Visitor Insights
July report 2024

Issued:
28th August 2024

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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 provide data and insights on visitors to the area.

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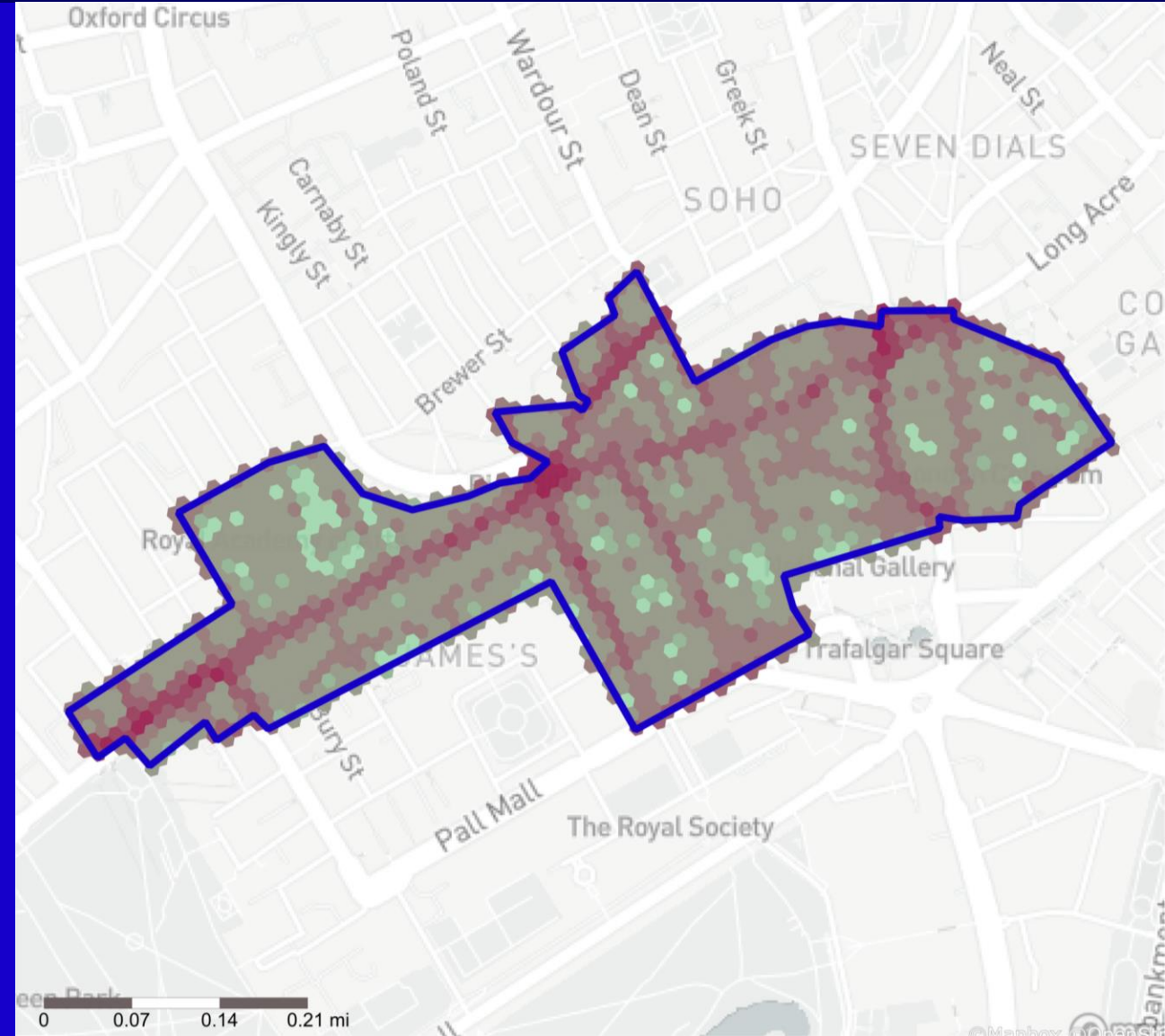
- Visitor footfall & profile
- Visitor behaviour

Colliers' LocateFootfall mobility data insights platform is central to the delivery of the insights set out in this report.

From April 2024, the raw source data provider has been changed to Huq, a leading mobility data provider.

Locate Footfall *powered by:* huq

Contents

Business

- Footfall in July has been very strong compared to the previous month, increasing by a total of 17%. This is likely primarily driven by increased visitation during the summer holidays, both from abroad and domestically.

- There was a particular increase in international visitation the week before the opening of the Paris Olympics. This is likely from tourists visiting London prior to traveling to Paris to attend the Olympics.

- Dwell time reduced by 9% this month. This is to be expected over the summer holidays as larger numbers of workers, who generally have higher dwell time, take time off work. Additionally, increased tourists will drive average dwell time down.

- The largest change to the demographics is a drop in Urban Cohesion visitors in Piccadilly and Jermyn Street districts. This is likely due to this group being a predominantly non-family group, they are likely still taking time off over summer but may be less likely to visit London.

- Spend metrics have been broadly stable compared to the last quarter (Jan - Mar 2024) with a 2% increase in spend and a 4% increase in transactions quarter on quarter. However, this is tracking below Q2 visits which increased by 31%. This increase is expected as Q2 usually sees higher footfall than Q1.

Business

Summary
July 2024

7.4 m (+17%)

Visitors to HOL area up 17% month on month

1 hrs 49 mins (-9%)

Visitors typically spend just under 2 hours in the area. Up 6 mins vs YTD average.

72.3% (+0.7%)

72.3% of visits from Core catchment, with more visitors coming from Outer London and surrounding commuter towns

Year-to-Date Update

Following some methodology updates and modifications, some recent historic data has been revised

- Visit volumes from April 2024 to-date – revisions largely reverse the negative trends previously reported

- International visitor mix and volumes – revisions deliver a stronger overall international % of total footfall (35.5% YTD) as well as reducing the negative trends previously reported

Locate Footfall *powered by:* **huq**

Year-to-Date
Footfall volumes down -6% year-to-date in July 2024

Footfall to HOL area down -6% year-to-date vs. the same period in 2023, with performance from domestic and international visitors relatively consistent
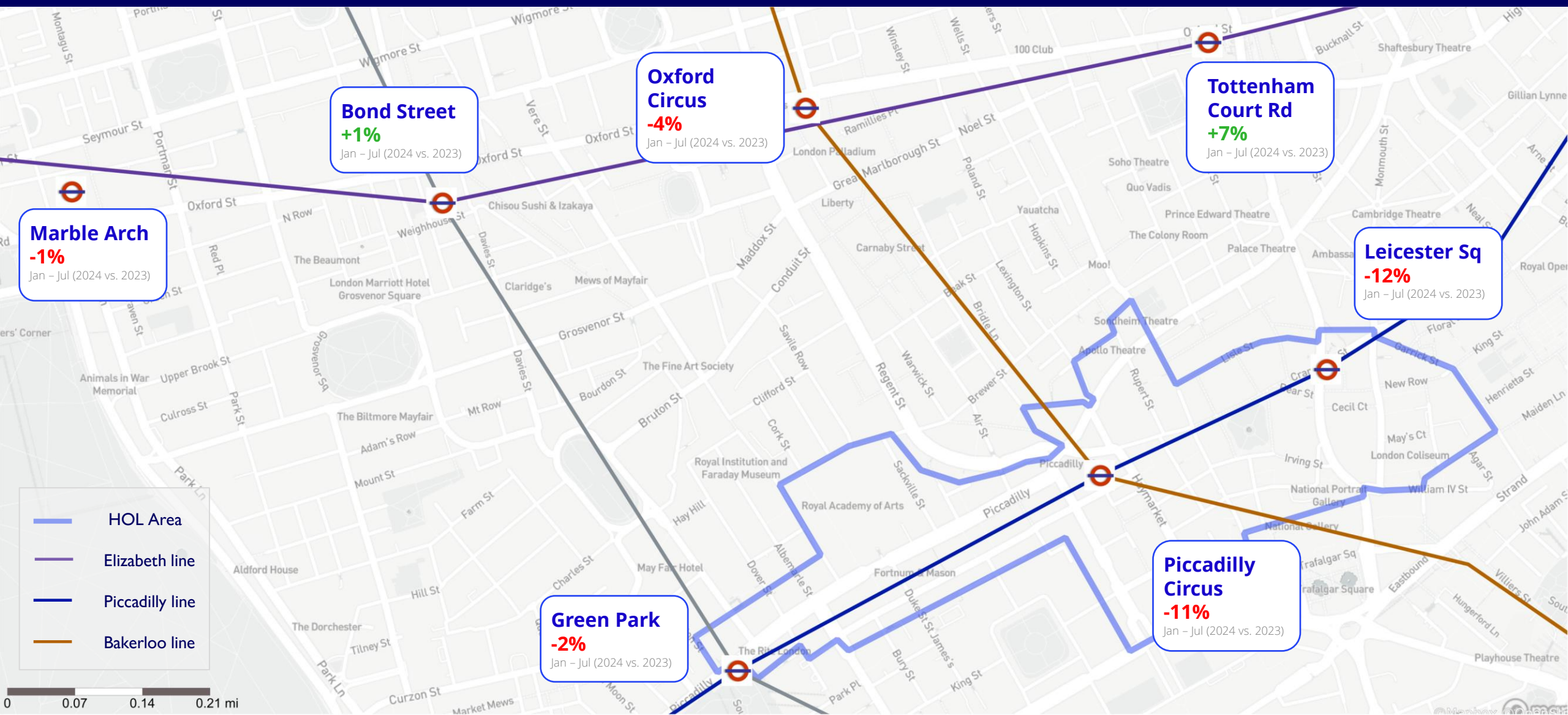
District	Year-to-Date (%)		
	Total	Domestic	International
HOL Area	-6%	-6%	-7%
Piccadilly District	-19%	-19%	-19%
Jermyn St District	-24%	-22%	-32%
Leicester Sq District	19%	20%	17%
Piccadilly Circus District	-16%	-23%	-2%
St Martin's Lane District	2%	-5%	16%
Haymarket District	-16%	-12%	-21%
Core West End	6%	5%	10%
HOL Area - major street avg	-18%	-25%	-7%

- Domestic (-6%) and International (-7%) experienced similar declines in performance vs. 2023

- Strongest performance seen in Leicester Sq (+19%), driven by +20% growth in domestic visitors and +17% growth in international visitation

Changing visitor travel behaviours following arrival of Elizabeth Line
Fewer entries/exits at HOL area stations vs. last year (Jan-Jul)

Bond Street
+1%
Jan – Jul (2024 vs. 2023)

Oxford Circus
-4%
Jan – Jul (2024 vs. 2023)

Tottenham Court Rd
+7%
Jan – Jul (2024 vs. 2023)

Marble Arch
-1%
Jan – Jul (2024 vs. 2023)

Leicester Sq
-12%
Jan – Jul (2024 vs. 2023)

Green Park
-2%
Jan – Jul (2024 vs. 2023)

Piccadilly Circus
-11%
Jan – Jul (2024 vs. 2023)

Legend:
- HOL Area
- Elizabeth line
- Piccadilly line
- Bakerloo line

0   0.07   0.14   0.21 mi

Summary Visitor Volumes
July 2024

- Footfall in July has been very strong compared to the previous month, increasing by a total of 17%. This is likely primarily driven by increased visitation during the summer holidays, both from abroad and domestically.

- The core catchment area increased by 0.7% due to an increase in domestic tourism. However, we have seen decreases in some area that are more associated with workers such as Reading and Gillingham.

- International visitors showed strong growth from Europe and Asia with a slower growth from North America, despite still being the largest single foreign market. North America may rebound post Olympics with tourists visiting London on the way back from Paris.

- TfL data shows that despite the increase in footfall, stations in the HOLBA area were lower. The only exception being Green Park which increased by 2%, likely due to more tourists visiting Buckingham Palace. This drop overall, is a continuation of a redistribution of passengers toward the Elizabeth Line. Additionally, however, the generally good weather and increase in tourists may mean more people opt to walk through the area.

Visitor Volumes
Footfall volumes up 17% vs June

Following decline in performance in June (-10% vs. May), volumes returned to growth month-on-month (+17%) in July

District	Month-on-Month			Year-on-Year		
	Total	*Domestic*	*International*	**Total**	*Domestic*	*International*
HOL Area	**17%**	**14%**	**23%**	**-1%**	**-8%**	**12%**
Piccadilly District	24%	13%	47%	-18%	-18%	-17%
Jermyn St District	-5%	-5%	-7%	-14%	-10%	-20%
Leicester Sq District	22%	24%	20%	13%	17%	6%
Piccadilly Circus District	18%	19%	17%	-14%	-24%	4%
St Martin's Lane District	26%	40%	4%	11%	17%	1%
Haymarket District	-12%	-21%	5%	-30%	-39%	-13%
Core West End	20%	13%	36%	18%	9%	40%
HOL Area - major street avg	12%	10%	16%	-26%	-29%	-20%

- Visits stable (-1%) across HOL area year-on-year, with growth seen in Leicester Sq (+13%) and St Martin's Lane (+11%)

- Strong international performance in July 2024 (+12% YoY & +23% MoM) across HOL area
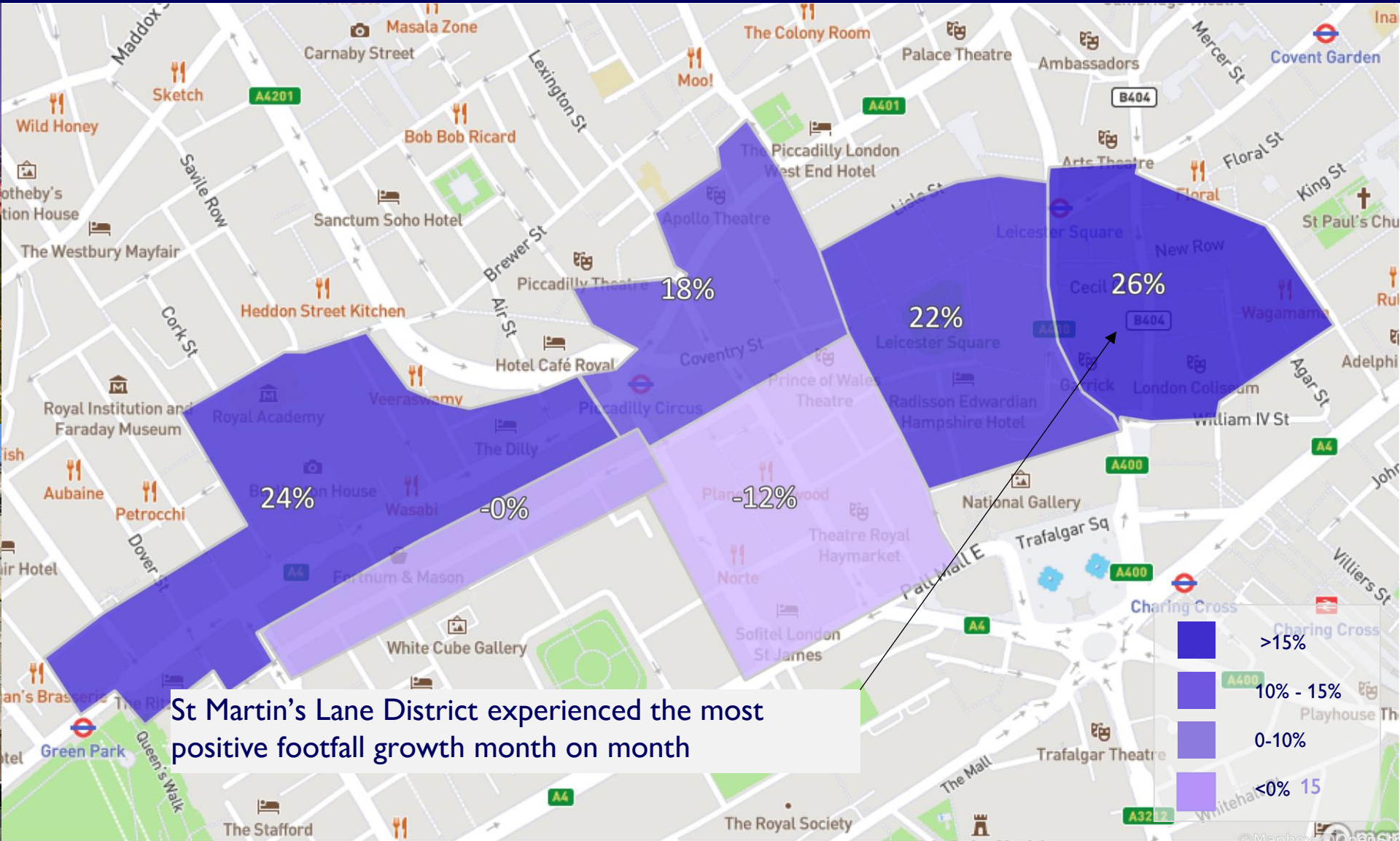
13

Visitor Volumes
Increase in visits towards end of July, in-line with summer holidays

Monthly footfall: HOL Area

Legend: Domestic, International, Rainfall (mm), Weekend
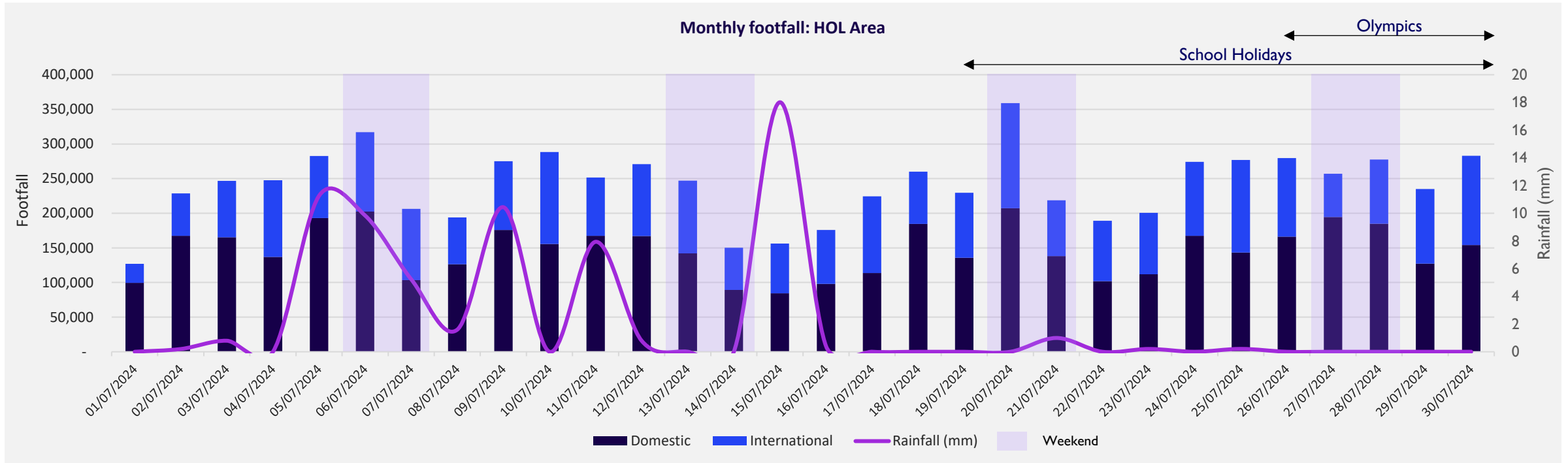
- Performance in HOL area experienced slight increase in second half of July, in-line with improved weather and the start of the school summer holidays

- Footfall on Saturday 20th July was +2% higher than Saturday average for the month. However, footfall was suppressed on 27th July (-13% vs. Saturday avg.), with protests in Trafalgar Sq likely impacting West End visits
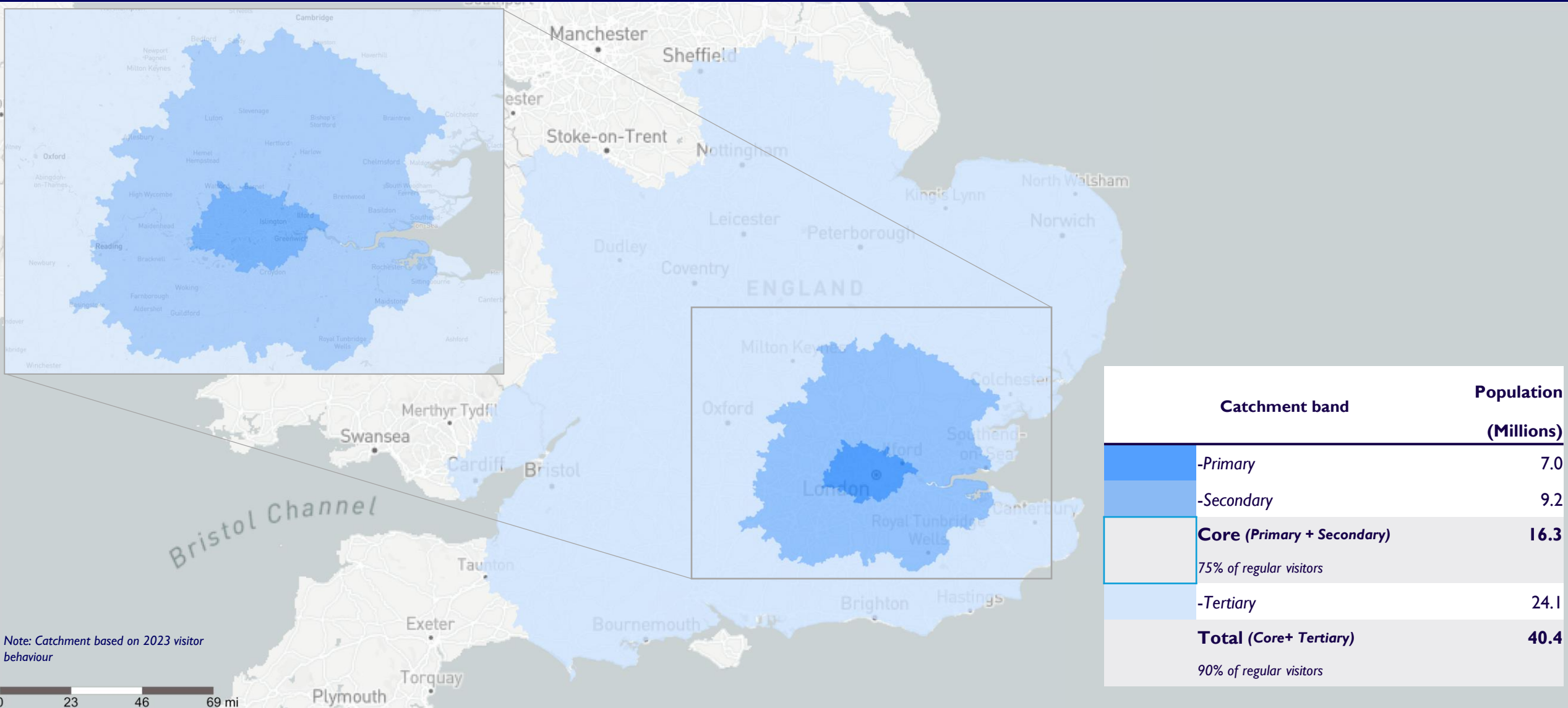
Business

Visitor Volumes
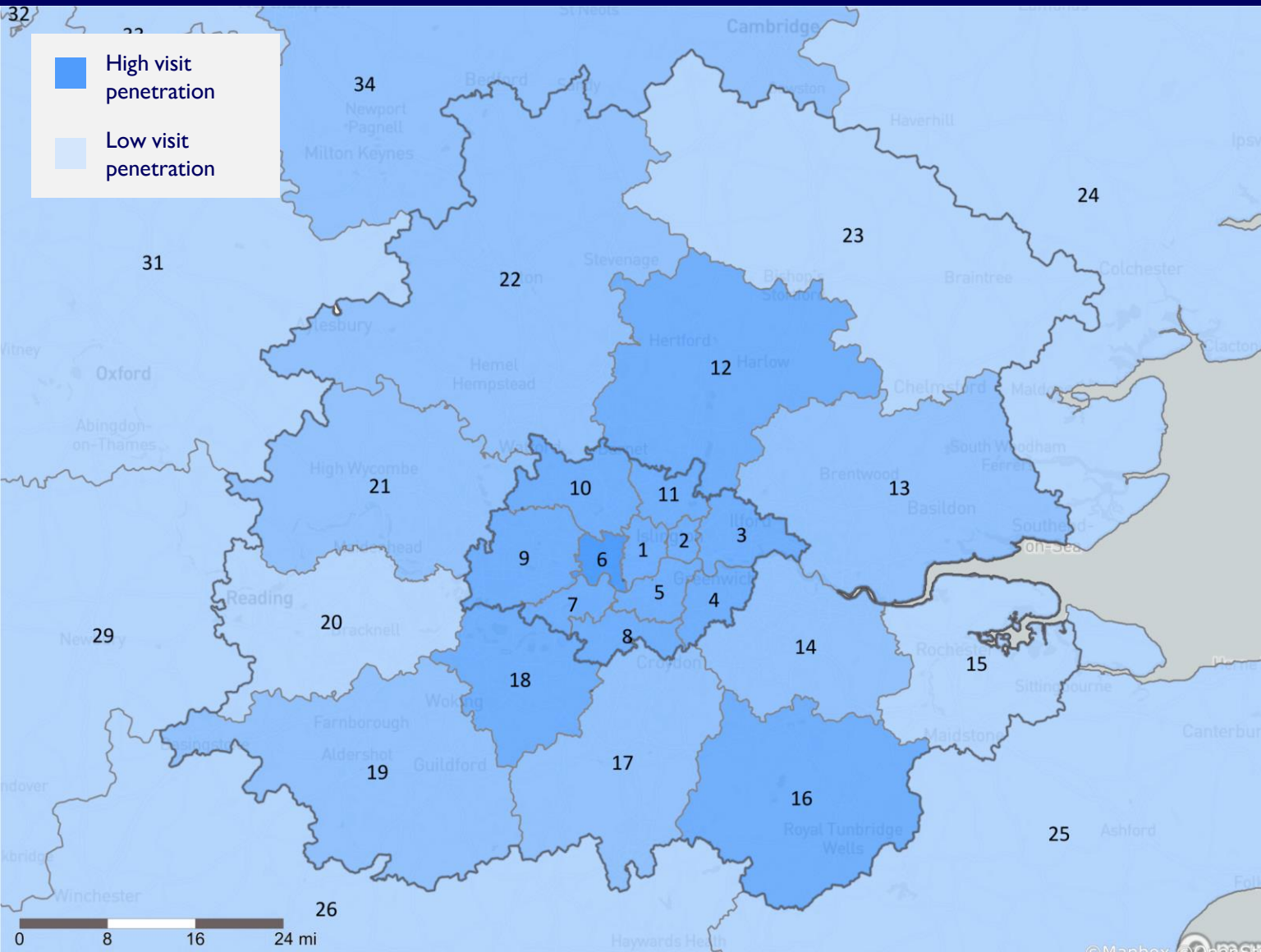## July vs. June 2024: St Martin's Lane saw strongest footfall increase

18%

22%

26%

24%

-0%

-12%

St Martin's Lane District experienced the most positive footfall growth month on month

>15%

10% - 15%

0-10%

<0%

Visitor Volumes
HOL's Core catchment has a population of 16.3million

Note: Catchment based on 2023 visitor behaviour

0   23   46   69 mi

Catchment band	Population (Millions)
-Primary	7.0
-Secondary	9.2
Core *(Primary + Secondary)*	**16.3**
75% of regular visitors	
-Tertiary	24.1
Total *(Core+ Tertiary)*	**40.4**
90% of regular visitors	

Visitor Volumes
## 3.8% increase in visits from Tertiary Catchment

- Relatively stable visit performance from zones in core catchment month-on-month in July (+0.7%)

- Increase in share of visits from zones in Tertiary catchment compared to June, representing additional pull from areas towards the edge of the catchment

Catchment band	Latest month visit %	Change vs. previous month
-Primary	50.2%	2.2%
-Secondary	22.2%	-1.8%
Core	72.3%	0.7%
-Tertiary	17.8%	3.8%
Total	90.2%	1.3%
-Pull in	9.8%	-1.3%

Note: Penetration = % of population from a zone that visits HOL Area
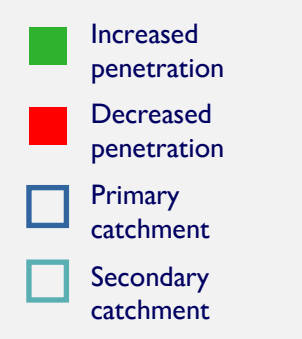
- Map represents the month-on-month change in penetration by catchment zone

  - Red areas represent zones which contributed fewer visits, while green areas represent zones that contributed more

- Zones towards the edge of the secondary & tertiary catchment have experienced slight increase in penetration, including Guildford (19) and Peterborough & Milton Keynes (34)

- Decreases in penetration from zones 20 (Reading) and 15 (Gillingham), indicating these areas primarily contribute worker visitors, which have declined as the school holidays commenced
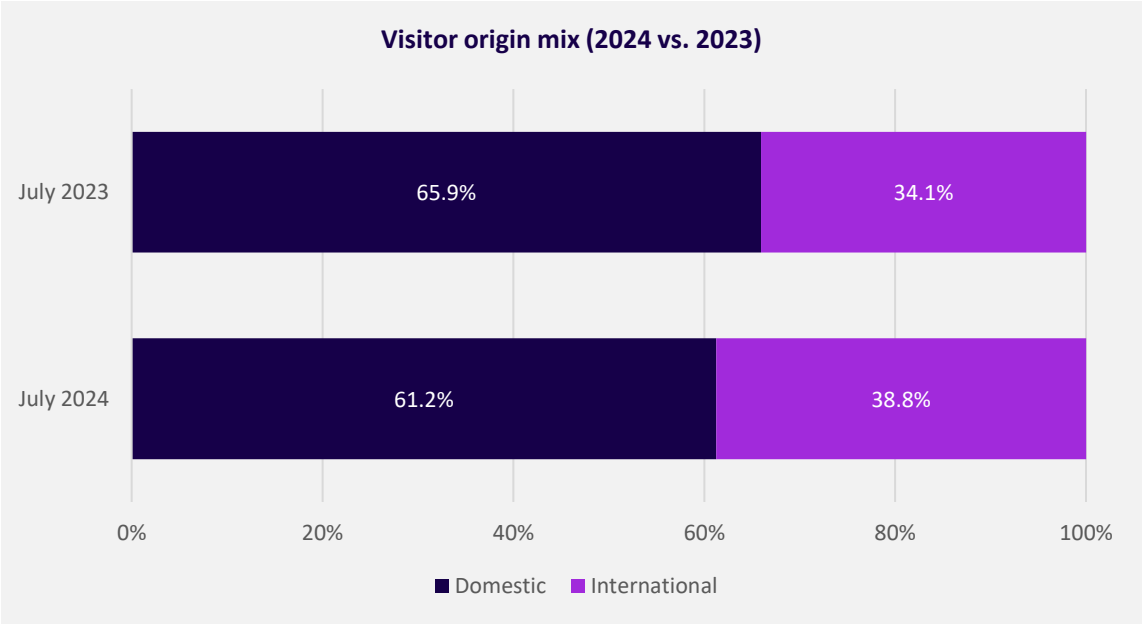
Visitor Volumes: visitor mix
International visitor volume and mix up on June

Area	International mix (%)	+/- change in mix		+/- change in volume	
		Month-on-Month	Year-on-year	Month-on-Month	Year-on-year
HOL Area	**38.8%**	**1.8%**	**4.7%**	**22.7%**	**12.5%**
Piccadilly District	39.5%	6.2%	0.3%	47.1%	-17.1%
Jermyn St District	24.2%	10.7%	4.6%	78.9%	-8.7%
Leicester Sq District	36.8%	-0.7%	-2.3%	19.7%	6.1%
Piccadilly Circus District	41.7%	-0.4%	7.4%	17.2%	4.5%
St Martin's Lane District	31.8%	-6.7%	-3.4%	3.9%	0.5%
Haymarket District	40.8%	6.2%	7.7%	3.8%	-14.0%
Core West End	34.2%	4.0%	5.3%	35.7%	39.9%

Visitor origin mix (2024 vs. 2023)

| July 2023 | Domestic 65.9% | International 34.1% |
| July 2024 | Domestic 61.2% | International 38.8% |

■ Domestic ■ International

- 1.8%-point increase in international mix versus June

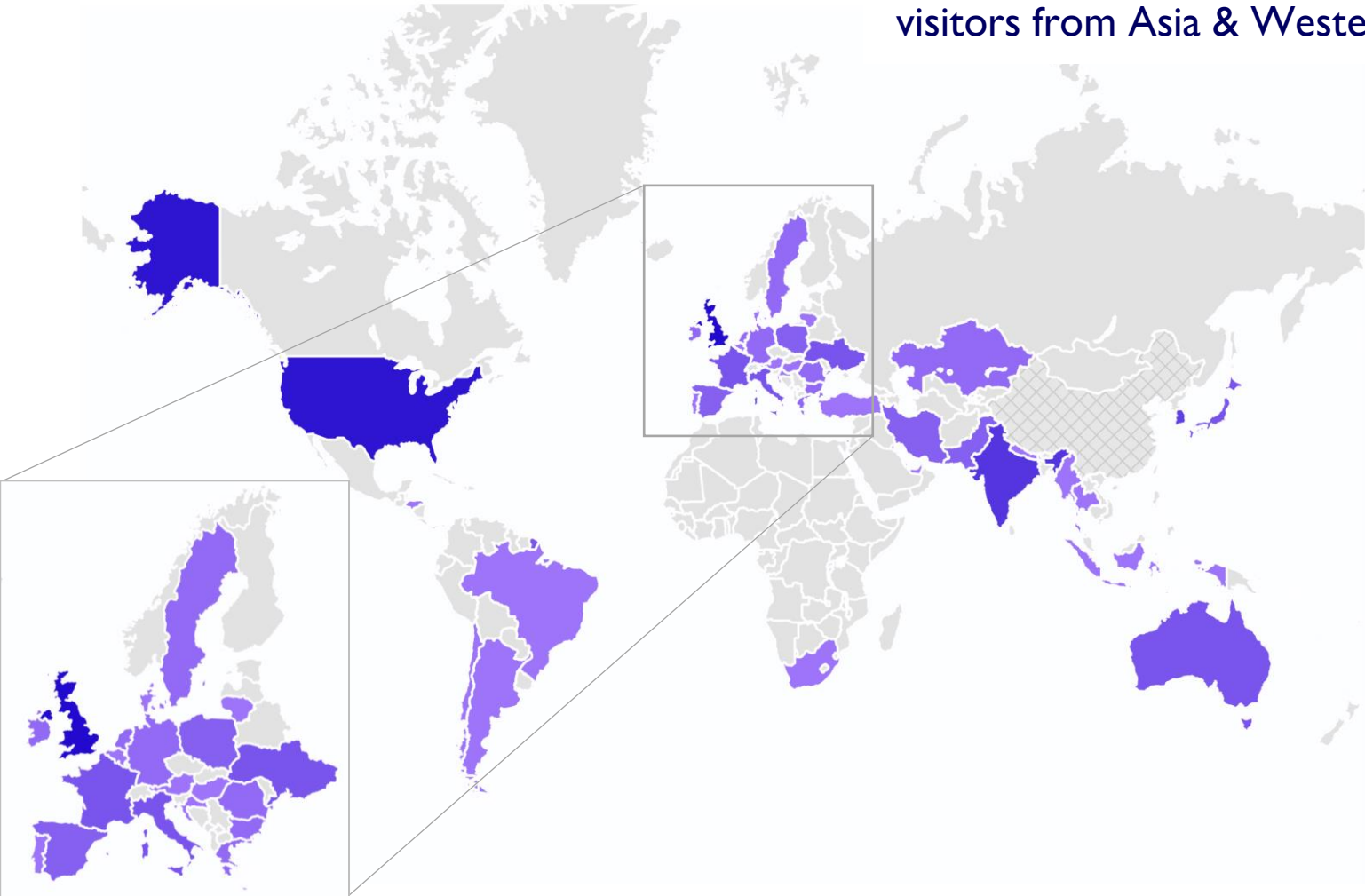- Equal to a 22.7% increase in the volume of international visitors month-on-month

- International visits accounted for 38.8% of visits in July 2024, vs. 34.1% last July

Visitor Volumes: visitor origin
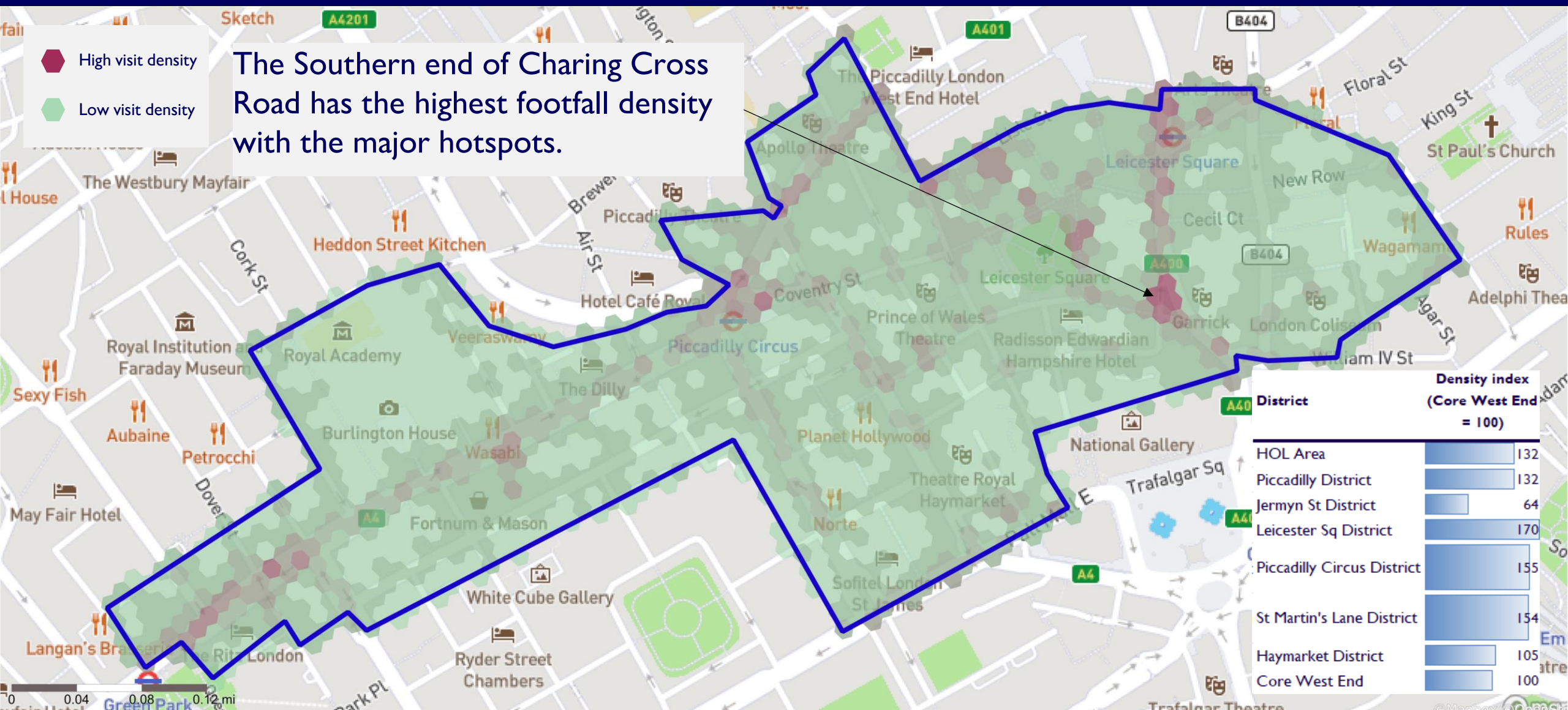## 38.8% of visitors to HOL from outside the UK

- Increase in international visitation in July 2024 driven by increases in visitors from Asia & Western and Southern Europe

Rank	Region	%	percentage point change
1	United Kingdom	61.2	↓ -1.8
2	Northern America	15.0	↓ -0.5
3	Southern Asia	5.4	↑ 1.5
4	Eastern Asia	4.3	↑ 1.5
5	Eastern Europe	4.1	↓ -0.1
6	Southern Europe	2.8	↑ 1.5
7	Western Europe	2.5	↑ 0.4
8	Northern Europe	1.1	↓ -0.7
9	Western Asia	1.0	↑ 0.4
10	Australia and New Zealand	1.0	↓ -0.1
	Europe (excl. UK)	10.6	↑ 1.2
	Rest of the world	28.2	↑ 0.6
	Non UK	38.8	↑ 1.8

Business   *Note: Data unavailable for visitors from China*

Visitor Volumes
Leicester Sq District has highest footfall density

High visit density

Low visit density

The Southern end of Charing Cross Road has the highest footfall density with the major hotspots.

District	Density index (Core West End = 100)	
HOL Area		132
Piccadilly District		132
Jermyn St District		64
Leicester Sq District		170
Piccadilly Circus District		155
St Martin's Lane District		154
Haymarket District		105
Core West End		100

Visitor Volumes: TFL station usage
High station usage throughout July

Weekly footfall vs. TFL usage

Legend: Footfall · TFL: Bond Street · TFL: Green Park · TFL: Leicester Square · TFL: Marble Arch · TFL: Oxford Circus · TFL: Piccadilly Circus · TFL: Tottenham Court Road
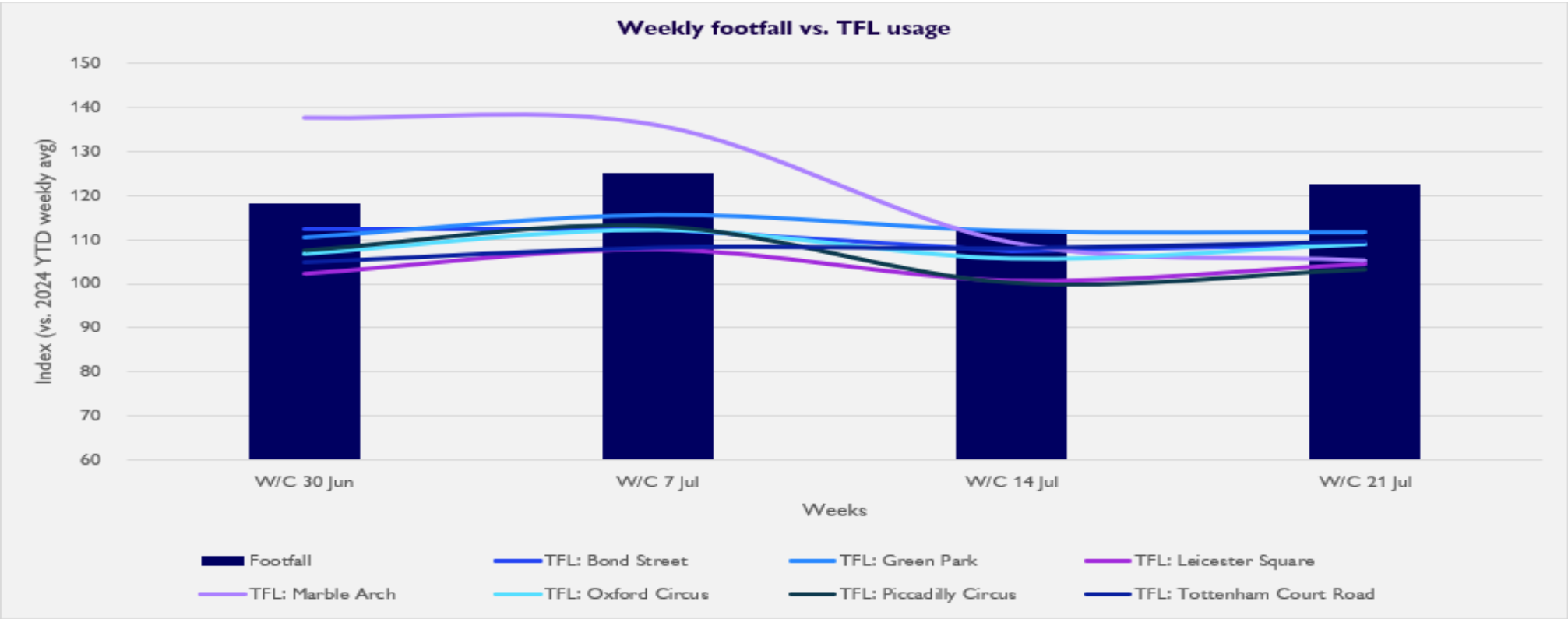
- High TfL usage seen at the end of June continued into July, with all stations experiencing increased usage vs. year-to-date weekly average in July 2024

Business *Note: Data covers Sunday – Saturday periods*

Visitor Volumes: TFL station usage | July
Decline in entries/exits at two of three HOL area tube stations

Bond Street
+2%
July 2024 vs. July 2023

Oxford Circus
+2%
July 2024 vs. July 2023

Tottenham Court Rd
+6%
July 2024 vs. July 2023

Marble Arch
+9%
July 2024 vs. July 2023

Leicester Sq
-13%
July 2024 vs. July 2023

Green Park
+2%
July 2024 vs. July 2023

Piccadilly Circus
-11%
July 2024 vs. July 2023

Legend:
- HOL Area
- Elizabeth line
- Piccadilly line
- Bakerloo line

0   0.07   0.14   0.21 mi
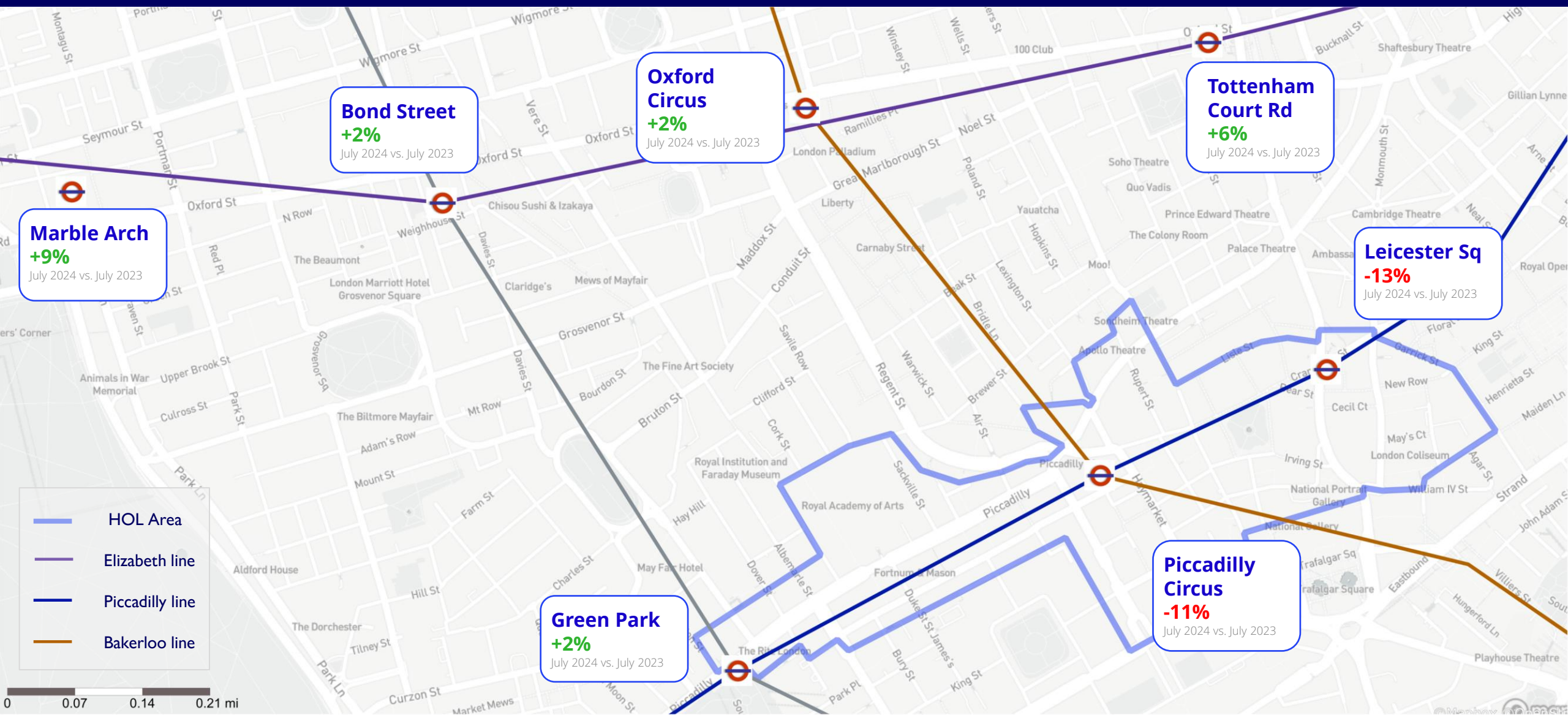
Summary Visitor Behaviour
July 2024

- The split across the day still shows clear distinctions between the districts. However, these are comparatively less pronounced than in previous months due to a change in regular visitation patterns caused by the Summer holidays.

- Dwell time reduced by 9% this month. This is to be expected over the summer holidays as larger numbers of workers, who generally have higher dwell time, take time off work. Additionally, increased tourists will drive average dwell time down.

32.9% of visitors to HOL area visit on a Friday or Saturday

Visitors by day

Legend:
- HOL Area
- Piccadilly District
- Jermyn St District
- Leicester Sq District
- Piccadilly Circus District
- St Martin's Lane District
- Haymarket District
- Core West End

Visitors by hour

District	00:00-06:00	06:00-09:00	09:00-12:00	12:00-15:00	15:00-18:00	18:00-00:00
HOL Area		6%	12%	20%	24%	32%
Piccadilly District		7%	17%	18%	20%	31%
Jermyn St District		1%	19%	26%	19%	28%
Leicester Sq District		3%	10%	20%	25%	35%
Piccadilly Circus District		5%	12%	19%	23%	36%
St Martin's Lane District		4%	8%	19%	27%	39%
Haymarket District		7%	10%	18%	22%	37%
Core West End		11%	17%	21%	23%	23%

- Fri-Sat has the highest proportion of visitors to HOL Area, as usual
- split by day of week relatively consistent due to school summer holidays
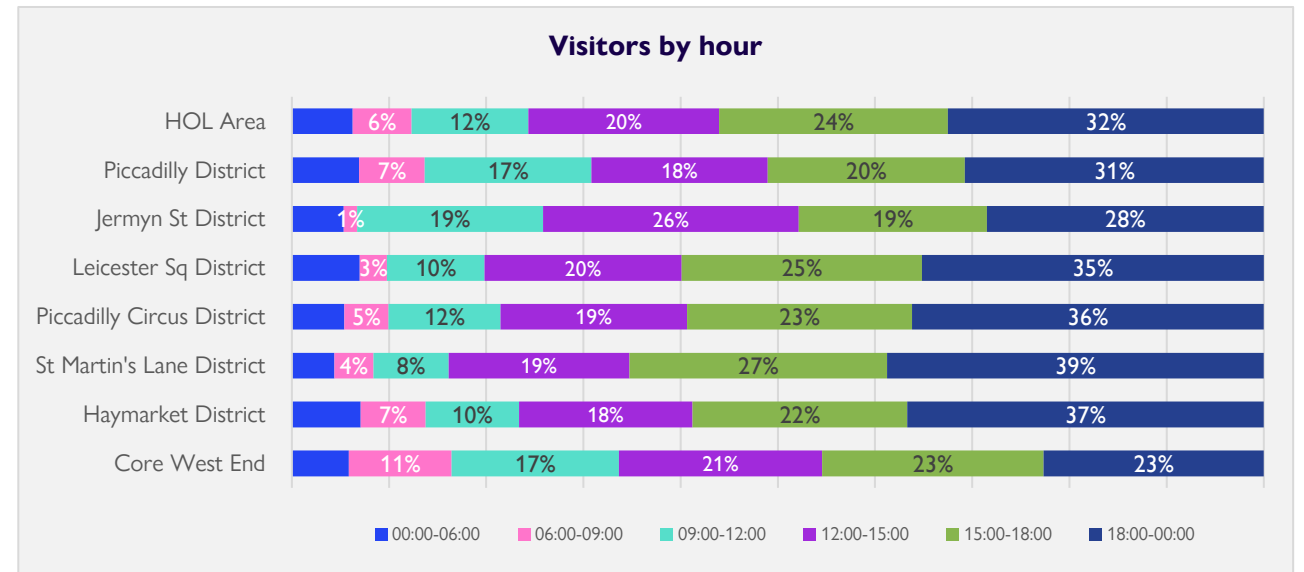
- Visitor volumes typically peak during lunchtime and into the afternoon
- Leicester Sq District, St Martin's Lane District, and Piccadilly Circus District have the highest proportion of evening visits, largely driven by F&B and leisure offer

Business

Visitor Behaviour
Dwell time decreased 11 mins in July vs. June

Visit frequency
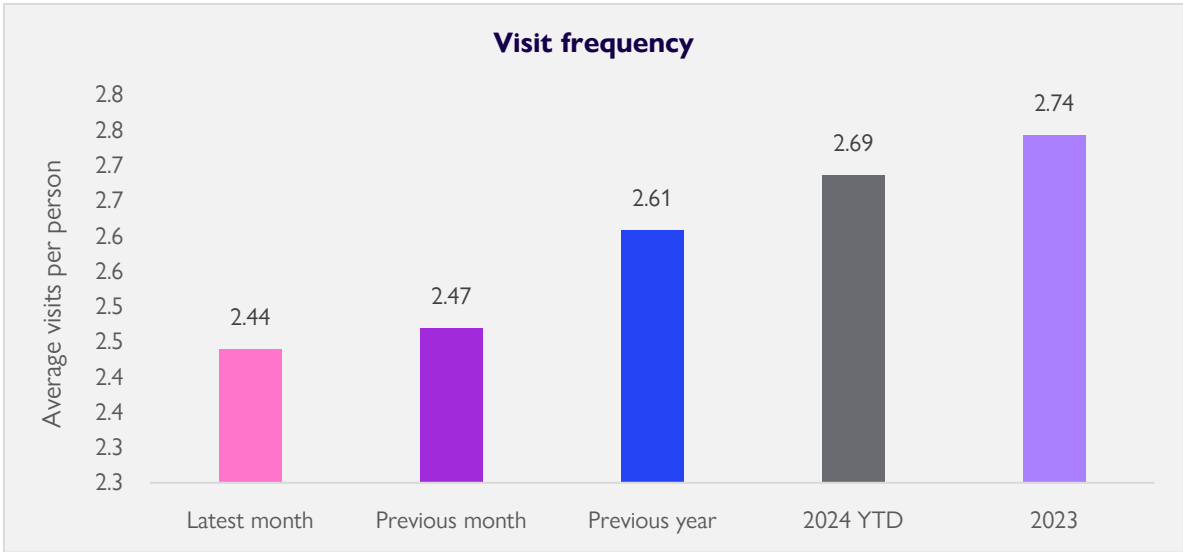
Dwell

- Average visitor visited HOL area 2.44 times in July, down from 2.47 in June
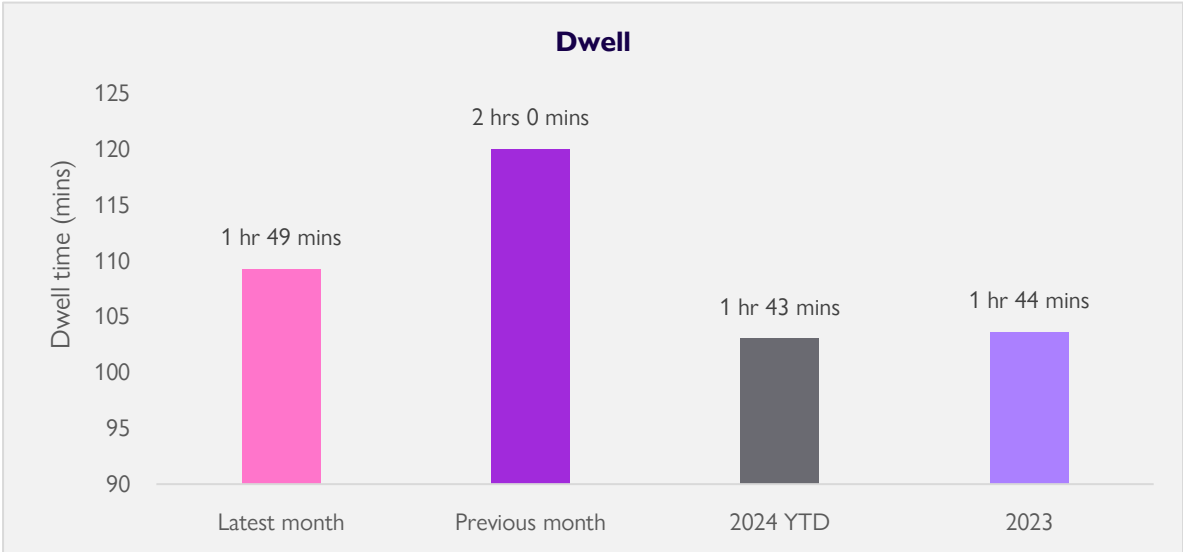
- Dwell time decreased 11 mins in July vs. June

- 44.8% of visitors to HOL Area dwell less than an hour

- Haymarket District had the longest dwell time in July, at 2 hours and 6 minutes

Business

Visitor Behaviour: Dwell time
Dwell time change varied by district

Dwell

Dwell time (mins) — y-axis: 0 to 180

Districts: HOL Area, Piccadilly District, Jermyn St District, Leicester Sq District, Piccadilly Circus District, St Martin's Lane District, Haymarket District, Core West End

Legend: 2024 YTD, 2023, Latest month

Dwell by day

Dwell time (index) — y-axis: 60 to 130

Days: Mon, Tues, Weds, Thurs, Fri, Sat, Sun

Legend: HOL Area, Core West End
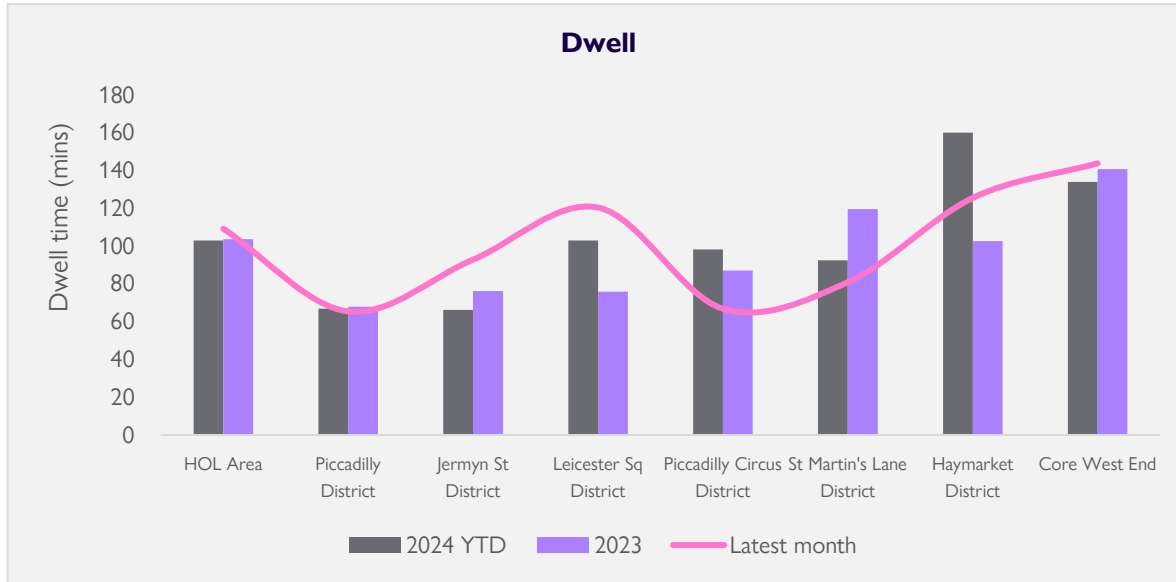
- Dwell time down in majority of districts in July

- Leicester Sq District saw the largest increase in dwell time vs. 2024 YTD, consistent with last month
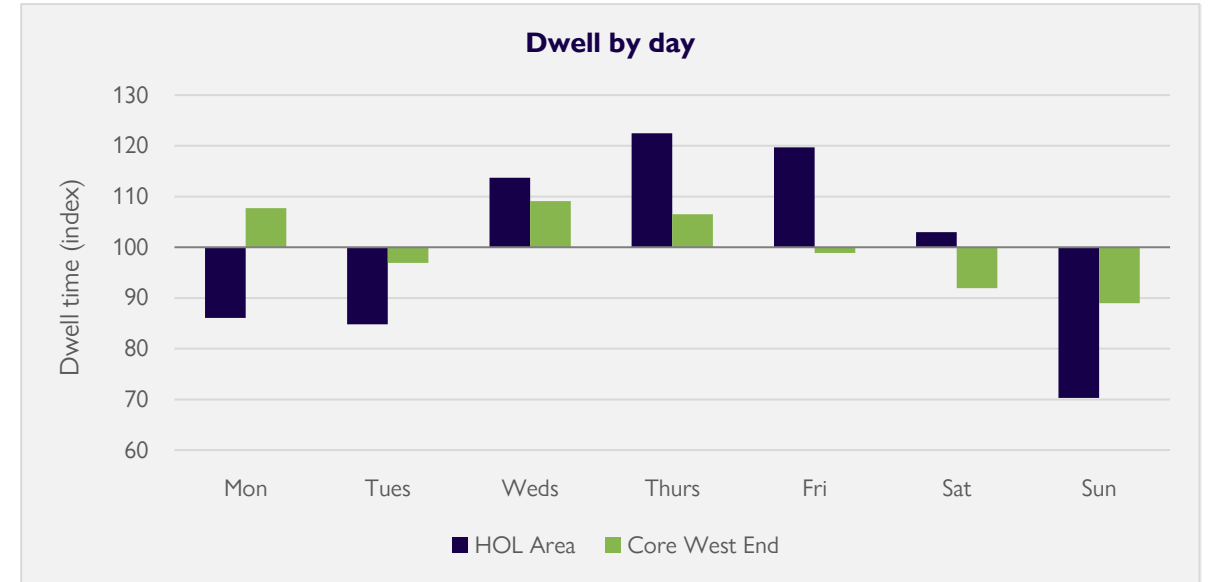
- HOL Area had longer dwell times Wednesday to Friday, likely driven by workers

- The pattern for the wider Core West End area is similar but less pronounced than HOL Area

Business

Summary Visitor profile
July 2024

- Mosaic demographics are largely unchanged from previous months, Urban cohesion and city prosperity are the two largest sociodemographic groups represented in the HOL area. Followed by Rental Hubs, municipal tenants and Domestic success. This profile is very much in line with the wider West end albeit with a slightly higher number of City Prosperity (see explanation of Sociodemographic groupings available in the appendix).

- The largest change is a drop in Urban cohesion visitors in Piccadilly and Jermyn Street districts. This Is likely due to this group being a predominantly non-family group, they are likely still taking time off over summer but may be less likely to visit London.

'City Prosperity' and 'Urban Cohesion' dominant Mosaic groups

Mosaic segmentation — HOL Area — Core West End
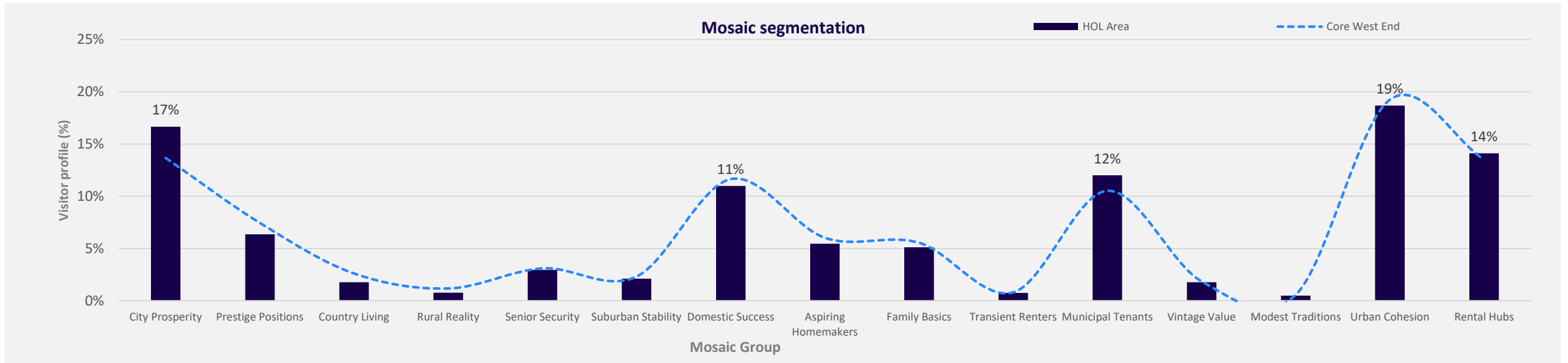
- Visitor profile biased towards 2 Mosaic groups 'Urban Cohesion' and 'City Prosperity'

– Urban Cohesion are residents of settled urban communities with a strong sense of identity

– City Prosperity are high income residents who have expensive homes in desirable metropolitan locations

– Profile very similar to Core West End visitors

Business

Visitor Profile: Mosaic profile
72.4% of domestic visitors from 5 Mosaic groups

Mosaic segmentation
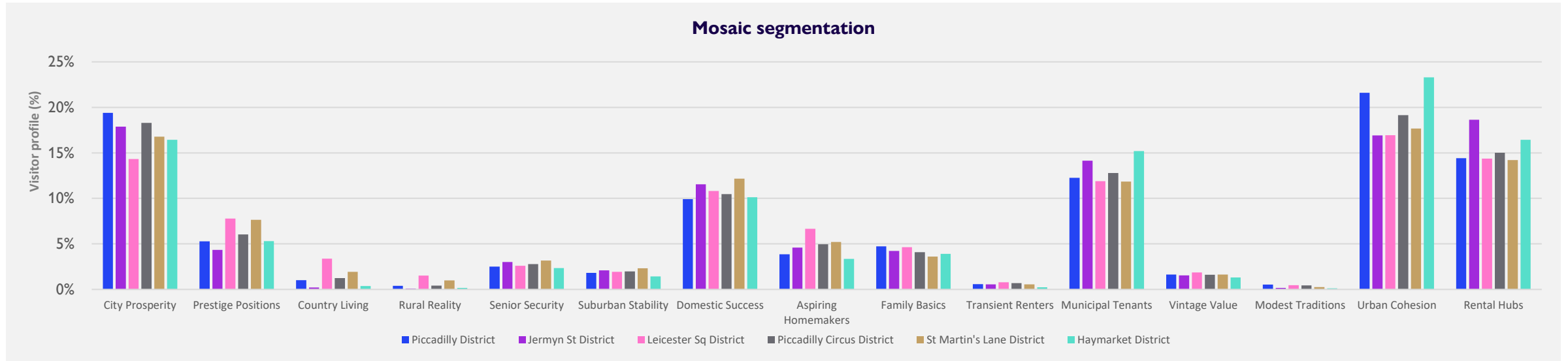
- Consistent profile across the districts with the same 5 Mosaic groups representing >72% of all visitors

- Piccadilly District has the highest proportion of City Prosperity visitors (19.4%) while Haymarket District has highest proportion of Urban Cohesion (23.3%)

Business

Visitor Profile: Mosaic profile
Demographic profile consistent with last month in most places

Mosaic segmentation month on month change
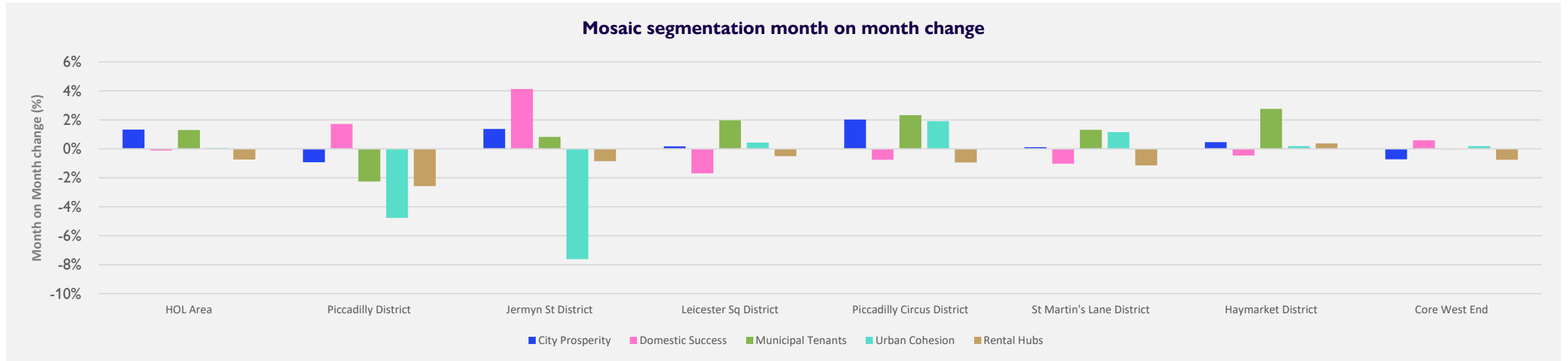
- 72.4% of HOL visitors from 5 core Mosaic groups (up **1.8%** vs. June)

- Demographic profile consistent with last month for majority of districts. Jermyn St District saw the greatest change with a decrease in 'Urban Cohesion' visitors matched by an increase in 'City Prosperity' & 'Domestic Success' visitors. This drop in 'Urban Cohesion' is likely due to the fact is not a family grouping, so we are likely not seeing that group represented by incoming tourists over the summer holidays.

Business

Summary Visitor Spend
July 2024

- Spend metrics have been broadly stable compared to the last quarter (Jan- Mar 24) with a 2% increase in spend and a 4% increase in transactions against the last quarter. However, this is tracking below the in Q2 visits which increased by 31%. This increase is expected as Q2 usually sees higher footfall than Q1.

- Most of the increase in the spend metrics occurred in April and may before decreasing in June in line with visits to the area.

- The largest increases came in weekday spending, likely due to the increased holidays in Q2. Apparel appears to be struggling more than overall retail and Food and Beverage businesses. Mastercard data shows that this is a wider sector issue and due to relatively few apparel businesses in the HOL area, is prone to greater fluctuations.

Spending up in Q1 in majority of districts vs. last quarter

Q1 2024: Apr-Jun

District	Spend		Transactions		Visits	
	Quarter-on-quarter	Year-on-year	Quarter-on-quarter	Year-on-year	Quarter-on-quarter	Year-on-year
	Total	Total	Total	Total	Total	Total
HOL Area	2%	-3%	4%	2%	31%	-3%
Piccadilly District	-1%	-8%	0%	-5%	24%	-17%
Jermyn St District	12%	2%	12%	5%	9%	-11%
Leicester Sq District	2%	-6%	3%	-3%	45%	25%
Piccadilly Circus District	3%	0%	6%	5%	12%	-19%
St Martin's Lane District	1%	-5%	2%	-3%	29%	-1%
Haymarket District	11%	0%	10%	7%	18%	-14%

Quarter-on-quarter change

Legend: Spend | Transactions | Visits
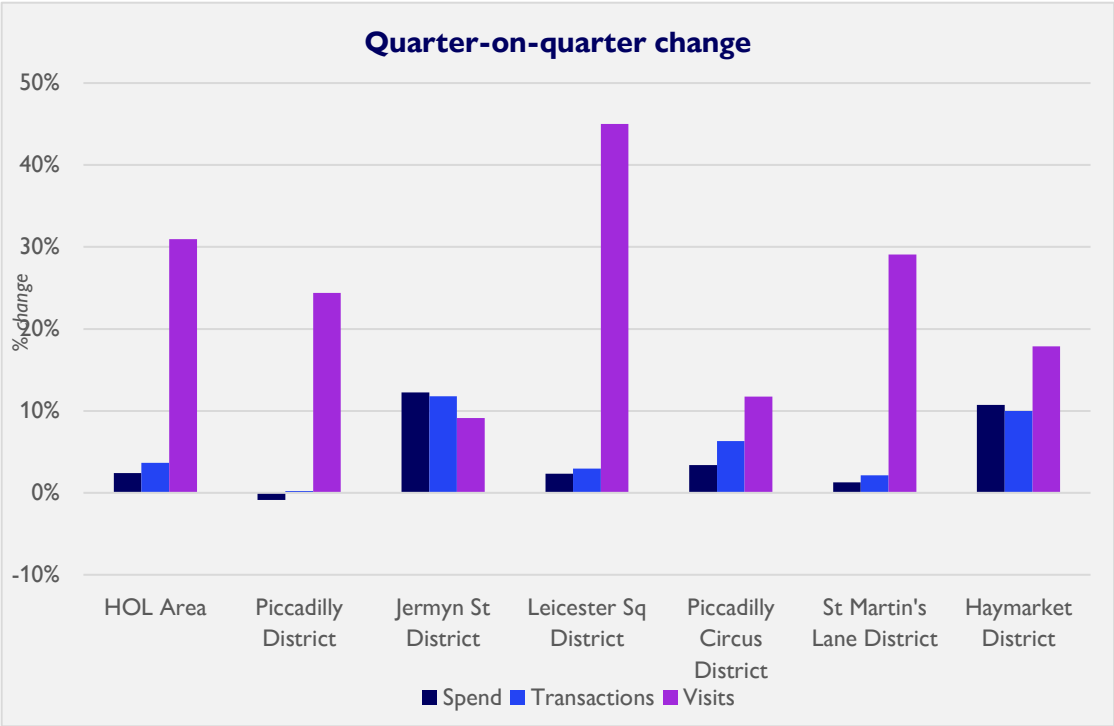
- Spending increase by 2% in HOL Area in **Q1** vs. Q4 FY2023, although to a lesser extent than visits over the same period

- Increase in spend is less than the increase in transactions suggesting those visiting were spending less, despite transacting more

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

Monthly spend: HOL Area

- Higher volume of spend and transactions in April and May before a decrease in June, in line with visits

- Visits were highest in May due to school holidays and two bank holidays and declined to below quarter average in June

Business

Visitor spend *(Q1 2024: Apr-Jun)*
More activity during last two weeks of April

Weekly spend: HOLBA Area

Legend: Spend, Transactions, Visits, Rainfall (mm)
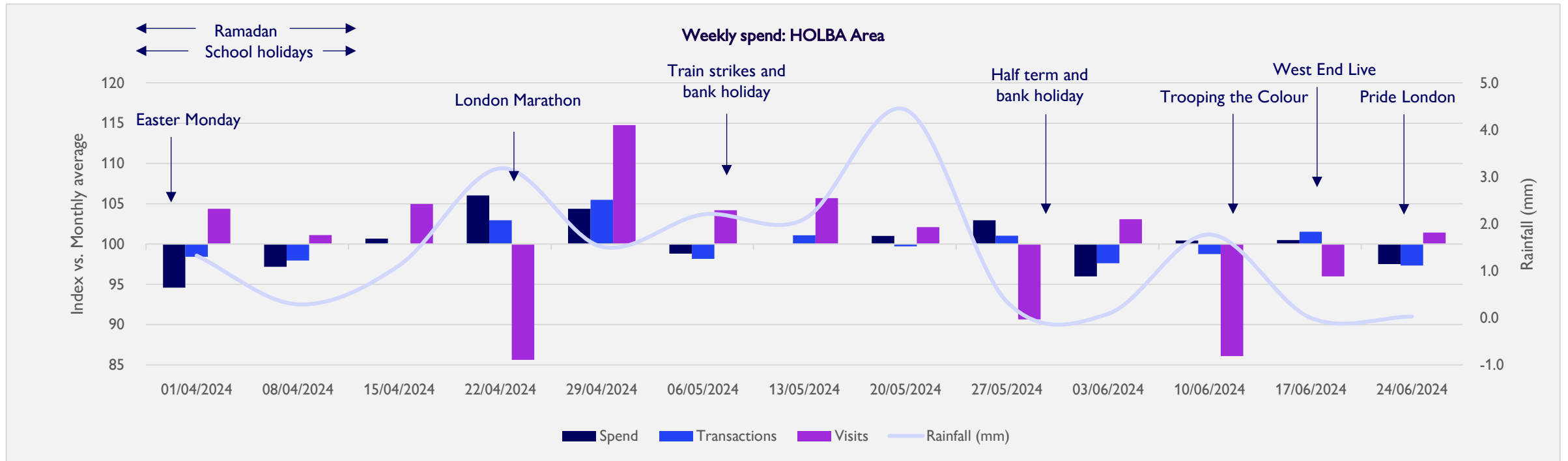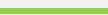
- Higher volume of spend and transactions early in the quarter before a decrease in June

- Limited impact of higher rainfall on week of 20th May on spending and visits, whilst rainfall on week of 22nd April looked to negatively impact visits

Visitor spend *(Q1 2024: Apr-Jun)*
Spend at similar levels to Q4 FY2023 in majority of categories

	Eating		Apparel		Total Retail	
	Weekday	Weekend	Weekday	Weekend	Weekday	Weekend
Quarter on quarter (%)	3%	-2%	3%	-14%	5%	0%
Year on year (%)	1%	0%	-25%	-21%	-5%	-3%
YTD vs. last year(%)	3%	2%	-17%	-12%	-3%	-4%

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

Business

Spend recovery update (Q1 2024: Apr-Jun)
Spend and transactions consistent with 2023 levels

YoY Footfall and Spend recovery

Q1

Year on year change (100% = in-line with same month in previous year)

| | July 2023 | August 2023 | Sept 2023 | Oct 2023 | Nov 2023 | Dec 2023 | Jan 2024 | Feb 2024 | Mar 2024 | Apr 2024 | May 2024 | Jun 2024 |

— Spend — Transactions — Visits - - YoY benchmark
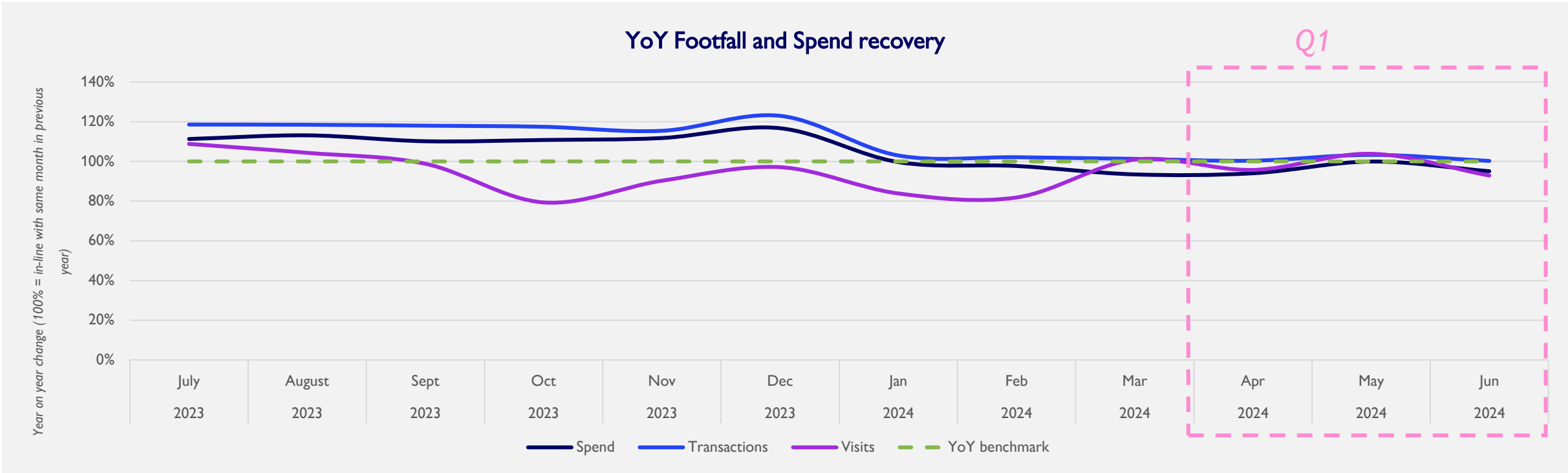
- Spend (value) and transactions (volume) both around 2023 levels throughout 2024, although suffered a slight decrease in June

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

Business

Spend has been outperforming visits in majority of categories

YoY Spend and footfall recovery

Legend:
- HOL Area visits
- Weekday eating spend
- Weekend eating spend
- Weekday apparel spend
- Weekend apperal spend
- Weekday retail spend
- Weekend retail spend
- YoY benchmark
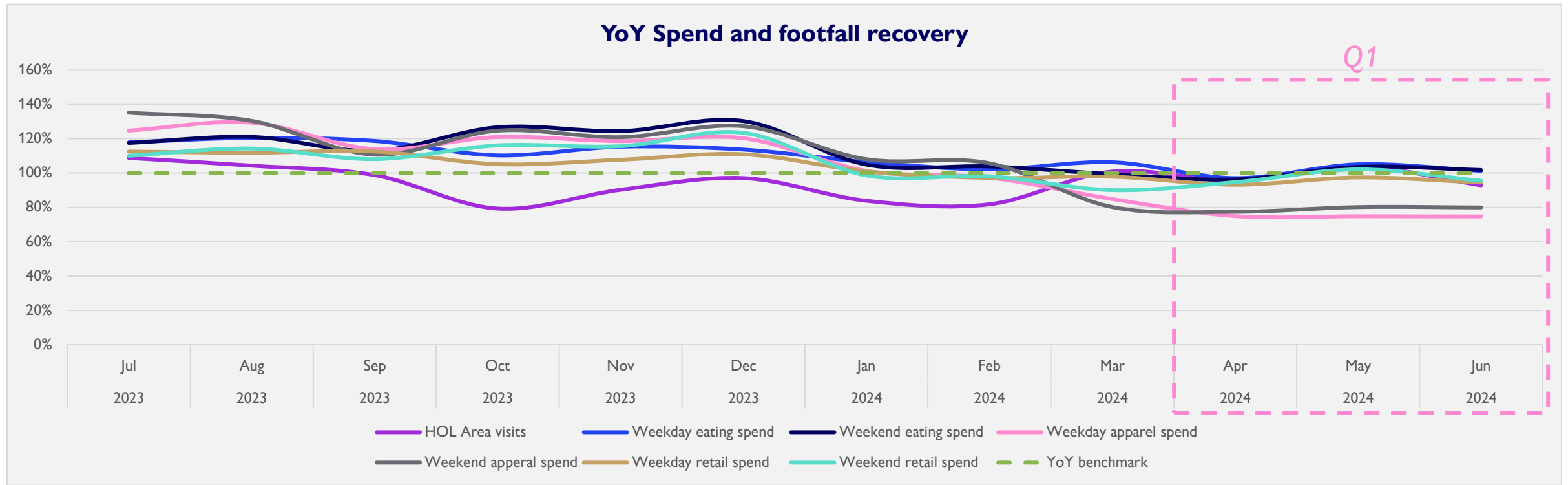
- Visits have been consistently around 85% of 2023 levels all year (aside from a peak in March), whilst spend has been closer to 2023 levels so far in 2024 in majority of categories

- Weekday and weekend apparel spend had larger decrease in Q1 than other categories

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Business

Visitor spending (*Q1 2024: Apr-Jun*)
Saturday has highest spend levels

Spend volume hotspots

District	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
HOL area	76	83	96	106	120	137	83
Piccadilly District	83	87	100	108	118	128	76
Jermyn St District	83	92	103	111	117	127	67
Leicester Sq District	74	75	88	98	118	148	99
Piccadilly Circus District	72	77	89	104	121	145	92
St Martin's Lane District	73	81	94	105	115	145	86
Haymarket District	74	83	98	106	124	135	80

Index (vs. district average)

Quarter-on-quarter change in spend

District	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
HOL area	9%	6%	5%	8%	5%	-1%	6%
Piccadilly District	6%	4%	-3%	6%	5%	-4%	1%
Jermyn St District	14%	18%	12%	17%	14%	10%	17%
Leicester Sq District	12%	4%	5%	6%	0%	-3%	4%
Piccadilly Circus District	12%	8%	6%	10%	2%	0%	8%
St Martin's Lane District	9%	4%	4%	4%	0%	-4%	6%
Haymarket District	13%	11%	10%	17%	17%	14%	21%

% change (volume)

- Saturdays saw largest volume of spend across HOL Area and in all districts, consistent with previous reports

- HOL Area spend up every day except Saturday in Q1 vs. Q4 FY2023

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

Business

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Visitor spending (*Q1 2024: Apr-Jun*)
12 - 3pm has highest spend levels

Spend volume hotspots

District	12am - 3am	3am - 6am	6am - 9am	9am - 12pm	12pm - 3pm	3pm - 6pm	6pm - 9pm	9pm - 12am
HOL area	30	6	11	56	207	190	180	119
Piccadilly District	28	4	9	68	256	225	113	97
Jermyn St District	31	10	12	88	256	221	109	73
Leicester Sq District	32	5	7	38	166	170	241	141
Piccadilly Circus District	45	6	7	38	161	163	228	152
St Martin's Lane District	18	4	13	48	189	182	229	116
Haymarket District	24	10	18	65	193	180	199	111

Index (vs. district average)

Quarter-on-quarter change in spend

District	12am - 3am	3am - 6am	6am - 9am	9am - 12pm	12pm - 3pm	3pm - 6pm	6pm - 9pm	9pm - 12am
HOL area	-7%	28%	14%	11%	10%	5%	0%	5%
Piccadilly District	-5%	2%	-5%	8%	10%	1%	-5%	2%
Jermyn St District	7%	54%	23%	20%	18%	12%	9%	12%
Leicester Sq District	-6%	11%	6%	10%	7%	5%	0%	6%
Piccadilly Circus District	-5%	2%	16%	18%	9%	7%	4%	7%
St Martin's Lane District	-14%	28%	19%	8%	5%	5%	-1%	0%
Haymarket District	-14%	86%	39%	21%	16%	18%	9%	15%

% change (volume)

- 12 – 3pm saw largest volume of spend across HOL Area, but 4 districts saw highest volumes between 6pm – 9pm, driven by a strong evening economy

- Volume of spend in HOL area increased vs. previous quarter in every time period except 12am – 3am and 6pm – 9pm, with the largest increases evident during the morning rush hour

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

Business

Get in touch

We want to hear your thoughts on our reports.

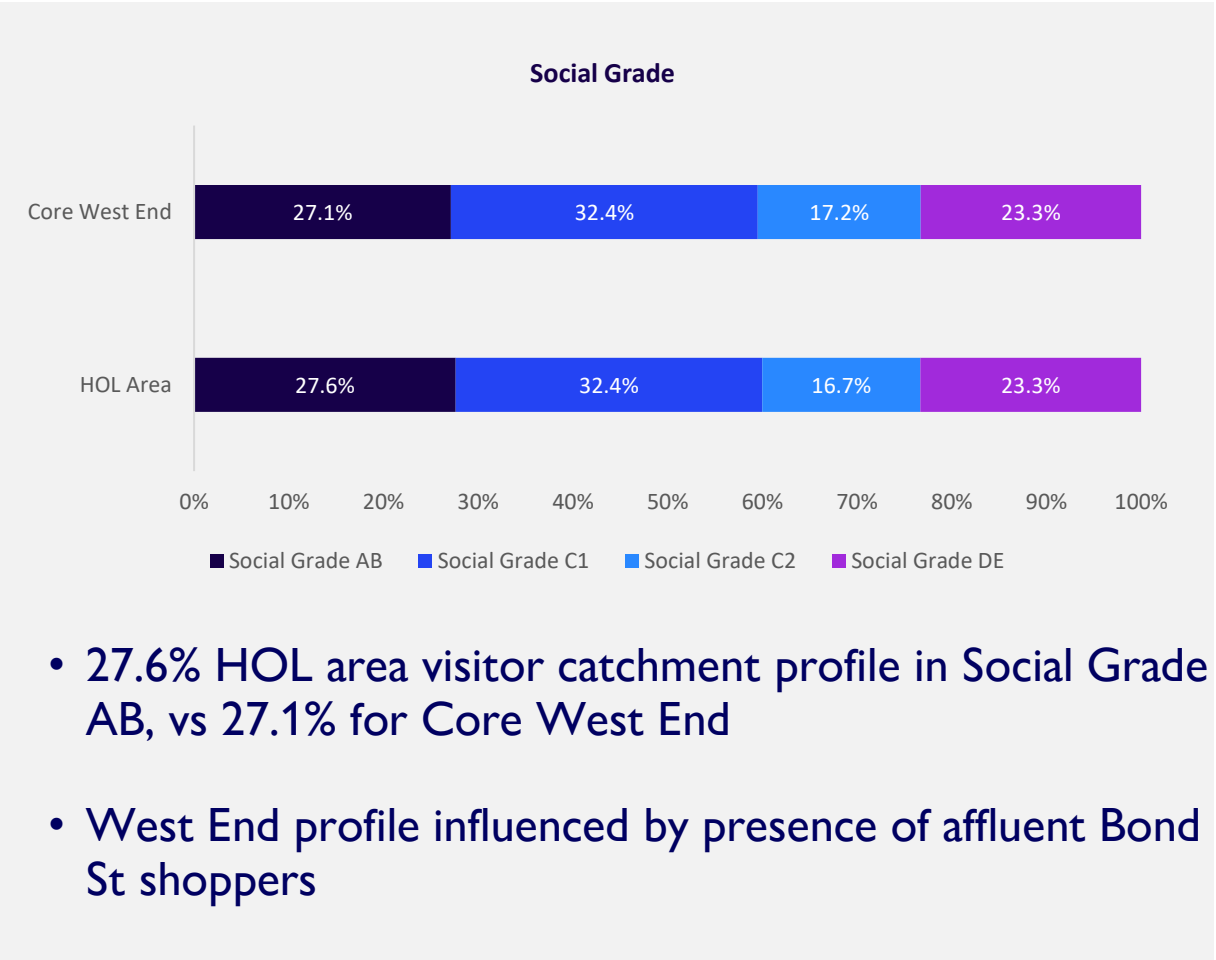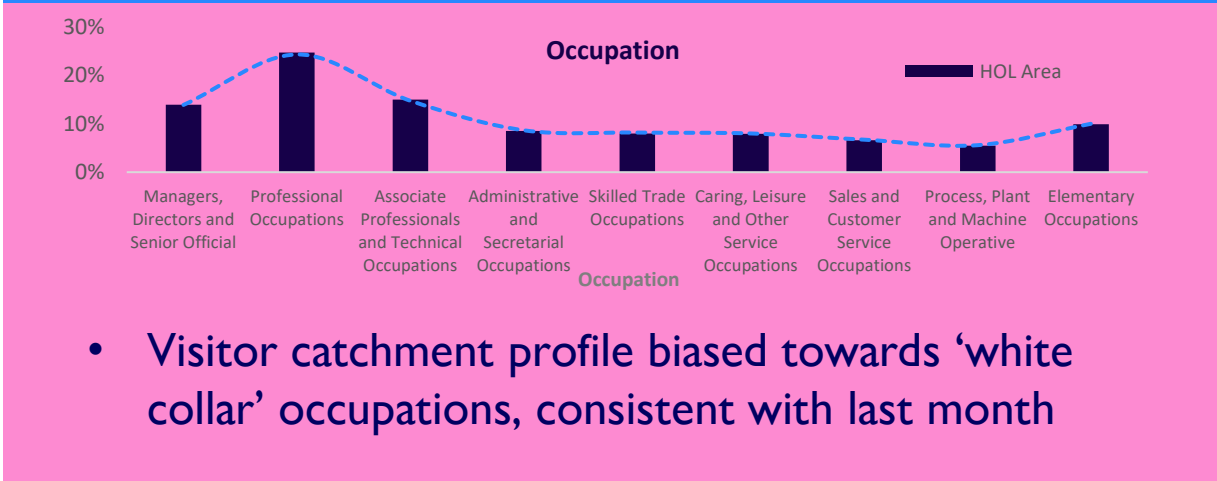Please fill out this short survey to help us continually refine and improve our reports.

https://forms.office.com/e/cdj4eGkPAK

Appendix

Catchment biased towards middle-aged, white-collar workers

Age

HOL Area   Core West End

- Visitor profile skewed towards those aged 30-59 years old

- Males & females are evenly split, and in-line with Core West End

Female **48.7%**   Male **51.3%**

Occupation

HOL Area

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

- Visitor catchment profile biased towards 'white collar' occupations, consistent with last month

Social Grade

	Social Grade AB	Social Grade C1	Social Grade C2	Social Grade DE
Core West End	27.1%	32.4%	17.2%	23.3%
HOL Area	27.6%	32.4%	16.7%	23.3%

- 27.6% HOL area visitor catchment profile in Social Grade AB, vs 27.1% for Core West End

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

Business

Appendix
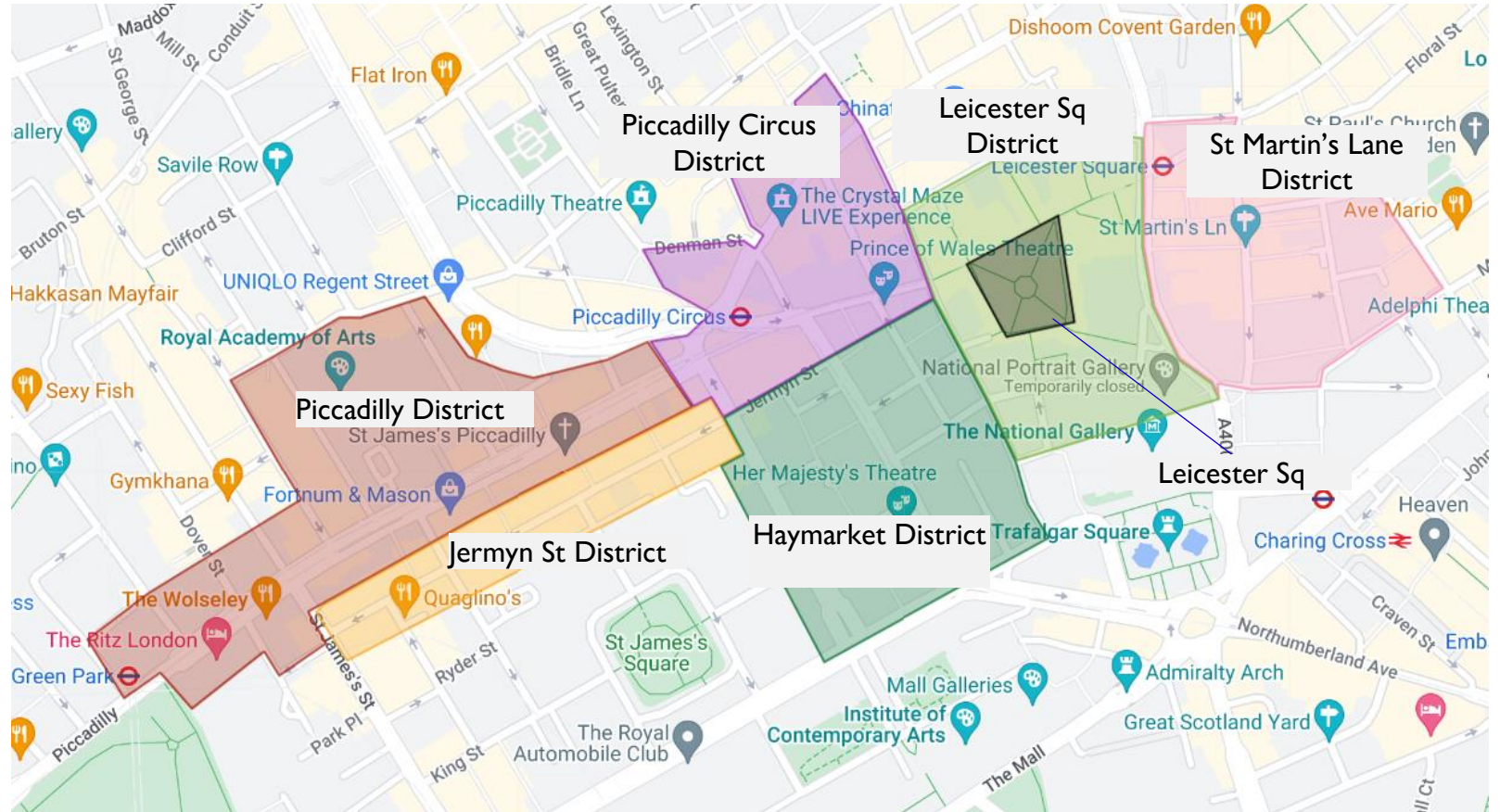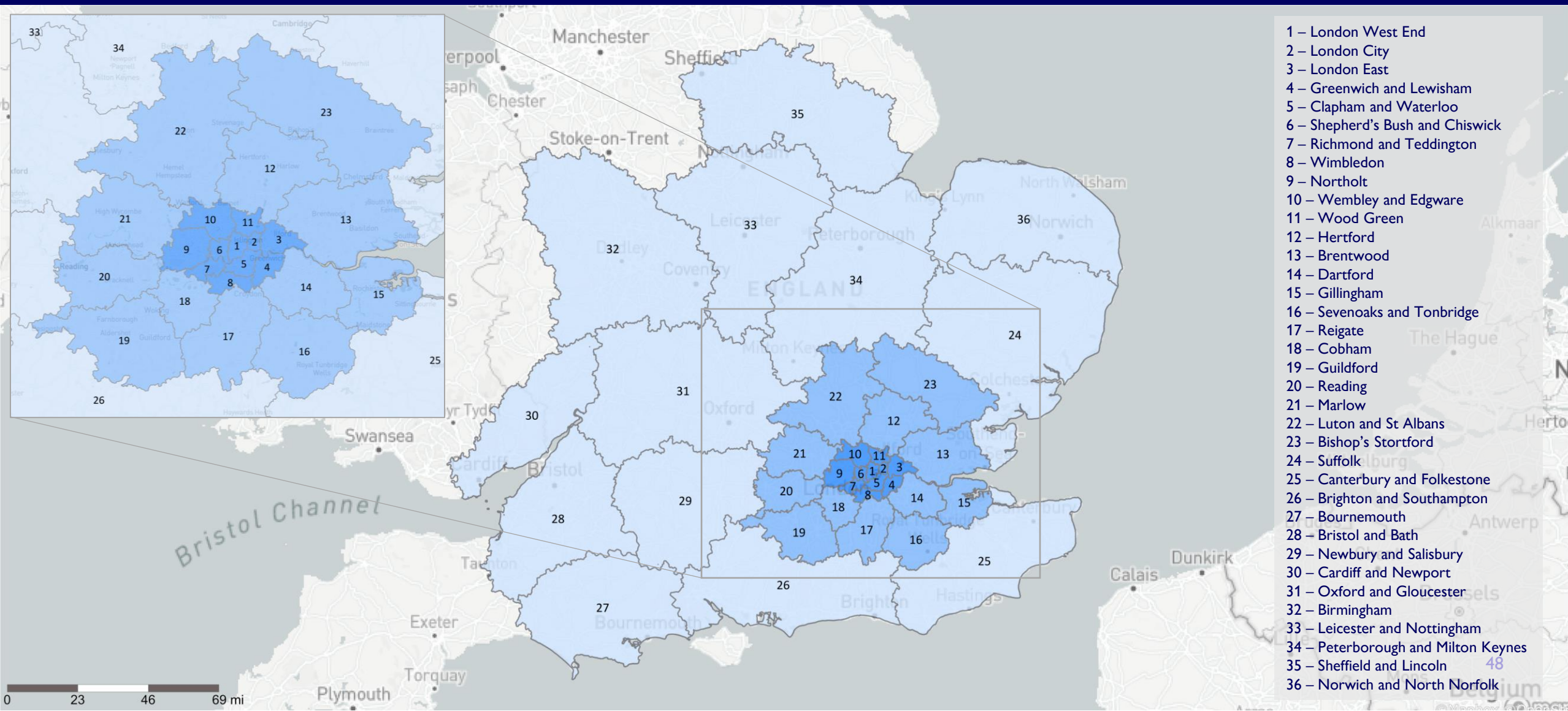## Location definition

- 7 key areas within HOL 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

1 – London West End
2 – London City
3 – London East
4 – Greenwich and Lewisham
5 – Clapham and Waterloo
6 – Shepherd's Bush and Chiswick
7 – Richmond and Teddington
8 – Wimbledon
9 – Northolt
10 – Wembley and Edgware
11 – Wood Green
12 – Hertford
13 – Brentwood
14 – Dartford
15 – Gillingham
16 – Sevenoaks and Tonbridge
17 – Reigate
18 – Cobham
19 – Guildford
20 – Reading
21 – Marlow
22 – Luton and St Albans
23 – Bishop's Stortford
24 – Suffolk
25 – Canterbury and Folkestone
26 – Brighton and Southampton
27 – Bournemouth
28 – Bristol and Bath
29 – Newbury and Salisbury
30 – Cardiff and Newport
31 – Oxford and Gloucester
32 – Birmingham
33 – Leicester and Nottingham
34 – Peterborough and Milton Keynes
35 – Sheffield and Lincoln
36 – Norwich and North Norfolk

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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

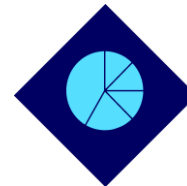**UK Population**

51m individuals

25m households

Mosaic

15 groups

66 types

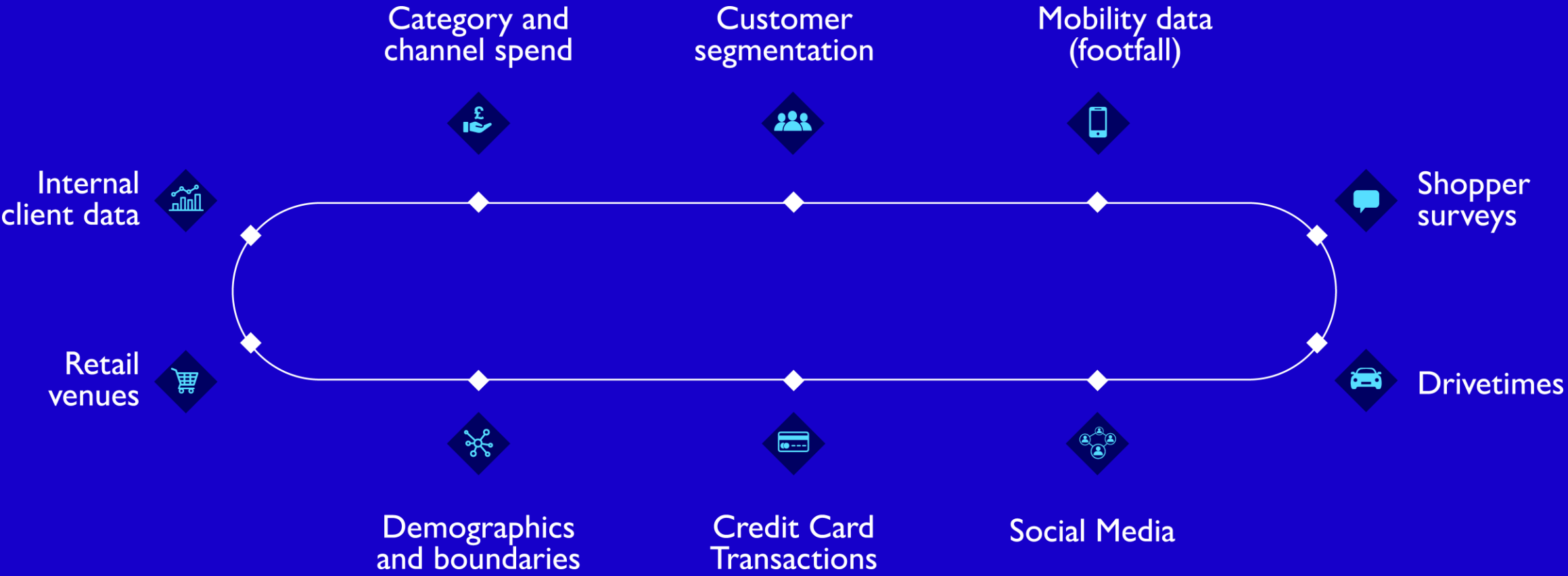**A02 Uptown Elite**

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

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