage | Weekday vs Weekend



Footfall vs. TfL Usage | April 2025



[1] Stations within HOL Area: Leicester Sq, Piccadilly Circus, Green Park

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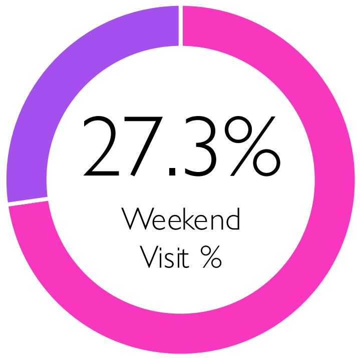
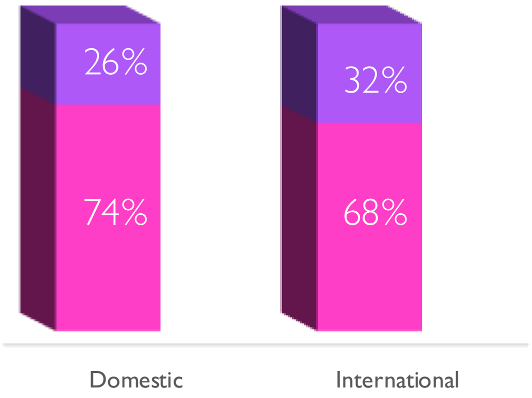
27.3% OF VISITS CAPTURED ON WEEKENDS, WITH INTERNATIONAL VISITORS SHOWING MORE DISTRIBUTED VISIT BEHAVIOUR

HOL Area | Weekday vs Weekend

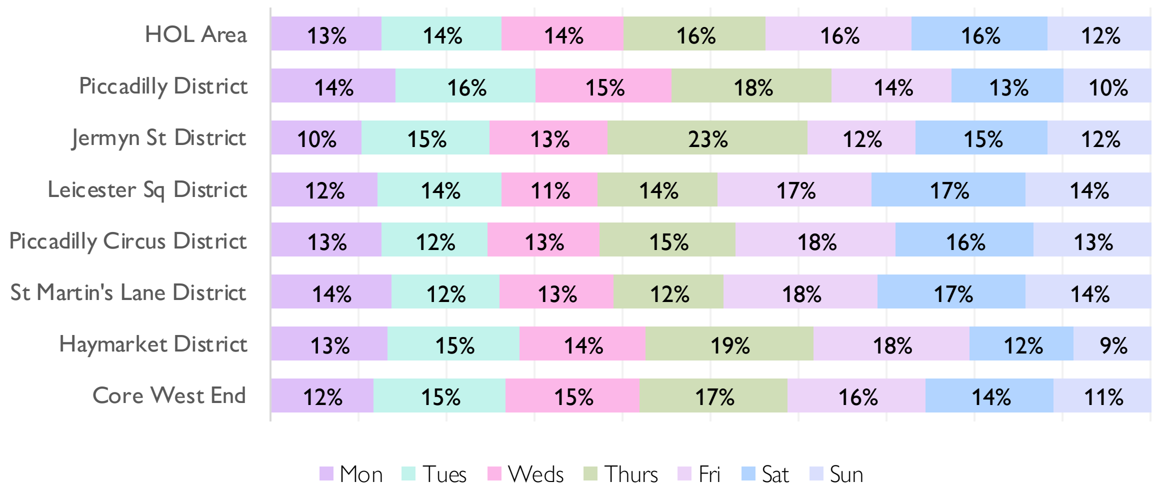


Visitor Origin | Weekday vs Weekend

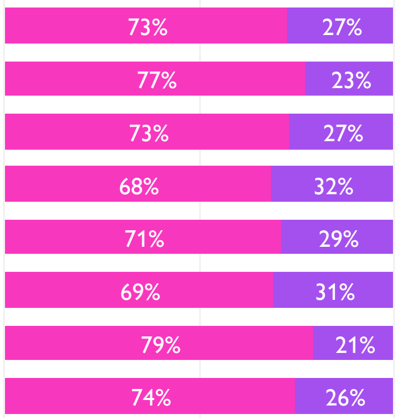


- 27.3% of visits in the HOL area took place over weekends, with leisure districts like Leicester Square and St Martin's Lane seeing closer to one-third.
- Domestic visits skewed toward weekdays, reflecting worker presence, while international visitors are more evenly spread across the week. Indicating a greater propensity to visit on weekends.

Daily Visit Distribution | District-Level

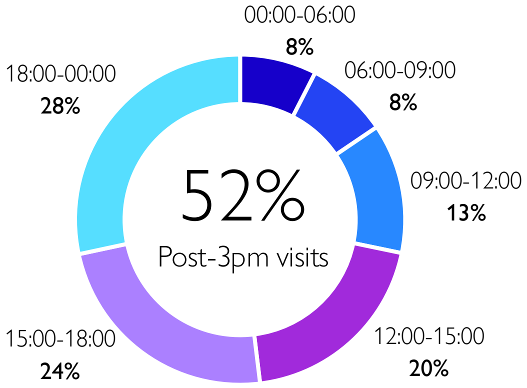


Weekday vs Weekend

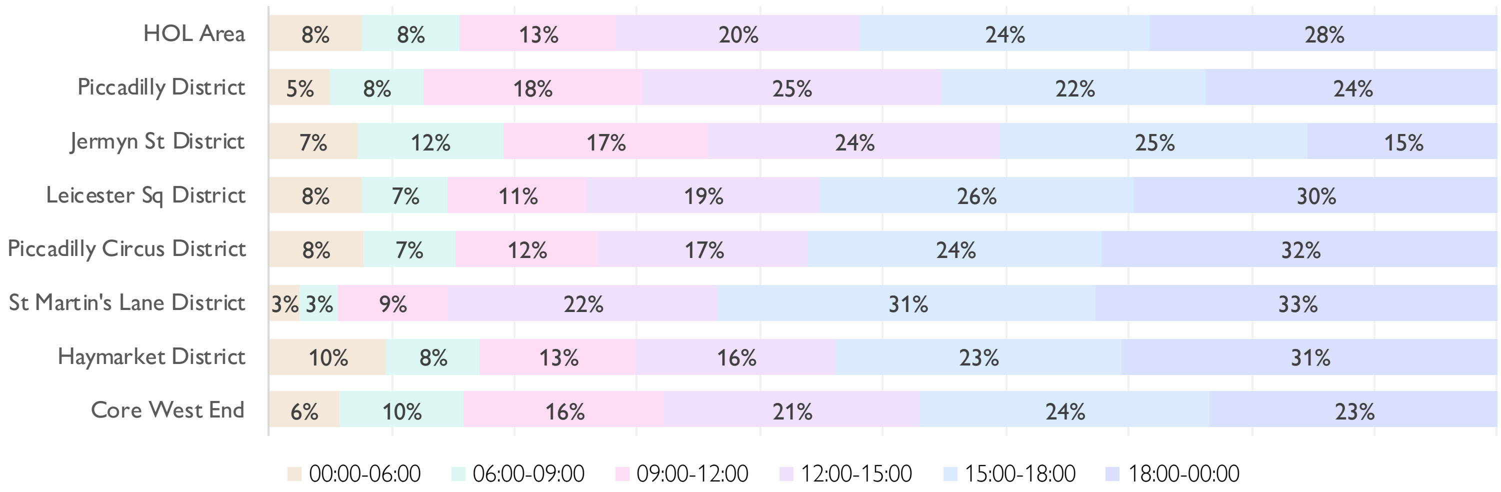


28% OF VISITS AFTER 6PM DRIVEN BY SOCIAL, LEISURE VISITORS ACROSS HOL AREA DURING APRIL

HOL Area | Visitors by Time Band



Hourly Visit Distribution | District-Level



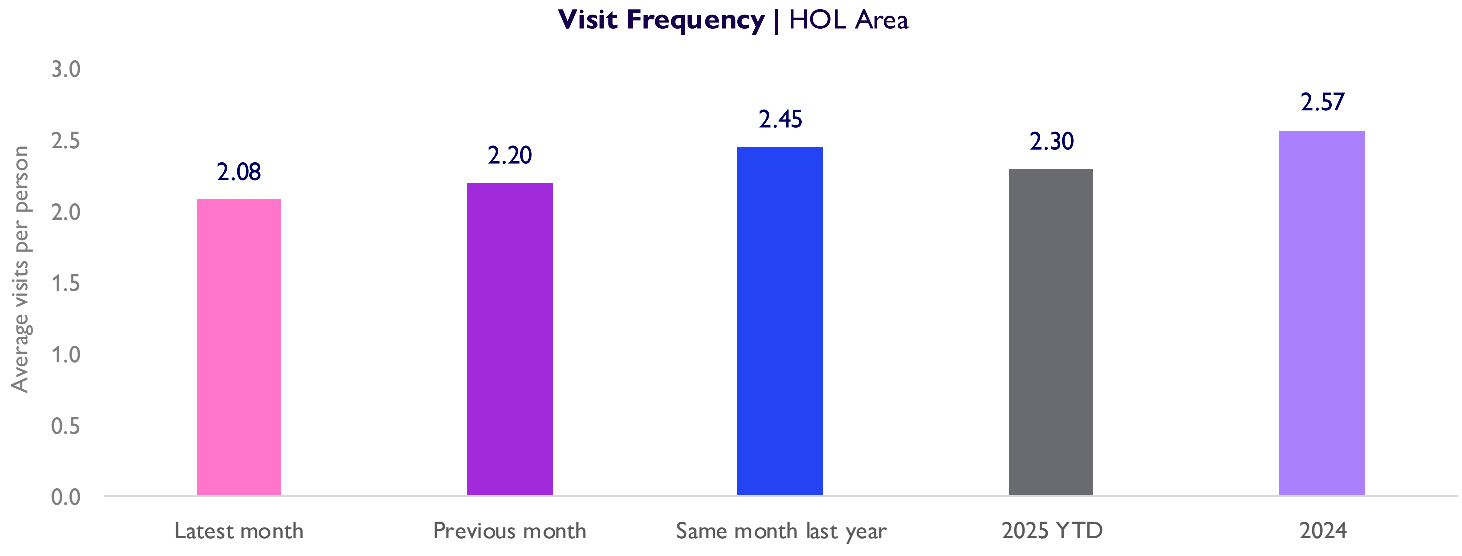
MOM
+13%
share of visits post-6pm

28%
HOL area visits post-6pm

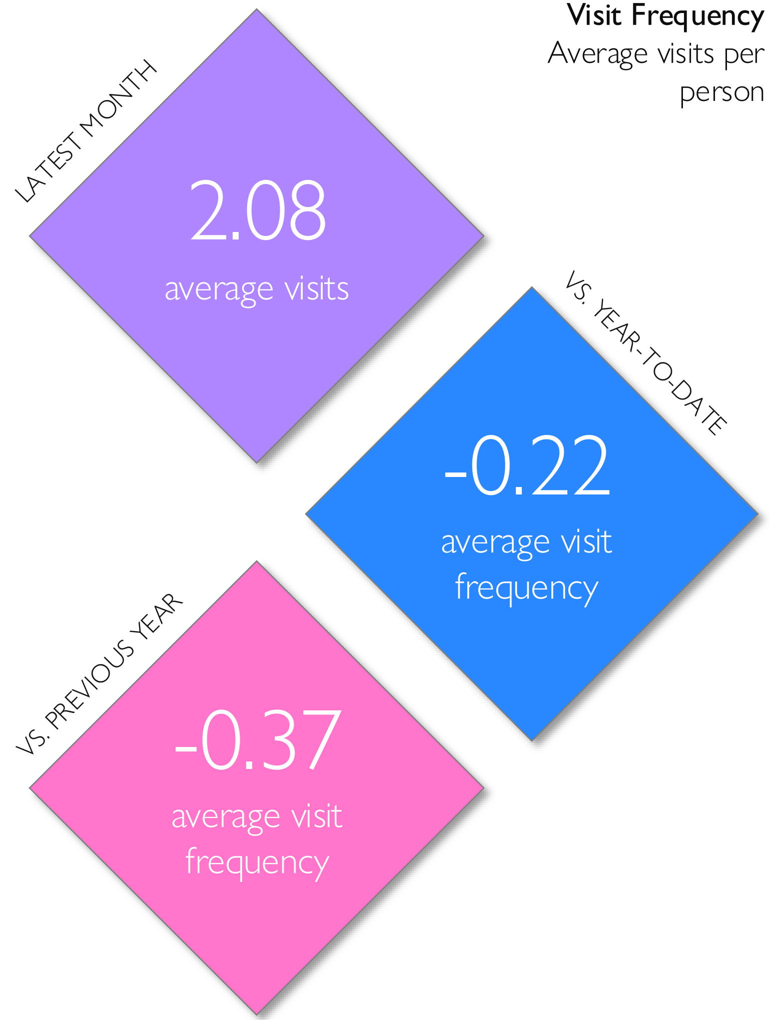
- A rise in social visitors drove a **13% increase MoM** in post-6pm visits.
- Districts with stronger weekend footfall, like **St Martin's Lane**, saw over **60%** of its visits occur after 3pm, driven by theatres and hotels.

REDUCED VISIT FREQUENCY IN APRIL, INDICATIVE OF MORE INFREQUENT, SOCIAL VISITORS

- The average visitor visited HOL area **2.08 times** during April, down from **2.45 times** in April 2024, and **2.30 times** in 2025 YtD.
- This reflects a shift toward **less frequent**, leisure-driven visits from further afield, alongside reduced worker presence.



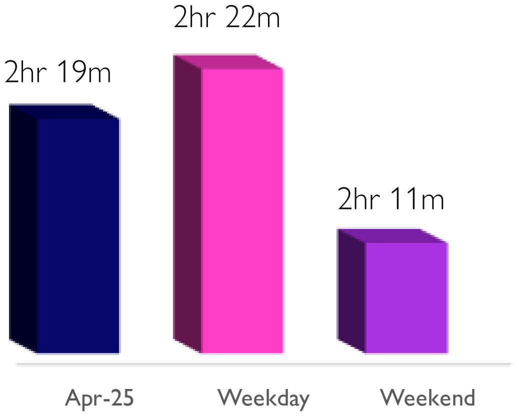
Visit Frequency
Average visits per person



CONSISTENT DWELL TIME VS. YEAR-TO-DATE AVERAGE IN APRIL

- Dwell time in April was broadly stable — **down 3 mins** vs. the YtD, and **8 mins** MoM.
- Weekday dwell time averaging **11 mins** more than weekends.
- Piccadilly District had the sharpest drop, reflecting fewer workers in the area since last year due to the later Easter this year.

Visit Dwell | Weekday vs Weekend



2hrs 19mins — Latest month average dwell

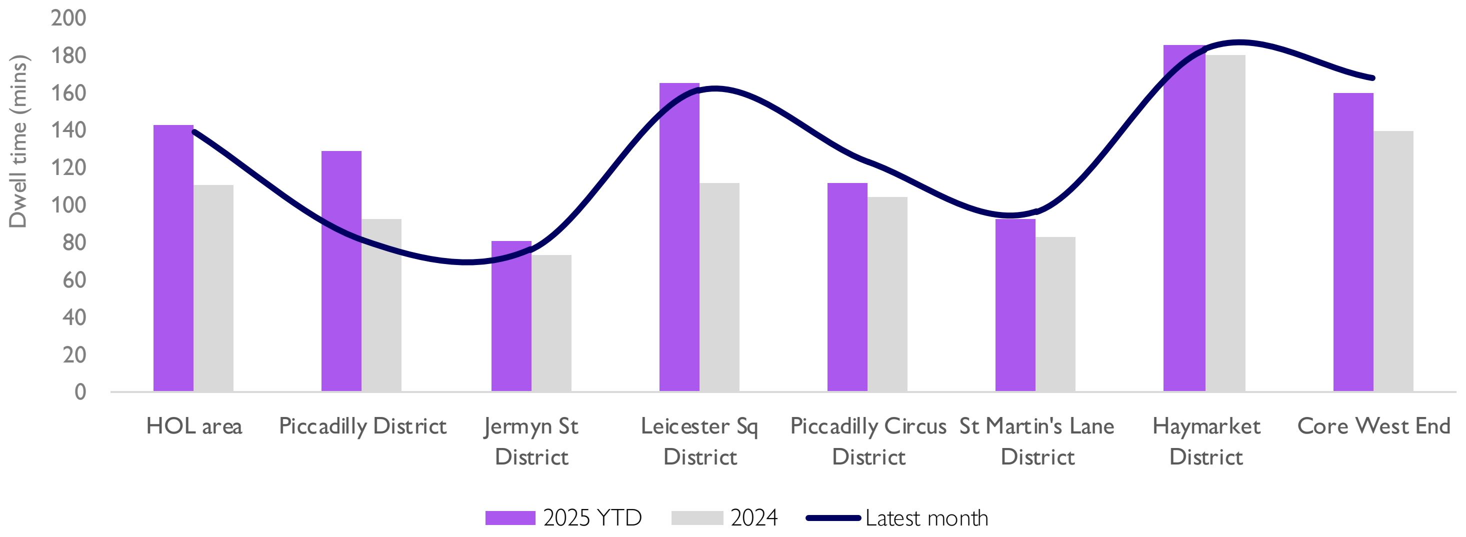
-8 mins MoM

+38 mins YoY

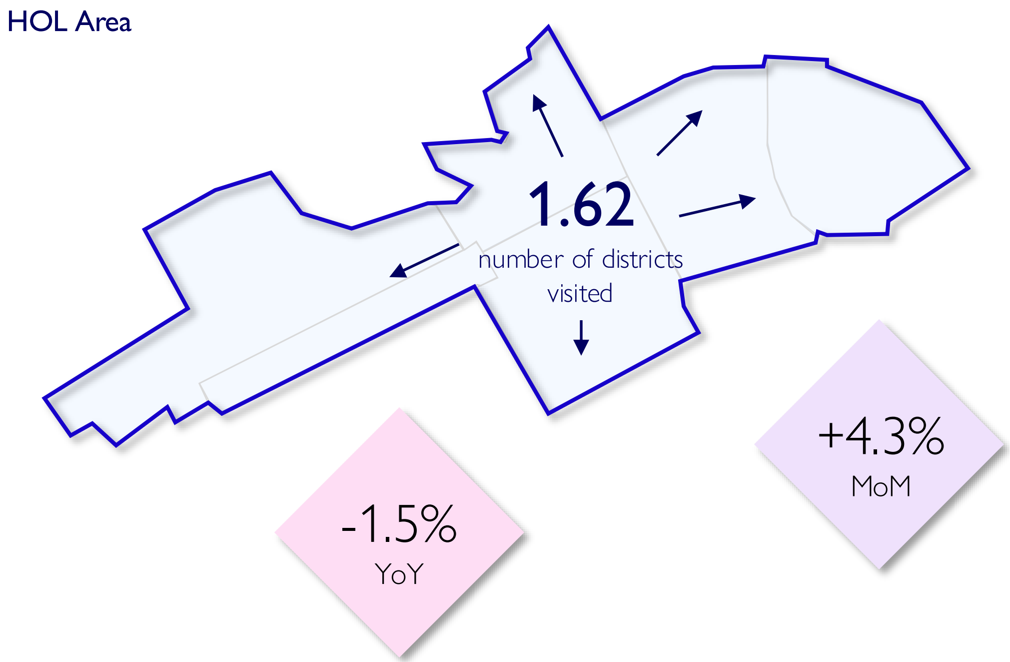
-3 mins vs. YtD

Average Dwell | District-Level

Latest Month	2h 19m	1h 21m	1h 16m	2h 41m	2h 3m	1h 37m	3h 3m	2h 48m

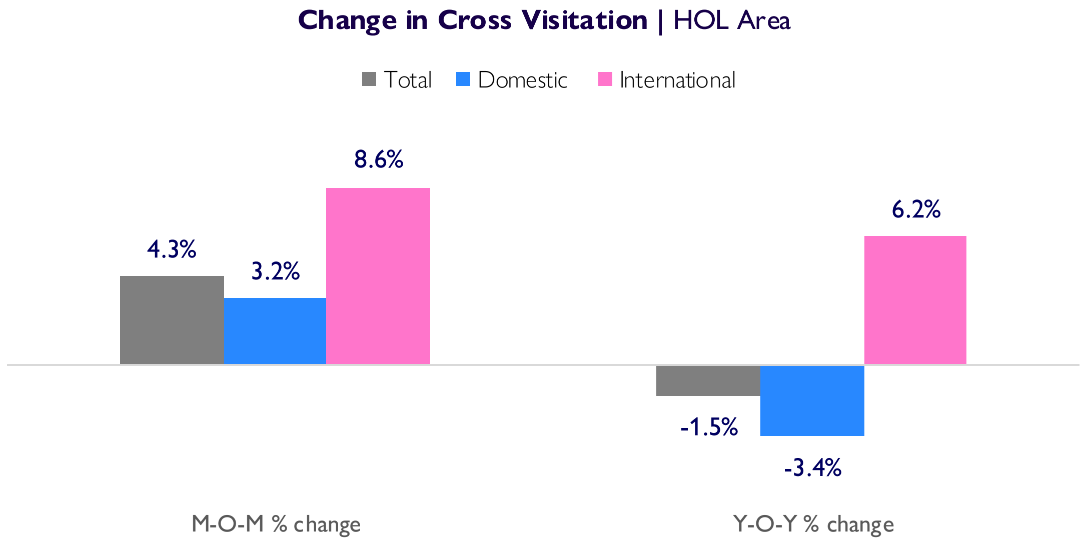


INCREASE IN CROSS-VISITATION VS. MARCH INDICATIVE OF SOCIAL VISITORS EXPLORING THE AREA



- Cross visitation helps understand the **number of visitors visiting multiple districts per trip** across the HOL area.
- Average visitor to HOL area visited **1.62 districts during their trip** in April 2025.

- Cross-visitation rose **4.3% MoM**, led by an **8.6% increase** among international visitors.
- However, visits were slightly more focused than in April 2024, with a **1% fall** in the cross-visitation index **YoY**.



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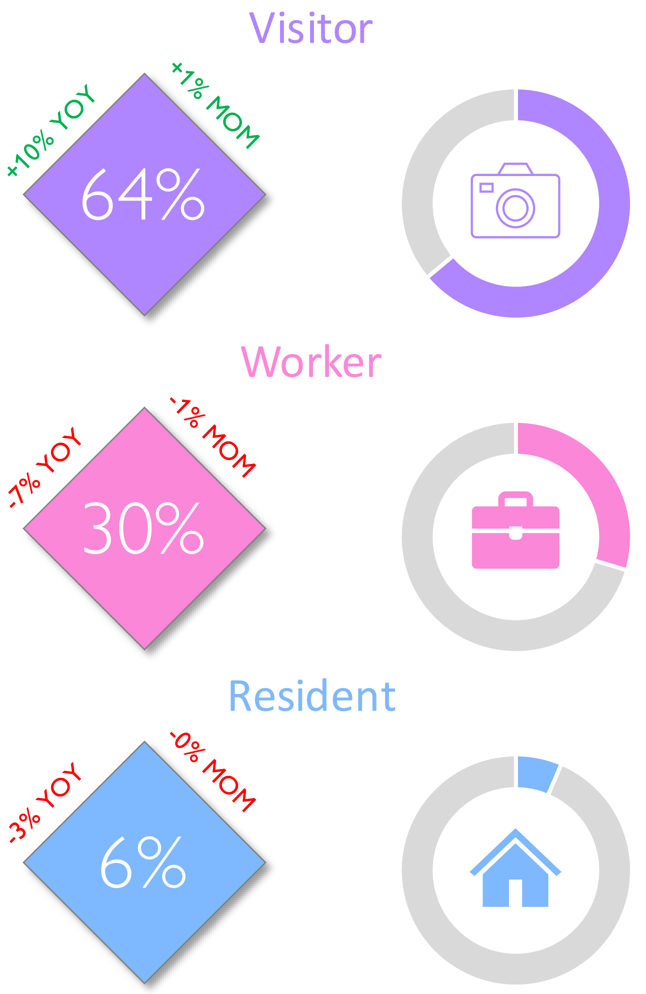
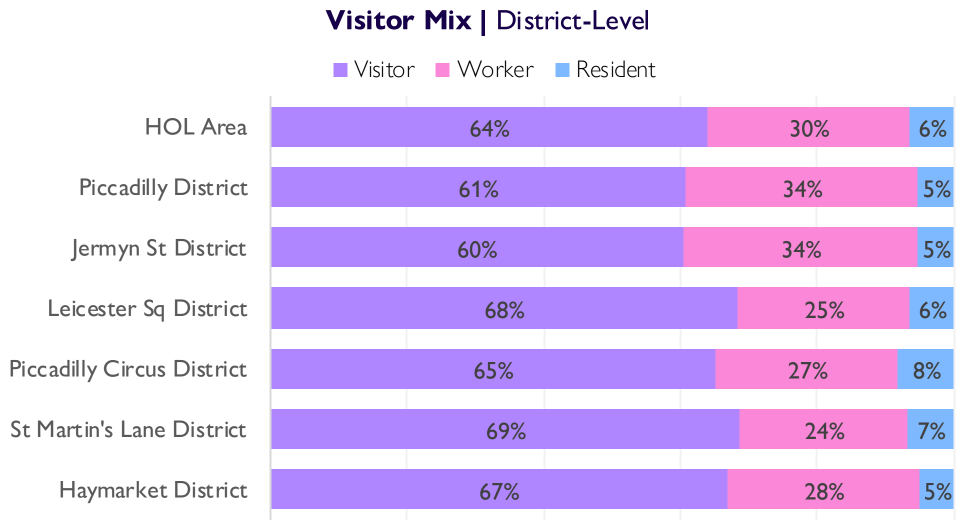
INCREASE IN SHARE OF DOMESTIC VISITORS, WITH TIMING OF EASTER IN APRIL INFLUENCING VISITOR MIX



- Seen across all districts, the share of domestic visitors grew by **10% YoY**, reflecting a shift toward social and leisure trips, displacing worker presence, which fell by around **7%.**
- Eastern districts attracted more domestic visitors, while Jermyn Street retained the highest share of workers.
- See **page 44** for visitor group definitions.



Year-on-Year			Month-on-Month		
Vis.	**Wrk.**	**Res.**	**Vis.**	**Wrk.**	**Res.**
+10%	-7%	-3%	+1%	-1%	-0%
+9%	-7%	-2%	+1%	-1%	-0%
+9%	-7%	-2%	+1%	-1%	-0%
+10%	-7%	-3%	+1%	-1%	-1%
+10%	-7%	-4%	+1%	-1%	-1%
+10%	-6%	-3%	+1%	-0%	-0%
+10%	-7%	-3%	+2%	-1%	-1%

Anonymised and aggregated by BT, via the High Streets Data Partnership | Visitor Mix definition in Appendix

Change in mix is calculated via percentage point change

21% OF DOMESTIC VISITORS ARE FROM URBAN COHESION MOSAIC SEGMENTATION GROUP

- Similar to the Core West End, the HOL area's visitor profile shows bias towards **affluent, professional visitor profile.**
- **Five main MOSAIC groups**, contribute **74%** of visits to the area.
- See **page 47** for mosaic group definitions.

Top 3 segments this month

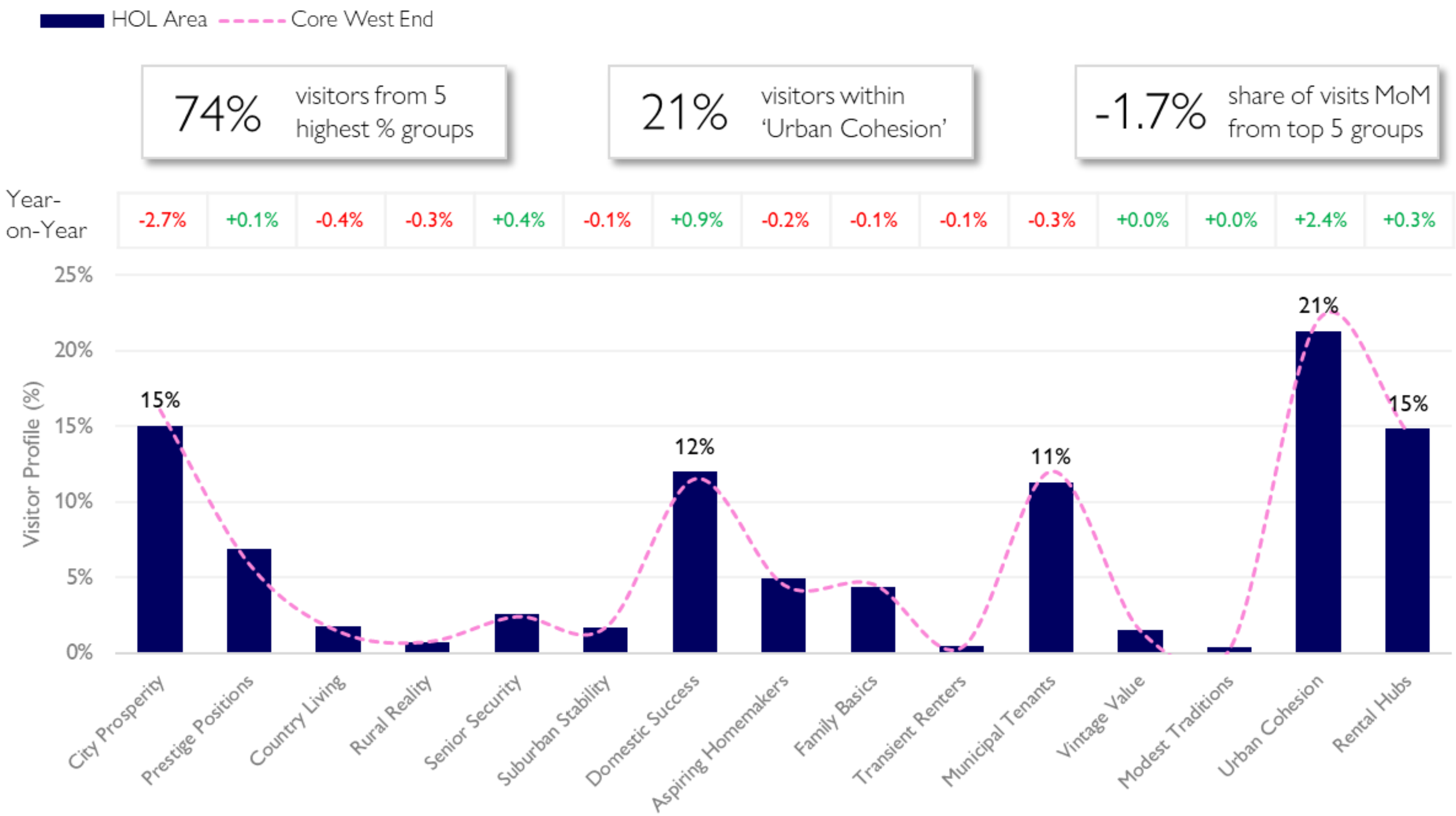
Urban Cohesion | 21% visitors
Residents of settled urban communities with a strong sense of identity

City Prosperity | 15% 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

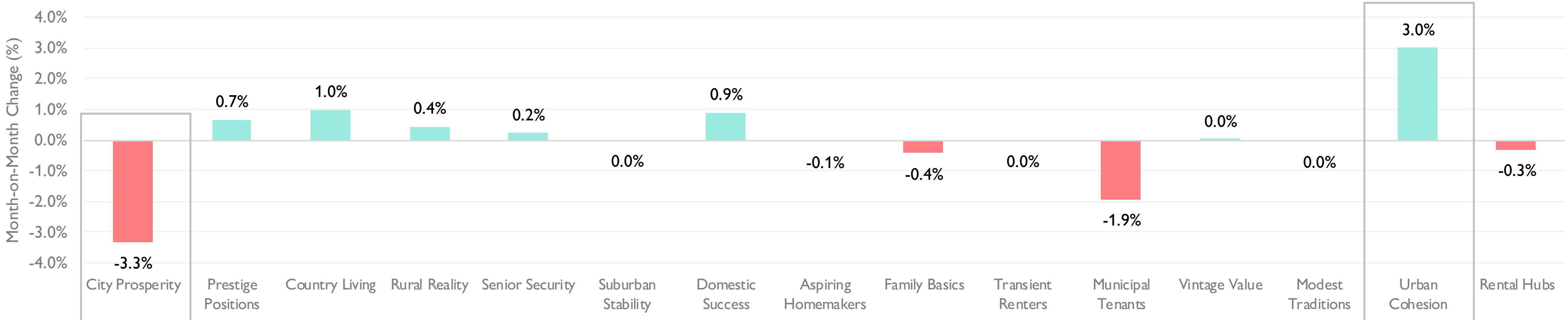
74%	visitors from 5 highest % groups
21%	visitors within 'Urban Cohesion'
-1.7%	share of visits MoM from top 5 groups



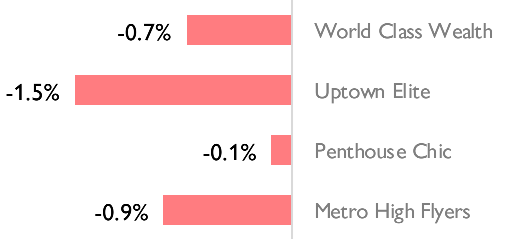
Experian MOSAIC | Detailed descriptions of all groups in appendix

See Page 45 for Mosaic Segmentation definitions

GREATER PROPORTION OF VISITORS WITHIN URBAN COHESION SEGMENT GROUP VS. PREVIOUS MONTH

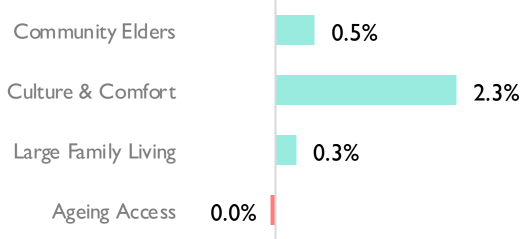


City Prosperity | MoM Change



- -3.3% decline in visitors from 'City Prosperity', with decline across all four types.
- Decline indicative of reduced worker presence, with 'Metro High Flyers' (-0.9%) representing “career-minded 20-30 year olds”.

Urban Cohesion | MoM Change



- +3.0% growth in share of visitors from 'Urban Cohesion' group.
- Growth in share of visitors from 'Culture & Comfort' type, representing “thriving families with good incomes in diverse suburbs”.

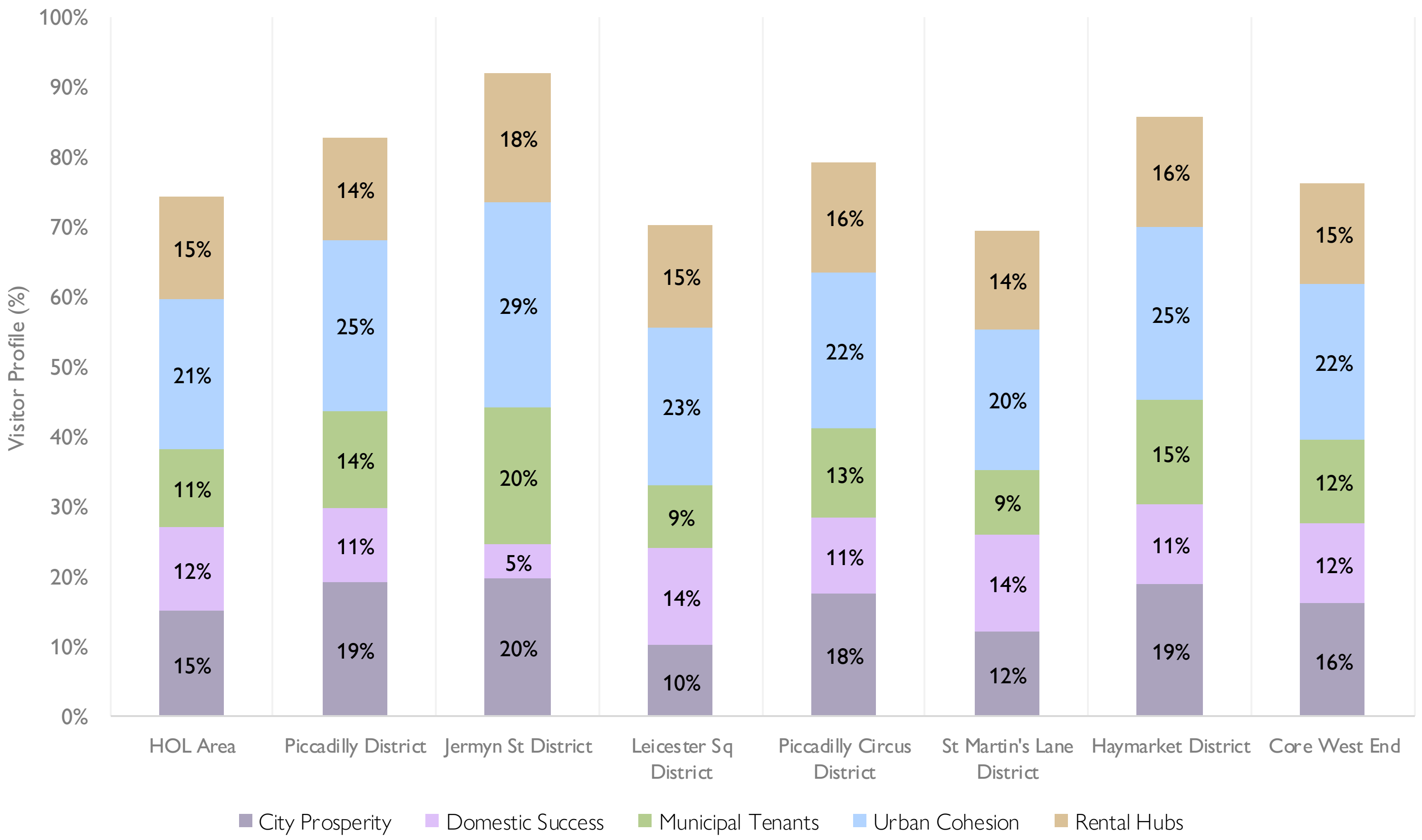
Experian MOSAIC | Detailed descriptions of all groups in appendix

DECLINE IN TOP 5 SEGMENT SHARE OF VISITORS MOM, INDICATIVE OF BROADER VISITOR DEMOGRAPHIC

- Decline in share of visitors from Top 5 segment groups across most districts, representing a **broader demographic base** visiting the area in April.

Area	Visitors from HOL Area's Top 5 Groups	Month -on- Month
HOL Area	74.5%	-1.7%
Piccadilly District	82.7%	+3.2%
Jermyn St District	92.0%	+5.1%
Leicester St District	70.4%	-3.0%
Piccadilly Circus District	79.3%	-2.1%
St Martin's Lane District	69.4%	-7.6%
Haymarket District	85.9%	-1.5%
Core West End	76.4%	-0.2%

HOL Area's Top 5 Groups | District-Level



Experian MOSAIC | Detailed descriptions of all groups in appendix

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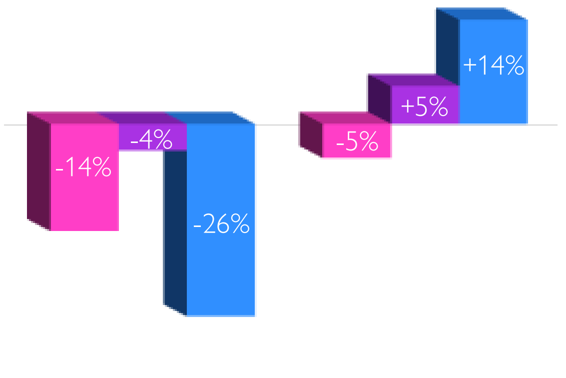
Q4 2024/25
JAN - MARCH

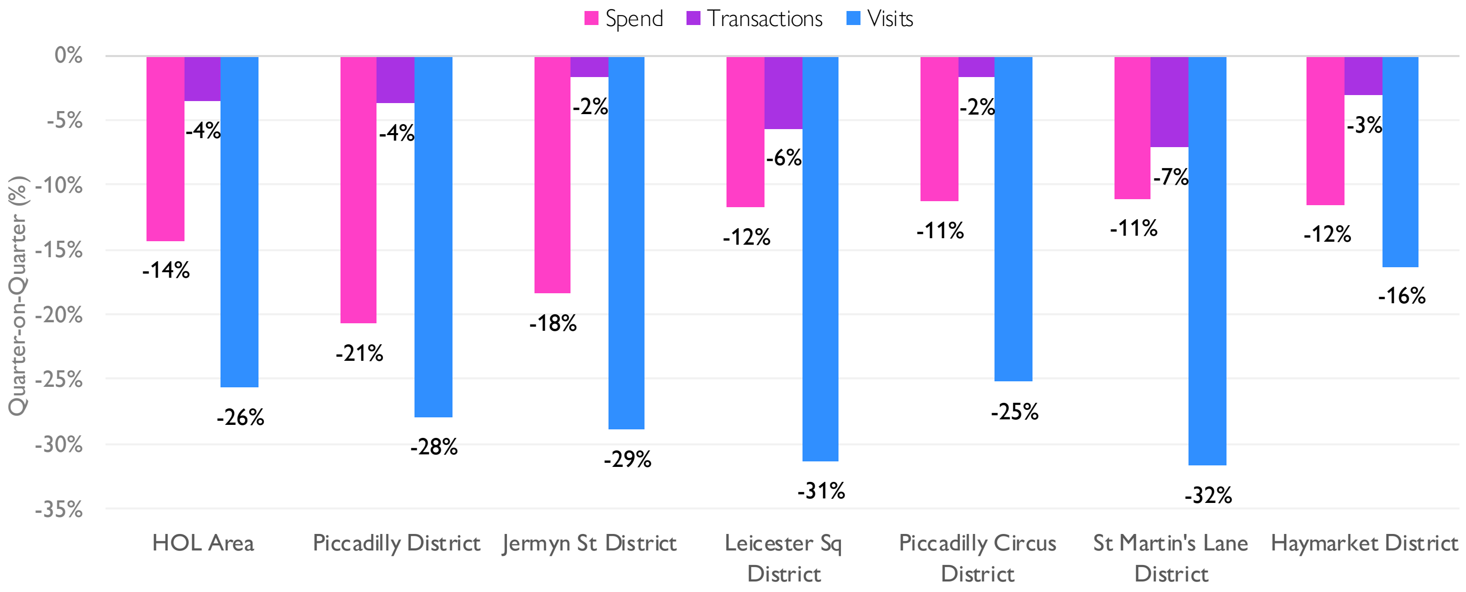
REDUCED SPEND & VISIT PERFORMANCE VS. PREVIOUS QUARTER, WITH INFLUENCE OF FESTIVE PERIOD CAUSING DECLINE

- Spend dropped **14%** vs. Q3 due to strong festive-period comparisons. This is to be expected as Q3 is usually the highest spending quarter of the year.
- YoY, transaction volumes rose **5%**, but overall spend value fell **5%**, suggesting visitors were more likely to spend, but spent less per transaction.

Quarter-on-Quarter & Year-on-Year
Spend, Transactions & Visits



Quarter-on-Quarter Performance | District-Level

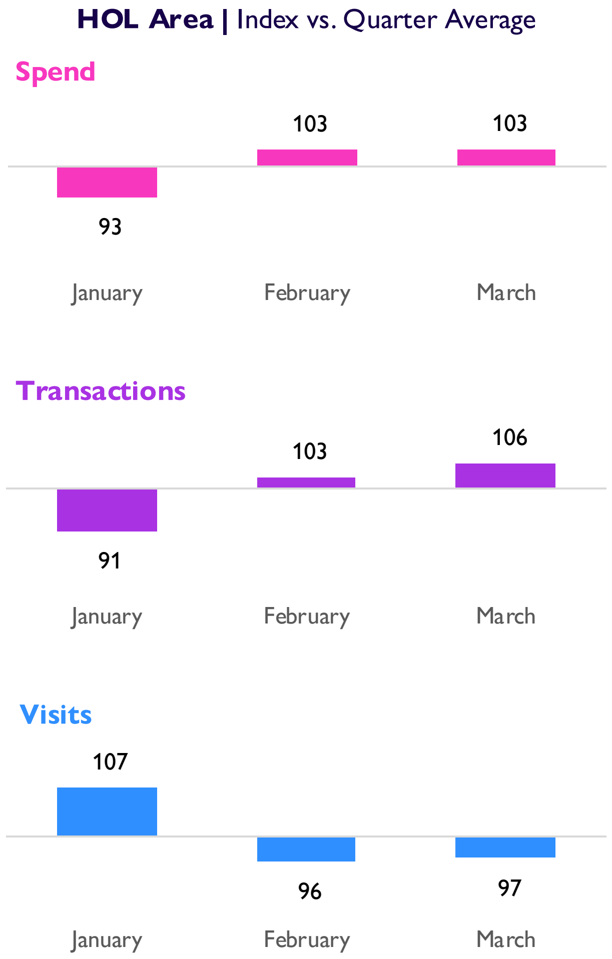


- All districts saw QoQ spend **decline** in Q4 2024, following **a festive-driven surge** in Q3.
- Eastern districts like Leicester Sq and St Martin's Lane showed greater resilience in spend, despite seeing the sharpest drop in visits.

Anonymised and aggregated by MasterCard, via the High Streets Data Partnership
Spend is the value of purchases; Transactions are the number of sales irrespective of amount spent

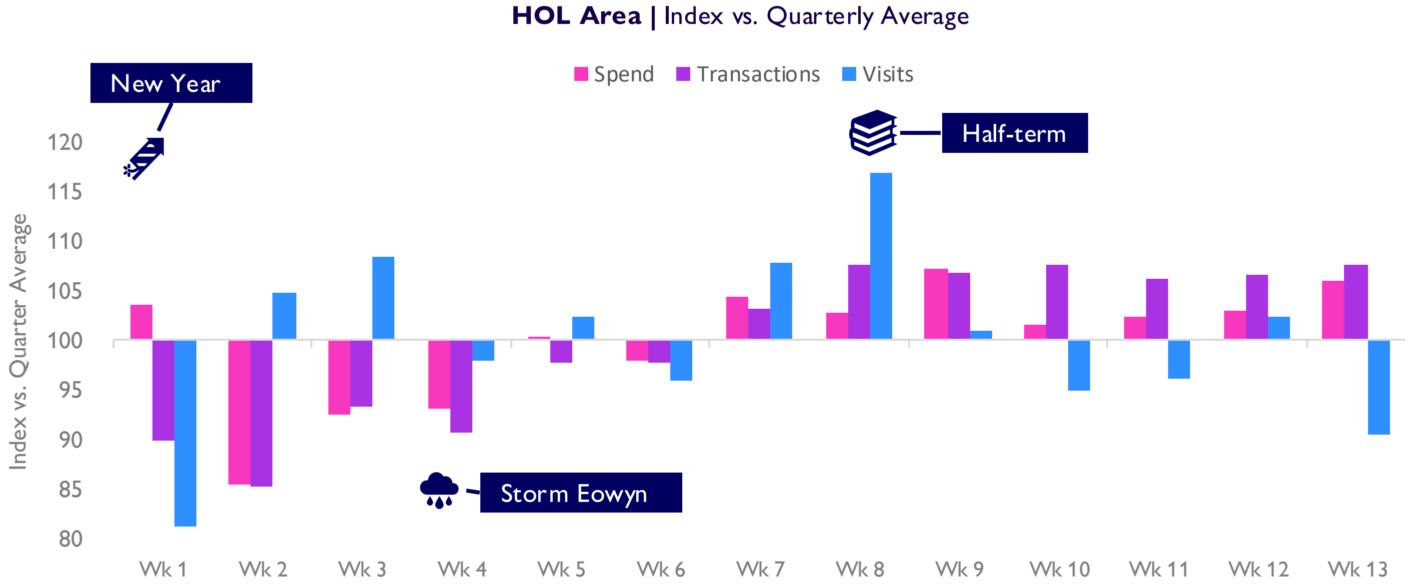
Note: Historic MasterCard figures have been adjusted for inflation

SLOWER START TO THE YEAR FOR SPEND PERFORMANCE, WITH UPLIFT EXPERIENCED IN MARCH



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

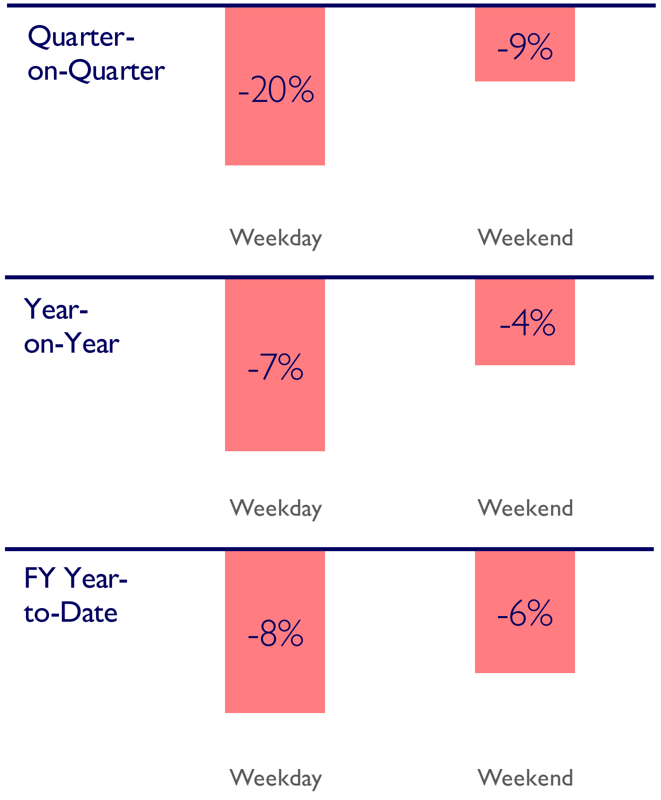
- **March** saw the highest share of **Q4 spend**, while **January** led in visits, reflecting a stronger worker presence early in the quarter.
- As the quarter progressed, visitor mix shifted toward leisure. Week 8 marked a clear uplift in both visits and spend, aligned with the school half-term.



Index refers to each week / month value compared to quarterly average; a value of 100 indicates higher performance than average quarter

EATING PLACES MORE RESILIENT ACROSS Q4 2024/25, WITH SLIGHT UPLIFT IN WEEKEND SPEND YEAR-ON-YEAR

TOTAL RETAIL



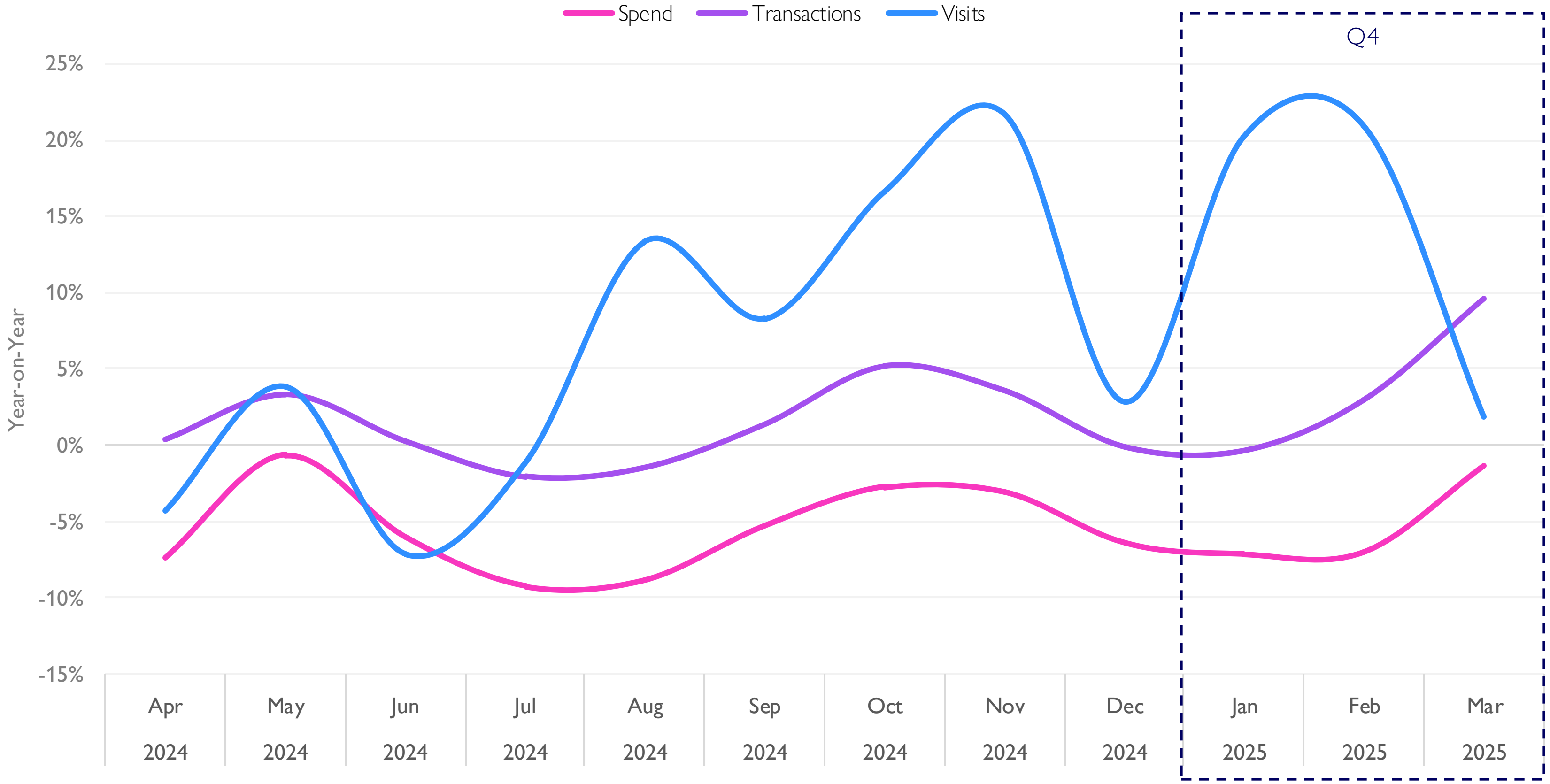
- Eating Places and Apparel both saw QoQ declines in Q4.
- Trends reflect a visitor preference for dining and social experiences over and above other forms of retail.
- Weekend spend proved more resilient, down just **4% YoY vs. 7%** on weekdays — highlighting the growing influence of social visitors.

Time Period	Total Retail		Eating		Apparel	
	Weekday	**Weekend**	**Weekday**	**Weekend**	**Weekday**	**Weekend**
Quarter-on-Quarter	-20%	-9%	-16%	-4%	-26%	-8%
Year-on-Year	-7%	-4%	-2%	+1%	-20%	-17%
Year-to-Date vs. Last Year	-8%	-6%	+1%	+3%	-30%	-26%

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

SIGNIFICANT UPLIFT IN VISITS AT THE START OF Q4, WHILE SPEND SAW IMPROVEMENT THROUGHOUT FEBRUARY & MARCH

Footfall & Spend | Last Twelve Months Year-on-Year

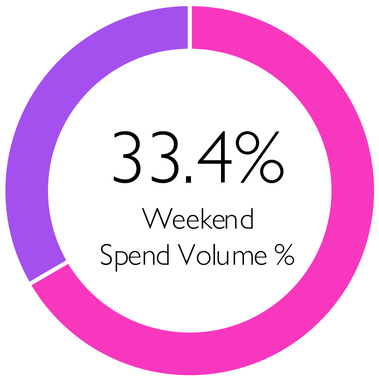


- Visits **rose 20% YoY** in January, but spend **declined**, driven by a higher share of frequent, non-spending visitors.
- Transaction volumes held steady over the past year, **suggesting smaller average spend per** visit despite consistent purchasing activity.

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

OVER A THIRD OF SPEND CAPTURED ON WEEKENDS ACROSS HOL AREA, WITH SATURDAYS SEEING 1.5X DAILY AVERAGE

Spend Volume | Weekday vs Weekend



- While only 27% of visits occurred on weekends, they accounted for 33.4% of total spend, underscoring the impact of social and leisure visitors on weekend spending in the HOL area.

Spend Volume Index | vs. District Average, where 100 equals daily average

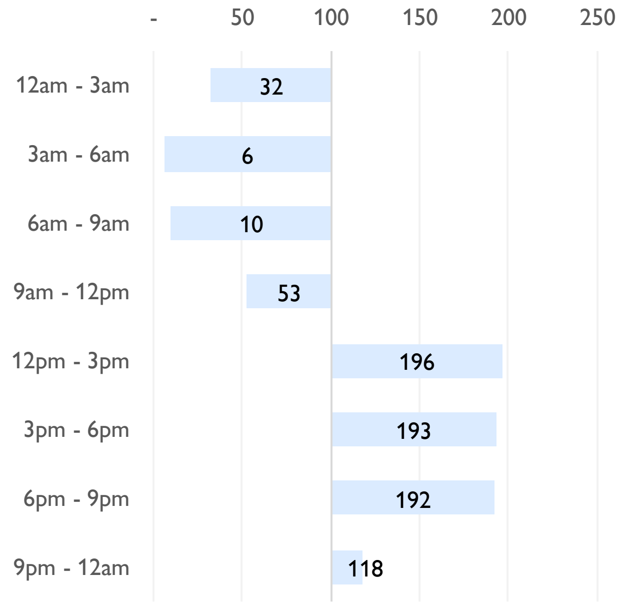
District	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
HOL area	72	82	89	103	120	150	84
Piccadilly District	80	87	92	104	117	143	77
Jermyn St District	81	94	96	109	119	133	69
Leicester Sq District	66	74	84	97	119	161	98
Piccadilly Circus District	67	75	83	100	121	160	93
St Martin's Lane District	69	79	89	104	118	157	84
Haymarket District	75	86	93	105	119	139	84

- The highest daily average spend is seen on Saturdays across Eastern districts like Leicester Square. These districts see a spend over 1.5 times the spend on an average day.
- In contrast, Jermyn Street showed the lowest Saturday skew, reflecting its worker-focused profile.

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

EASTERN DISTRICTS CAPTURED SIGNIFICANT SHARE OF SPEND IN THE EVENING BETWEEN 6PM – 9PM

HOL Area | Index vs. Time-band Average



- Spend between 3–9pm was almost the 3 hourly average, highlighting the strength of HOL's evening economy.

Spend Volume Index | vs. District Average, where 100 equals hourly average

District	12am - 3am	3am – 6am	6am – 9am	9am - 12pm	12pm - 3pm	3pm – 6pm	6pm – 9pm	9pm - 12am
HOLBA area	32	6	10	53	196	193	192	118
Piccadilly District	34	4	10	68	233	239	121	91
Jermyn St District	38	6	13	88	238	224	111	82
Leicester Sq District	29	4	6	36	170	169	253	133
Piccadilly Circus District	40	6	6	34	165	165	235	148
St Martin's Lane District	22	5	10	44	188	177	237	118
Haymarket District	17	8	14	54	196	182	214	114

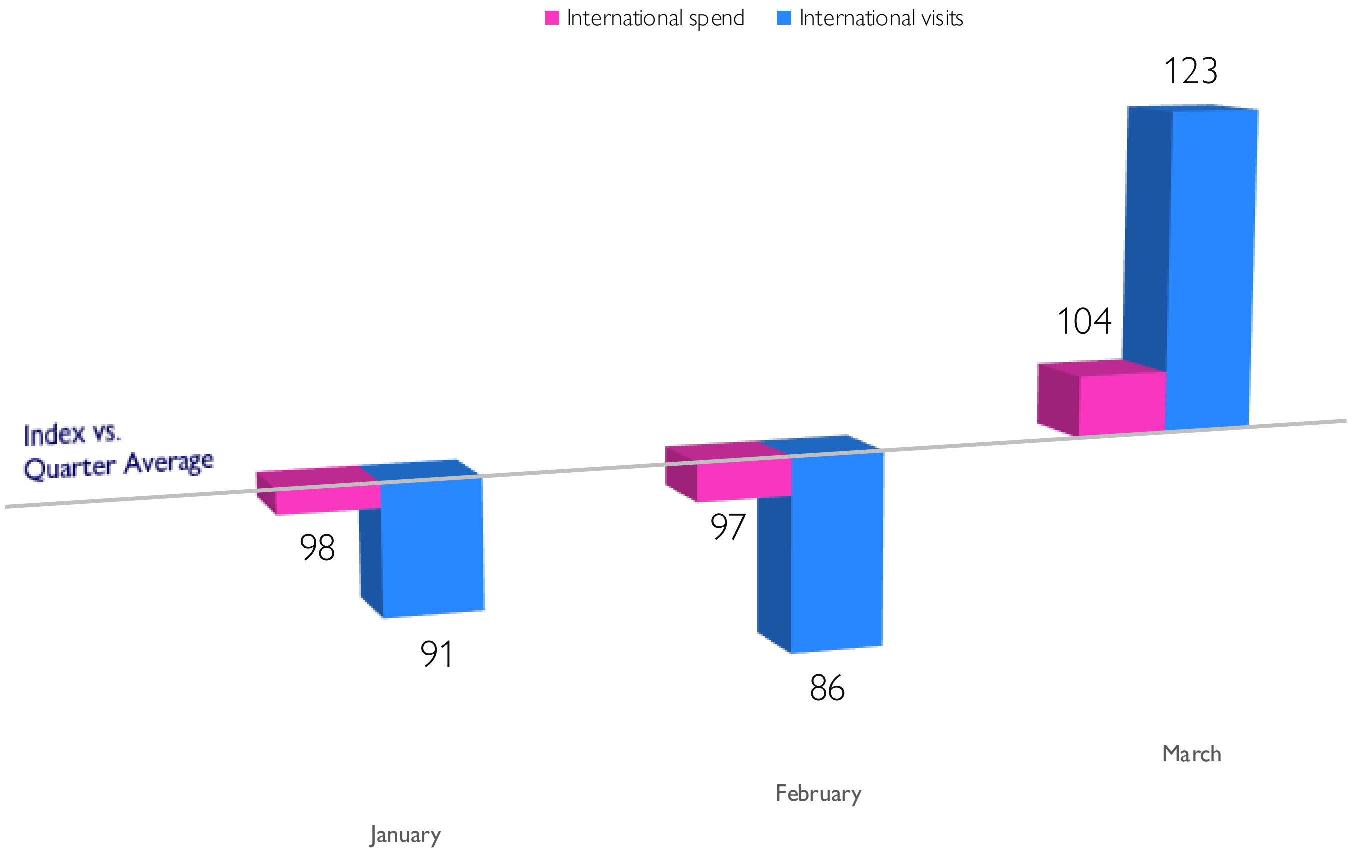
- Worker-focused districts like Piccadilly and Jermyn Street saw peak spend in the afternoon (2.3x hourly average), while leisure-led areas like Leicester Square peaked in the evening — with 2.5x average spend between 6–9pm.

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

SIGNIFICANT SHARE OF INTERNATIONAL VISITS IN MARCH, TRANSLATING INTO GREATER INTERNATIONAL SPEND

- International visitors accounted for **23%** more spend in March vs. the quarterly average. This is **19% higher** than the domestic spend increase.
- This aligned with overall visit patterns, as lower international and domestic footfall in January and February led to weaker spend earlier in the quarter.

HOL Area | International Spend vs. Visits



Anonymised and aggregated by MasterCard, via the High Streets Data Partnership
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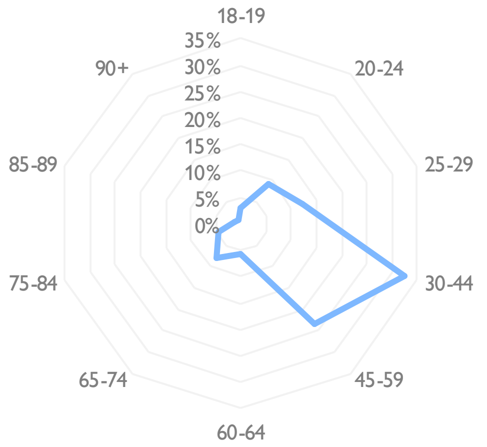
HOL AREA PROFILE SKEWED TOWARDS PROFESSIONAL, MID-AGED VISITOR

Age & Gender Profile



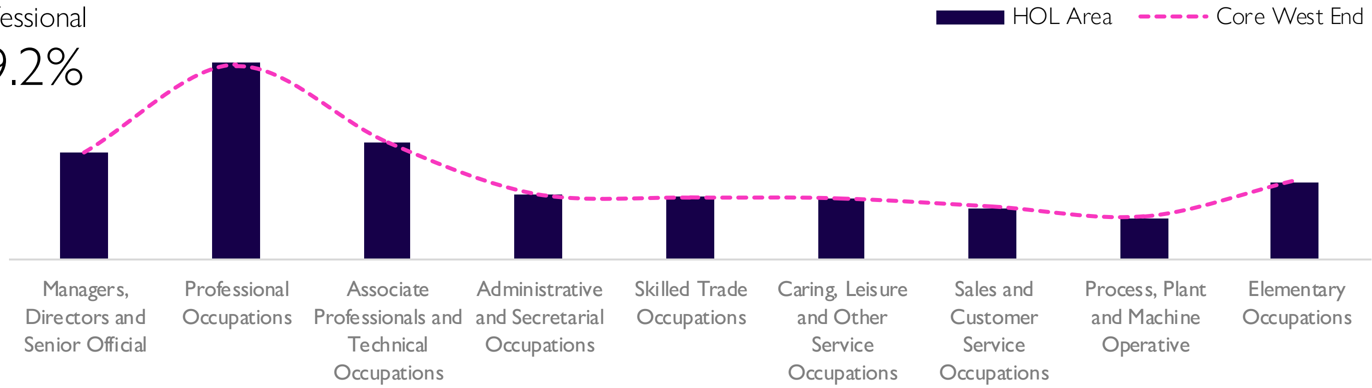
- Visitor profile skewed towards visitors aged **30-59 years old** (56.1%)

Female
51.2%

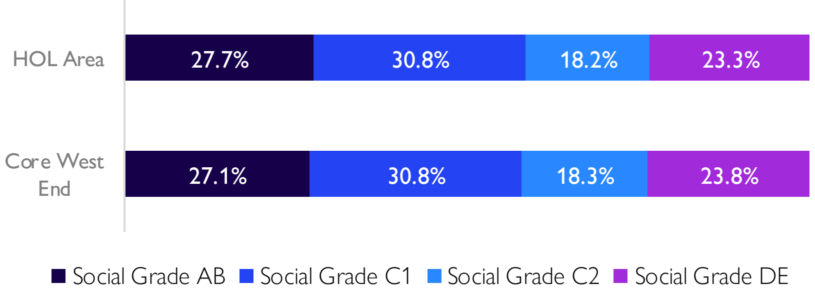
Male
48.8%

Occupation

Managers & Professional
39.2%



Social Grade



- Slightly **more affluent visitor profile** visiting HOL area vs. Core West End
- **27.7%** of visitors to HOL area within most-affluent social grade (AB) vs. **27.1%** of Core West End visitors

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

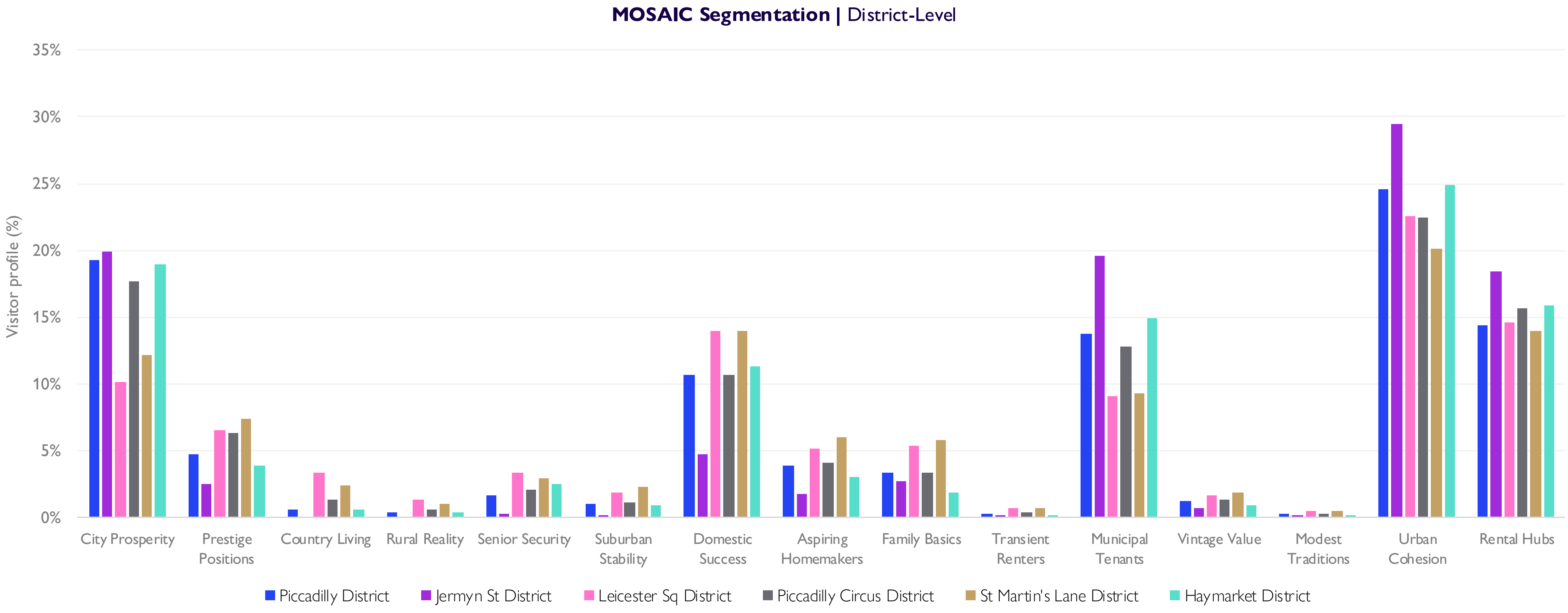
The number of workers of that MSOA / HEX who spend more than 10 minutes in the location in the specified time period. A person's work location is based on where they have spent most of their working hours based on latest available calendar month.

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.

Anonymised and aggregated by BT, via the High Streets Data Partnership

CONSISTENT MOSAIC SEGMENTATION PROFILE BETWEEN DISTRICTS WITH ALL DISTRICTS SEEING GREATEST SHARE OF URBAN COHESION



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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

Experian MOSAIC

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

51m individuals

Mosaic

15 groups

A02 Uptown Elite

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

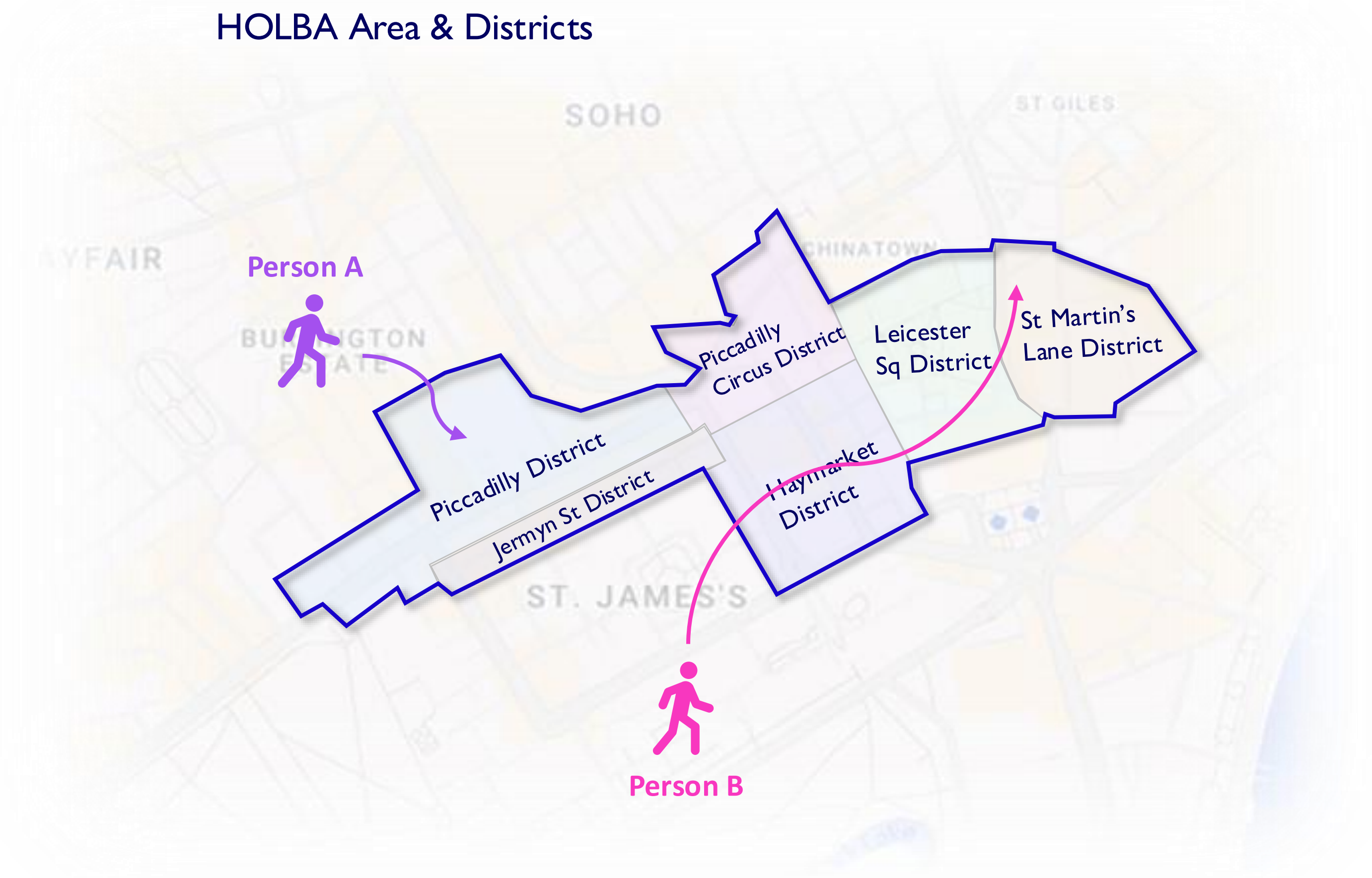
CROSS VISITATION EXAMPLE

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 Marin'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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