Visitor Insights
September Report 2023

Shaping a world-class West End

HEART OF LONDON BUSINESS ALLIANCE

Colliers

# Background
Introduction and context

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

This monthly report provides key insights from preceding calendar month including information about:
- Visitor footfall & profile
- Visitor behaviour

Colliers' Locate Footfall mobility data platform is central to the delivery of the insights set out in this report. The platform is powered by extensive mobility data covering a growing sample of 9+ million smartphone users nationally.
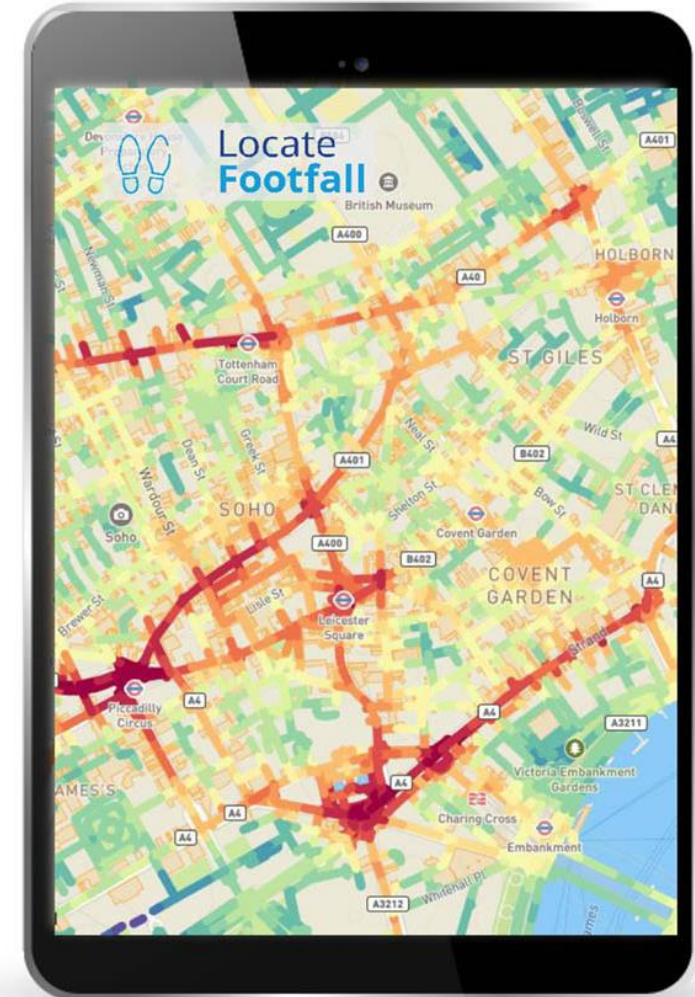
Contents

Summary
September 2023

12.2 m (-12%)

Visitors to HOLBA area up % month on month

142 mins (-6%)

Visitors typically spend almost 2 and a half hours in the area. Slightly below YTD average

9.2m (-15%)

People live within the HOLBA area core catchment

- Footfall across the HOLBA area decreased by 12%, in line with broader trends across the West End. This is likely due to a fall in tourist footfall, both international and domestic, due to the summer holidays coming to an end.

- We also see a slight departure from the weekly trend. Generally, we see lower footfall at the beginning of the week, rising through the week before peaking on a Saturday. This month Saturdays are still the highest footfall day however there is less of a clear pattern throughout the week. This may be due to a greater proportion of workers in the footfall mix compared to previous months.

- The core catchment area saw a similar decline of around 15%. This is likely due to rail strikes impacting commuters at the start and end of the month.

- Haymarket has seen the largest change in its socio-demographic audience over the last month. However, the largest of these changes are within the country living and rural reality. These categories saw a significant decline last month and are now returning to the regular patterns.

Visitor volumes

Visitor volumes
Footfall - districts

Footfall down 12% month-on-month, and down 36% year-on-year.

Domestic and international visits down in all districts compared with August.

September 2022 experienced particularly high footfall, not consistent with pre- covid trends. This is partly the cause of the large swing in footfall YOY.

District	Month-on-Month			Year-on-year		
	Total	Domestic	International	Total	Domestic	International
HOLBA area	**-12%**	**-10%**	**-19%**	**-36%**	**-30%**	**-55%**
Piccadilly District	-12%	-10%	-21%	-27%	-21%	-50%
Jermyn St District	-16%	-11%	-32%	-33%	-24%	-53%
Leicester Sq District	-12%	-11%	-17%	-41%	-36%	-53%
Piccadilly Circus District	-13%	-11%	-21%	-43%	-28%	-70%
St Martin's Lane District	-15%	-11%	-26%	-37%	-30%	-51%
Haymarket District	-11%	-10%	-13%	-31%	-21%	-57%
Core West End	-12%	-10%	-19%	-31%	-28%	-41%

- Decrease in visits in all areas in September vs. August

- Decrease in visitation likely driven by decreased tourism due to end of summer holidays

Visitor volumes
Footfall – street level

Footfall is down month-on-month in all streets except St Martin's Lane

Strong increase in international visits around Haymarket and St Martin's Lane

Street	Month-on-month			Year-on-year		
	Total	Domestic	International	Total	Domestic	International
HOLBA area	**-12%**	**-10%**	**-19%**	**-36%**	**-30%**	**-55%**
Piccadilly	-13%	-10%	-26%	-17%	-9%	-44%
Jermyn St	-33%	-13%	-63%	-4%	-13%	48%
Piccadilly Circus	-15%	-12%	-27%	-30%	-14%	-61%
St Martin's Lane	2%	-12%	18%	14%	-28%	123%
Haymarket	-4%	-10%	22%	-15%	-6%	-37%
Haymarket - Regent St / St James	-11%	-9%	-24%	-23%	-2%	-65%
Core West End	-12%	-10%	-19%	-31%	-28%	-41%

- Decrease in both domestic and international visits probably due to end of summer holidays.

- St Martin's Lane was only area to see increased visits, likely due to increase in office workers post holidays.
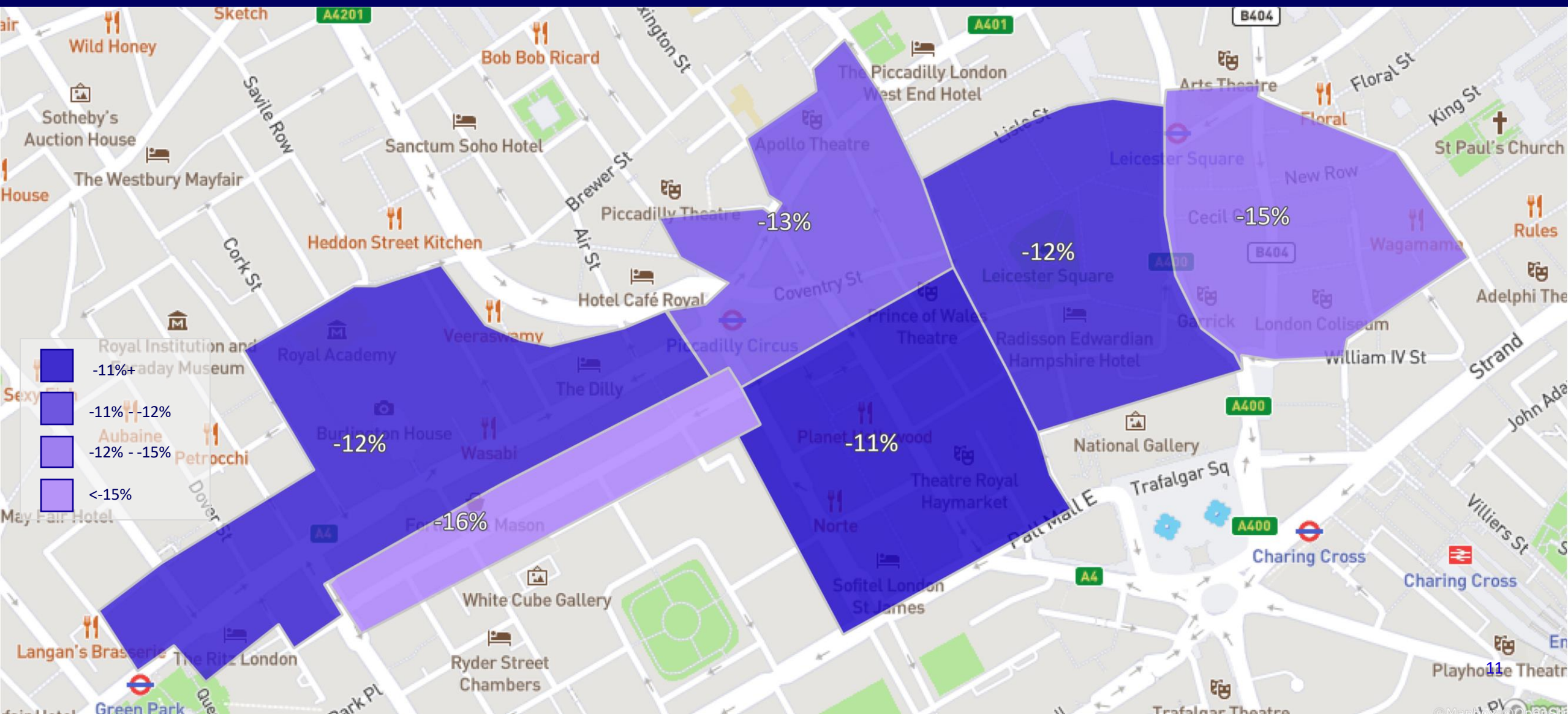
Visitor volumes
Strong Saturday footfall continues, particularly towards end of month

Monthly footfall: HOLBA Area
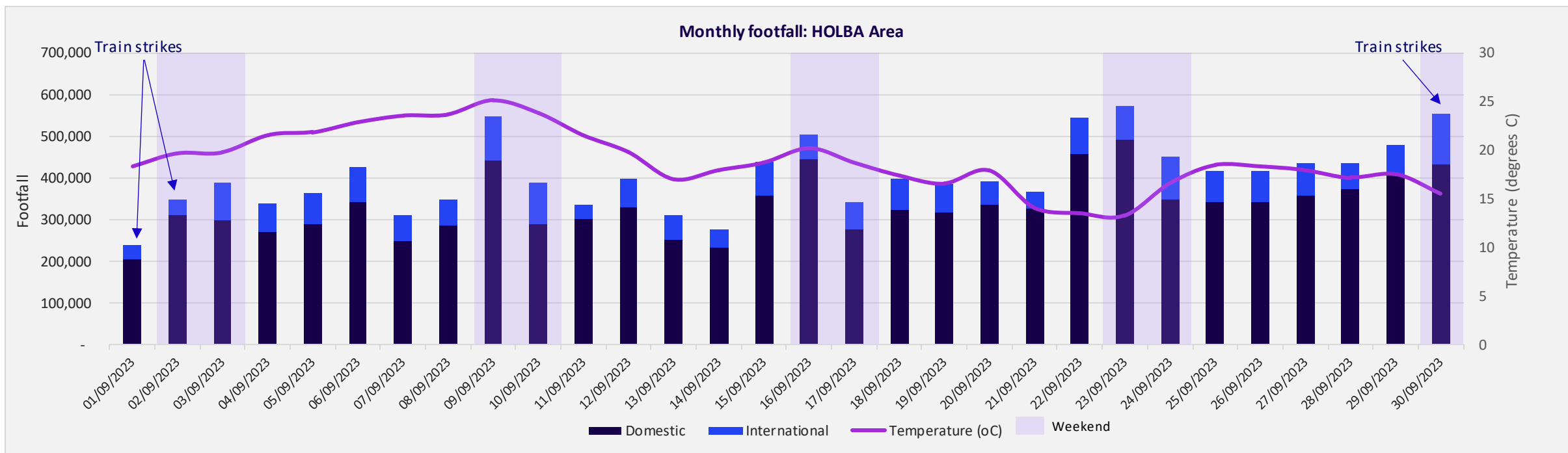
- Saturdays remain the highest footfall days across the month, however weekend of 2 September saw lower than average Saturday footfall due to RMT rail strike.

- Higher temperatures towards start of the month appeared to have a negative correlation with footfall, as visits increased as the temperature decreased towards the latter half of September.
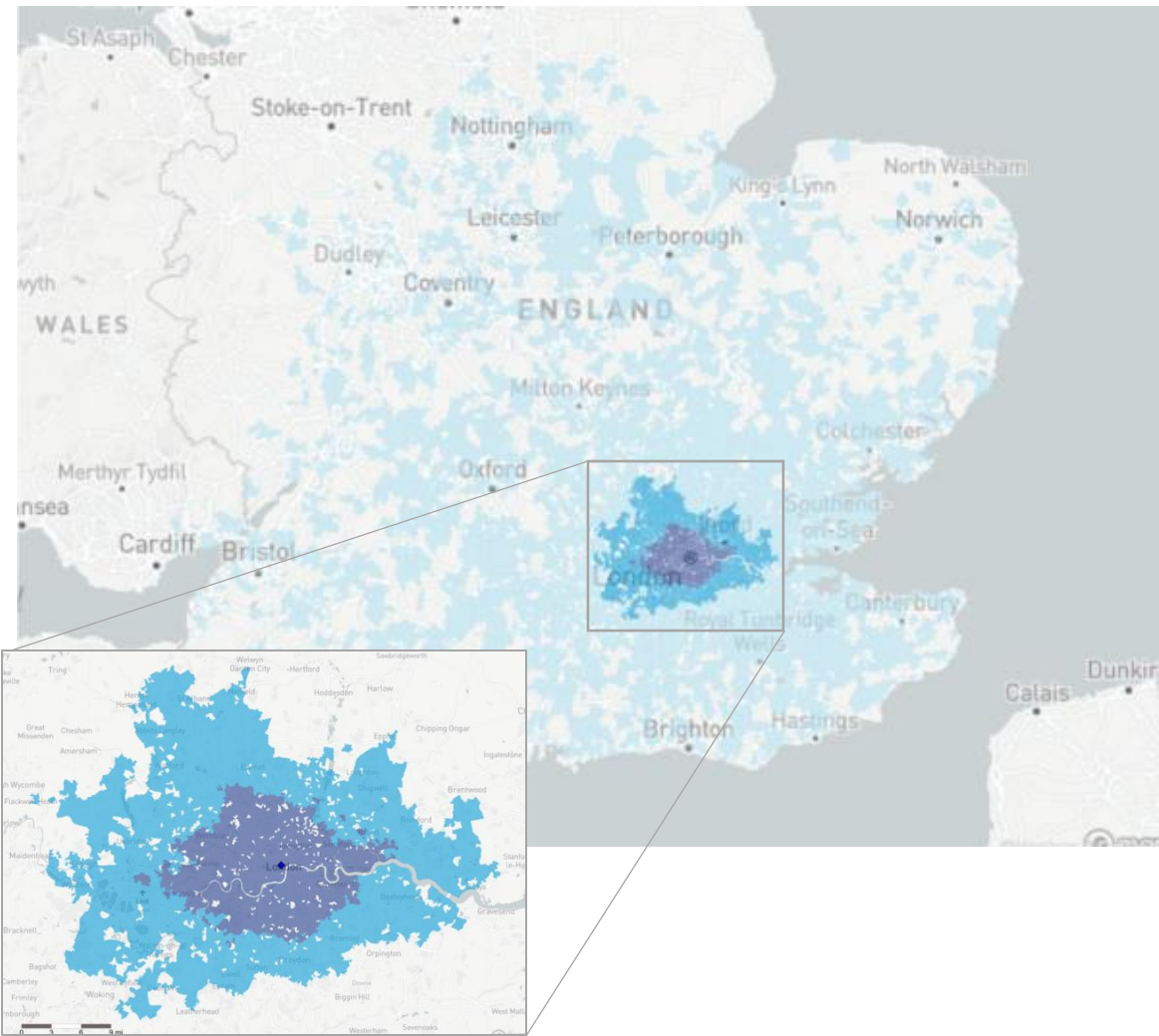
Map legend:
- -11%+
- -11% - -12%
- -12% - -15%
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Data labels on map: -13%, -15%, -12%, -12%, -11%, -16%

Visitor volumes
Core catchment decreased 15.3% in size vs. August

Catchment band		Population (Millions)	Change vs. previous month
	-Primary	4.5	-5.8%
	-Secondary	4.7	-22.9%
	Core *(Primary + Secondary)* *75% of regular visitors*	**9.2**	**-15.3%**
	-Tertiary	13.2	14.3%
	Total *(Core+ Tertiary)* *95% of regular visitors*	**22.4**	**0.0%**

- Decrease in Core catchment likely driven by rail strikes impacting commuters at start and end of the month.

- Growth in tertiary catchment band beyond Outer London and the Home Counties led to a stable catchment size this month despite a reduction in core catchment.
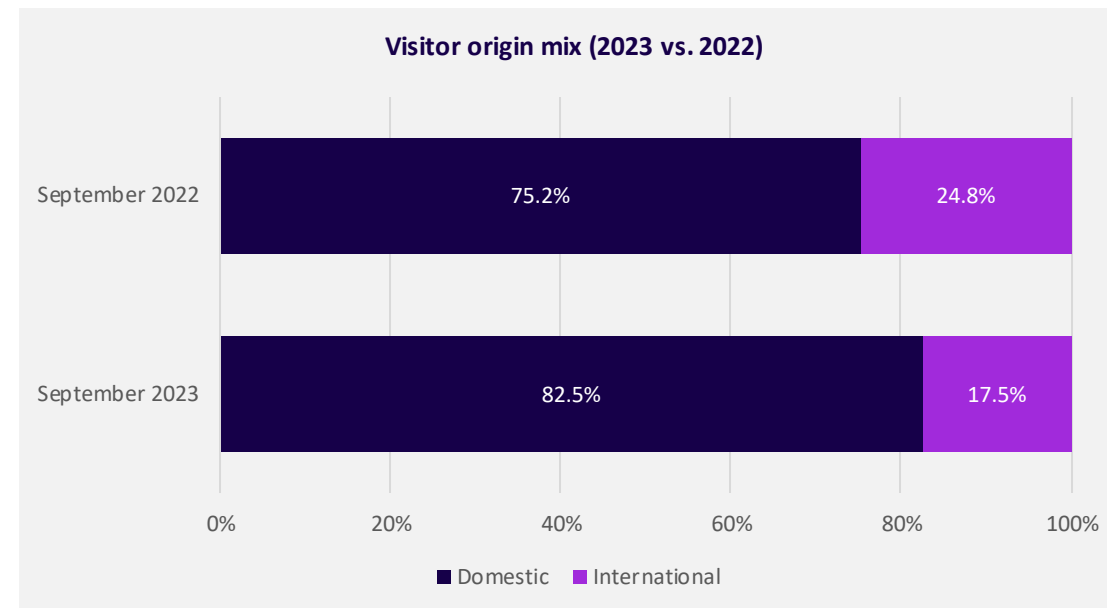
Visitor volumes: visitor mix
International visitor mix down on August

Area	International mix (%)	+/- change in mix	
		Month-on-Month	Year-on-year
HOLBA area	**17.5%**	**-1.6%**	**-7.3%**
Piccadilly	14.7%	-2.7%	-7.2%
Jermyn St	23.2%	-18.3%	8.1%
Leicester Sq	39.9%	-14.0%	7.3%
Piccadilly Circus	18.7%	-3.1%	-15.0%
St Martin's Lane	53.9%	7.3%	26.4%
Haymarket	21.2%	4.6%	-7.4%
Haymarket - Regent St / St James	14.7%	-2.4%	-17.9%
Core West End	18.8%	-1.6%	-3.1%

Visitor origin mix (2023 vs. 2022)

September 2022: Domestic 75.2% | International 24.8%
September 2023: Domestic 82.5% | International 17.5%

■ Domestic ■ International

- 1.6% decrease in international mix vs. last month due to decrease in foreign tourism post-school holidays.

- This equates to a 19% decrease in the volume of international visitors.

- This represents a 7.3% decrease in mix vs. August last year.

Visitor volumes: visitor origin
-1.6% decrease in visits from outside the UK
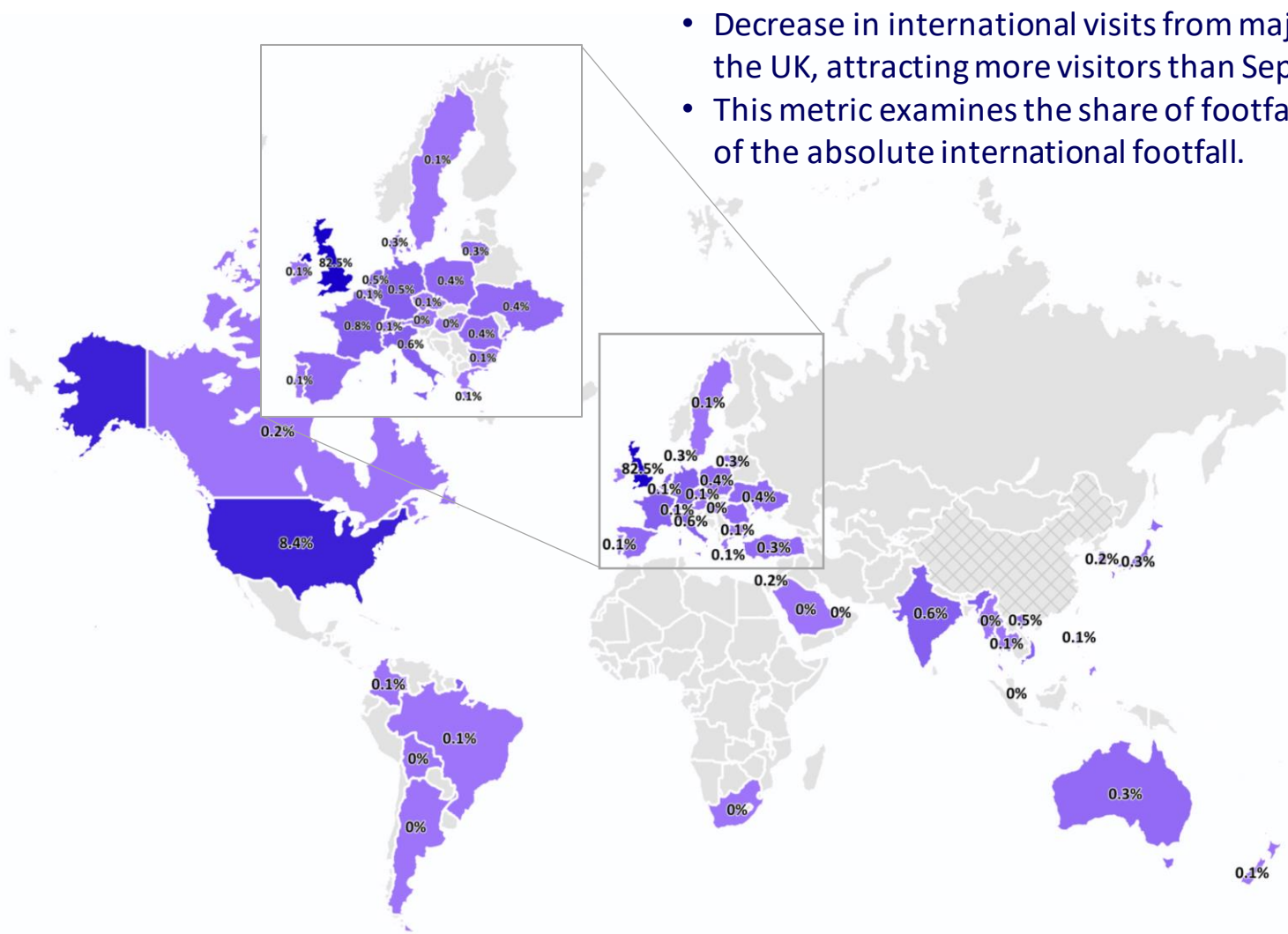
- Decrease in international visits from majority of countries likely due to August being peak of summer in the UK, attracting more visitors than September due to typically better weather and school holidays.
- This metric examines the share of footfall by country visiting the HOLBA area. It is not a direct measure of the absolute international footfall.
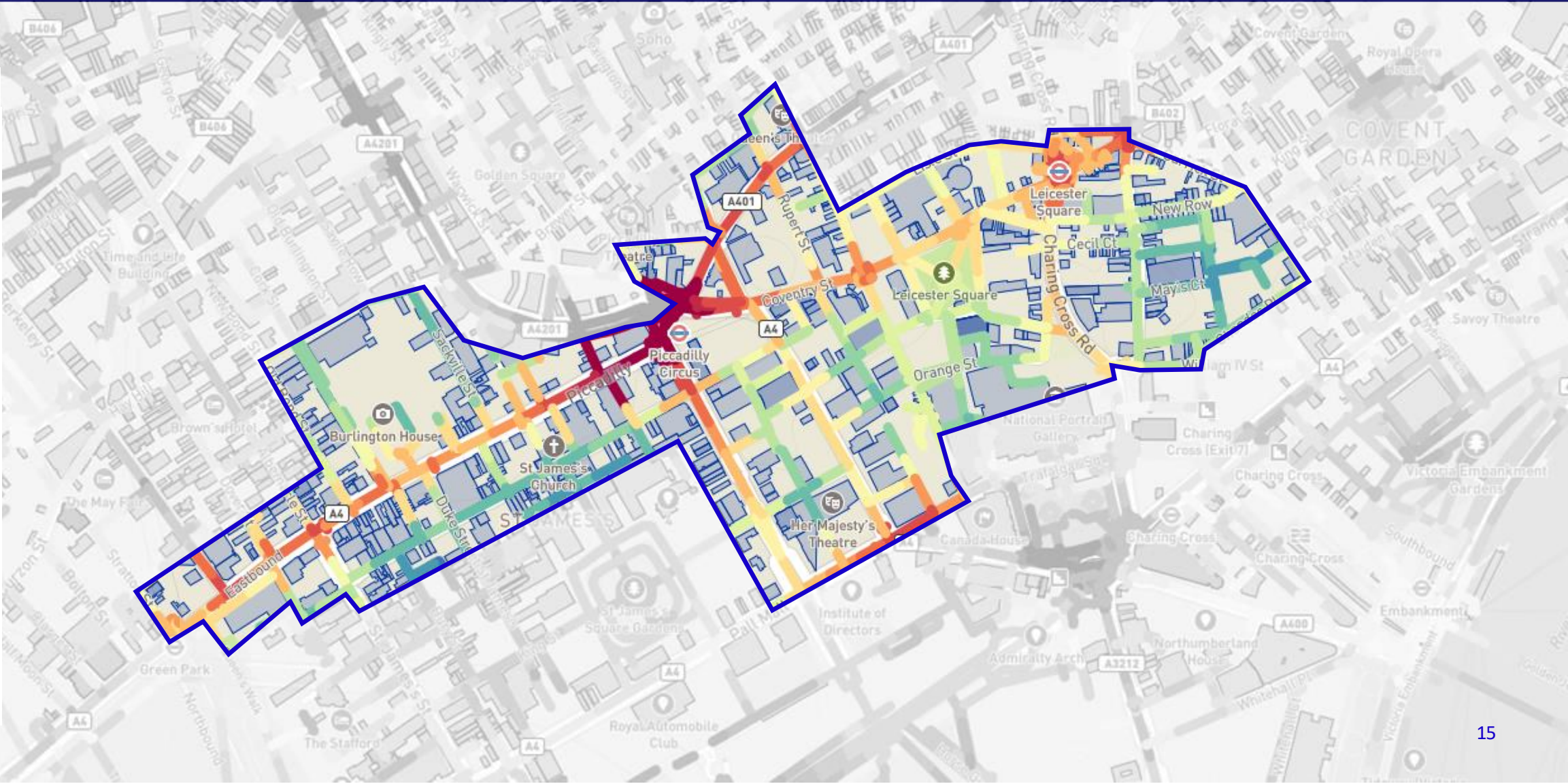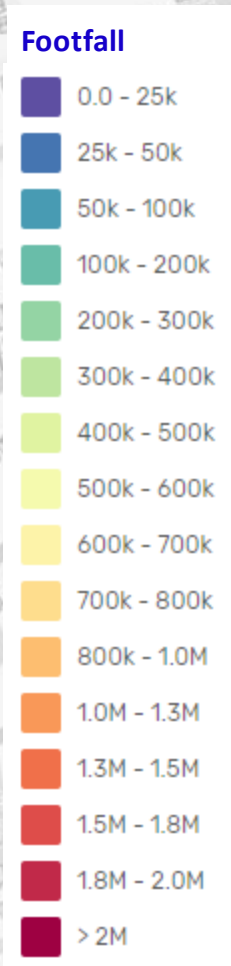
Rank	Country	%	+/- change
1	United Kingdom	82.5%	⬆ 1.6%
2	United States	8.4%	⬆ 1.2%
3	France	0.8%	⬇ -0.9%
4	Italy	0.6%	⬇ -0.5%
5	India	0.6%	⬇ -0.2%
6	Vietnam	0.5%	➡ 0.0%
7	Germany	0.5%	➡ -0.0%
8	Netherlands	0.5%	➡ -0.1%
9	Ukraine	0.4%	➡ -0.1%
10	Romania	0.4%	➡ -0.1%
Europe (excl. UK)		5.3%	-1.2%
Rest of the world		12.2%	-0.3%
Non UK		17.5%	-1.6%

Note: Data unavailable for visitors from China

Visitor volumes
Segment footfall

Footfall

	0.0 – 25k
	25k – 50k
	50k – 100k
	100k – 200k
	200k – 300k
	300k – 400k
	400k – 500k
	500k – 600k
	600k – 700k
	700k – 800k
	800k – 1.0M
	1.0M – 1.3M
	1.3M – 1.5M
	1.5M – 1.8M
	1.8M – 2.0M
	> 2M

Visitor behaviour: visits by day and hour
Saturday visits most popular

Visitors by day

Visitors by hour
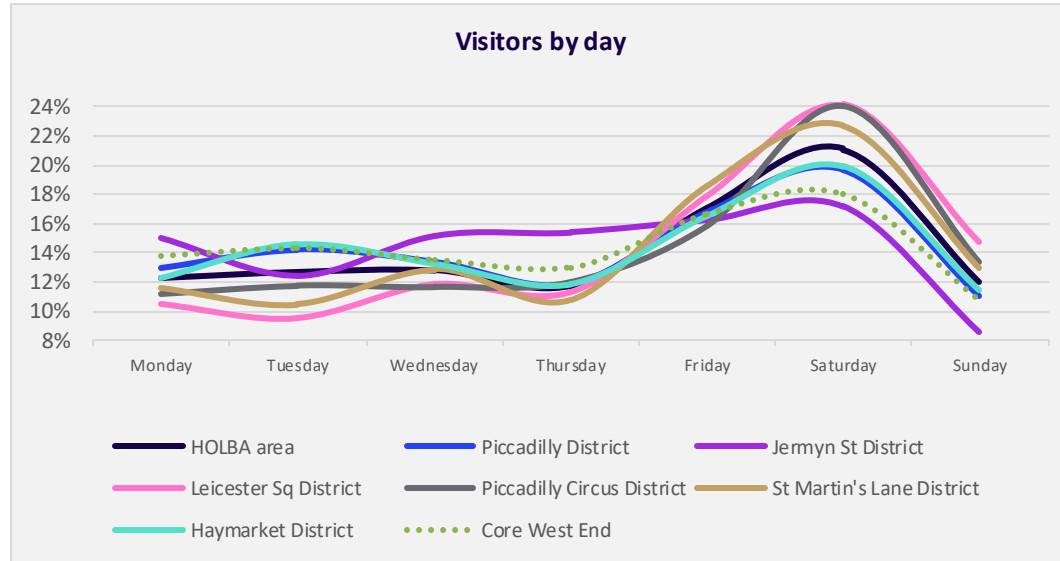
- Strong Saturday visitor trend for all areas in September.

- Jermyn St declines significantly on Sundays due to worker-focus whilst tourist districts (such as Leicester Sq) saw strong visitor volumes, often ahead of weekdays.
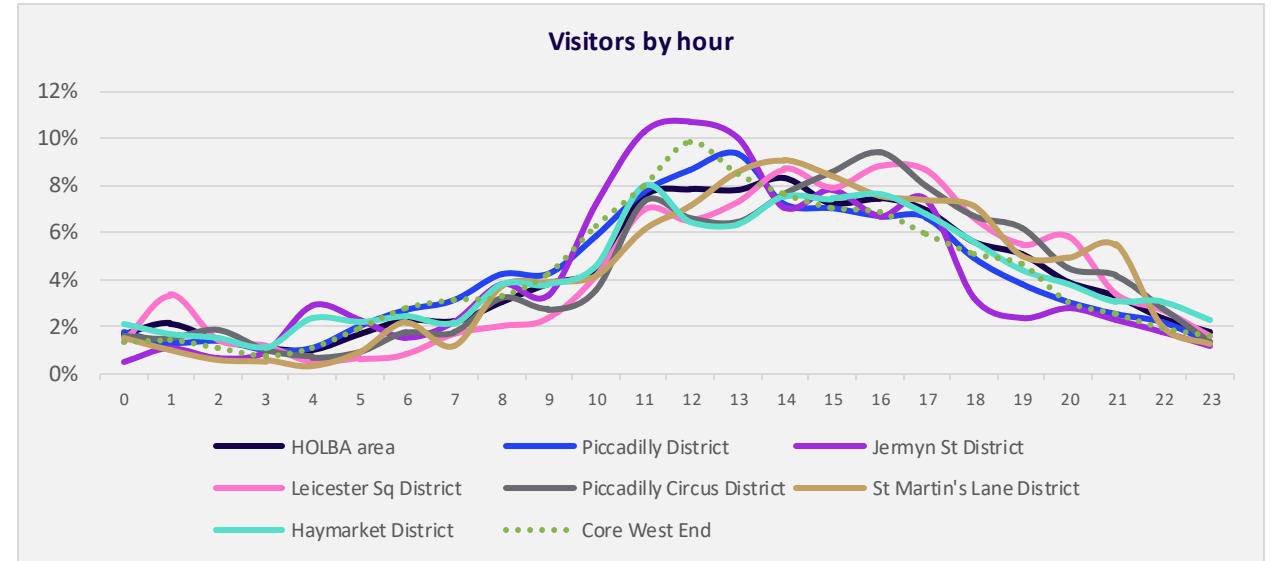
- Visitor volumes typically peak during lunchtime and into the afternoon

- Leicester Sq and Piccadilly Circus had the latest 'peak hour' (4pm), likely driven by their roles as major leisure destinations and focus for after work visits

Visitor behaviour: visits by day and hour
Saturday afternoon was the busiest part of the week

HOLBA - % of visits

	Morning	Afternoon	Evening
	(07.00-12.29)	(12.30-17.59)	(18.00-23.59)
Monday	3.8%	5.9%	2.6%
Tuesday	4.1%	5.9%	2.9%
Wednesday	4.0%	5.6%	3.3%
Thursday	3.7%	5.0%	2.7%
Friday	4.8%	7.2%	4.9%
Saturday	4.6%	10.2%	6.0%
Sunday	3.2%	7.2%	2.4%

INDEX VS. CORE WEST END

	Morning	Afternoon	Evening
	(07.00-12.29)	(12.30-17.59)	(18.00-23.59)
Monday	72	100	106
Tuesday	77	93	108
Wednesday	81	95	125
Thursday	75	91	119
Friday	90	100	114
Saturday	103	116	124
Sunday	109	120	123

- Saturday afternoon is the highest week segment for visits – 10.2% of all visitors this month.

- Friday and Saturdays have the strongest evening visit shares, driven by strong leisure visitation.

- Weekends and evenings continue to outperform vs. the wider Core West End, again driven by strong leisure offer.

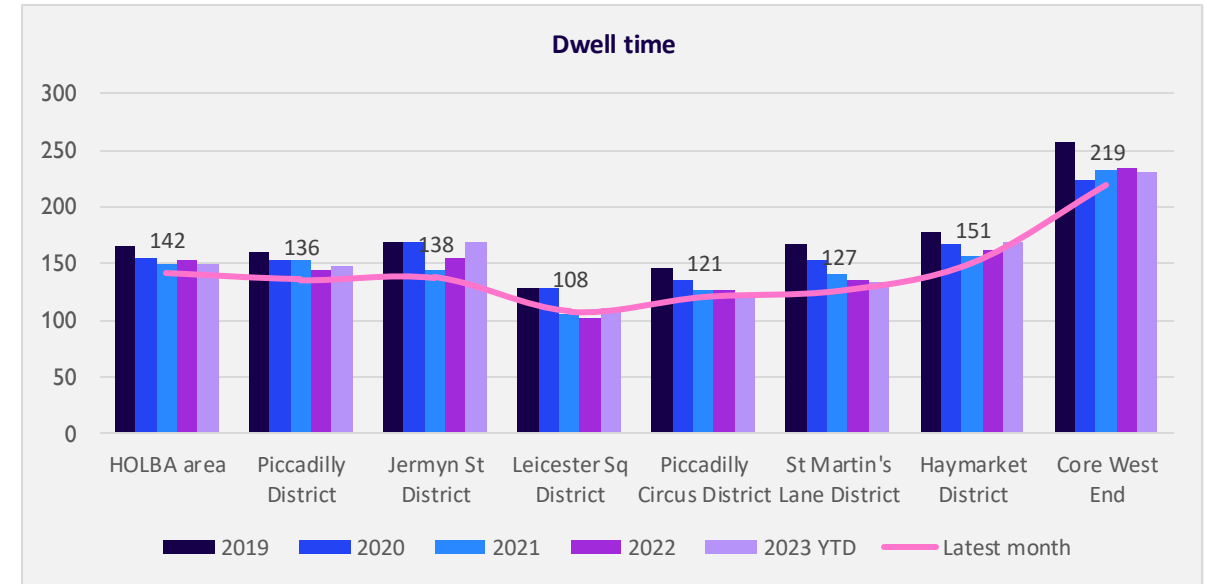- Friday-Sunday evenings were an average of 20% ahead of Core West End.

Visitor behaviour: frequency
Visitors coming more frequently but staying for less time

Visit frequency

Legend: 2019, 2020, 2021, 2022, 2023 YTD, Latest Month

Dwell time

HOLBA area 142, Piccadilly District 136, Jermyn St District 138, Leicester Sq District 108, Piccadilly Circus District 121, St Martin's Lane District 127, Haymarket District 151, Core West End 219

Legend: 2019, 2020, 2021, 2022, 2023 YTD, Latest month
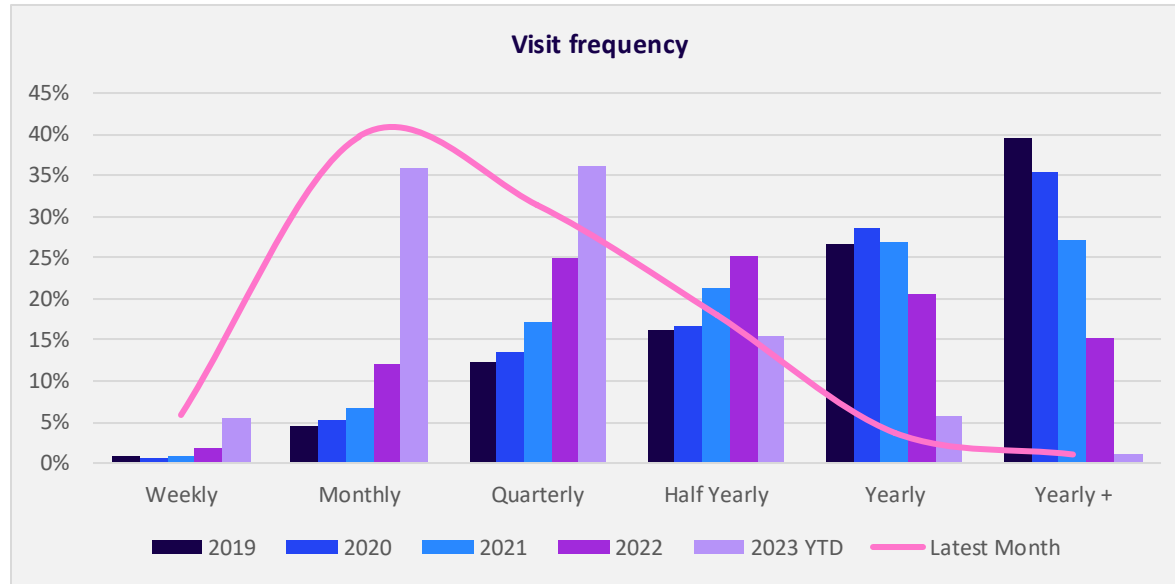
- Continued increase in regular visitors, in part influenced by growth in office-working.

- Dwell time decreased further below YTD levels (142 mins this month vs. 15 mins YTD and 148 mins in August).

- Office-focused locations have the highest dwell time, with Haymarket at 151 mins vs. leisure districts such as Leicester Sq being shorter at 108 mins.

Visitor behaviour: dwell time
Little change in dwell time patterns in September vs. August

Dwell time

Dwell time / square mile
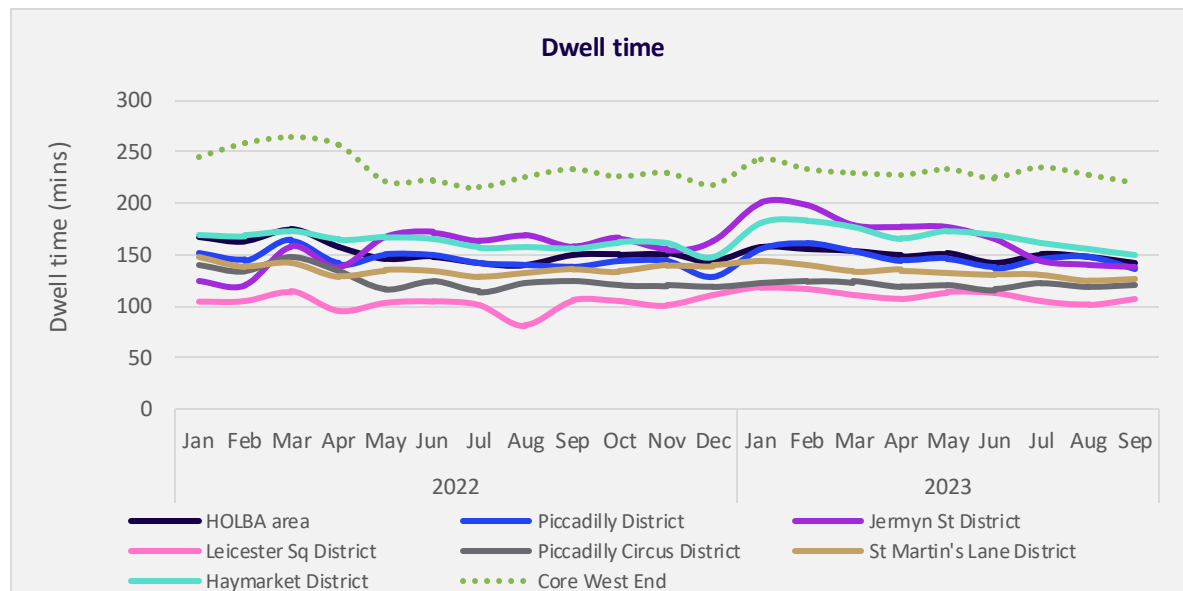
- Dwell time was consistent with August, likely due to train strikes negating the return of workers to the office after the summer holidays.
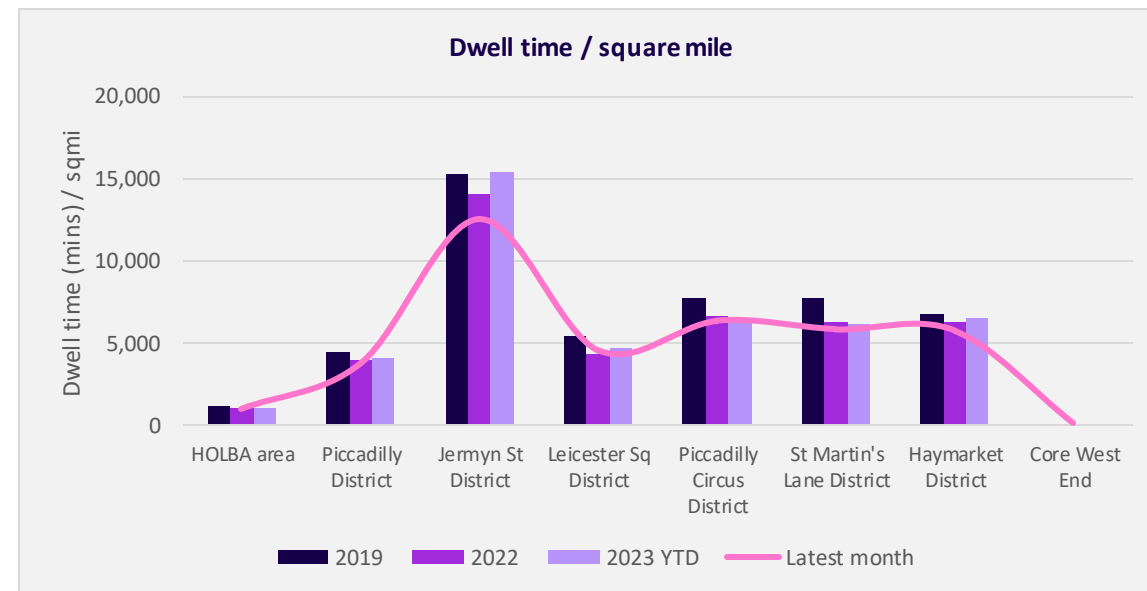
- Jermyn St has the highest dwell times, given its comparatively small geographic area, driven by its strong worker focus.

- This graph explores the average dwell time relative to the size of each district (in sq mi) to account for the impact of area size on behaviours.
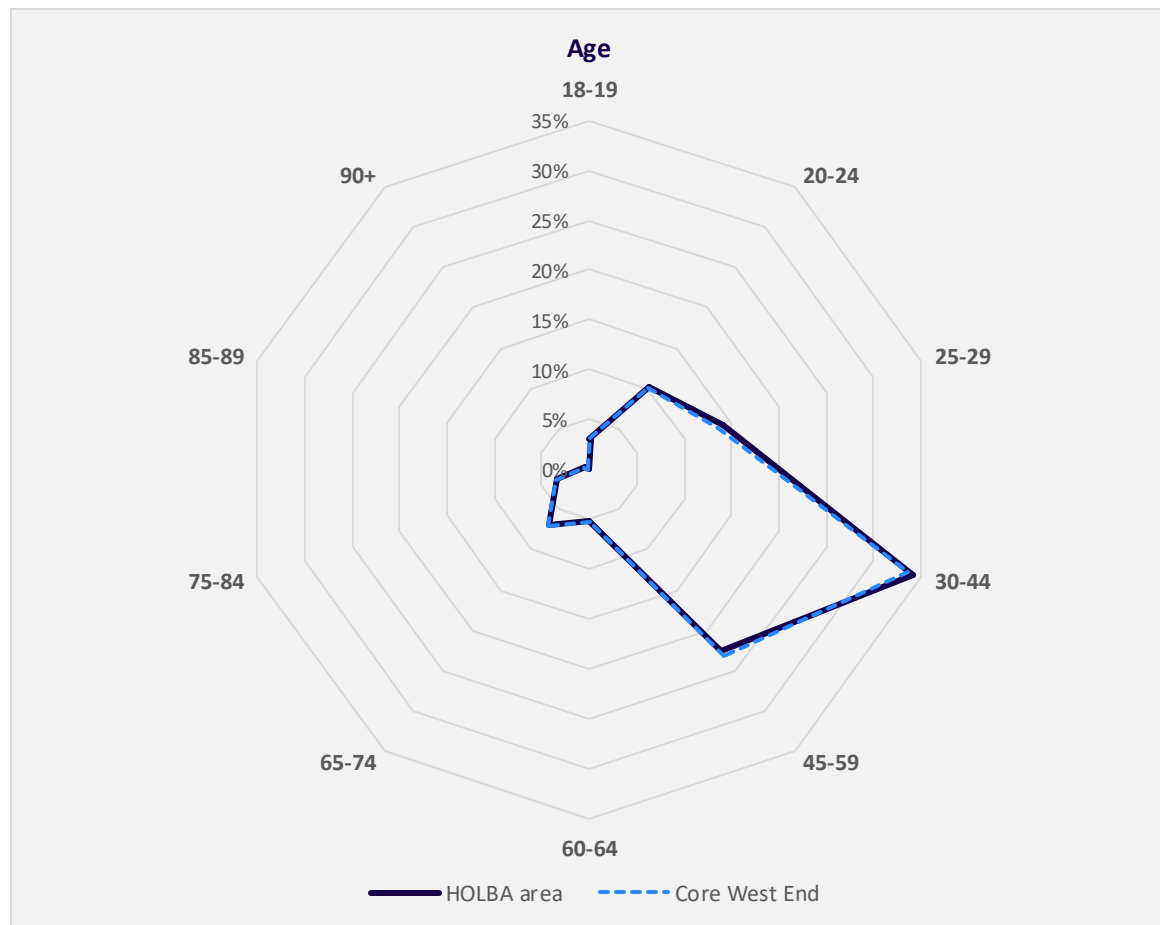
Visitor profile: age & gender
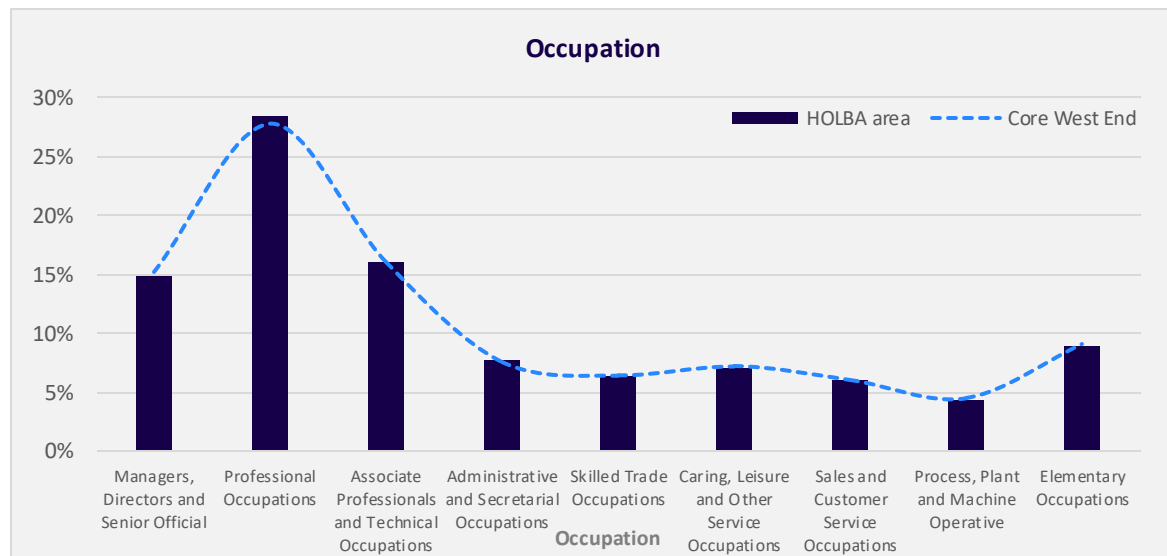## 56.6% of visitors are aged between 30-59 years old

Age

- Visitor profile skewed towards those aged 30-59 years old.
  – 56.6% of visitors aged 30-59, versus 54.0% in August.

- Average age relatively consistent across the different areas within Heart of London area.

- Males & females are nearly evenly split, and in-line with the make up of the Core West End as a whole.
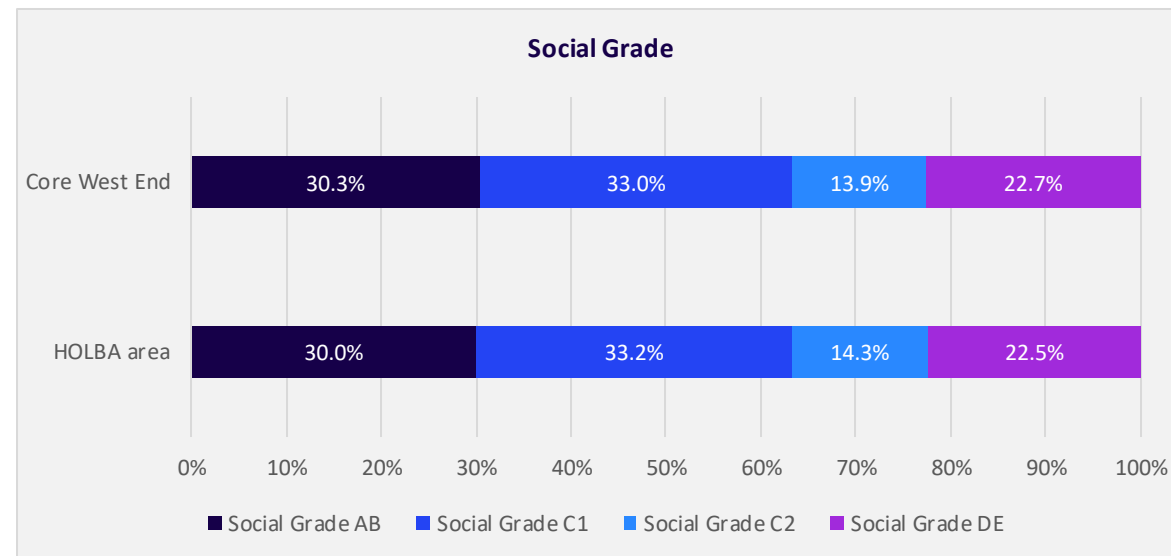
HOLBA Area

Female **51.1%**   Male 48.9%

Core West End

Female **51.3%**   Male 48.7%
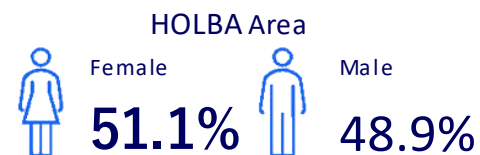
Visitor profile: occupation & social grade
Visitors biased towards white collar workers

Occupation

HOLBA area ▬ Core West End - - -

30%	

Occupation categories:
Managers, Directors and Senior Official; Professional Occupations; Associate Professionals and Technical Occupations; Administrative and Secretarial Occupations; Skilled Trade Occupations; Caring, Leisure and Other Service Occupations; Sales and Customer Service Occupations; Process, Plant and Machine Operative; Elementary Occupations

Social Grade

	Social Grade AB	Social Grade C1	Social Grade C2	Social Grade DE
Core West End	30.3%	33.0%	13.9%	22.7%
HOLBA area	30.0%	33.2%	14.3%	22.5%

- Visitor profile biased towards 'white collar' occupations, consistent with last month.
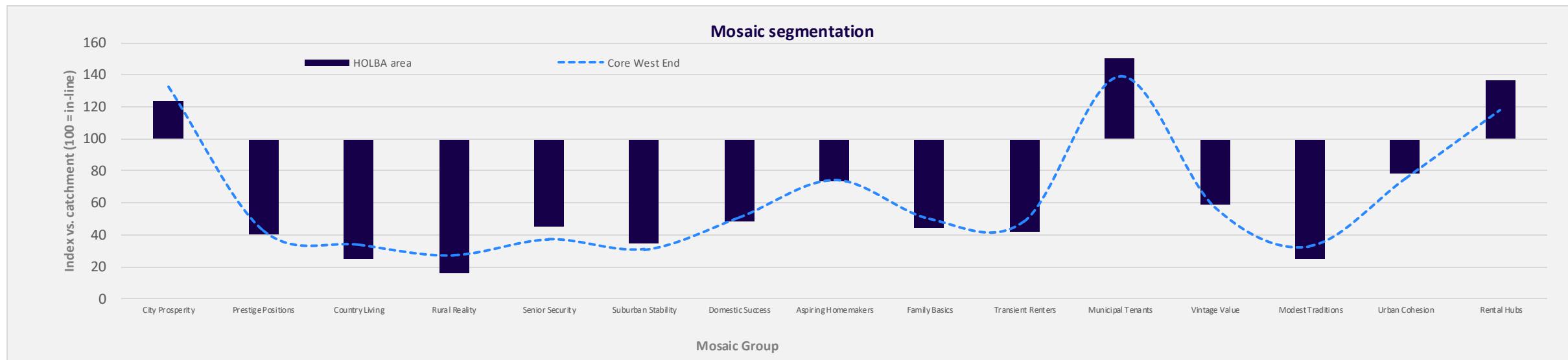
- In line with wider Core West End profile.

- 30.0% HOLBA area visitor profile in Social Grade AB, vs 30.3% for Core West End.

- West End profile influenced by presence of affluent Bond St shoppers.

- Little change from the previous month.
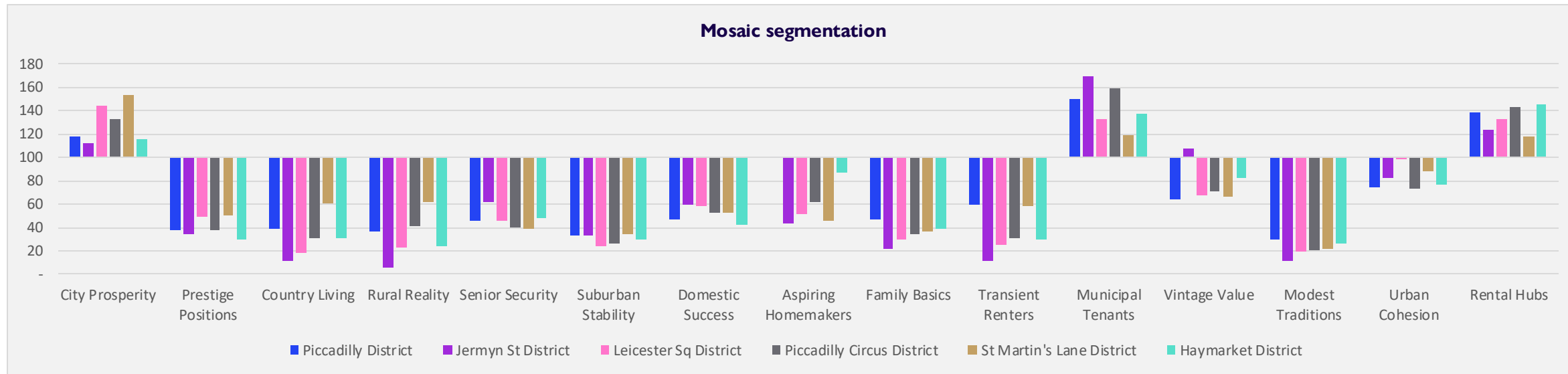
Visitor profile: occupation & social grade
'Municipal Tenants' is the most dominant Mosaic group

Mosaic segmentation

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

- 'City Prosperity' are high-income residents who have expensive homes in desirable metropolitan locations.

- 'Municipal Tenants' are residents who rent inexpensive city homes in central locations.

- 'Rental Hubs' are educated young people privately renting in urban neighbourhoods.

- Profile very similar to Core West End visitors.
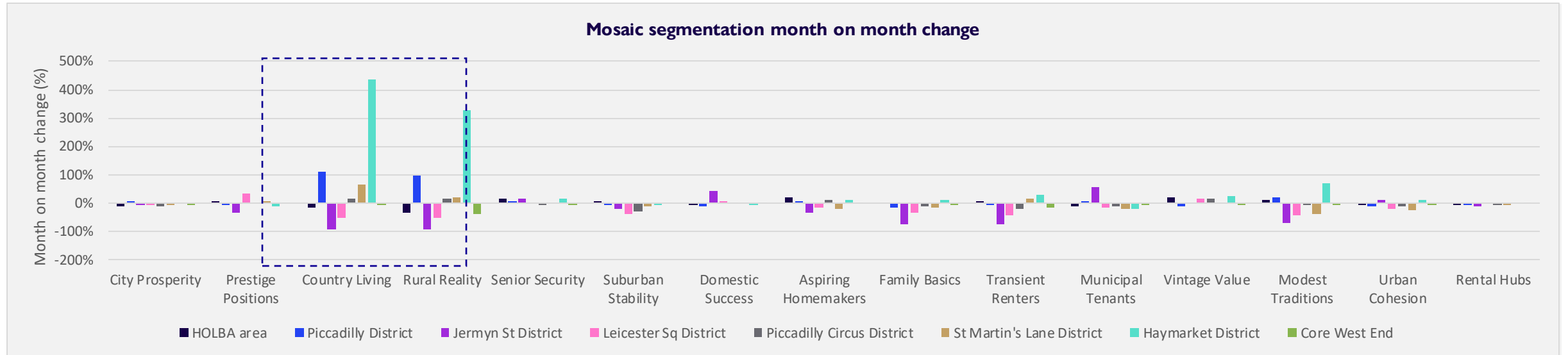
Visitor profile: occupation & social grade
'Municipal Tenants' is the most dominant Mosaic group

Mosaic segmentation

Legend: Piccadilly District · Jermyn St District · Leicester Sq District · Piccadilly Circus District · St Martin's Lane District · Haymarket District

Categories: 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

- Consistent over-indexed groups across the district.

- Jermyn St District over-indexes the most in 'Municipal Tenants', whilst St Martin's Lane District over-indexes the most in 'City Prosperity', the most affluent group.

Visitor profile: occupation & social grade
'Rental Hubs' has the greatest month on month increase

Mosaic segmentation month on month change

Y-axis: Month on month change (%), ranging from -200% to 500%

X-axis categories: 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

Legend: HOLBA area, Piccadilly District, Jermyn St District, Leicester Sq District, Piccadilly Circus District, St Martin's Lane District, Haymarket District, Core West End

- Little change in 'Rental Hubs' vs. last month – it had the largest increase of all groups across the HOLBA Area in August.

- Haymarket District has seen the largest month on month variation – the index of these groups was considerably lower over the summer and has now rebounded.

- 'Country Living' and 'Rural Reality' have seen the biggest decreases in the HOLBA Area (-16% and -33%), in line with August.
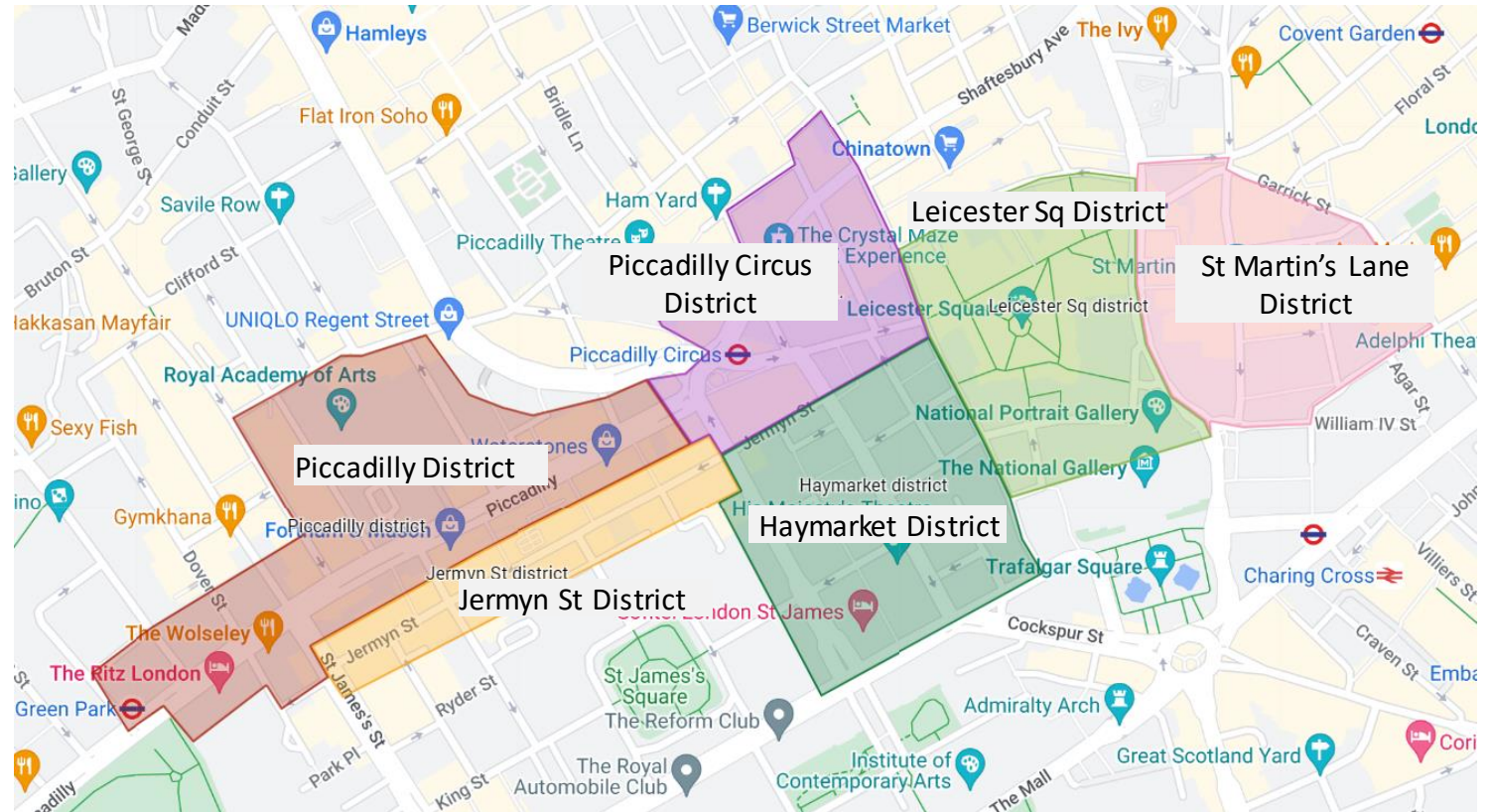
Appendix

Location definition

- Key areas within HOLBA used for analysis:

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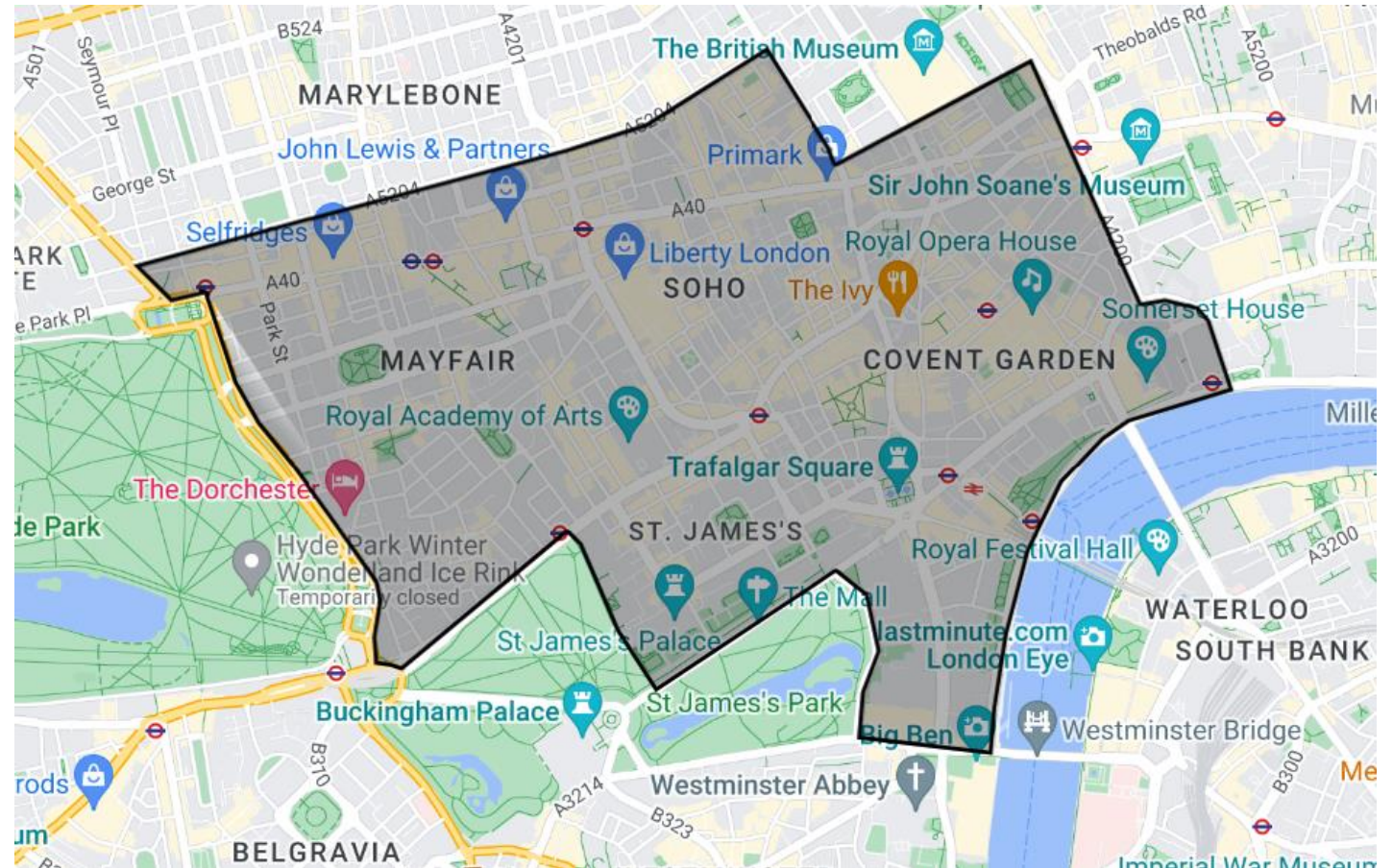 – St Martin's Lane District

Location definition

- Core West End area defined as a benchmark location

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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