HEART OF LONDON BUSINESS ALLIANCE

Visitor Insights
November 2025

Shaping a world-class West End

Issued: December 2025

Colliers

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INTRODUCTION & CONTEXT

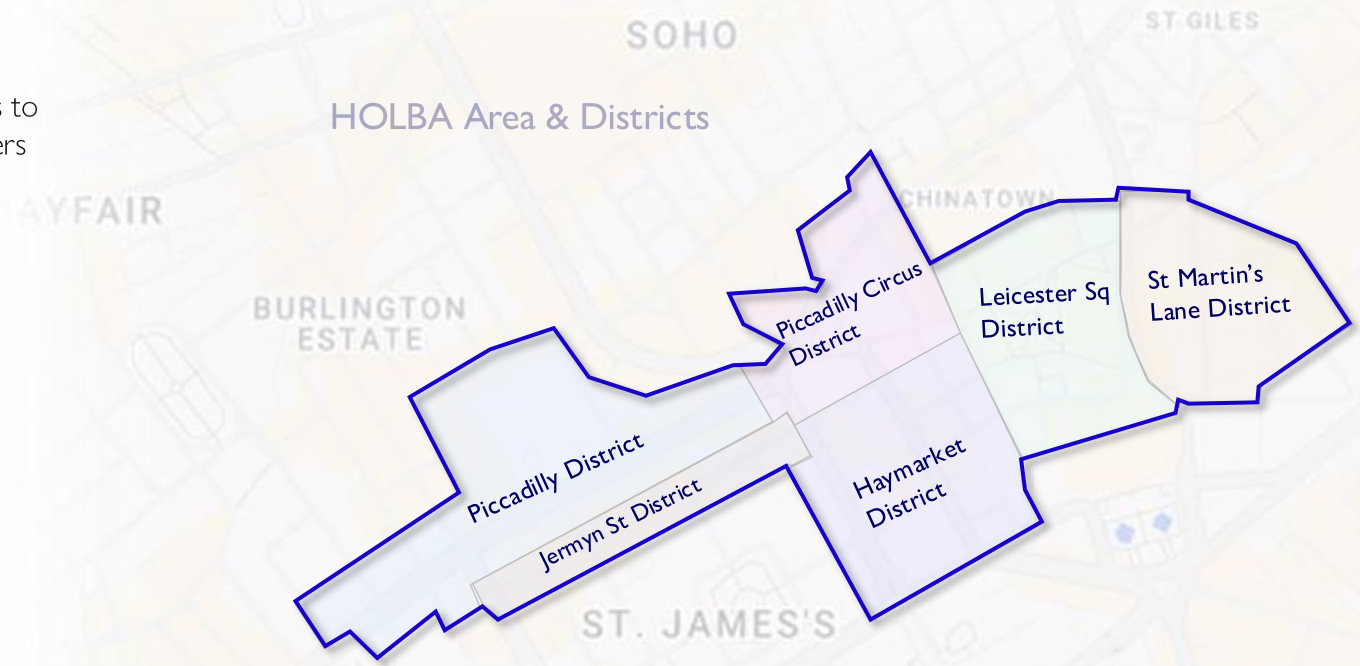
Heart of London Business Alliance (HOLBA) has partnered with Colliers to provide data and insights on visitors to the HOL area to support members and HOLBA management with trading and strategic decision making.

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

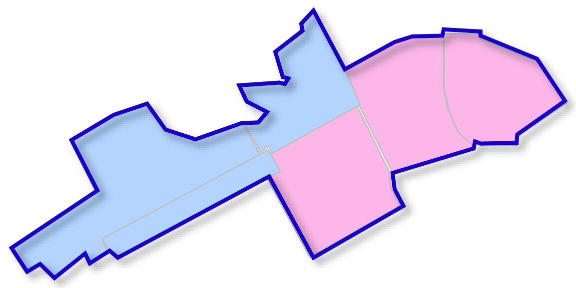
- Visitor footfall & profile
- Visitor behaviour
- Visitor catchment
- TfL station usage

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.

HOLBA Area & Districts



Districts | West vs. East



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EXECUTIVE SUMMARY

November 2025

VARIED FOOTFALL PERFORMANCE ACROSS HOL AREA IN NOVEMBER, WITH STRONG YEAR-ON-YEAR GROWTH OVERALL

Visits across the HOL area rose 7% YoY, driven largely by a large increase in visitors to Piccadilly. Piccadilly was also the most resilient district MoM, growing 3% while overall visits fell 5% from October—likely reflecting increased footfall for the Fortnum & Mason and Burlington Arcade Christmas lights.

LEICESTER SQUARE ATTRACTS MORE LONDON-BASED SOCIAL VISITORS

London-based social visits rose 4% MoM, forming a larger share of the HOL area audience. Leicester Square captured the highest share (69%, up 4% MoM) and the highest visit density (1.7x the West End average), reflecting the draw of the Christmas Market & Skate Leicester Square.

INTERNATIONAL VISITS DRIVEN BY WESTERN EUROPE

Europe accounted for six in ten international visitors to the HOL area in November. Western Europe saw an 11% MoM increase in visitor share (29% of total), while North America (+6%) and the Middle East (+3%) also grew. The rise in Western European visitors contributed to a higher weekend share of international visits (36% vs. 25% domestic), reflecting short-haul weekend trips.

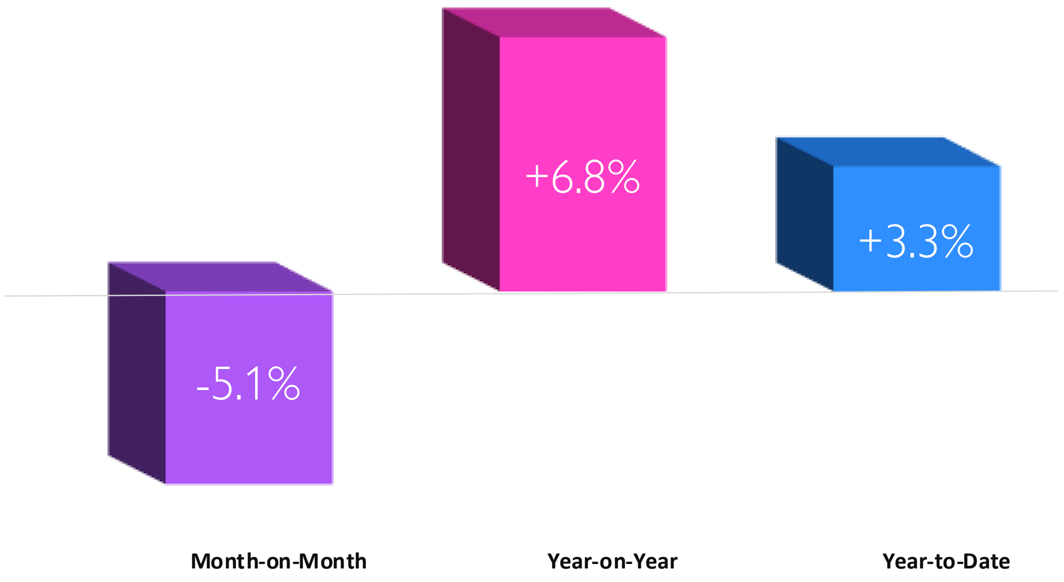
CHANGE IN VISITOR PROFILE ACROSS HOL AREA IN NOVEMBER, REPRESENTING MORE FOCUSED VISITOR BASE

The top five MOSAIC groups accounted for 81% of HOL visitors, up 5% MoM, reflecting a more concentrated, affluent London resident audience. Visitors from the primary catchment also rose (+2.6% MoM; 6% above baseline).

SUMMARY - VISIT VOLUMES

November 2025

Strong growth across the HOL area YoY **(+7%)**, despite decline MoM **(-5%)**, with growth driven by strong Piccadilly performance in November.



Further visit performance detail on Pages 11 – 14

MoM = month-on-month | YoY = year-on-year

SUMMARY - VISIT DWELL

November 2025

Visitor dwell up **+5 mins** vs. 2025 average, with visitors typically spending **2 hrs 28 mins** in the HOL area.

+15 mins
YoY

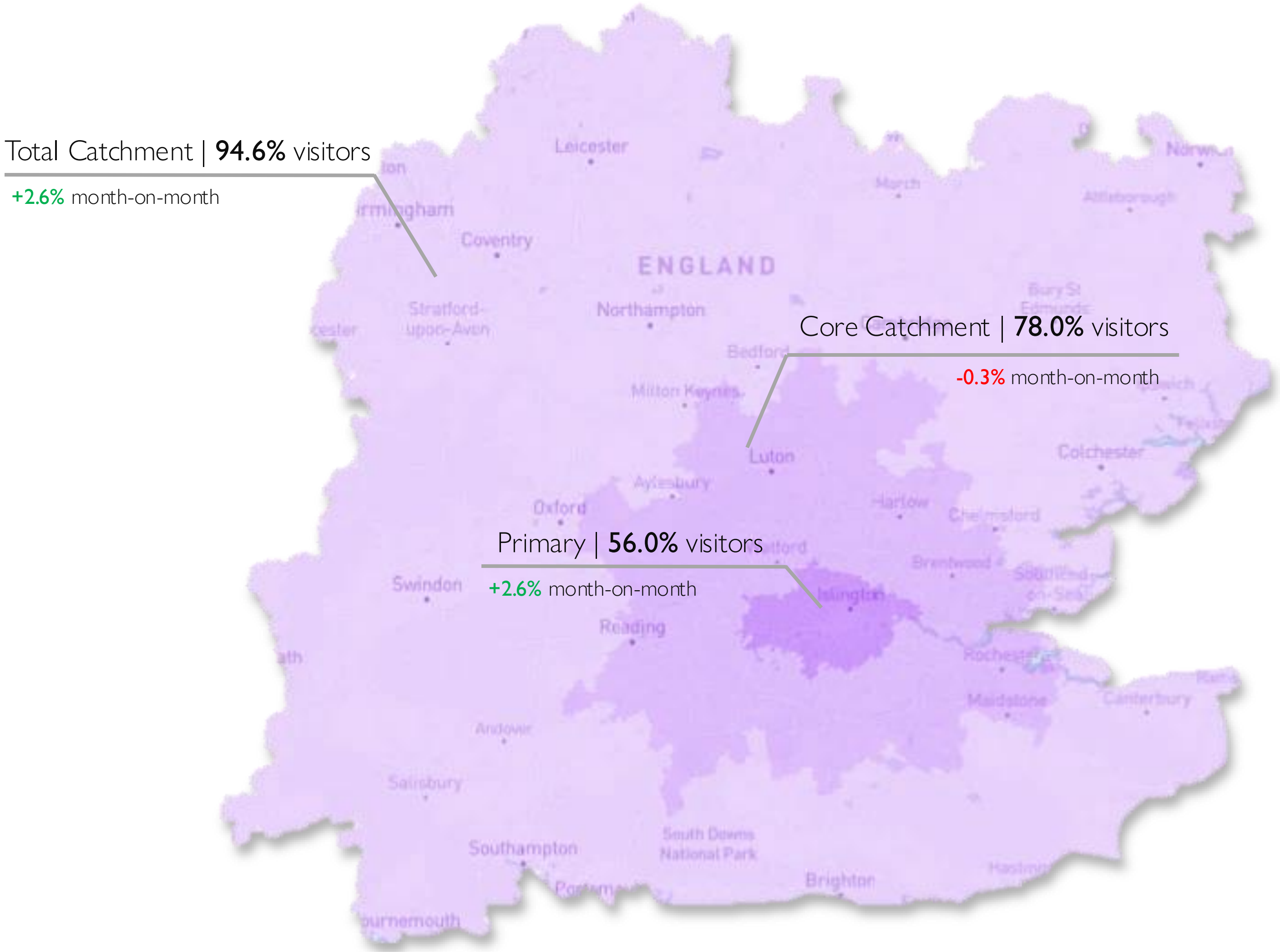
+5 mins
vs. 2025 YtD average

Further dwell performance detail on Page 27

SUMMARY - DOMESTIC VISITOR ORIGIN

November 2025

Uplift in share of visitors from both London-based primary catchment **(+2.6%)** and from further afield in the tertiary catchment **(+3.0%)** vs. October.



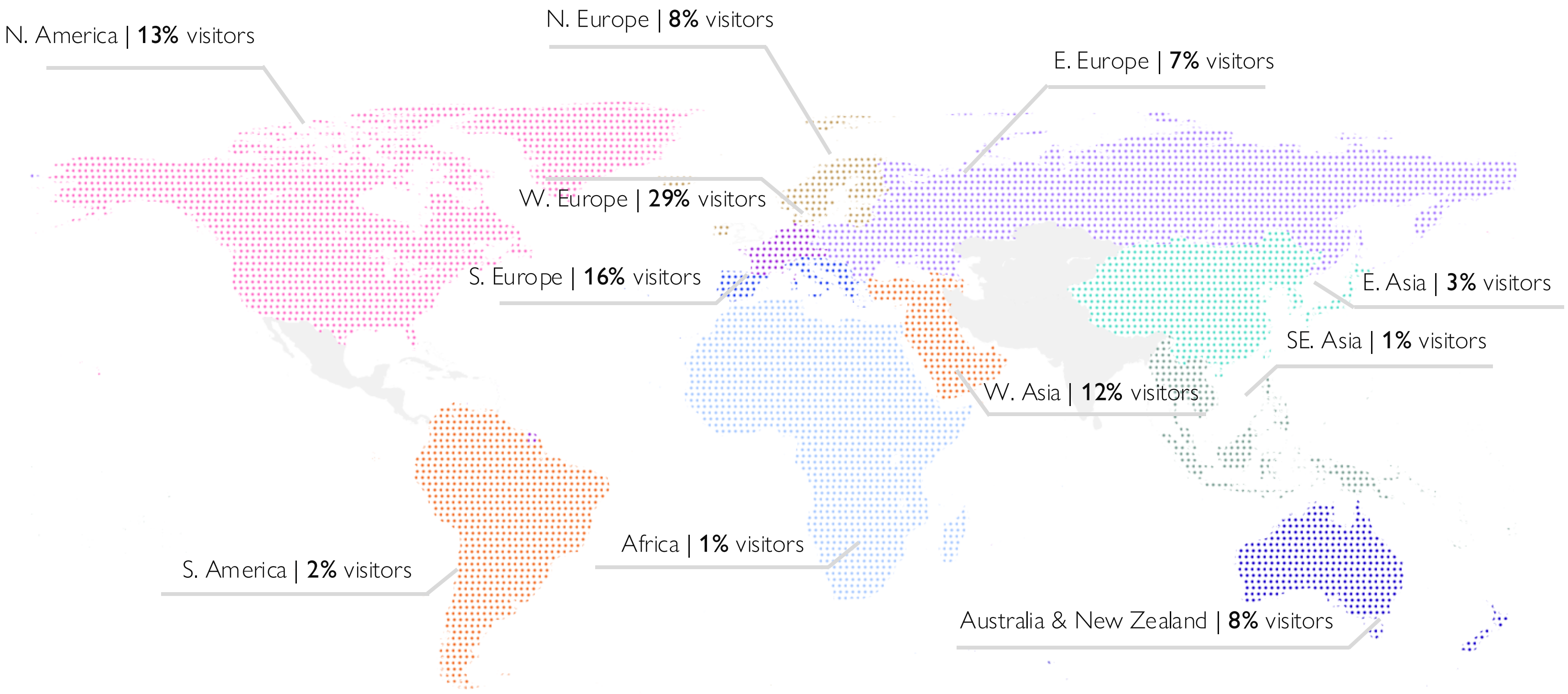
Further catchment performance detail on Pages 15 - 17

SUMMARY - INTERNATIONAL VISITATION

November 2025

14% of total visitors from outside of UK, with **60%** of international visitors from **Europe**, including **29%** from **Western Europe**

Share of International Visits (%)



Further international performance detail on Pages 18 - 19

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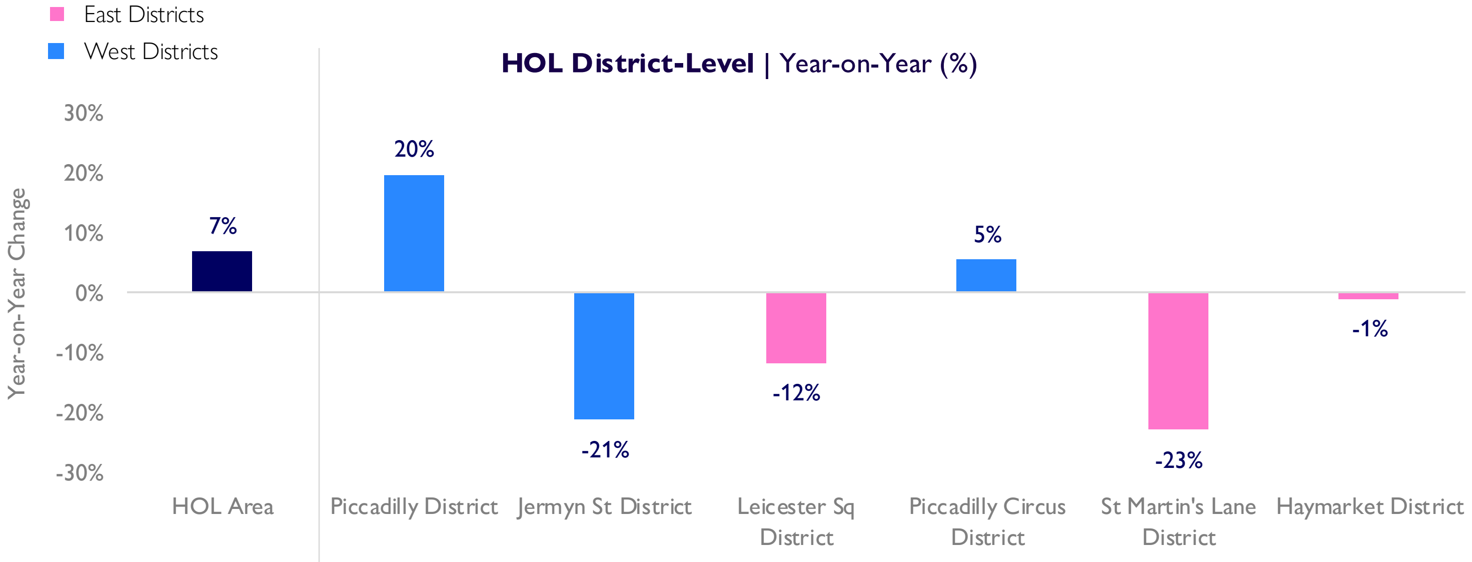
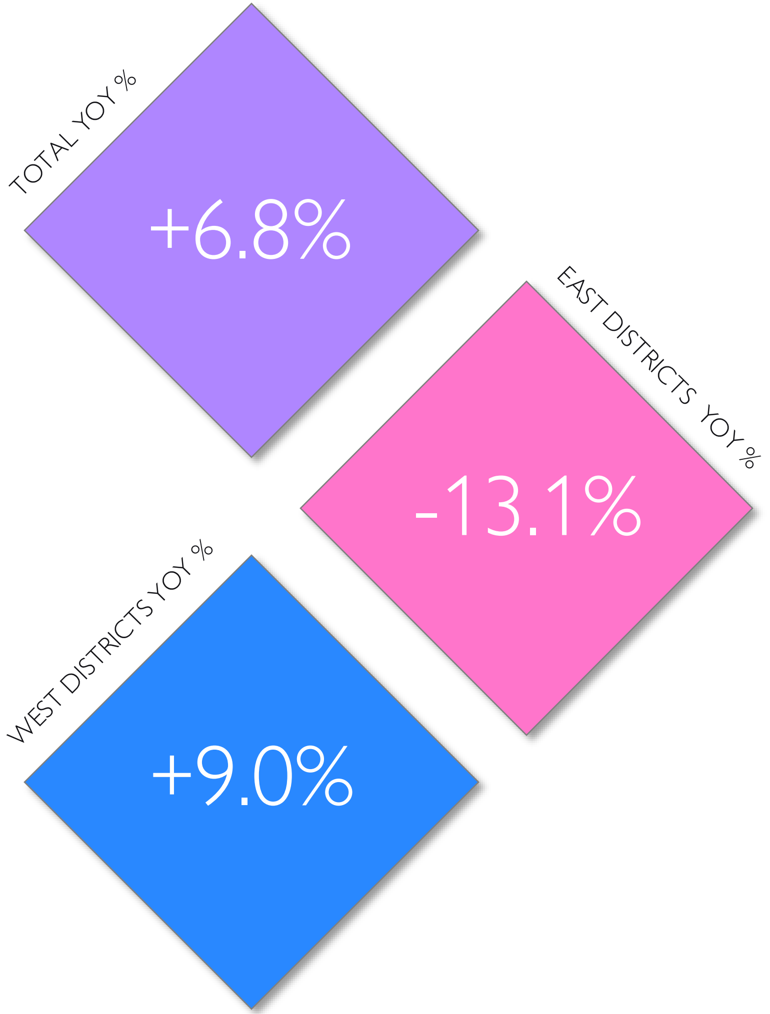
VISIT VOLUMES UP 7% YEAR-ON-YEAR, WITH STRONG GROWTH ACROSS WORKER-LED DISTRICTS

- Visits across the HOL area grew 6.8% YoY, driven by Piccadilly and Piccadilly Circus. Piccadilly saw the strongest growth, up 20% YoY, likely boosted by high-end retail and tourism.





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

HOL AREA MAINTAINS YOY GROWTH IN 2025

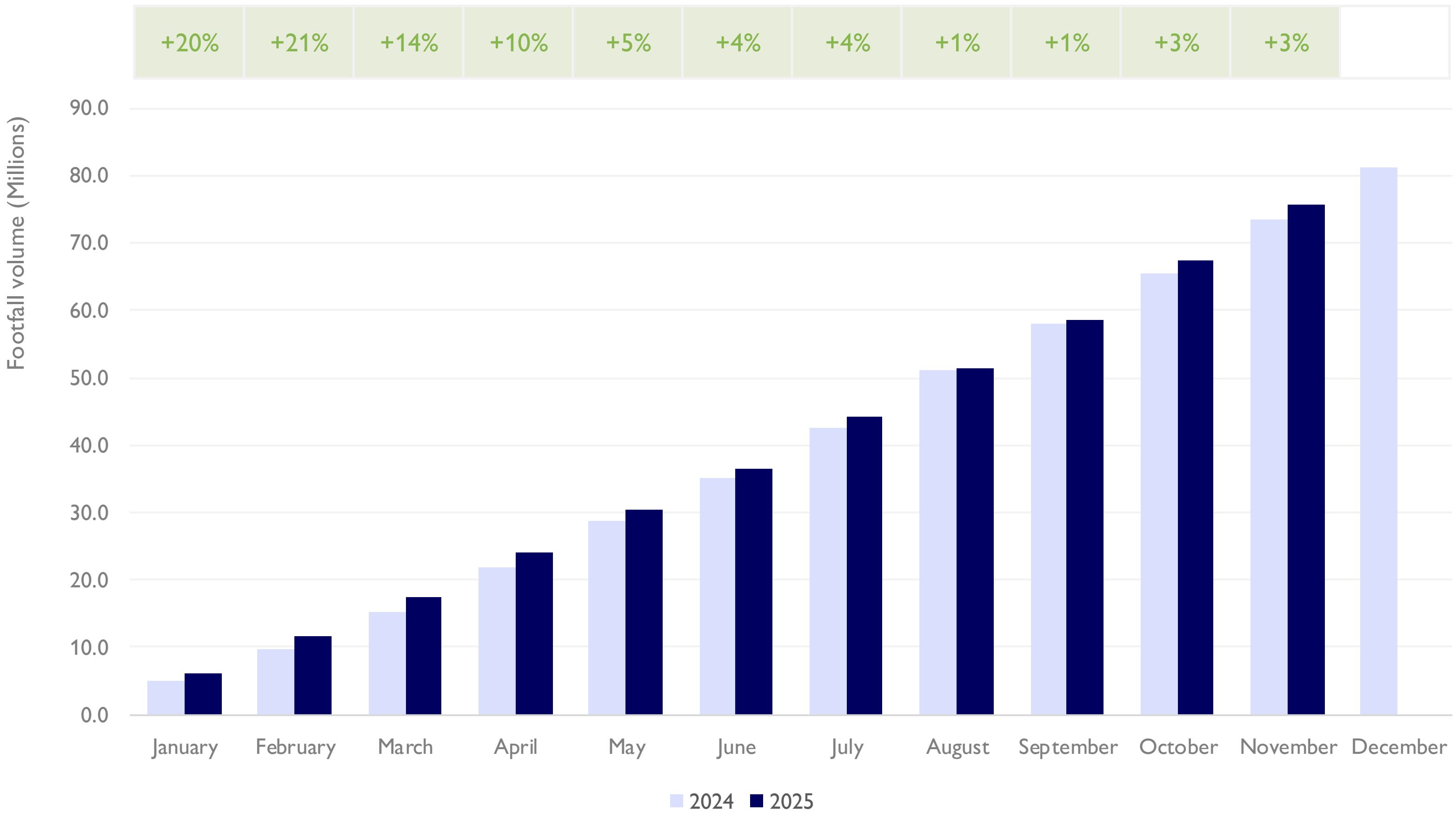
HOL AREA

+3%

YtD

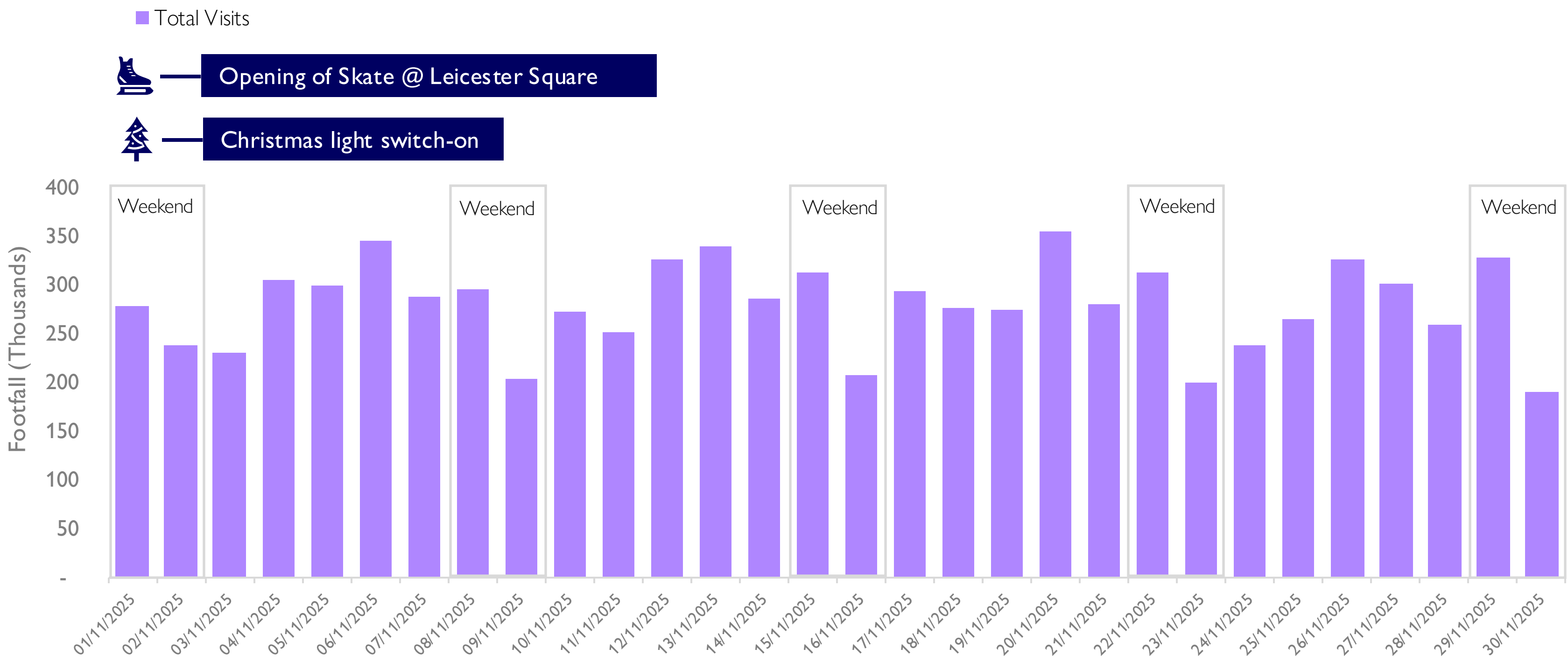
- Continued November growth lifted 2025 YTD performance to +3.3% vs. 2024.
- Strongest YtD performance has been seen across Haymarket District (+8%) and Piccadilly District (+4%), vs. 2024.

HOL Area | Year-to-Date Visit Performance



HOL VISITS STEADY IN NOVEMBER, WITH KEY SPIKE FOLLOWING FESTIVE LIGHTS

HOL Area | Monthly Footfall



	Week 45	Week 46	Week 47	Week 48
Avg. Daily Visits	280,919	285,035	284,349	272,543
Avg. Daily Rain (mm)	0.0	3.5	3.2	1.0

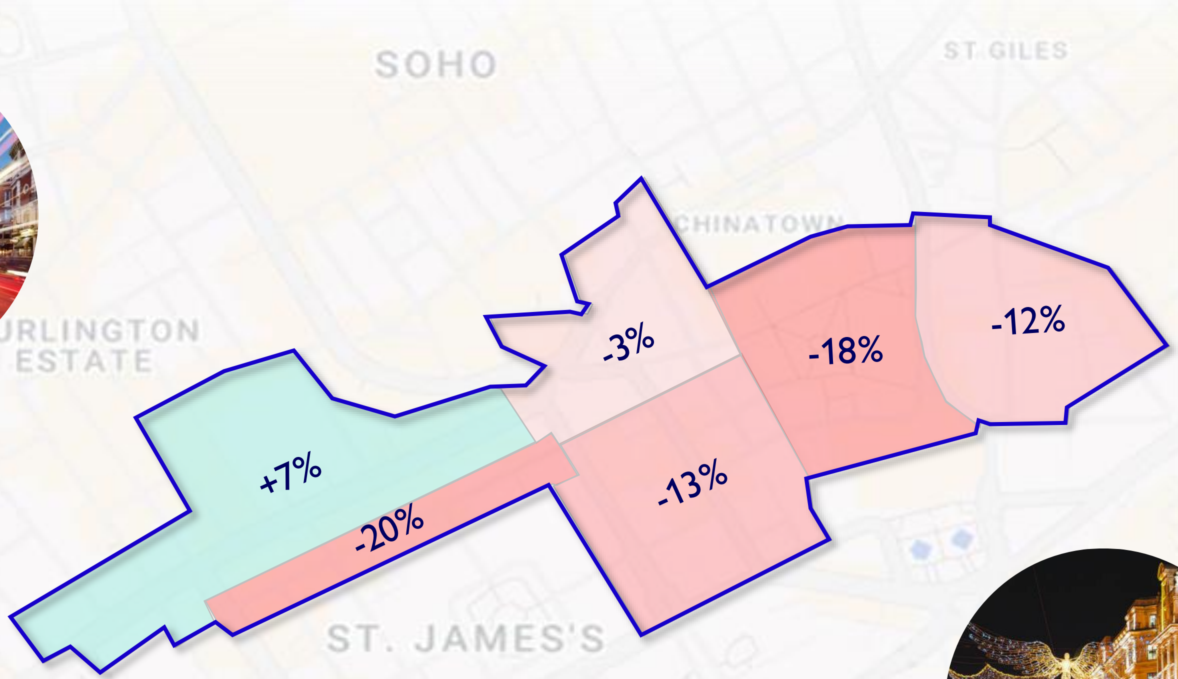
- Daily visits in November remained within +/-14% of the monthly average.
- Week 46 saw the highest weekly traffic, +2.1% above the November average.
- Sunday 2nd November recorded the largest daily uplift (+14%), following the opening of Leicester Square's Christmas Market & Skate.

STRONGEST MONTH-ON-MONTH UPLIFT EXPERIENCED ACROSS PICCADILLY DISTRICT

HOL AREA

-5%

month-on-month



- Overall visits to the HOL area fell 5% MoM, with Piccadilly the only district to grow, building on its strong October performance.
- Despite most districts experiencing a decline in footfall MoM, footfall around main roads in the HOL area saw an average growth of 2% vs. October.

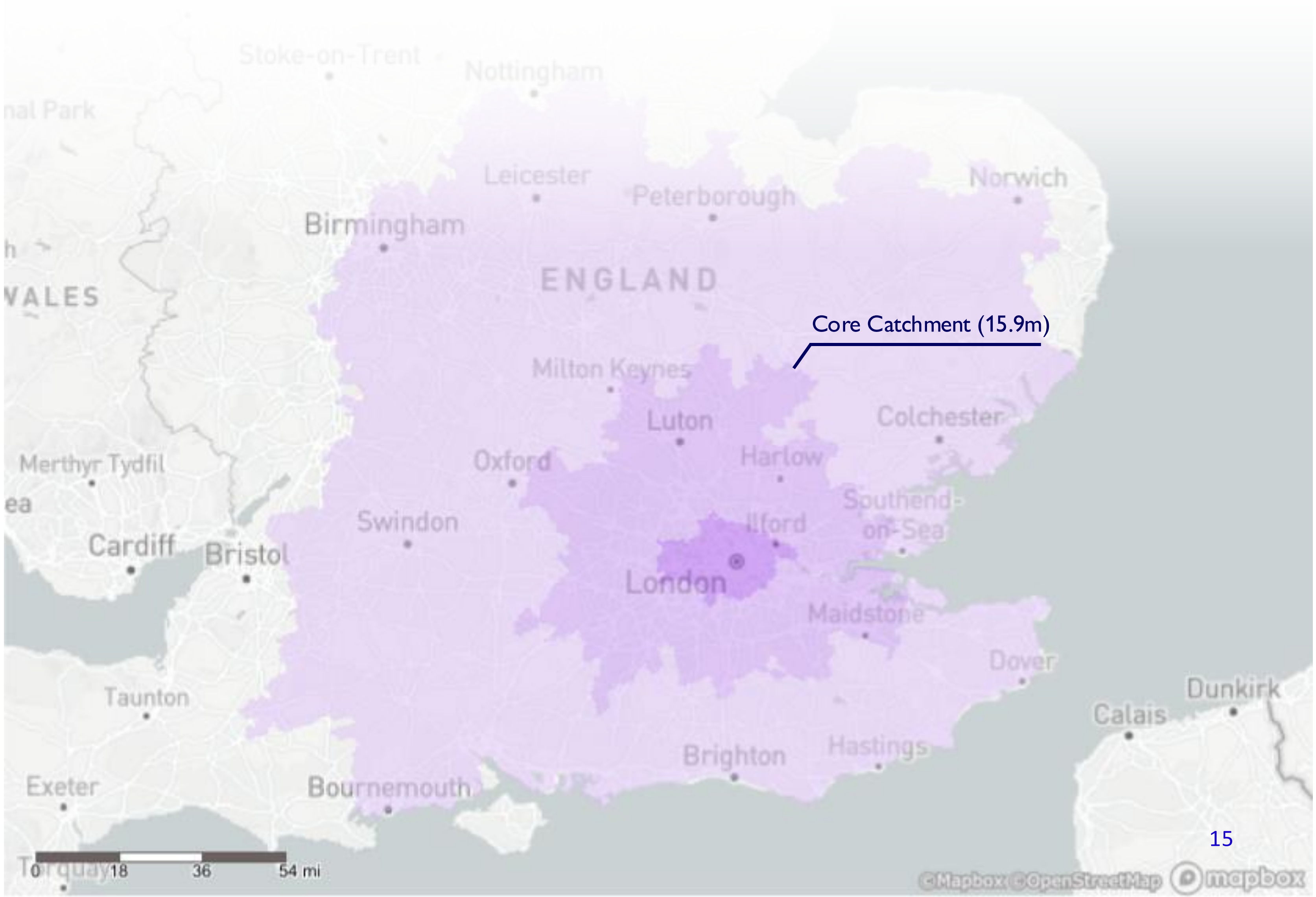
15.9M PEOPLE IN HOL AREA'S DOMESTIC CORE CATCHMENT

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

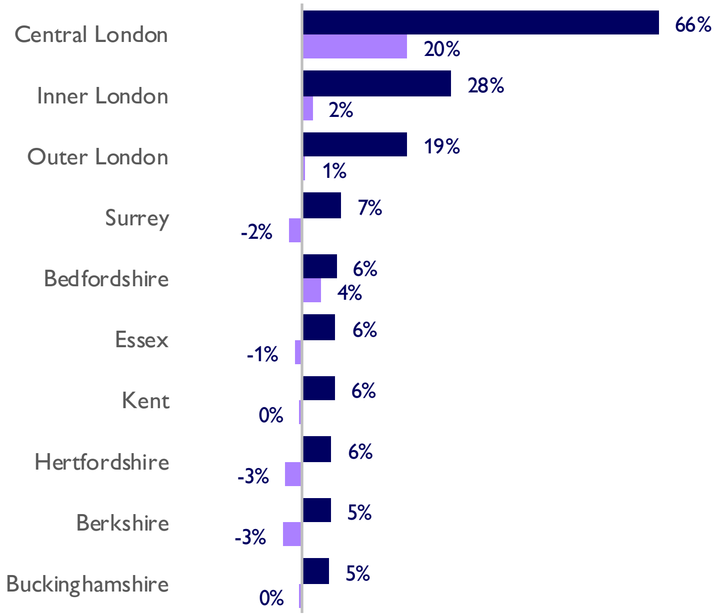


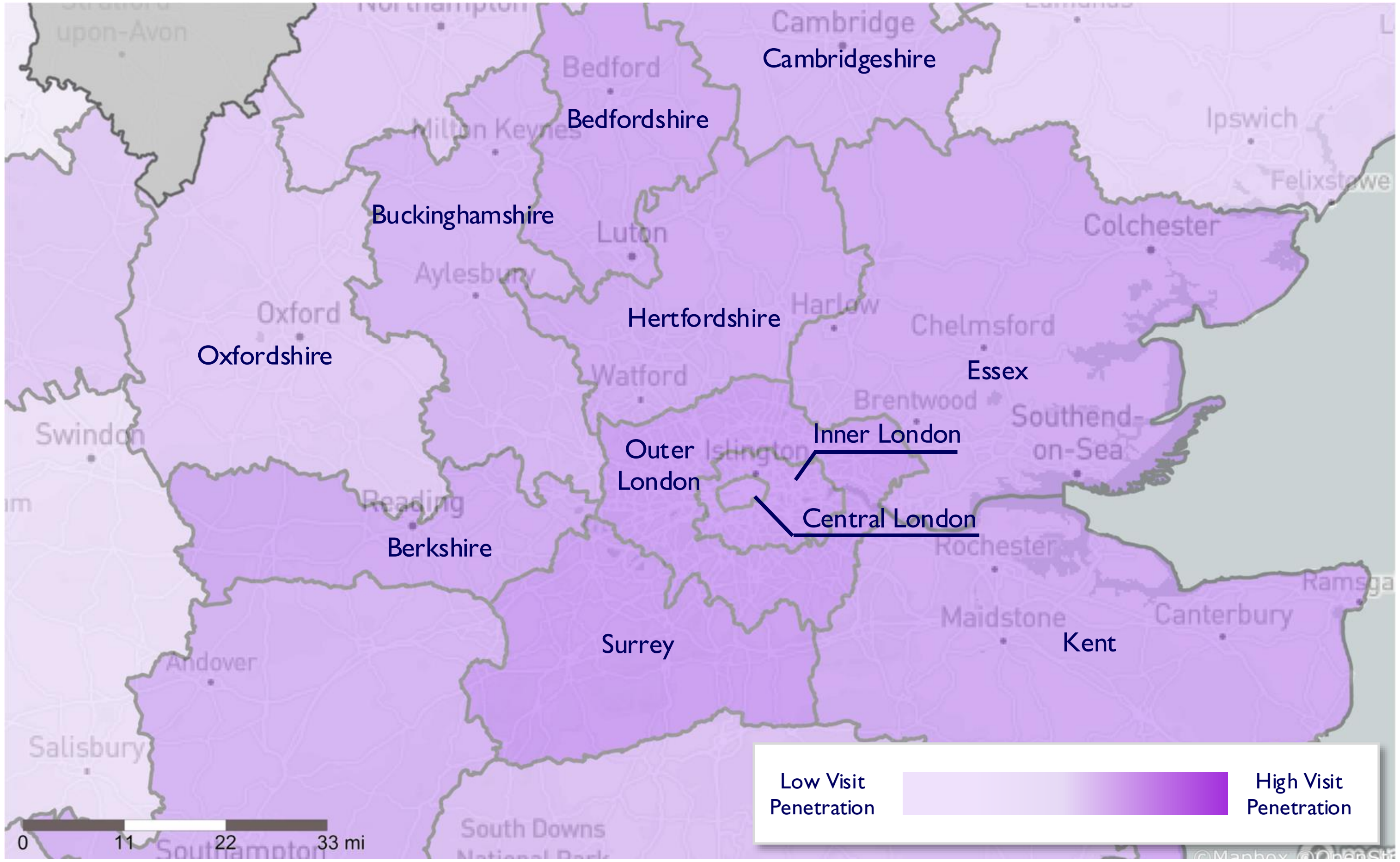
HIGHEST VISIT PENETRATION ACROSS LONDON WITH INCREASED PENETRATION MONTH-ON-MONTH

66% visit penetration within Central London

+20% Increased **penetration** from Central London month-on-month

Visit Penetration | Top 10 Counties



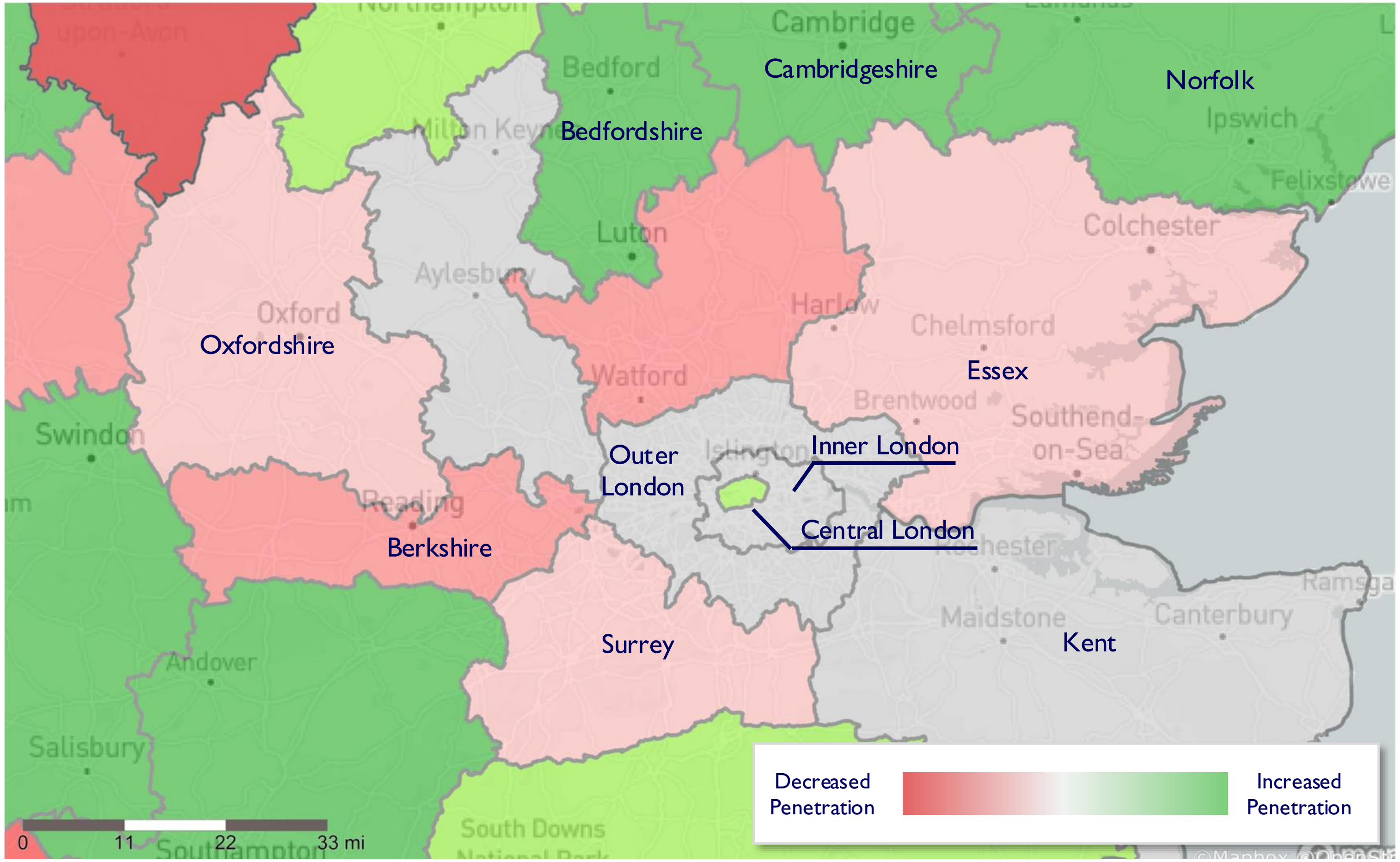


Penetration refers to % of population from a zone that visits HOL area

HOL AREA SEES HIGHER CATCHMENT PENETRATION IN NOVEMBER

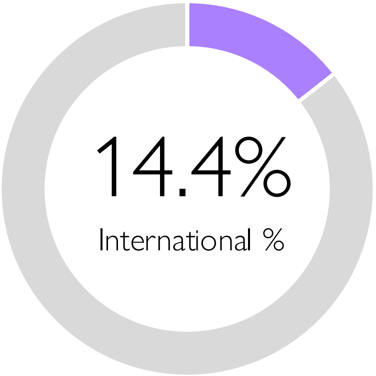
- Total HOL catchment share rose 2.6% MoM, and 6% higher than expected, driven by an increase in visitors from both primary and tertiary catchments.
- Despite an overall MoM decline in visits (-5.6%), penetration from Central London areas increased, reflecting a higher share of local visits.

Catchment Band	Nov-25 Visit %	Percentage Point change vs. previous month
Primary	56.0%	+2.6%
Secondary	22.0%	-2.9%
Core Catchment *(75% of visitors)*	**78.0%**	**-0.3%**
Tertiary	16.5%	+3.0%
Total Catchment *(90% of visitors)*	**94.6%**	**+2.6%**
Pull-In	5.4%	-2.6%



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

GROWTH IN SHARE OF INTERNATIONAL VISITORS YEAR-ON-YEAR IN NOVEMBER, WITH ~15% OF TOTAL HOL AREA VISITORS



-5.6%
MoM

+7.5%
YoY

- International visitors made up **14.4%** of all November visits — a 7.5% increase YoY despite -5.6% decline MoM.
- MoM decline influenced by comparison to October half-term driving higher share of international visitors last month.
- All districts experienced uplift in international share of visitors YoY. St Martin's Lane, providing a more tourist-led offering, saw the greatest uplift, +12.6% YoY and captured the highest share of international visitors (20.5%).

Area	International Mix (%)	Month-on-Month	Year-on-Year
HOL Area	14.4%	-5.6%	+7.5%
Piccadilly District	14.1%	-4.3%	+8.2%
Jermyn St District	18.5%	-3.6%	+11.3%
Leicester Sq District	16.3%	-6.7%	+8.6%
Piccadilly Circus District	20.0%	-8.7%	+11.6%
St Martin's Lane District	20.5%	-0.6%	+12.6%
Haymarket District	17.8%	-14.0%	+9.4%
Core West End	11.9%	-3.9%	+5.1%

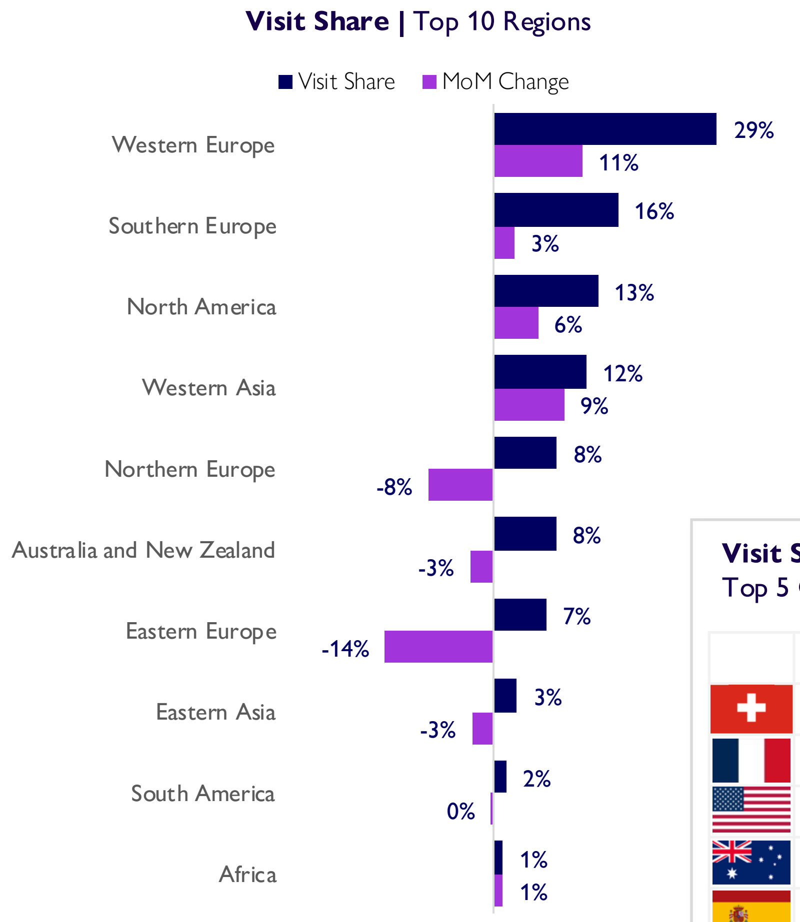
Change in mix is calculated via percentage point change
Please note, as of April 2025 Huq changed their methodology for calculating international visitation. For more info please contact HOLBA

INCREASED SHARE OF VISITS FROM N.AMERICA IN NOVEMBER, REPRESENTING THANKSGIVING IMPACT

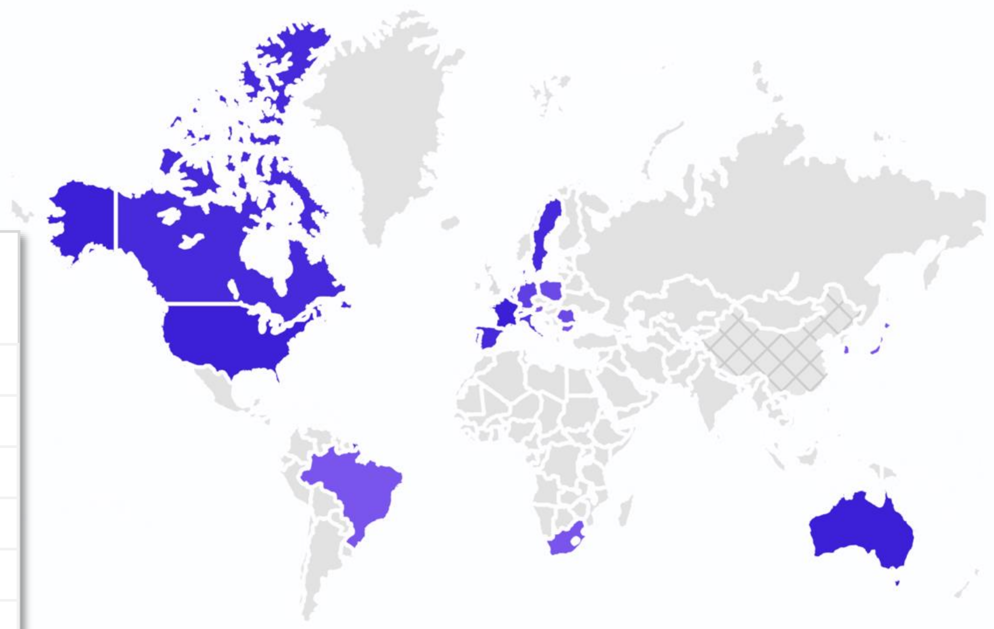
59.9% Europe
-8.2% MoM -14.7% YoY

13.4% N. America
+5.7% MoM +3.0% YoY

6.0% Middle East
+3.1% MoM -0.1% YoY



Share of International Visits (%)



Visit Share
Top 5 Countries (% of Intl)

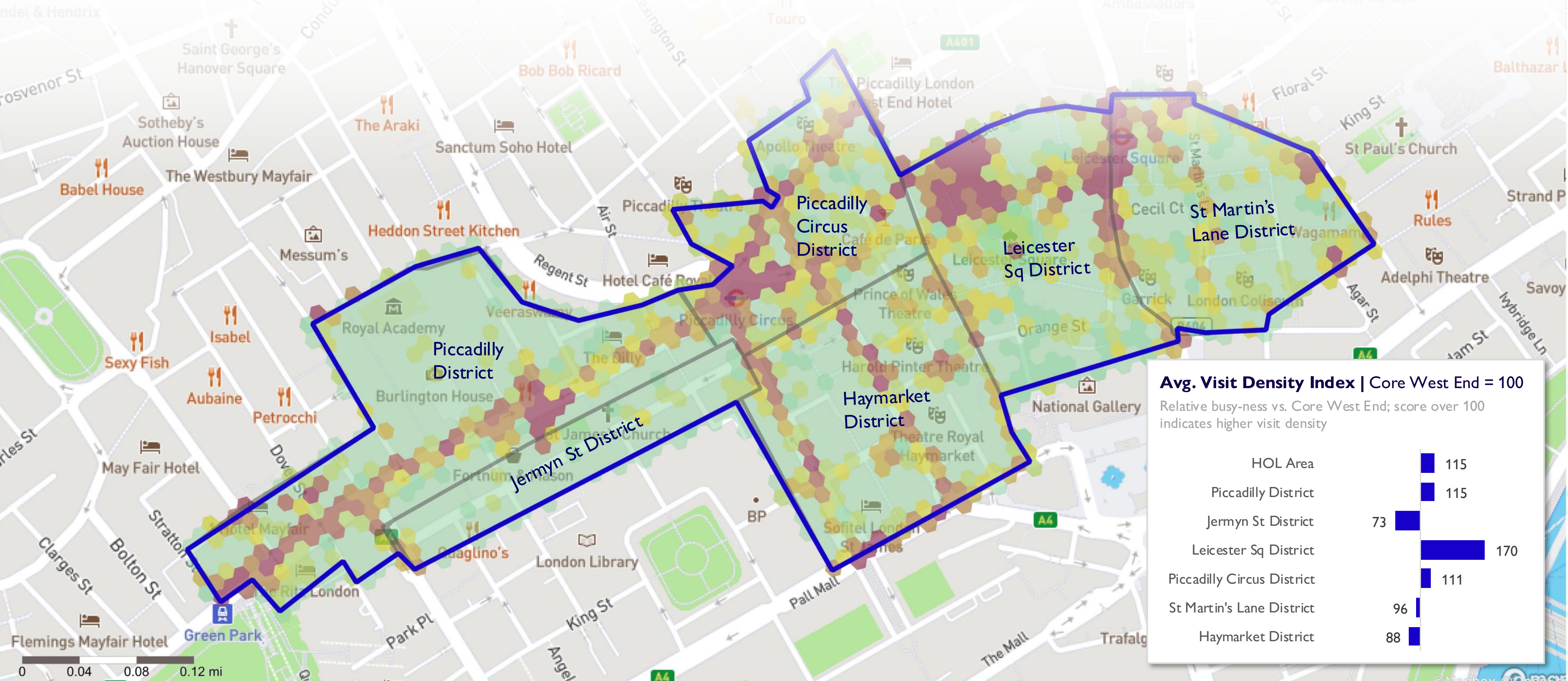
	Country	%	MoM
	Switzerland	11.7%	+10.4%
	France	8.7%	+2.1%
	United States	8.3%	+1.2%
	Australia	8.1%	-3.0%
	Spain	6.8%	+3.0%

International data unavailable for China

Change in mix is calculated via percentage point change

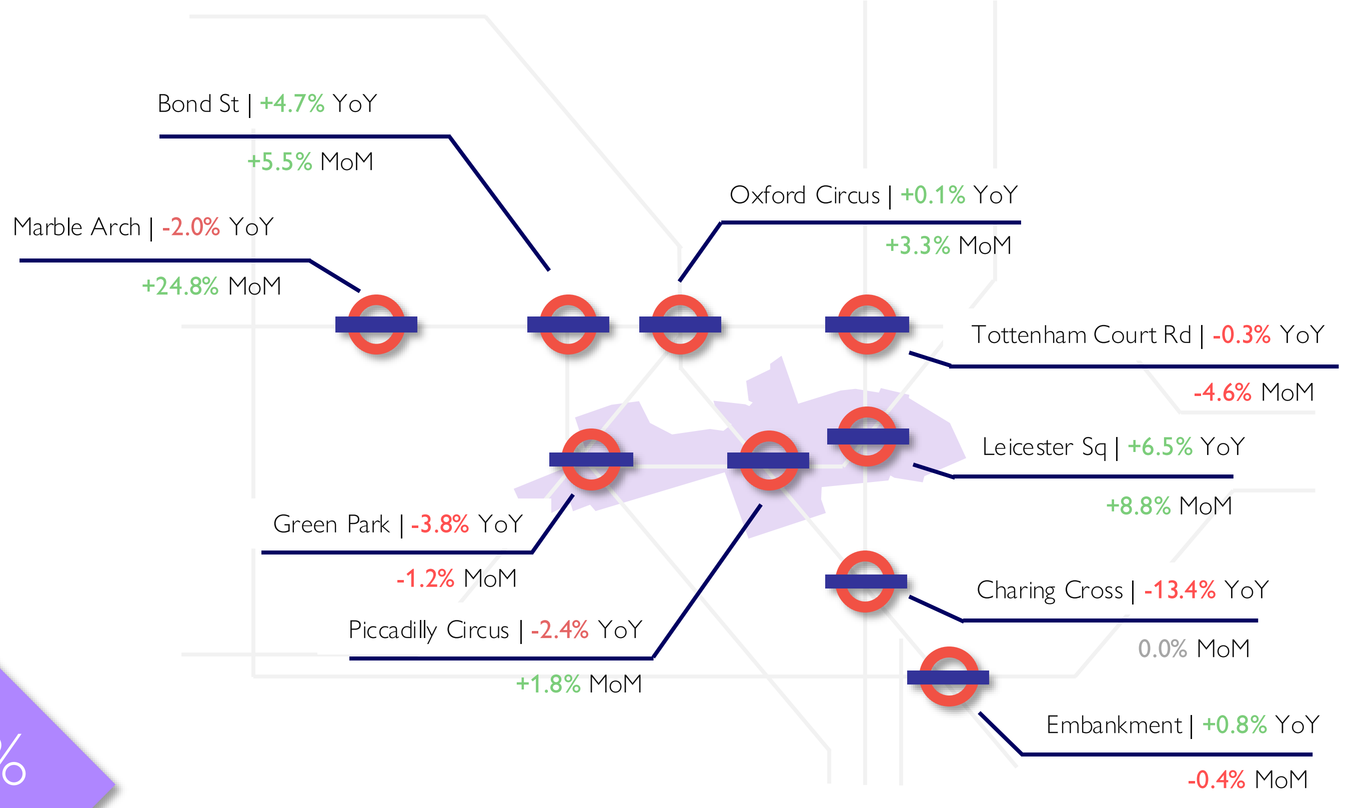
Please note, as of April 2025 Huq changed their methodology for calculating international visitation. For more info please contact HOLBA

HIGHEST VISIT DENSITY ACROSS LEICESTER SQ DISTRICT, WITH HOTSPOTS SURROUNDING MAIN WEST END STATIONS



GROWTH IN STATION USAGE ACROSS HOL AREA VS. OCTOBER

- TfL station usage across HOL stations saw uplift MoM (**+2.9%**) with relatively consistent YoY performance (**-0.1%**).
- Strongest growth in station usage across HOL area was seen at Leicester Square station; uplift in entries/exits by **+6.5%** YoY & **+8.8%** MoM, with **~90k** daily passengers starting or ending their journey at the station. Possibly attracted by Skate Leicester Square Ice Rink.



Increase in usage from stations within HOL area in November 2025 vs. October 2025[1]

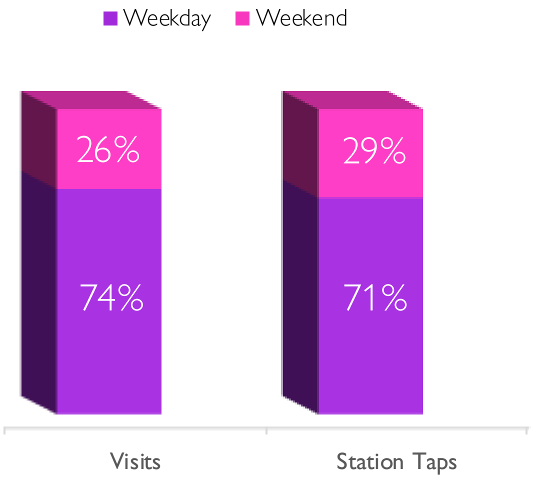
+2.9%
MoM

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

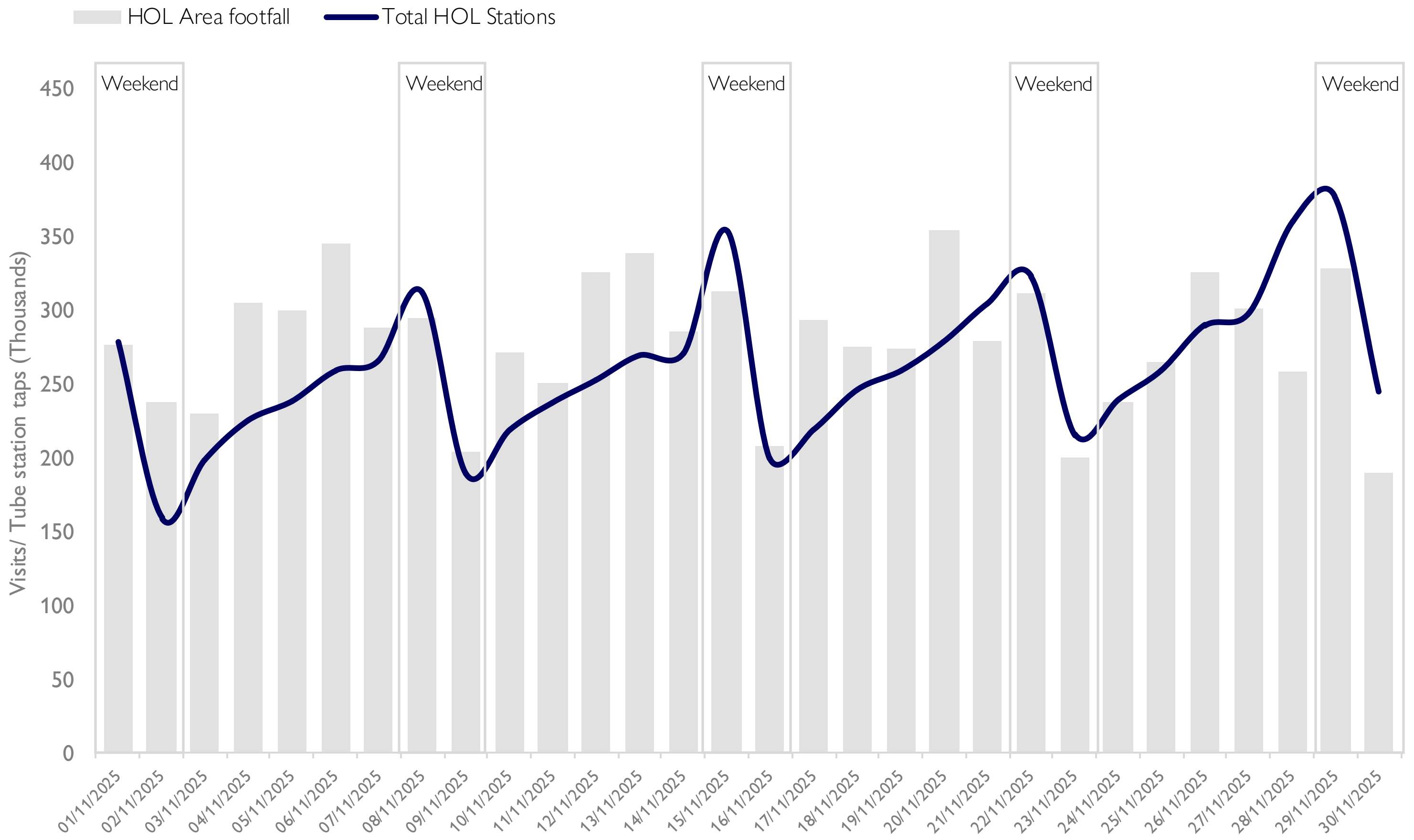
GREATER WEEKEND BIAS ACROSS WEST END TFL STATIONS VS. HOL AREA VISITS IN NOVEMBER

- ~280k daily passengers starting/ending their journeys through HOL area stations in November.
- While slight alignment between station usage & HOL area footfall, TfL usage continues to show a greater weekend bias (29% compared to 26% of visits).
- Closure of Elizabeth Line on 15th / 16th November contributed to an uplift in HOL stations, offering visitors an alternative route into the West End via Piccadilly & Jubilee lines.

Visit & TfL Usage | Weekday vs Weekend



Footfall vs. TfL Usage | November 2025



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

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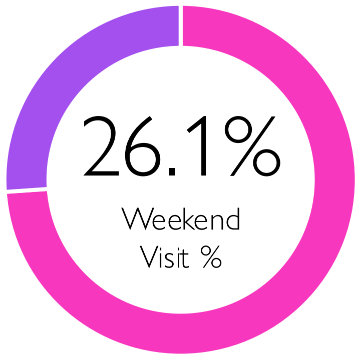
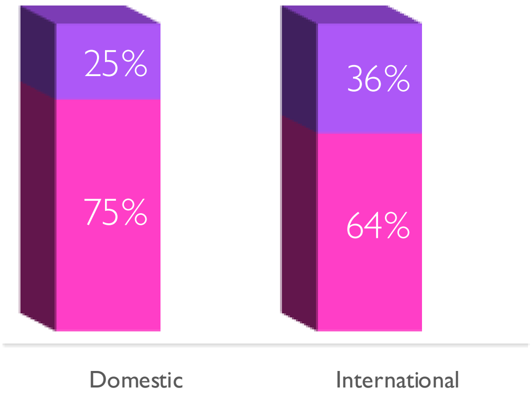
INCREASED SHARE OF WEEKEND VISITS IN NOVEMBER, WITH TOURIST-LED DISTRICTS CAPTURING HIGHER WEEKEND SHARE

HOL Area | Weekday vs Weekend



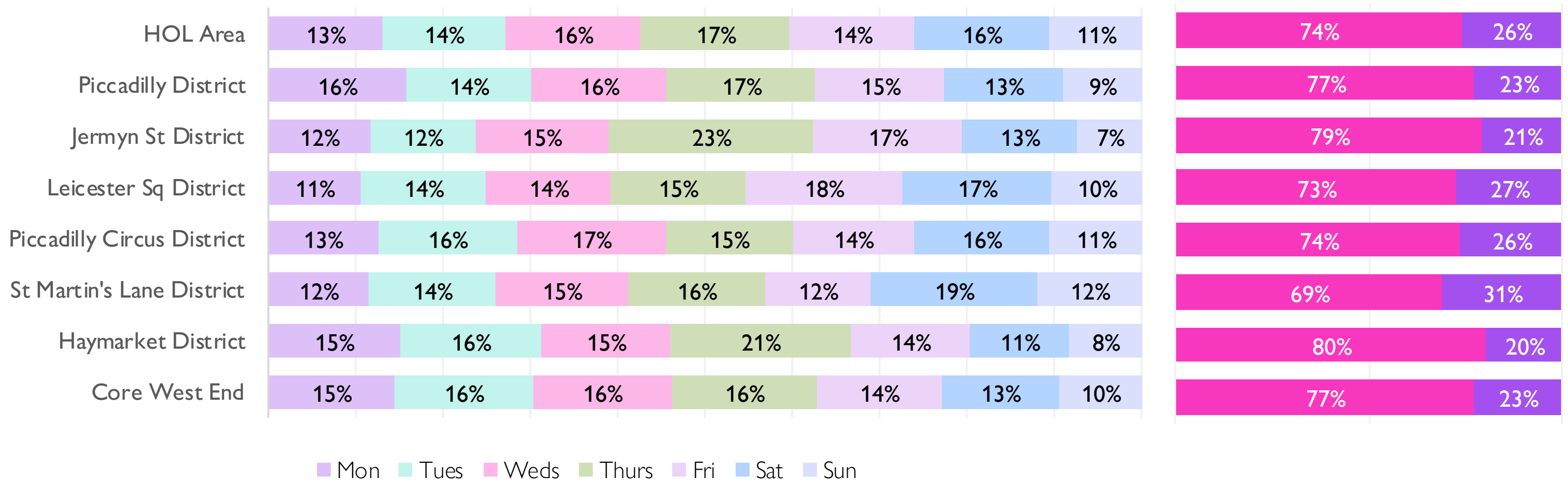
Visitor Origin | Weekday vs Weekend



- Increased share of weekend visits MoM (+1.3%), due in part by comparison to school half-term holidays in October giving social visitors greater flexibility.
- The HOL area sees a 3-percentage point higher weekend share than the wider Core West End, driven by leisure offering..
- International visits are skewed to weekends (36% vs. 25% domestic); a combination of domestic workers across the week international weekend-trips contributing to this disparity.

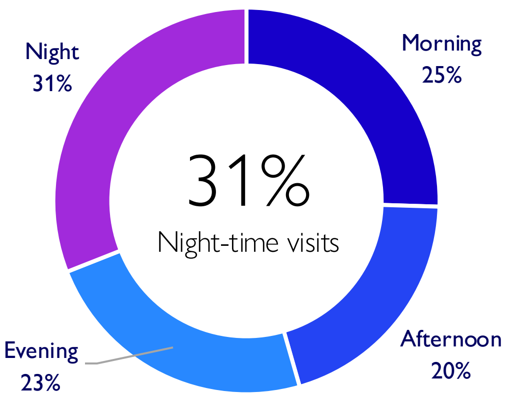
Daily Visit Distribution | District-Level

Weekday vs Weekend



CONSIDERABLE NIGHT-TIME ECONOMIC ACTIVITY ACROSS HOL AREA WITH JUST UNDER A THIRD OF VISITORS BETWEEN 6PM – 6AM

HOL Area | Visitors by Time Band

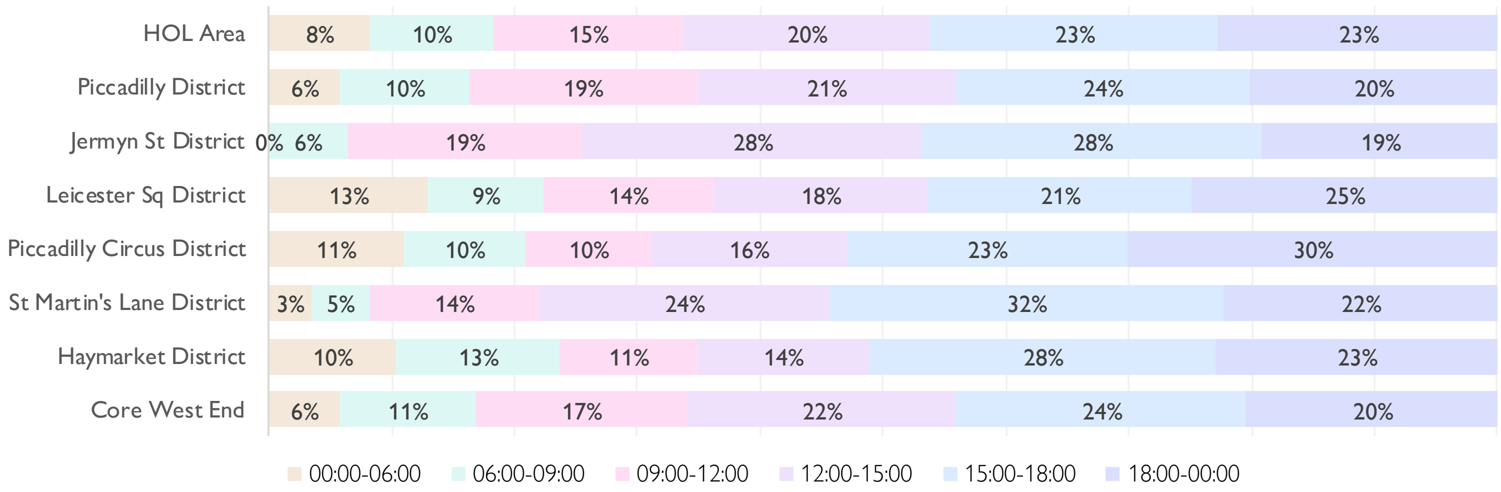


MOM

-2%
share of night-time visits

25%
HOL area visits post-6pm

Hourly Visit Distribution | District-Level

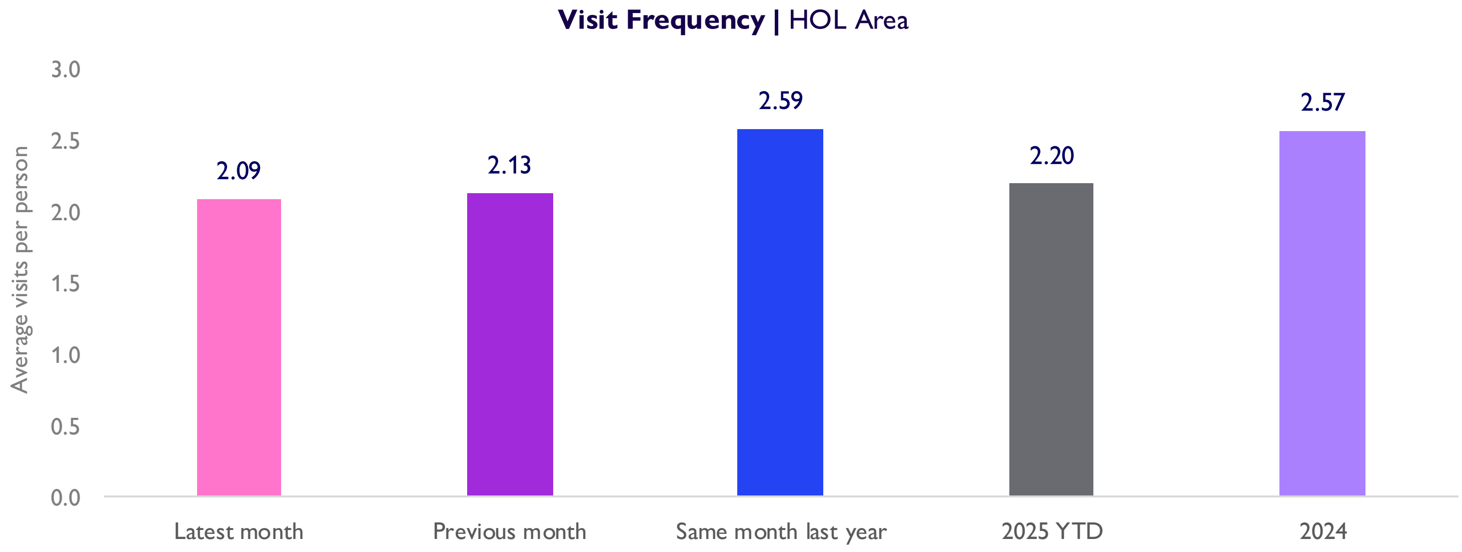


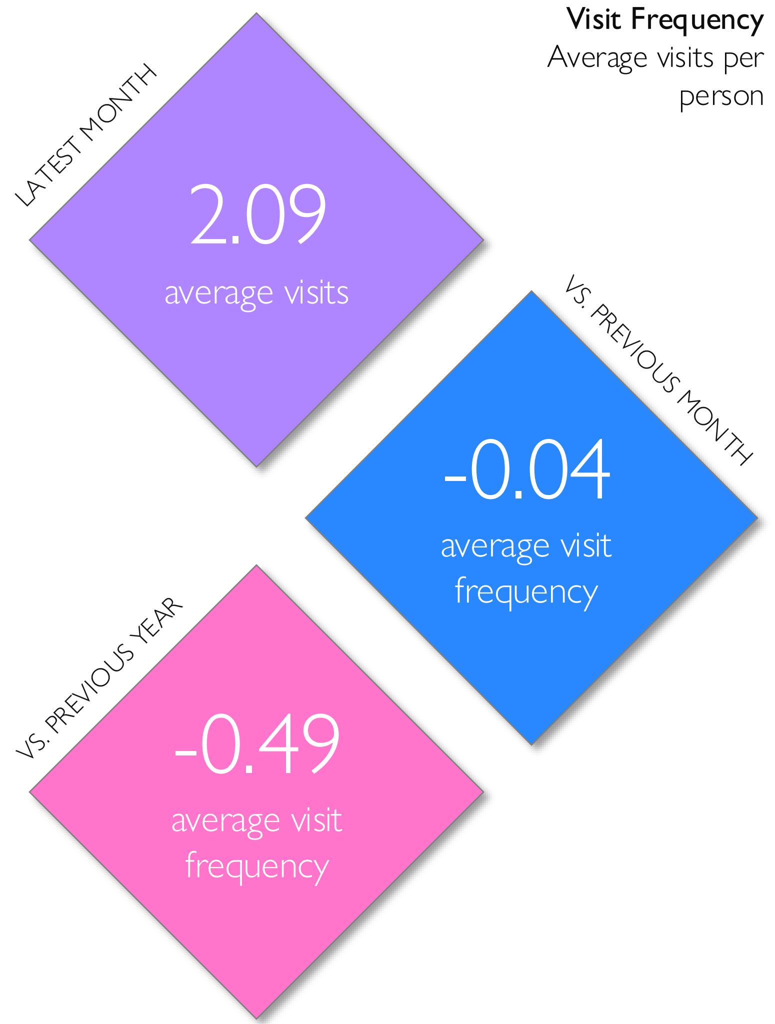
- Slight MoM decrease in share of night-time visits (-2%), despite still accounting for a high share of visitors to the area in November (31%).
- Districts that are more leisure-orientated (e.g. Piccadilly Circus District & Leicester Sq District) continue to see the greatest share of visits after 6pm.

Morning (06:00 – 12:00) | Afternoon (12:00 – 15:00) | Evening (15:00 – 18:00) | Night (18:00 – 06:00)

SLIGHT DECLINE IN VISIT FREQUENCY VS. 2025 YTD AVERAGE IN NOVEMBER

- The average visitor visited the HOL area 2.09 times during November, down from 2.13 times in October 2025 and 2.20 times YtD.
- Slight decline in visitor frequency further represents increased share of domestic social visitors in November. Larger YoY decline in visit frequency driven by a greater share of international visitors in November 2025 vs. November 2024, visiting the area less frequently. Additionally on the build up to Christmas we typically see more tourists

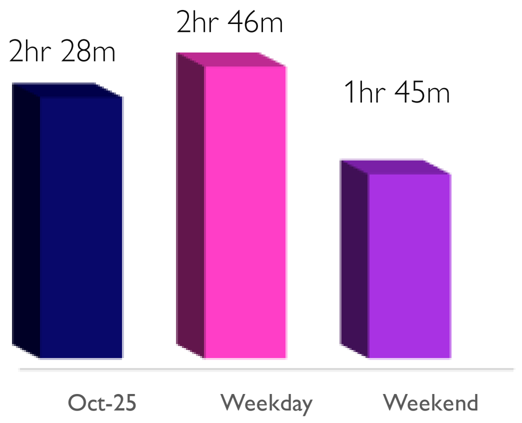




ALL DISTRICTS ACROSS HOL AREA EXPERIENCED HIGHER AVERAGE DWELL IN NOVEMBER VS. YEAR-TO-DATE AVERAGE

- Average visitor dwell time in November saw growth YoY (**+15 mins**) and vs. 2025 YtD average (**+5 mins**).
- Despite decline in visitor frequency, as discussed on the previous page, when visitors visited the area, they typically stayed longer on average.

Average Visit Dwell
Weekday vs Weekend



2hrs 28mins — Latest month average dwell

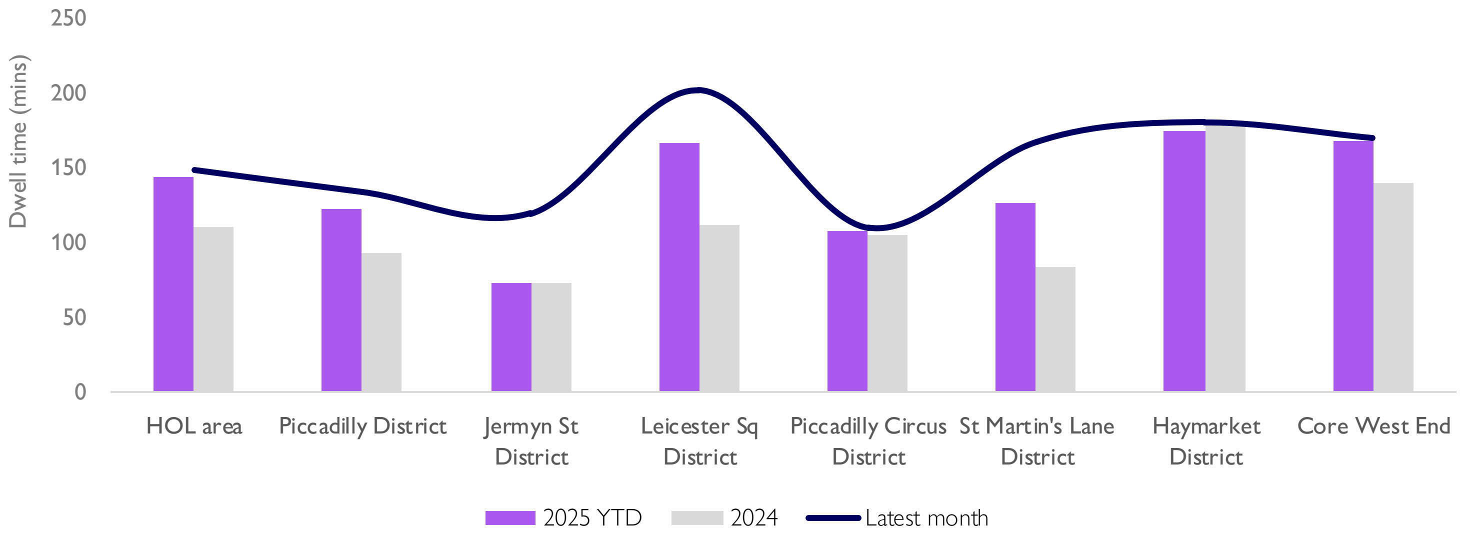
+0 min MoM

+15 mins YoY

+5 mins vs. YtD

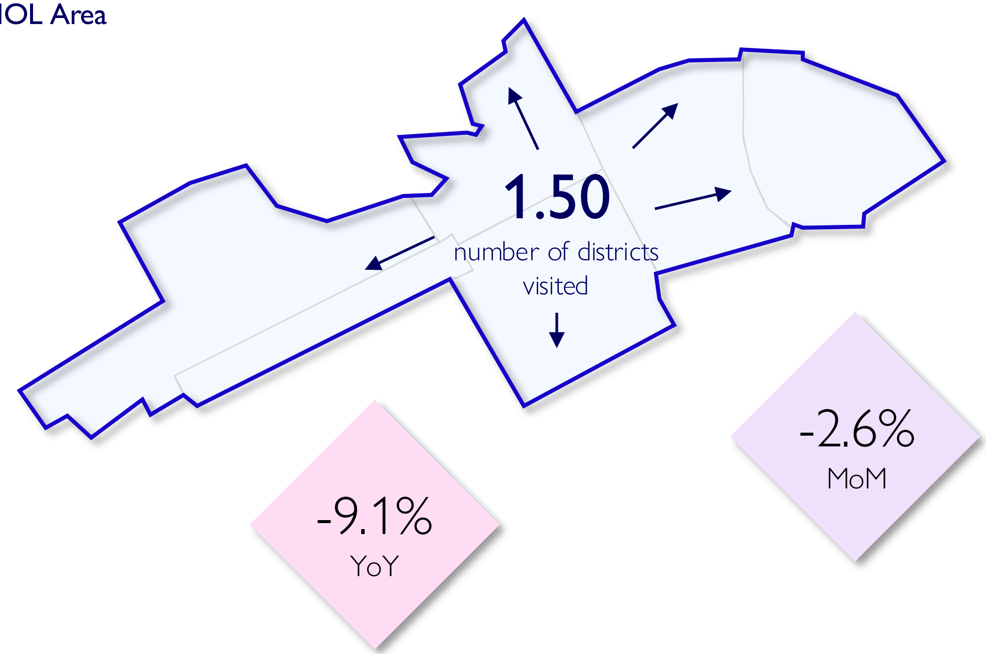
Average Dwell | District-Level

Latest Month	2h 28m	2h 13m	1h 59m	3h 21m	1h 50m	2h 48m	3h 0m	2h 50m



MORE TRIP-FOCUSED VISITS ACROSS HOL AREA MONTH-ON-MONTH

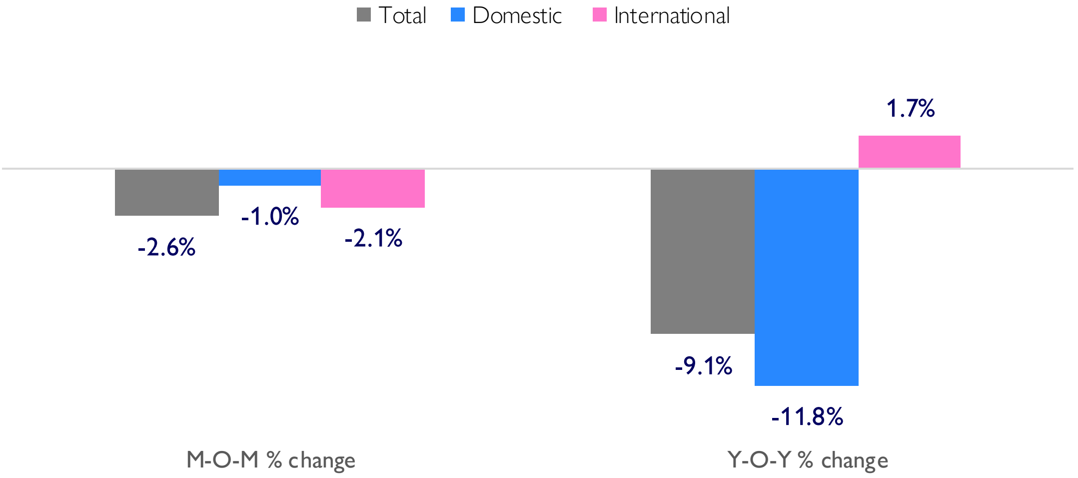
HOL Area



- Cross visitation helps understand the **number of visitors visiting multiple districts per trip** across the HOL area.
- Average visitor to HOL area visited **1.50 districts during their trip** in November 2025.

- Cross-visitation much higher for international visitors (**1.83** districts visited) vs. domestic visitors (**1.45** districts).
- Both domestic and international visitors experienced slightly decline in cross-visitation MoM leading to an overall -2.6% decrease. However, YoY, domestic visitors saw much greater decline (-12%), driving overall cross-visitation decline on -9% YoY across HOL area.

Change in Cross Visitation | HOL Area



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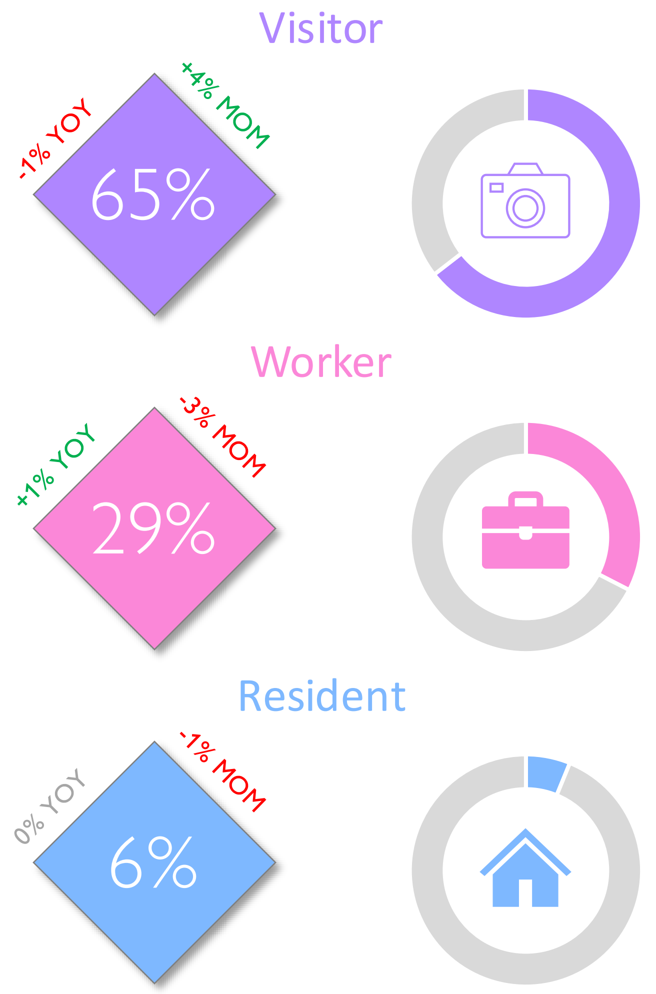
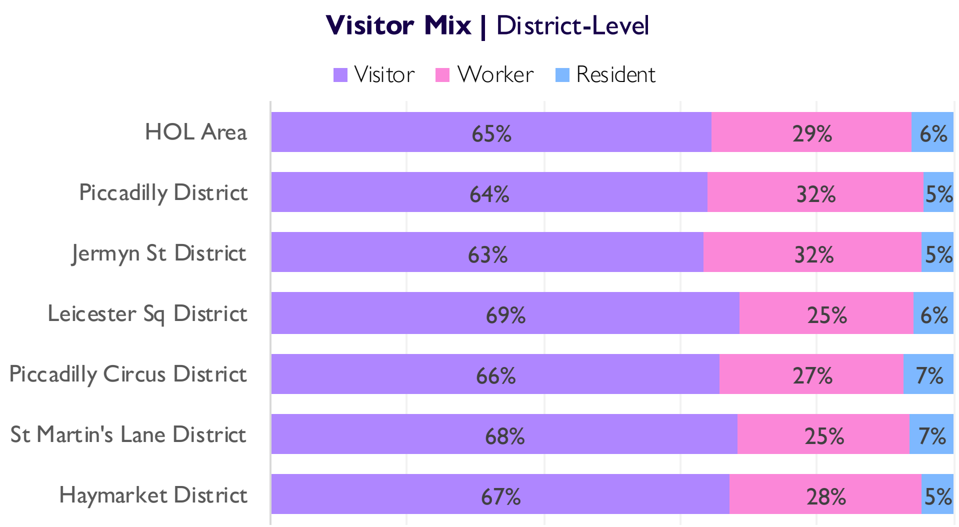
INCREASED SHARE OF DOMESTIC SOCIAL VISITORS ACROSS HOL AREA, REPRESENTING START OF THE FESTIVE PERIOD



- Shift in visitor profile across the HOL area MoM, with large increase in share of domestic visitors on social reasons visiting the area in November, up +4% MoM.
- Eastern tourist-focused districts continue to capture a greater share of domestic visitors; 69% of Leicester Sq District visitors, up +4% MoM representing impact of Christmas Market & Skate at Leicester Square.
- See page 37 for visitor group definitions.



	Year-on-Year			Month-on-Month		
	Vis.	Wrk.	Res.	Vis.	Wrk.	Res.
HOL Area	-1%	+1%	0%	+4%	-3%	-1%
Piccadilly District	0%	0%	0%	+5%	-4%	-1%
Jermyn St District	+1%	0%	0%	+6%	-4%	-1%
Leicester Sq District	-1%	+1%	0%	+4%	-3%	-1%
Piccadilly Circus District	0%	+1%	-1%	+3%	-2%	-1%
St Martin's Lane District	-2%	+2%	+1%	+4%	-3%	-1%
Haymarket District	-1%	+1%	0%	+4%	-3%	-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

TOP 5 MOSAIC GROUPS REPRESENT 81% OF HOL AREA VISITORS WITH LESS DISTRIBUTED VISITOR BASE IN NOVEMBER

- Visitors to the HOL area in November represented a more focused MOSAIC profile, more representative of local, affluent London residents.
- Five main MOSAIC groups, contribute 81% of visits to the area.
- See page 39 for mosaic group definitions.

Top 3 segments this month

City Prosperity | 22% visitors
High status city dwellers living in central locations, pursuing careers with high rewards

Urban Cohesion | 18% visitors
Residents of settled urban communities with a strong sense of identity

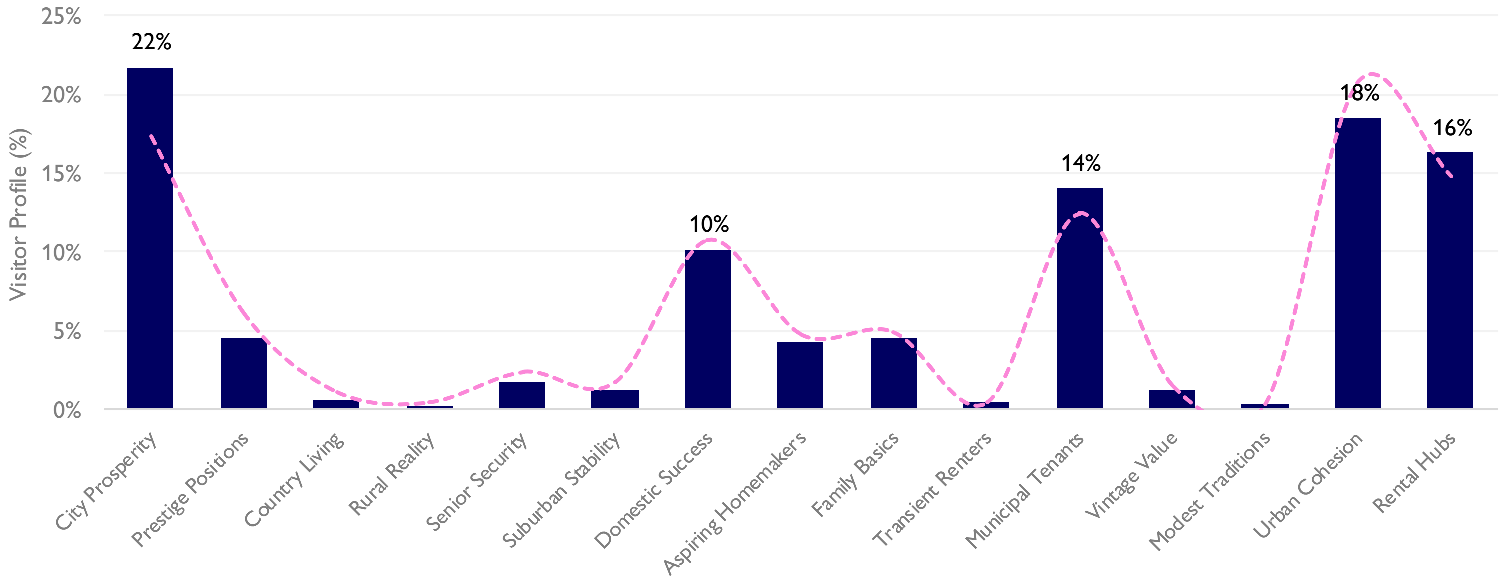
Rental Hubs | 16% visitors
Educated young people privately renting in urban neighbourhoods

MOSAIC Segmentation | HOL Area

HOL Area — Core West End

81%	visitors from 5 highest % groups
22%	visitors within 'City Prosperity'
+4.8%	share of visits MoM from top 5 groups

	City Prosperity	Prestige Positions	Country Living	Rural Reality	Senior Security	Suburban Stability	Domestic Success	Aspiring Homemakers	Family Basics	Transient Renters	Municipal Tenants	Vintage Value	Modest Traditions	Urban Cohesion	Rental Hubs
Month-on-Month	+3.4%	-1.9%	-0.1%	0.0%	-0.8%	-0.7%	-1.2%	-0.9%	0.0%	-0.1%	+2.0%	-0.3%	0.0%	+0.3%	+0.3%

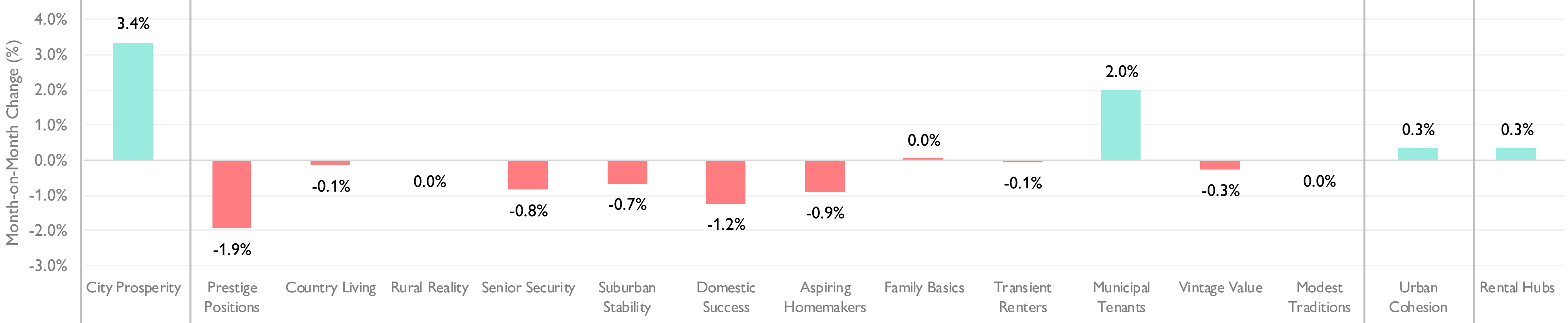


Experian MOSAIC | Detailed descriptions of all groups in appendix

See Page 49 for Mosaic Segmentation definitions

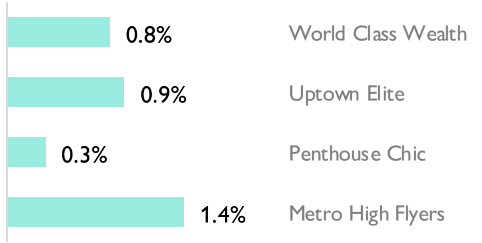
INCREASED SHARE OF VISITORS FROM TOP TWO DOMINANT GROUPS, REPRESENTING AFFLUENT LONDON RESIDENT

MOSAIC Segmentation | Month-on-Month Change



Highest Visitor Share Group

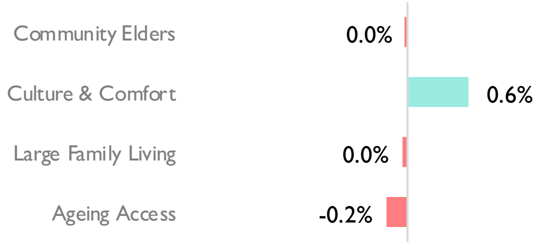
City Prosperity | MoM Change



- +3.4% overall increase in visitors from 'City Prosperity'.
- Increase across all groups, with largest MoM increase across 'Metro High Flyers' group: *'career-minded 20 & 30 year olds…'*, representing London residents.

2nd Highest Visitor Share Group

Urban Cohesion | MoM Change



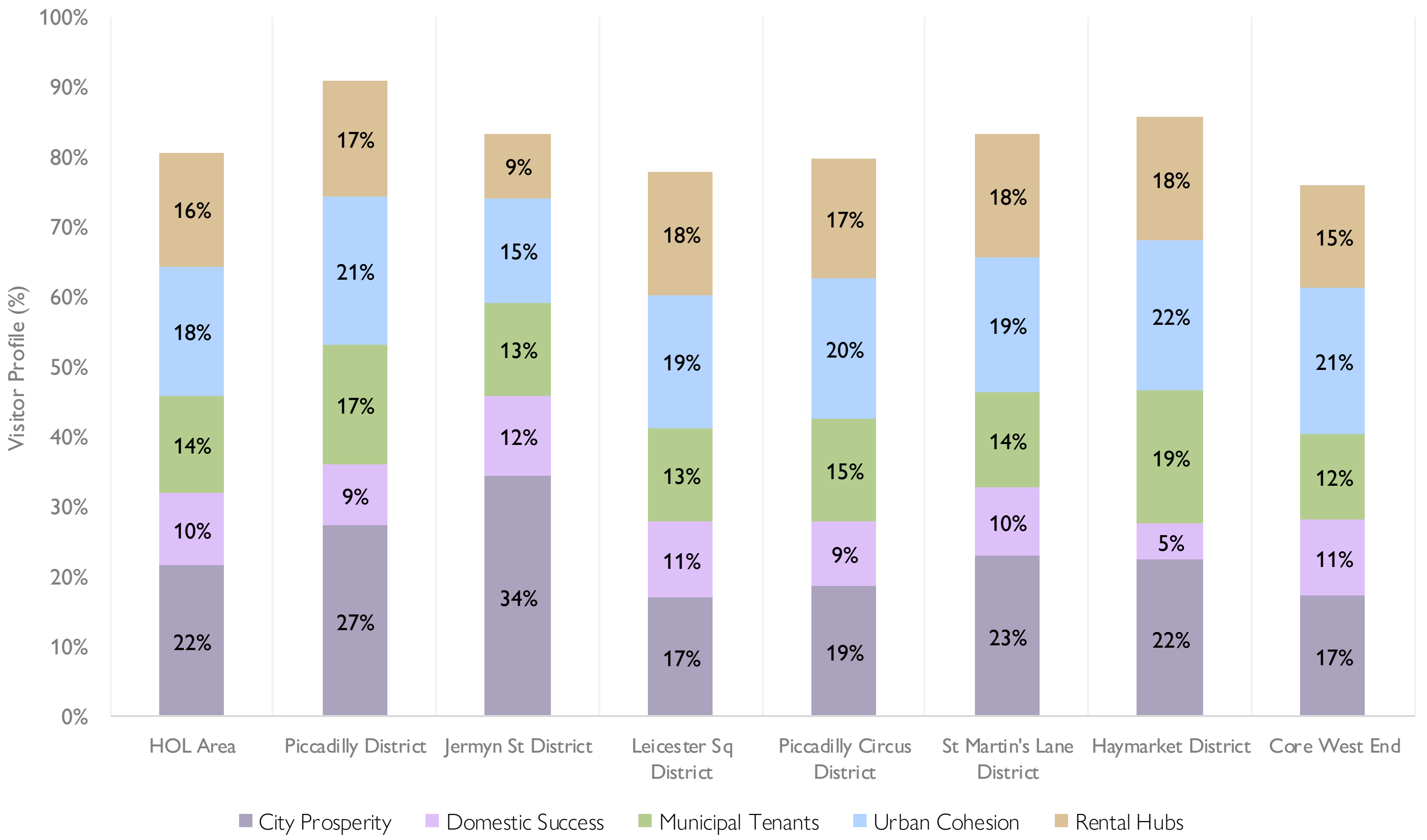
- In contrast to City Prosperity, there was mixed MoM change across Urban Cohesion types.
- Main type which experienced increase (+0.6%) was 'Culture & Comfort' group, representing *'thriving families with good incomes in diverse suburbs'*.

+4.8% INCREASE IN TOP 5 SEGMENT GROUPS, INDICATING LESS DISTRIBUTED DEMOGRAPHIC VISITOR BASE

- Increase in share of visitors from Top 5 segment groups across all districts in HOL area, representing a more **focused demographic base** visiting the area in November, in-part due to comparison to October's half-term & increased share of visitors from around London in November.

Area	Visitors from HOL Area's Top 5 Groups	Month -on- Month
HOL Area	80.7%	+4.8%
Piccadilly District	91.0%	+6.9%
Jermyn St District	83.4%	+6.3%
Leicester St District	77.9%	+2.5%
Piccadilly Circus District	79.9%	+9.0%
St Martin's Lane District	83.3%	+5.0%
Haymarket District	85.8%	+2.3%
Core West End	76.1%	-1.1%

HOL Area's Top 5 Groups | District-Level



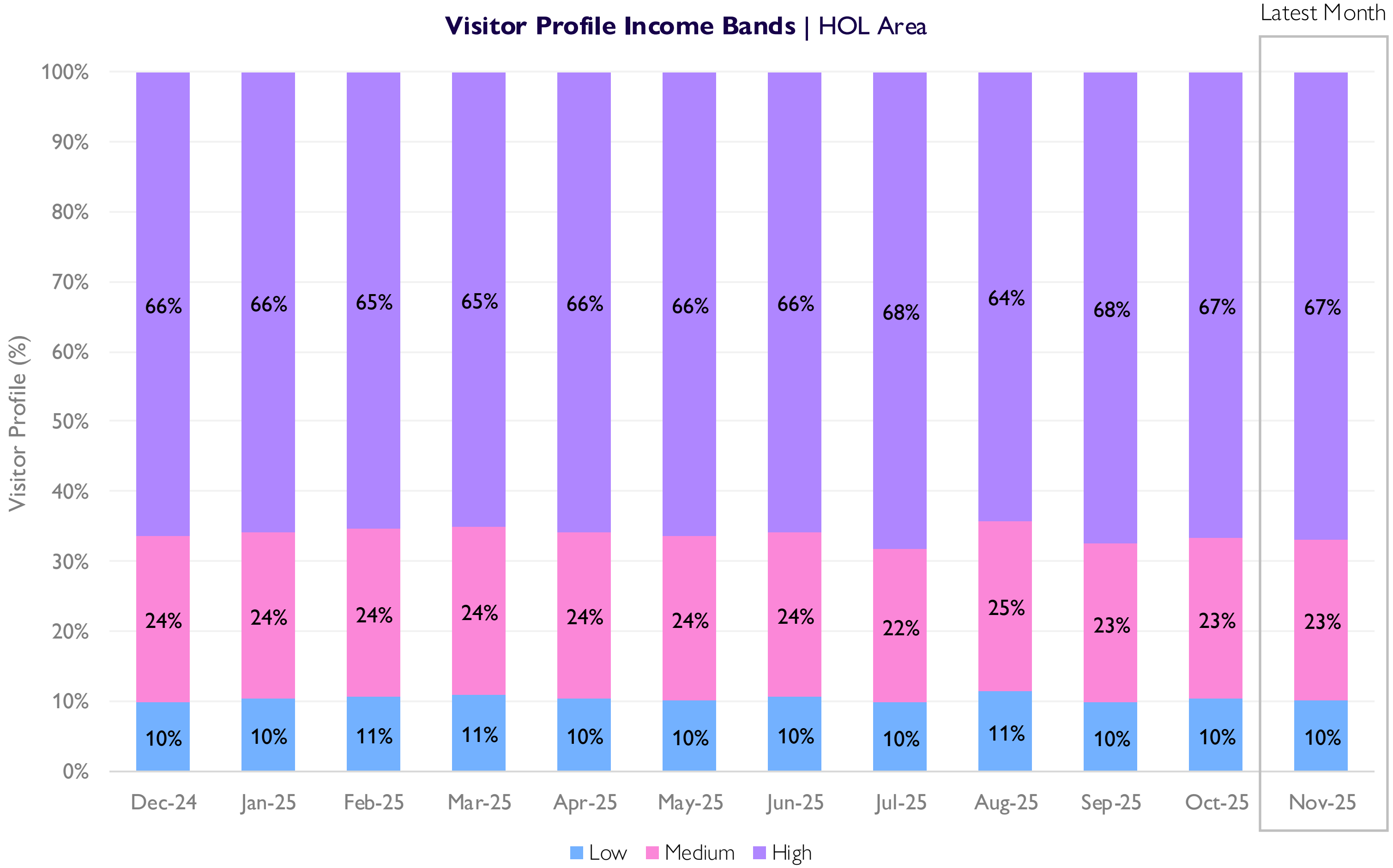
Experian MOSAIC | Detailed descriptions of all groups in appendix

SHARE OF VISITORS FROM HIGH-INCOME VISITOR SEGMENTS CONSISTENT MONTH-ON-MONTH & ABOVE YTD AVERAGE

- 67% of visitors to the HOL area in November from within high-income segment types, consistent MoM.
- Demographic profile across the HOL area in November still shows a greater bias towards high-income segments vs. YtD average.

67%
of visitors from 'high-income' segment

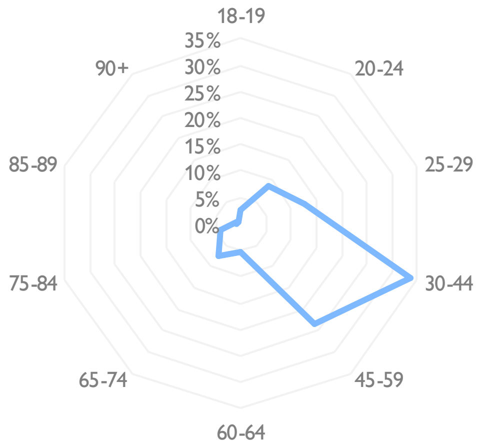
0%
month-on-month change in 'high-income' segment



Experian MOSAIC | Example of classifications in appendix

HOL AREA PROFILE SKEWED TOWARDS PROFESSIONAL, MID-AGED VISITOR

Age & Gender Profile



- Visitor profile skewed towards visitors aged 30-59 years old (57.0%)

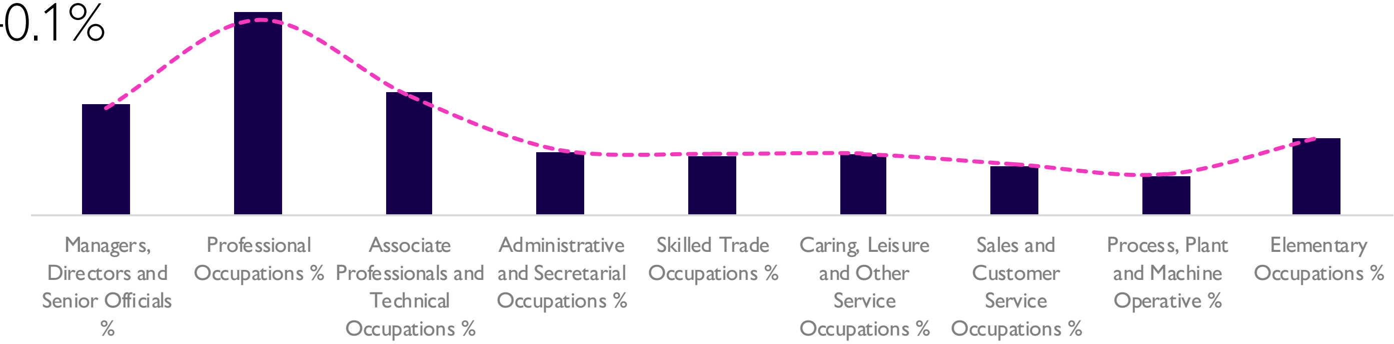
Female 51.4%

Male 48.6%

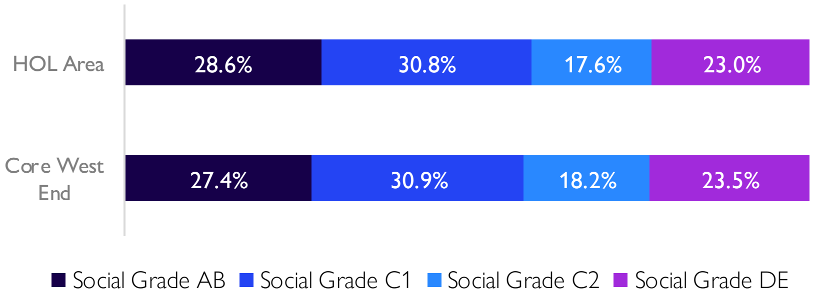
Occupation

Managers & Professional

40.1%



Social Grade



- Social Grade profile of those visiting HOL area vs. Core West End very similar
- 28.6% of visitors to HOL area within most-affluent social grade (AB), +1.2% higher than Core West End.

BT VISITOR MIX DEFINITIONS

3 key visitor types used within BT data…

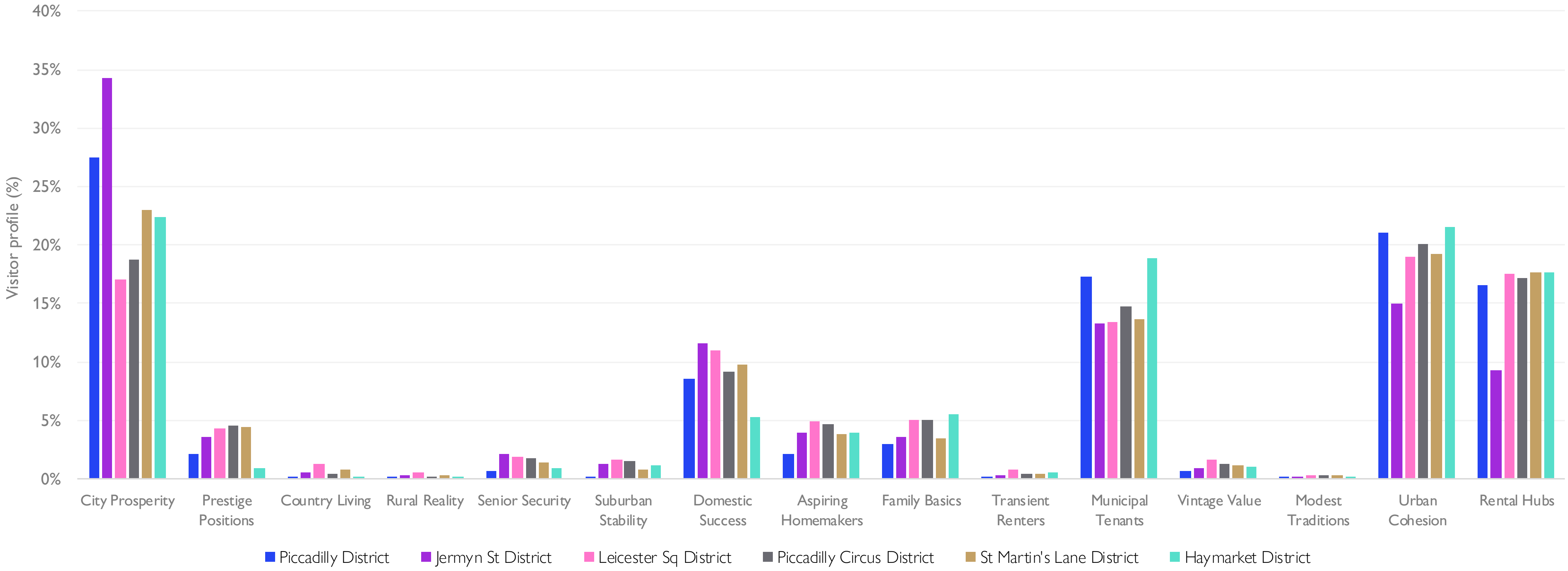
Visitor — The number of non-residents and non-workers who spend at least 10 minutes in that MSOA / HEX in the specified time period.

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



Experian MOSAIC

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	Mosaic	A02 Uptown Elite
51m individuals	15 groups	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...

Single Essentials
Singles renting small social flats in town centres.

City Diversity
Households renting social flats in busy city suburbs where many nationalities live as neighbours.

Local Focus
Rural families in affordable village homes who are reliant on the local economy for jobs.

Fledgling Free
Pre-retirement couples enjoying space and reduced commitments since their children left home.

Primary Ambitions
Families with school-age children, who have bought the best house they can afford within popular neighbourhoods.

World Class Wealth
Global highflyers and moneyed families living luxurious lifestyles in London's most exclusive boroughs,

Premium Fortunes
Asset-rich families with substantial income, established in distinctive, expansive homes in wealth enclaves.

Low Income — Medium Income — High Income

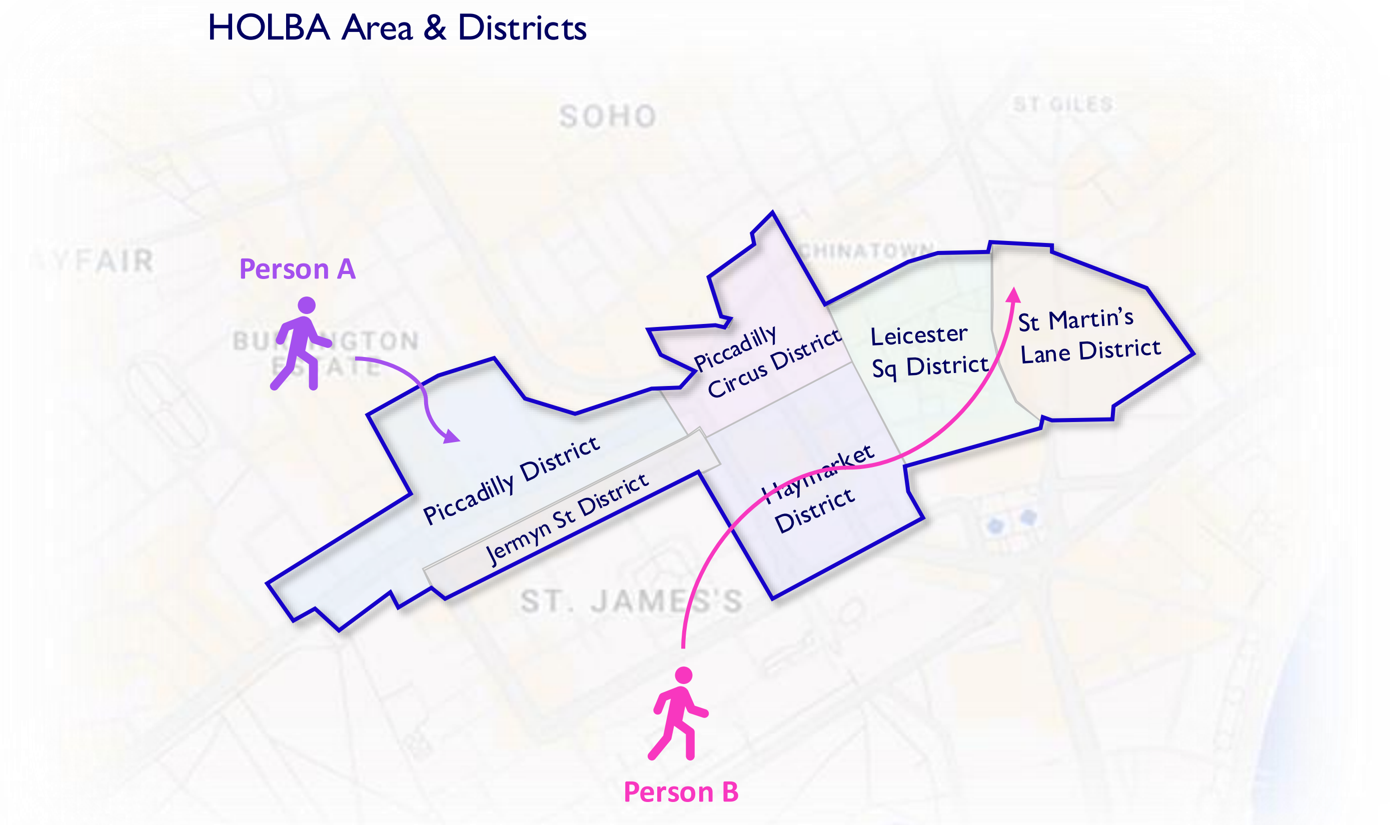
CROSS VISITATION EXAMPLE

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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