

# Visitor Insights

## June report 2024

Shaping a  
world-class  
West End

Issued:  
10<sup>th</sup> July 2024

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# 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 the preceding calendar month including information about:

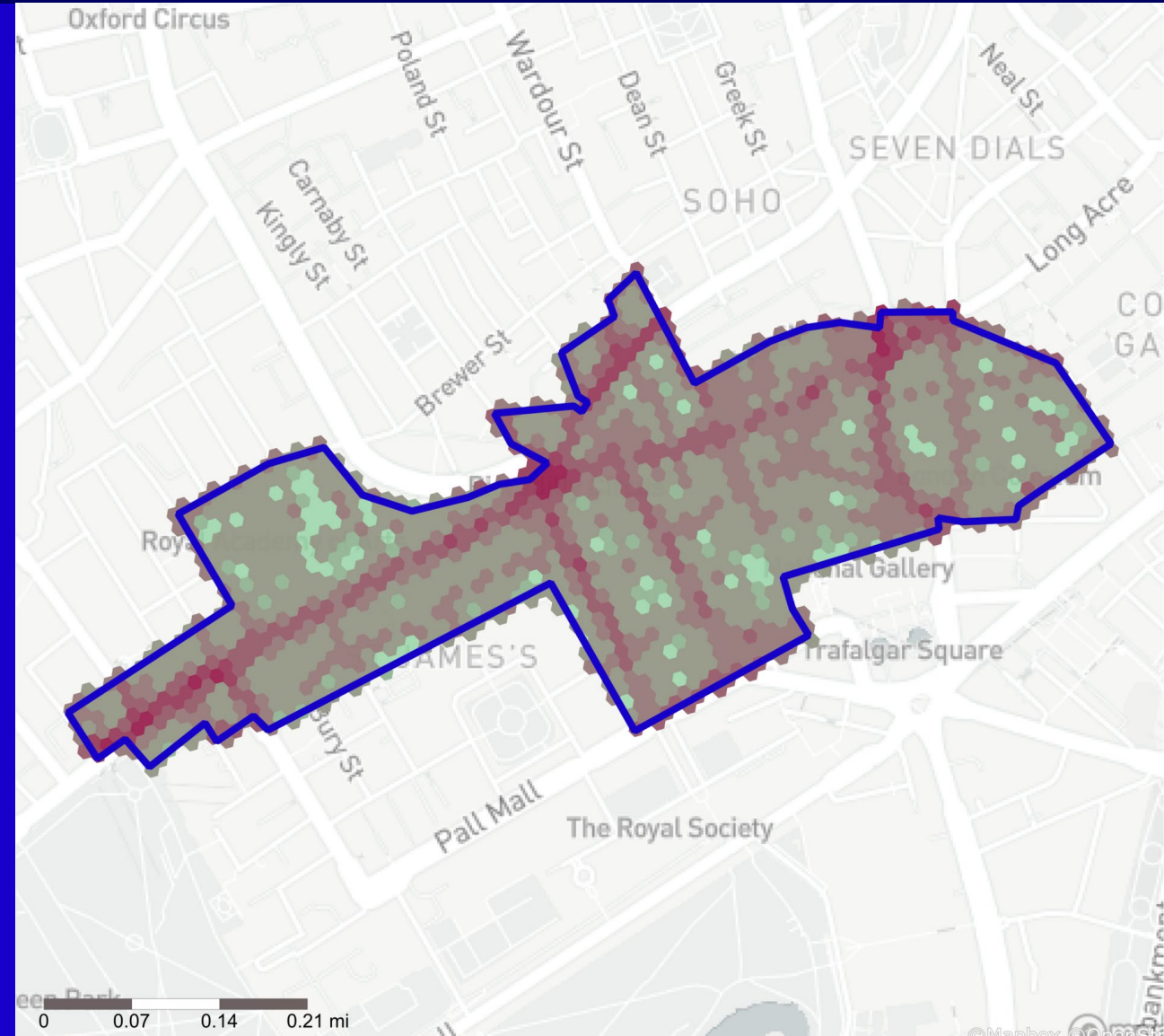
- Visitor footfall & profile
- Visitor behaviour

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**





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# 01 Summary





# Summary June 2024



5.1 m  
(-13%)

Visitors to HOL area  
down 13% month on  
month



2 hrs  
(-9.3%)

Visitors typically spend  
2 hours in the area.  
An increase of  
18 minutes compared  
to the YTD average



71.7%  
(-3.9%)

71.7% of visits from  
Core catchment,  
with more visitors  
coming from beyond  
catchment this  
month

# Summary- Key points

## June 2024



- Footfall this month has decreased by 13% in comparison to May. This is partially due to an increase in footfall in May that has now normalised.
- Haymarket and Piccadilly saw an increase in footfall, particularly from international visitors, caused by annual events such as West End Live, Pride in London and Trooping of The Colour.
- Thursday was the second most popular day to visit the HOL in June compared to the usual Friday, caused by an increase in visits to St Martin's Lane, Jermyn Street and Piccadilly Circus areas. Saturday is still the most popular day to visit the HOL area.
- Mosaic data demonstrated similar trends to previous months, with “City Property” and “Urban Cohesion” being the two most dominant sociodemographic groups visiting our area.



02

# Visitor Volumes



# Summary Visitor Volumes

## June 2024



- Footfall has decreased by 13% compared to May. This is partially due to an increase in footfall in May that has now normalised. Whilst footfall has decreased, it is not usually as substantial a drop and the HOL area has proved less resilient than the West End Benchmark in this regard.
- The Average Dwell time for the HOL area was two hours in June, a decrease in 9.3%, however this is still 18 minutes higher than the year-to-date average.
- The catchment area decreased by 4% to 71.1% compared to May which was 75.6%.
- Haymarket and Piccadilly saw an increase in footfall, particularly from international visitors, caused by annual events such as West End Live, Pride in London and Trooping of The Colour.



# Visitor Volumes

## Footfall volumes down 13% vs May



Following footfall growth in May volumes in June are down 13% month on month

This is partially a normalisation of the growth seen last month.

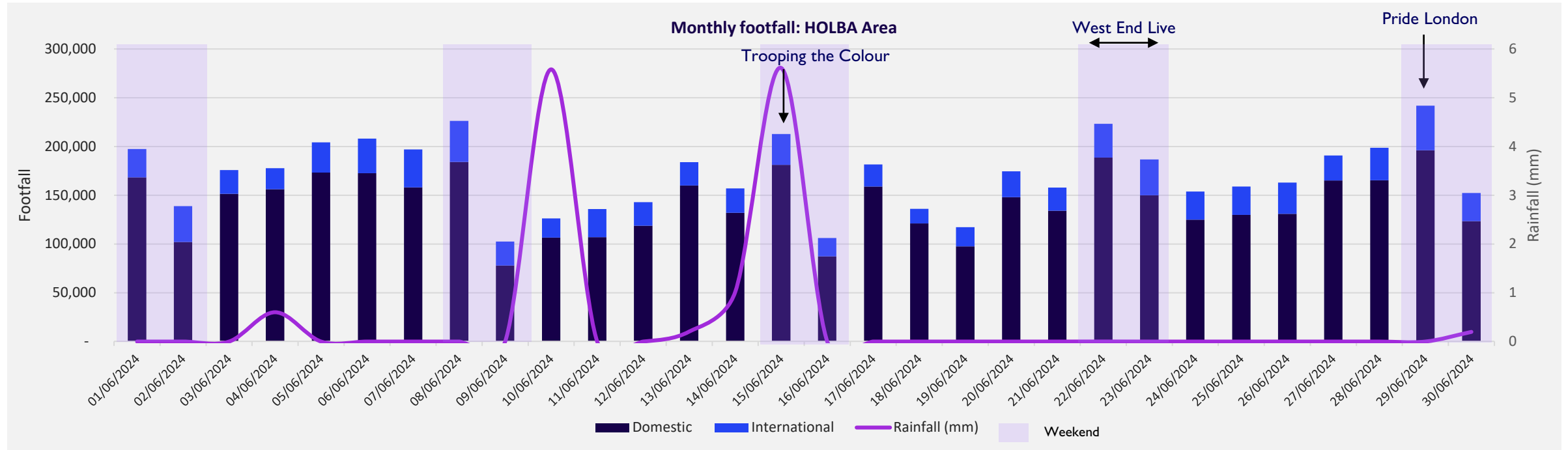


District	Month-on-Month			Year-on-Year		
	Total	Domestic	International	Total	Domestic	International
<b>HOL Area</b>	<b>-13%</b>	<b>-14%</b>	<b>-5%</b>	<b>-25%</b>	<b>-26%</b>	<b>-23%</b>
Piccadilly District	-14%	-14%	-15%	-40%	-39%	-44%
Jermyn St District	-18%	-16%	-38%	-16%	-10%	-55%
Leicester Sq District	-20%	-22%	-13%	-20%	-19%	-23%
Piccadilly Circus District	-4%	-7%	9%	-32%	-34%	-19%
St Martin's Lane District	-23%	-22%	-26%	-33%	-34%	-29%
Haymarket District	7%	4%	26%	-17%	-18%	-10%
Core West End	-6%	-7%	-3%	-17%	-18%	-10%
HOL Area - major street avg	-6%	-7%	2%	-35%	-35%	-32%

- Visits have decreased across all districts month on month, except for Haymarket which increased by 7%, driven by a strong increase in international footfall. This is possibly due to events such as Trooping of The Colour, West End Live and Pride in London.
- Footfall has decreased year-on-year, a continuing trend recorded in recent months. YTD footfall has decreased by 16% compared to this time last year.
- This month's data is within the context of a strong increase in the previous month's data. We also typically see a small drop from May to June due to the May half term.

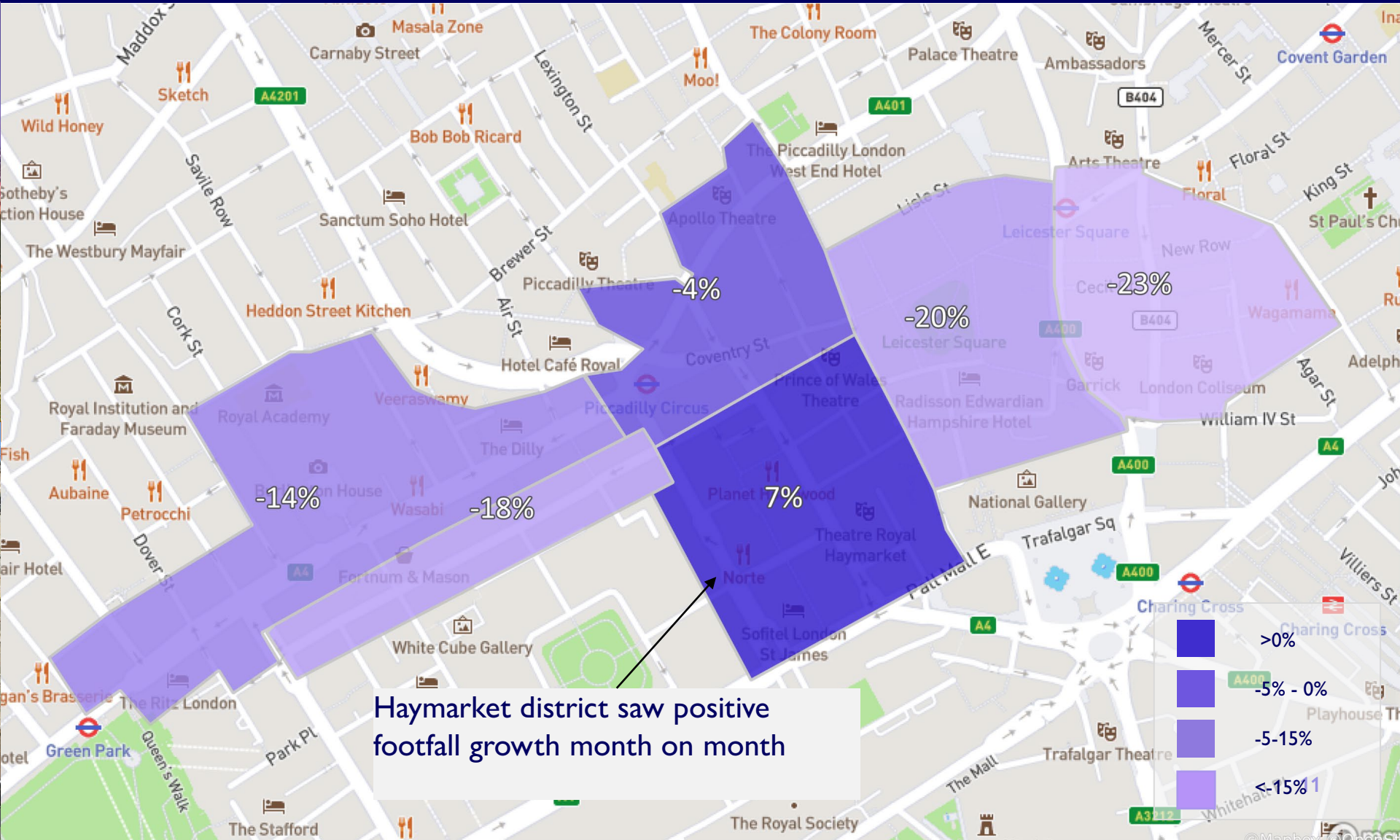
# Visitor Volumes

## Day of Pride London parade had strongest footfall volumes



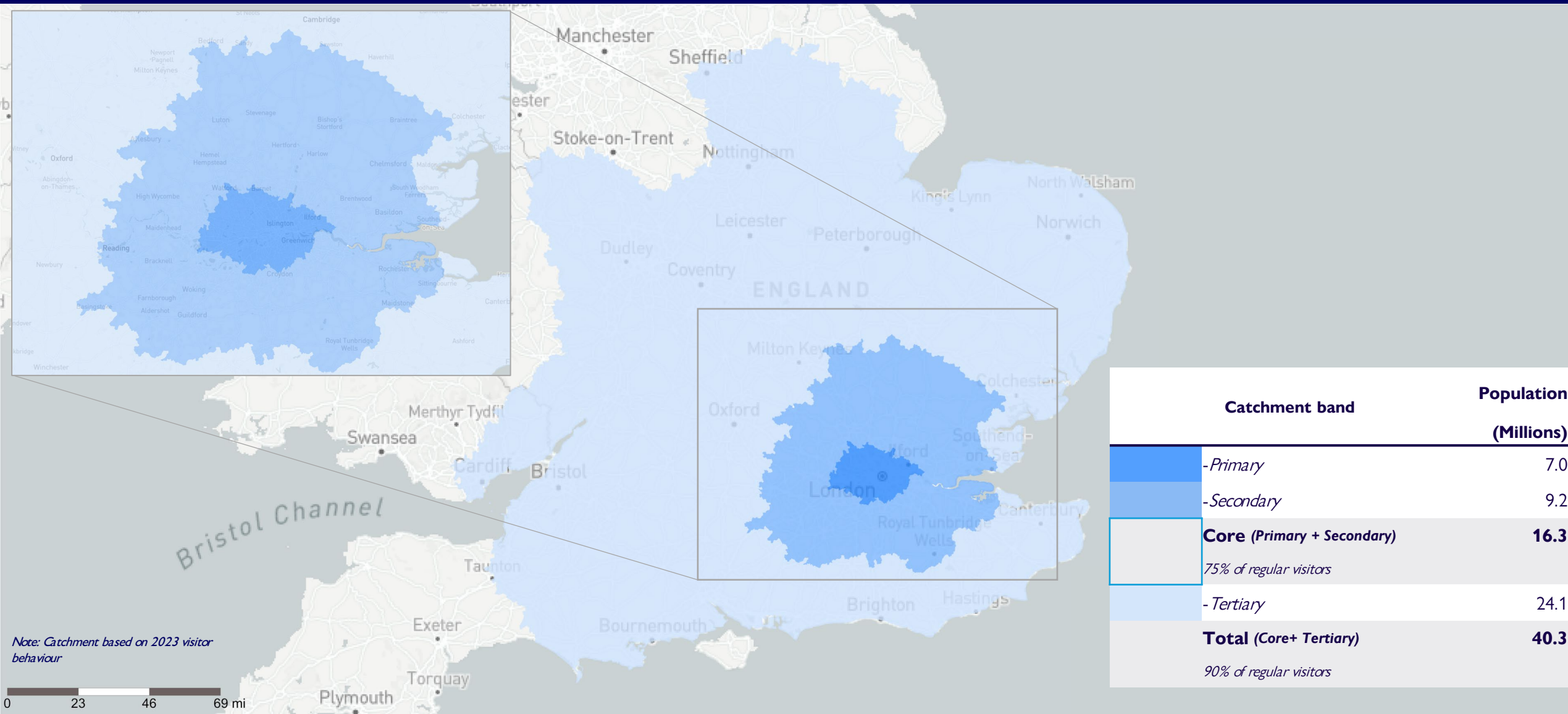
- Saturdays continued to have the strongest footfall levels throughout June. Saturday 29 June had the strongest footfall volumes coinciding with Pride in London which travelled down Piccadilly, across Piccadilly Circus and down Haymarket
- Footfall on Sunday 23 June (second day of West End live) was up 35% compared to the average Sunday footfall in June, demonstrating the attraction of Arts and culture in the West End.





# Visitor Volumes

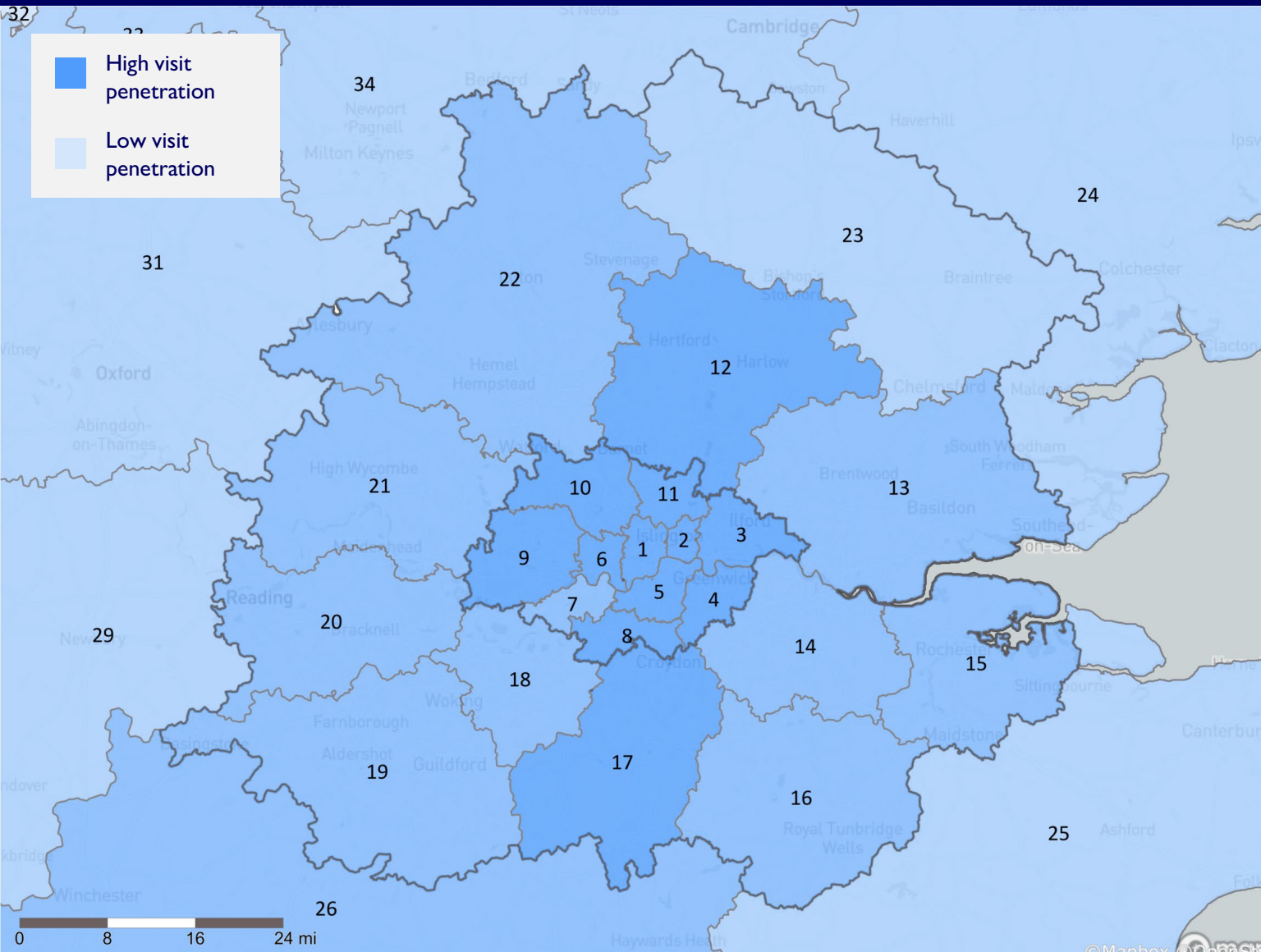
## HOL's Core catchment has a population of 16.3 million





# Visitor Volumes

-3.9% decrease in visits from core catchment area



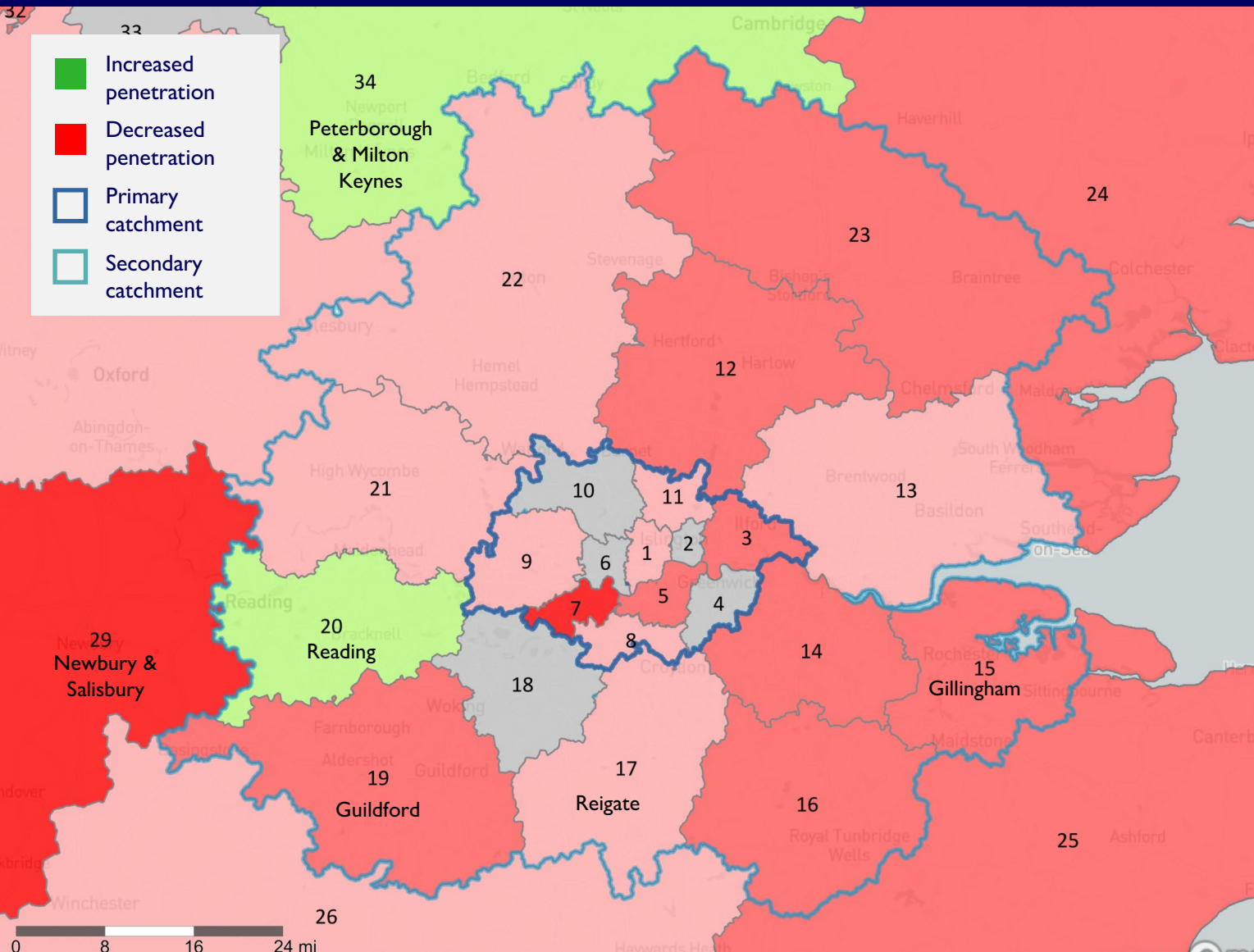
- Decrease in visits from Core catchment, particularly the secondary catchment (zones 12-23)
- Zones 12 (Hertford) and 17 (Reigate) had highest penetrations in Secondary catchment

Catchment band	Latest month visit %	Change vs. previous month
-Primary	49.1%	-2.3%
-Secondary	22.6%	-10.8%
<b>Core</b>	71.7%	-3.9%
-Tertiary	17.2%	-0.7%
<b>Total</b>	88.8%	-4.0%
-Pull in	11.2%	4.0%

Note: Penetration = % of population from a zone that visits HOL Area

# Visitor Volumes

## Decrease in visitor penetration to East and South-West



- This map shows the month on month change in visitor penetration by zone
- Red areas indicate a zone contributing fewer visitors, green areas indicate a zone contributing more
- Increases in penetration
  - 20 (Reading) - possibly due to increased reliability on the Paddington to Reading section of the Elizabeth line.
  - 34 (Peterborough & Milton Keynes)
- Decreases in penetration
  - 7 (Richmond & Teddington) down from particularly high in May.
  - 29 (Newbury & Salisbury)



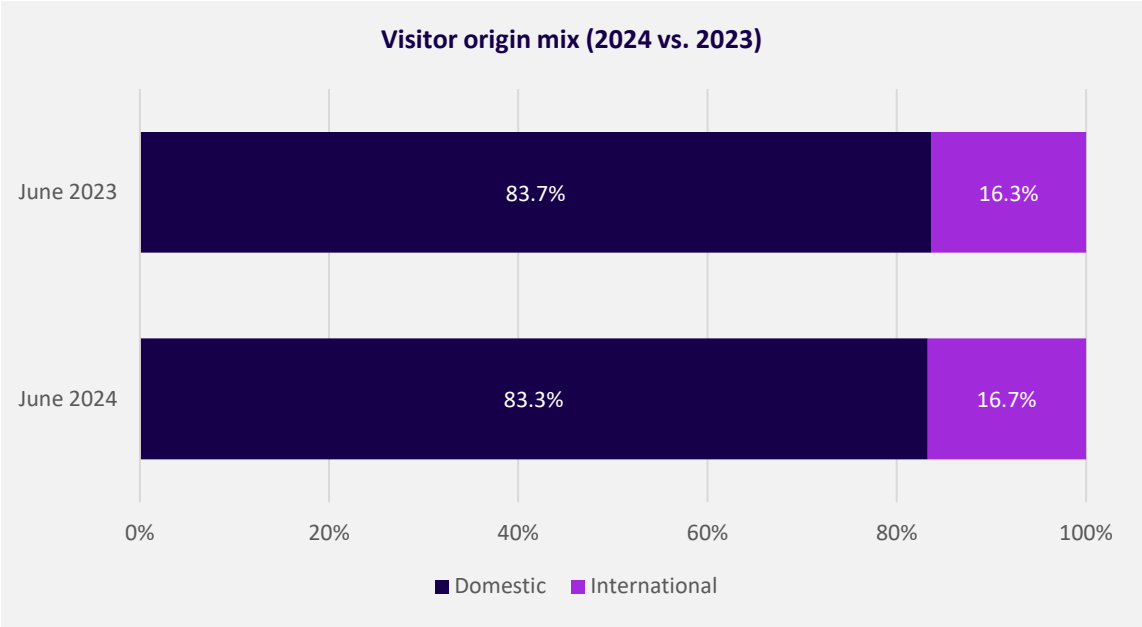
# Visitor Volumes: visitor mix

## Higher proportion of international visitors during June



Area	International mix (%)	+/- change in mix		+/- change in volume	
		Month-on-Month	Year-on-year	Month-on-Month	Year-on-year
HOL Area	16.7%	1.4%	0.4%	-4.7%	-23.2%
Piccadilly District	10.6%	0.0%	-0.8%	-14.8%	-43.9%
Jermyn St District	7.1%	-2.3%	-6.2%	-37.9%	-54.8%
Leicester Sq District	21.6%	1.8%	-0.8%	-13.1%	-22.5%
Piccadilly Circus District	17.7%	2.1%	2.8%	8.8%	-18.8%
St Martin's Lane District	20.6%	-0.8%	1.0%	-25.5%	-29.2%
Haymarket District	12.6%	2.0%	1.0%	26.3%	-9.7%
Core West End	17.8%	0.5%	1.3%	-3.1%	-10.3%

- 1.4%-point increase in international mix versus May. This is likely a combination of a domestic drop with a more stable international segment.
- Volume of international visitors decreased by 23% versus the same period last year, however, a proportional drop in domestic footfall has led to an increase in the mix overall.



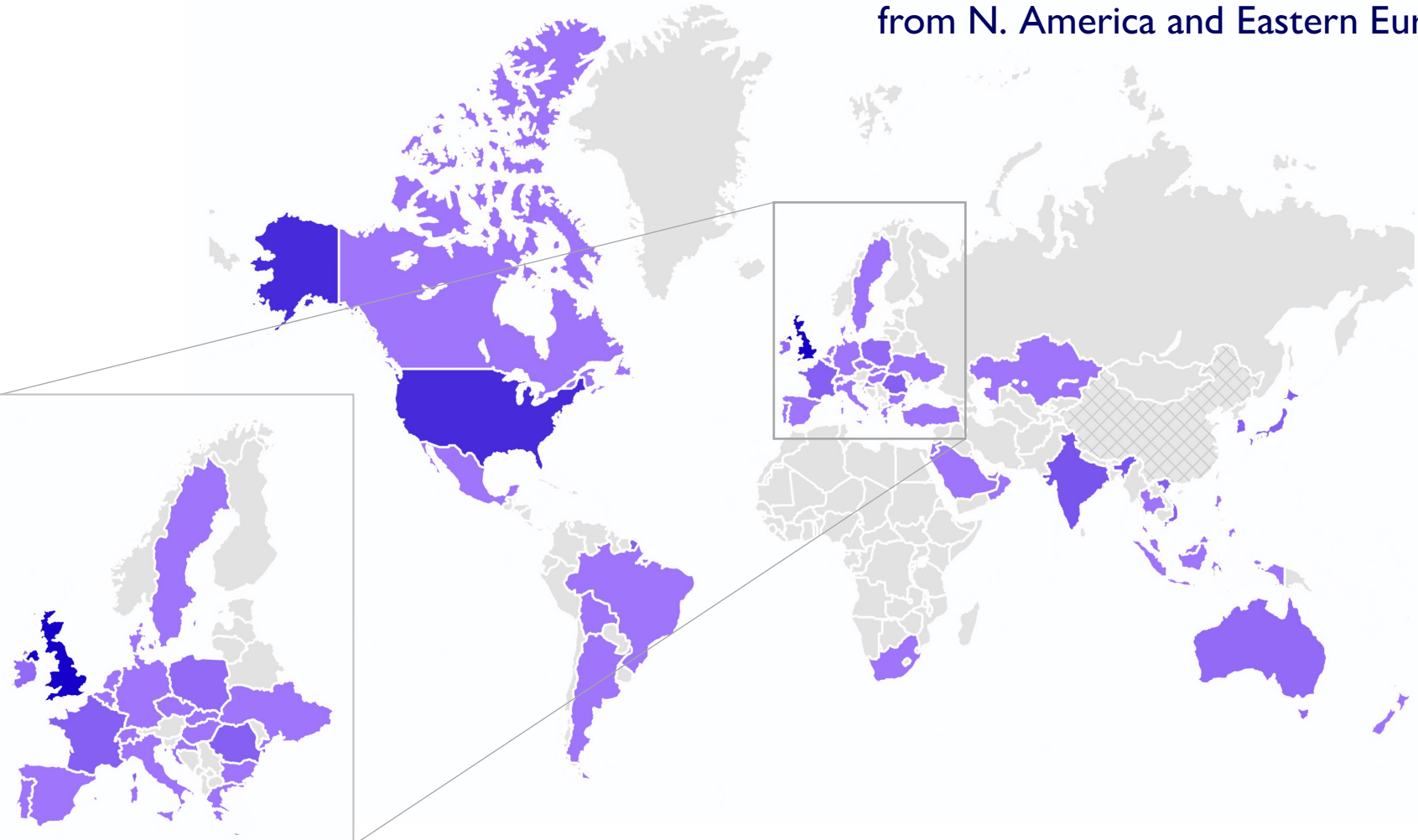
- International visits accounted for 16.7% of visits in June compared to 16.3% last June.

# Visitor Volumes: visitor origin

## 16.7% of visitors to HOLBA from outside the UK



- Increase in international visitation this month driven by increases in visitors from N. America and Eastern Europe



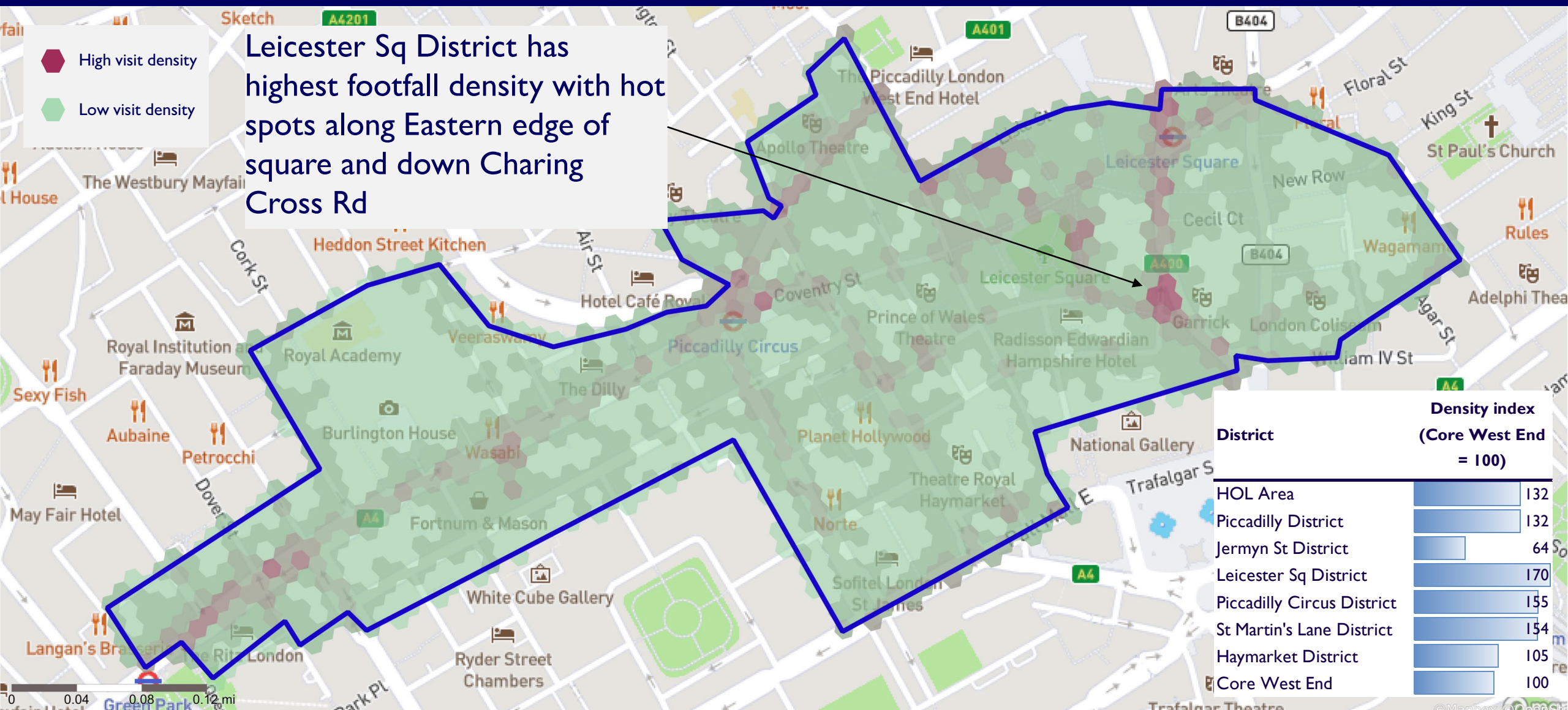
	Region	%	+/- percentage point change	
1	United Kingdom	83.26	↓	-1.4
2	Northern America	7.30	↑	0.7
3	Eastern Europe	2.40	↑	0.2
4	Southern Asia	1.70	↓	-0.3
5	Eastern Asia	1.15	↑	0.7
6	South-eastern Asia	0.93	↑	0.2
7	Western Europe	0.88	↓	-0.6
8	Northern Europe	0.69	↑	0.5
9	Southern Europe	0.55	↓	-0.1
10	Australia and New Zealand	0.39	↑	0.1
	Europe (excl. UK)	4.513	↓	-0.1
	Rest of the world	12.2	↑	1.5
	Non UK	16.74	↑	1.4

Note: Data unavailable for visitors from China



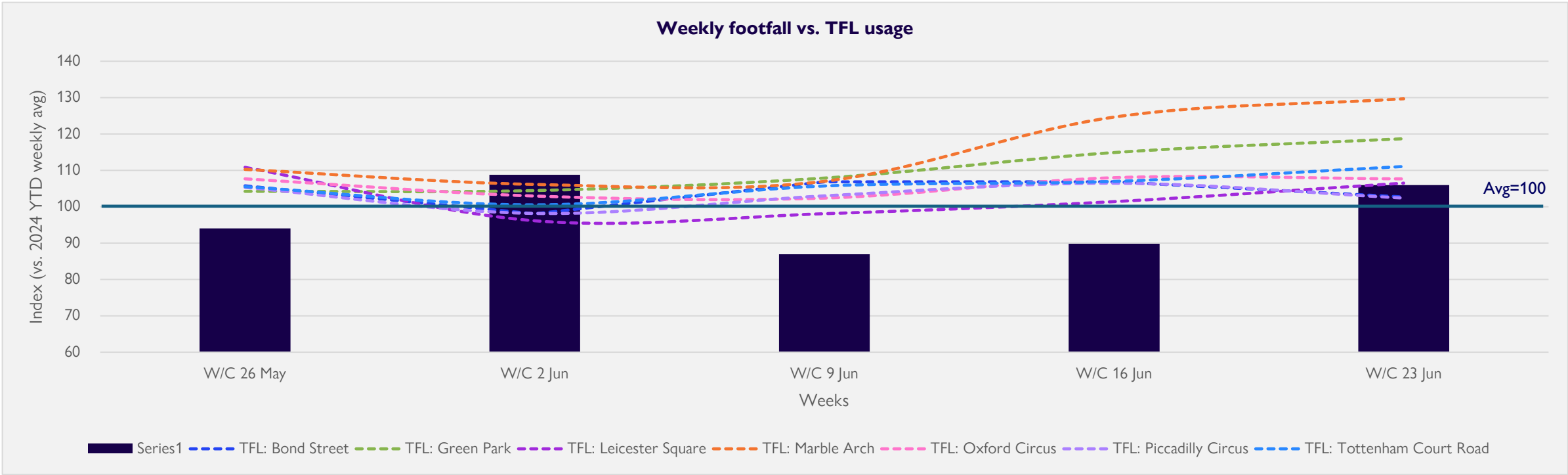
# Visitor Volumes

## Leicester Sq District has highest footfall density



# Visitor Volumes: TFL station usage

## High station usage during last week of June



- Bond Street, Green Park and Marble Arch tube stations received the highest number of taps in 2024 so far.



# 03

# Visitor Behaviour



# Summary Visitor Behaviour

## June 2024

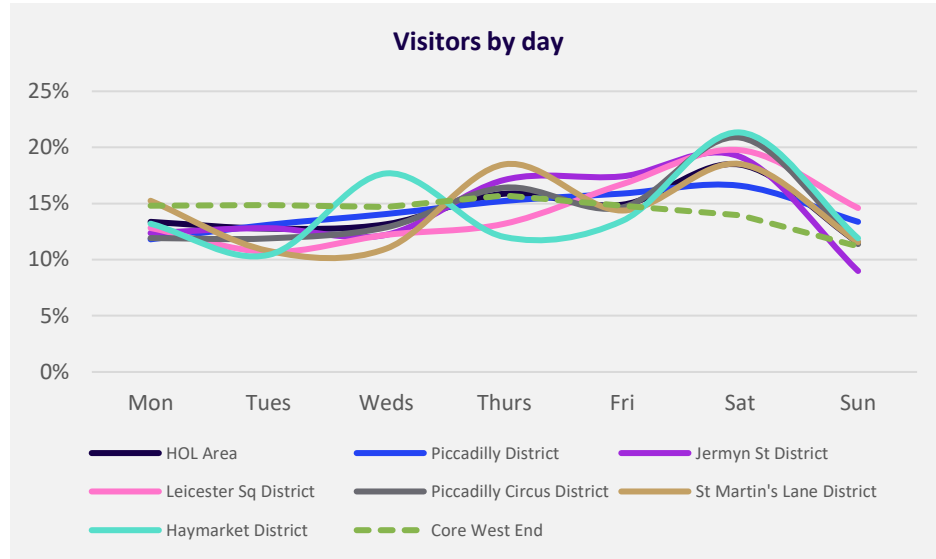


- Thursday was the second most popular day to visit the HOL in June compared to the usual Friday, caused by an increase in visits to St Martin's Lane, Jermyn Street and Piccadilly Circus areas. Saturday is still the most popular day to visit the HOL area.
- Visitor behaviours were still consistent with trends seen in previous months, with leisure focused areas gaining the largest proportions of their visits during the evening and overnight. However, this is down slightly against last month, possibly caused by more day-time events taking place in this month causing a positive swing toward a greater proportion of visits between 9am and 6pm. It may also be caused by people going home or elsewhere to watch the Euros.
- Visit frequency increased on the previous month but is still lower on the YTD average. Dwell time decreased in comparison to May, although still above the YTD average.
- Dwell by day is showing higher levels of dwell compared to the Core West end on Tuesday and Wednesday, whereas it is lower on Monday and Friday. This could suggest that flexible working maybe be more prevalent in the HOL area this month.

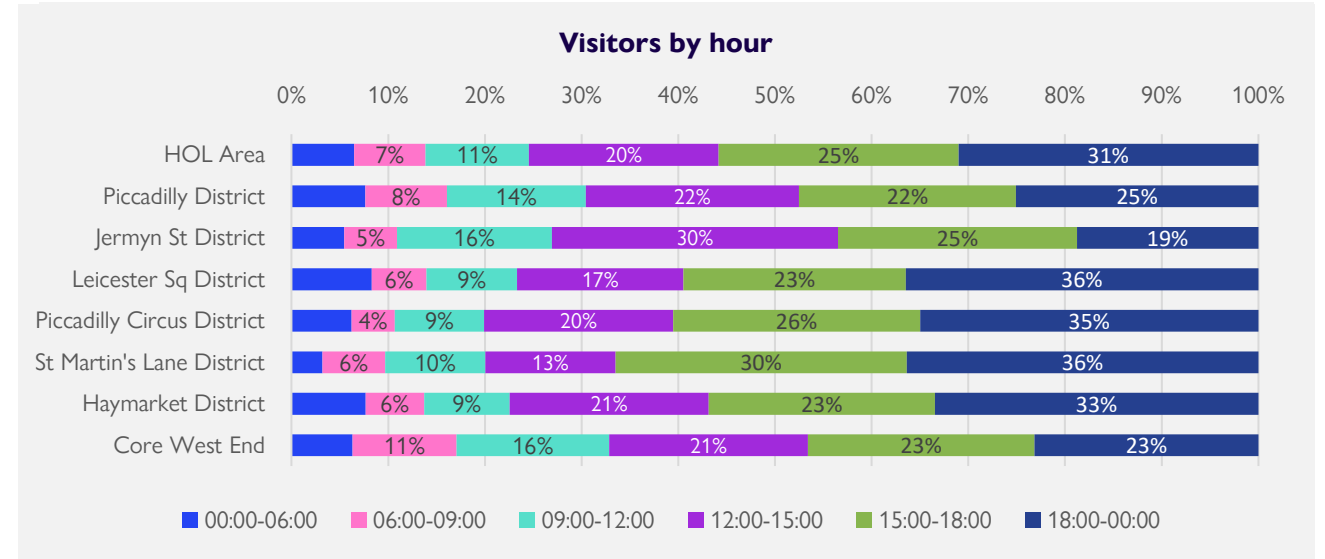


# Visitor Behaviour

## 33.4% of visitors to HOL area visit on a Friday or Saturday



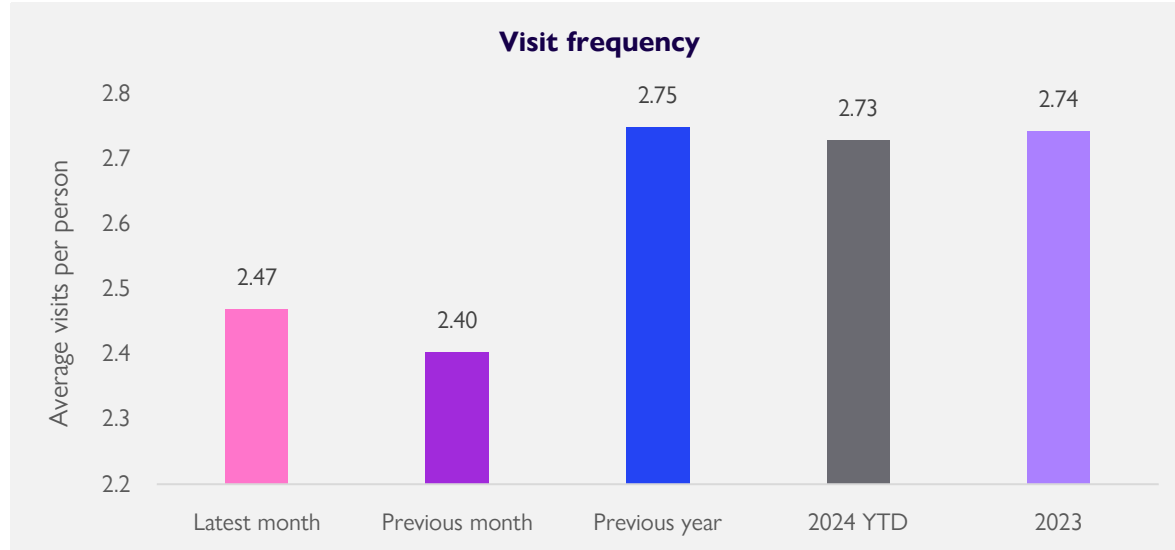
- Fri-Sat had the highest proportion of visitors with Thursday being the second most popular day to visit this month.
- Sundays were the quietest day, driven by a lower proportion of domestic visitors.



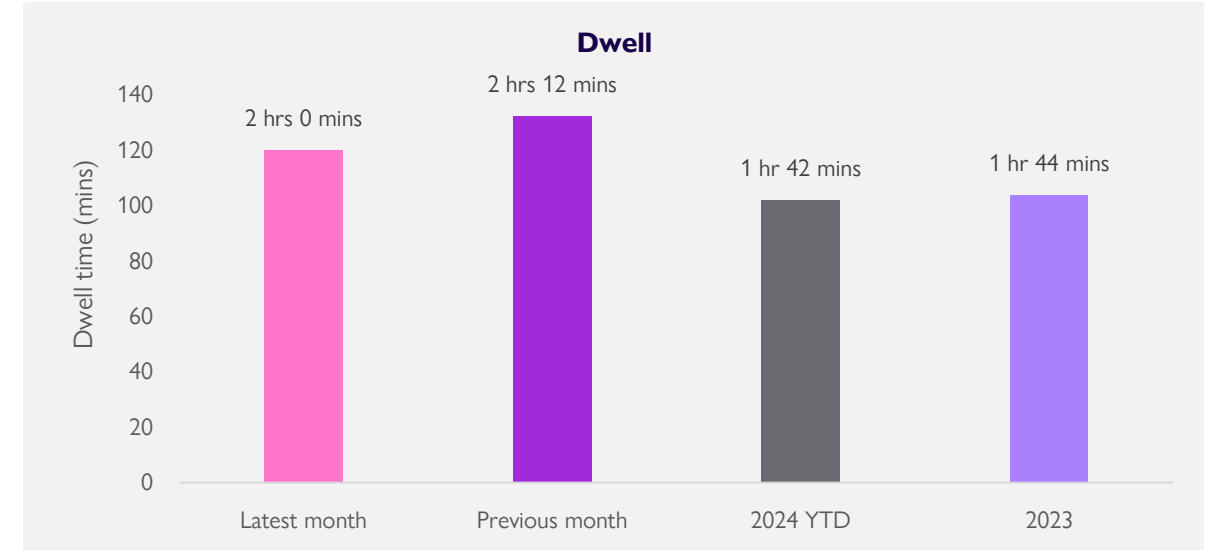
- Visitor volume peaked during lunchtime and into the afternoon.
- Leicester Sq District, St Martin's Lane and Piccadilly Circus had the highest proportion of evening visits driven by the F&B and leisure offer, however this is lower compared to the previous month. This may be due to more daytime events this month and people going home to watch the Euros could have contributed to this.

# Visitor Behaviour

## Dwell time decreased 12 mins in June vs. May



- Average visitor visited HOL area 2.47 times, an increase from 2.4 visits in May.



- Dwell time decreased 12 mins in June compared to May.
- 47.4% of visitors to HOL area dwell for less than an hour.
- The Haymarket district had the longest dwell time during June with an average of 2 hours 36 mins.

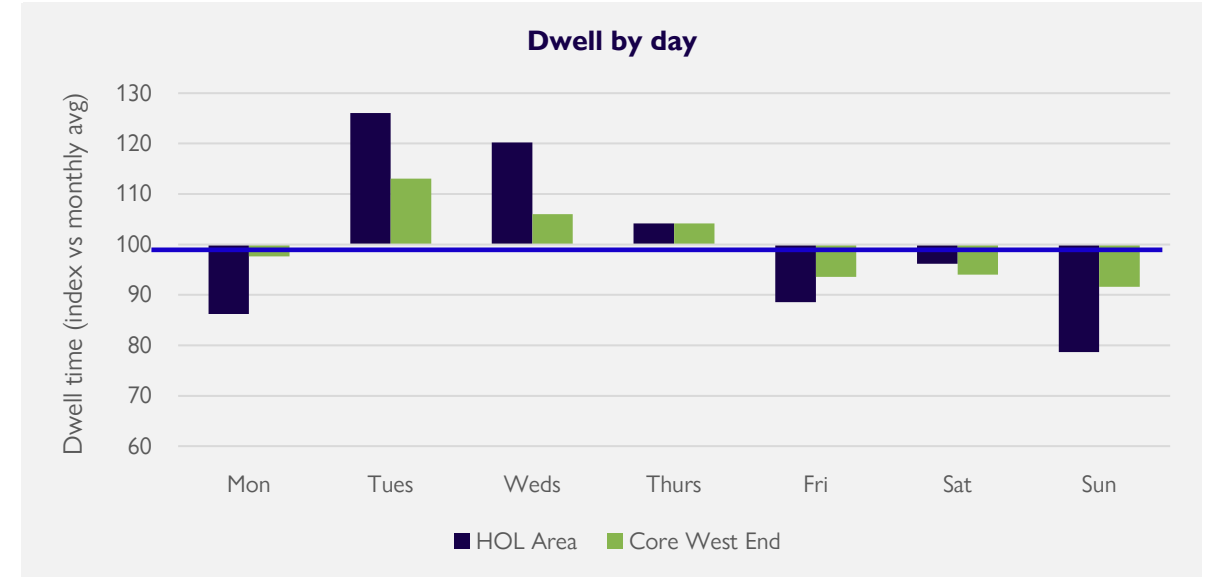


# Visitor Behaviour: Dwell time

## Dwell time change has varied by district



- Dwell picture is positive across the districts during June with most increasing against the YTD average.
- Leicester Sq saw the largest increase in dwell time compared to 2024 YTD. Dry weather may have contributed to this.



- HOL area had longer dwell times Tuesday to Thursday compared to the latter part of the week, likely driven by workers.
- The pattern for the wider Core West End also had longer dwell times Tues-Thursday but it was more pronounced than the HOL area.

04

# Visitor Profile





# Summary Visitor profile

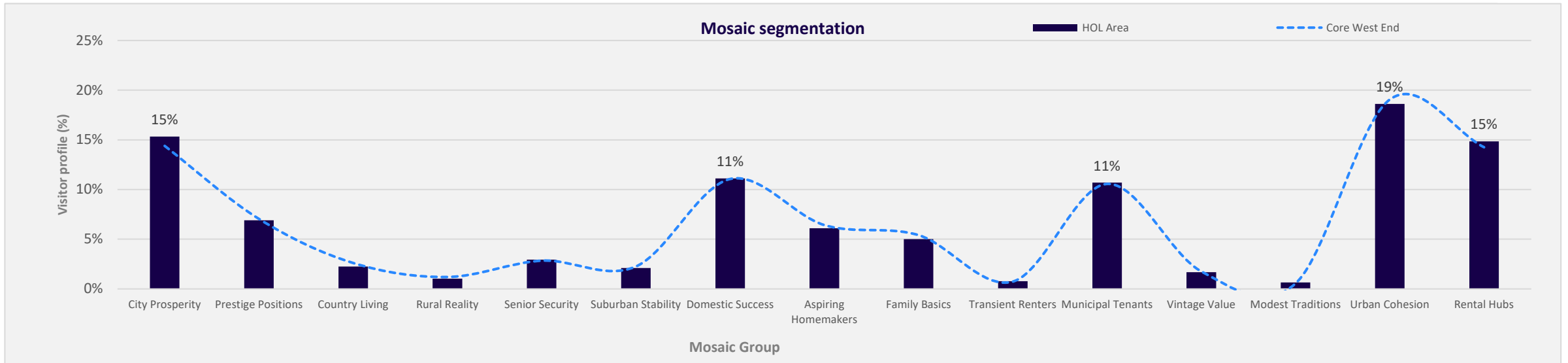
## June 2024



- Mosaic data demonstrated similar trends to previous months, with “City Property” and “Urban Cohesion” being the two most dominant sociodemographic groups visiting our area.
- The largest change in mosaic data this month was in Jermyn Street, which saw a drop in “City Property” but a rise in “Rental Hubs”. This is possibly due to an increase in annual leave being taken by office workers. It should also be noted that Jermyn Street has relatively low footfall so smaller changes equate to larger percentage changes.

# Visitor Profile

## ‘City Prosperity’ and ‘Urban Cohesion’ dominant Mosaic groups



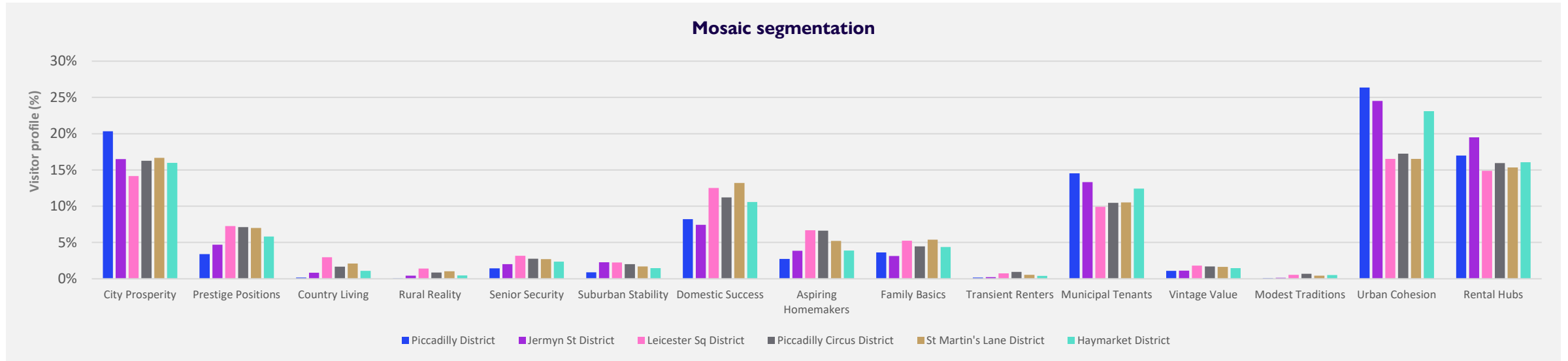
- ‘Urban Cohesion’ and ‘City Prosperity’ were the most common visitor profiles, continuing an already well-established trend.

- *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



# Visitor Profile: Mosaic profile

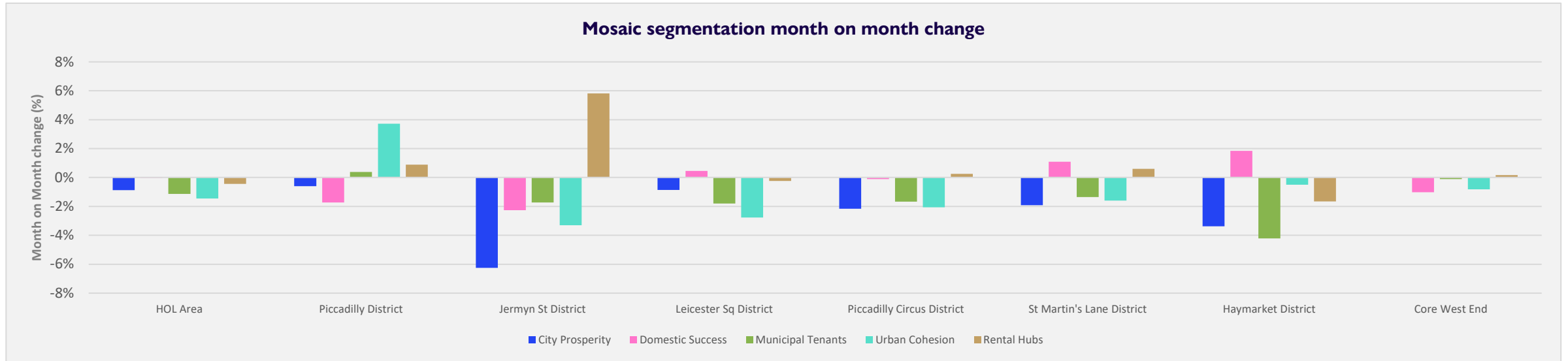
## 70.6% of domestic visitors from 5 Mosaic groups



- There was a consistent profile across the districts with the same 5 Mosaic groups representing 68% of all visitors.
- Piccadilly District has the highest proportion of 'City Prosperity' visitors (20.3%) – the most affluent Mosaic group. This is likely driven by the Piccadilly area catering to higher end and luxury retail and hospitality.

# Visitor Profile: Mosaic profile

## Demographic profile consistent with last month in most places



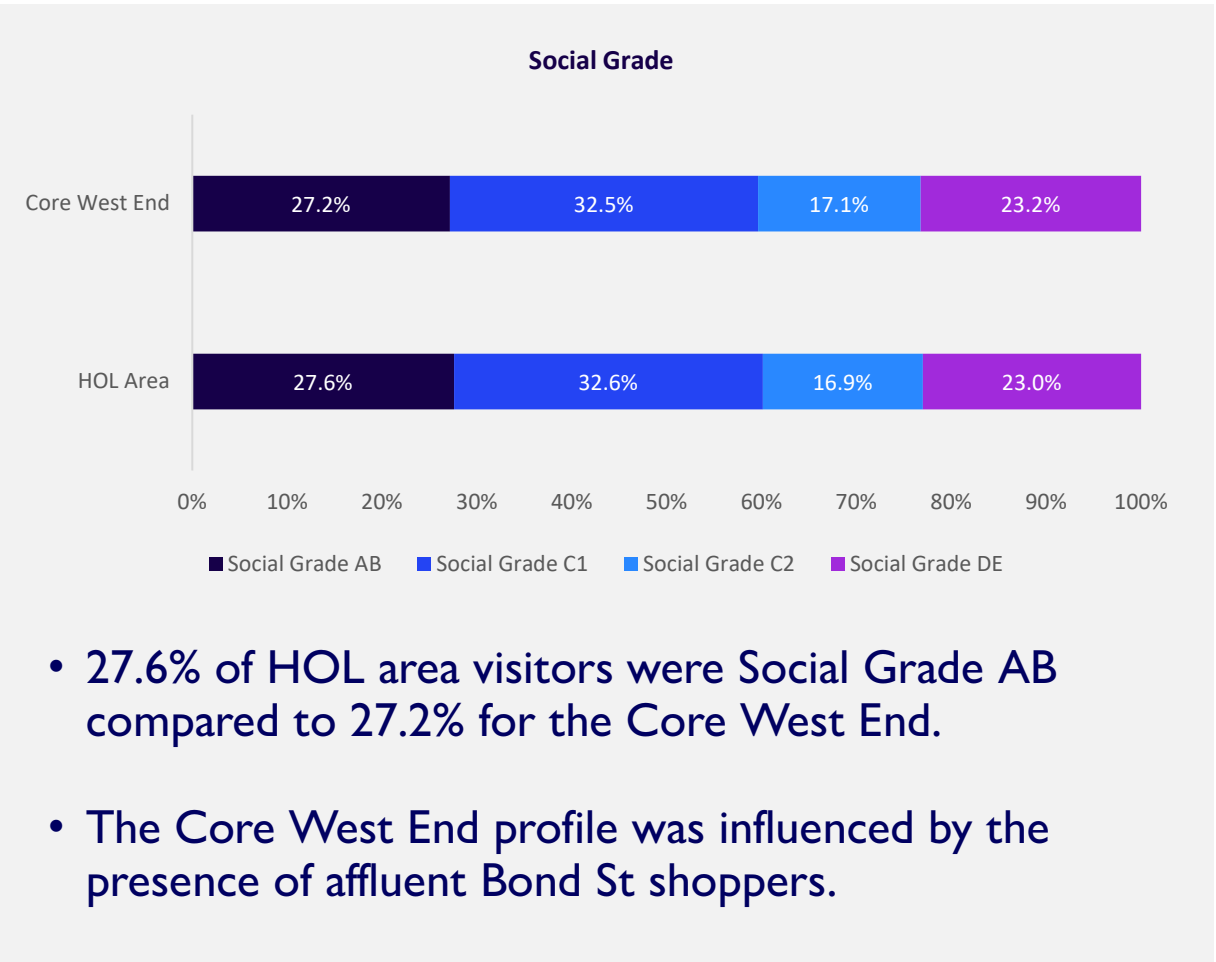
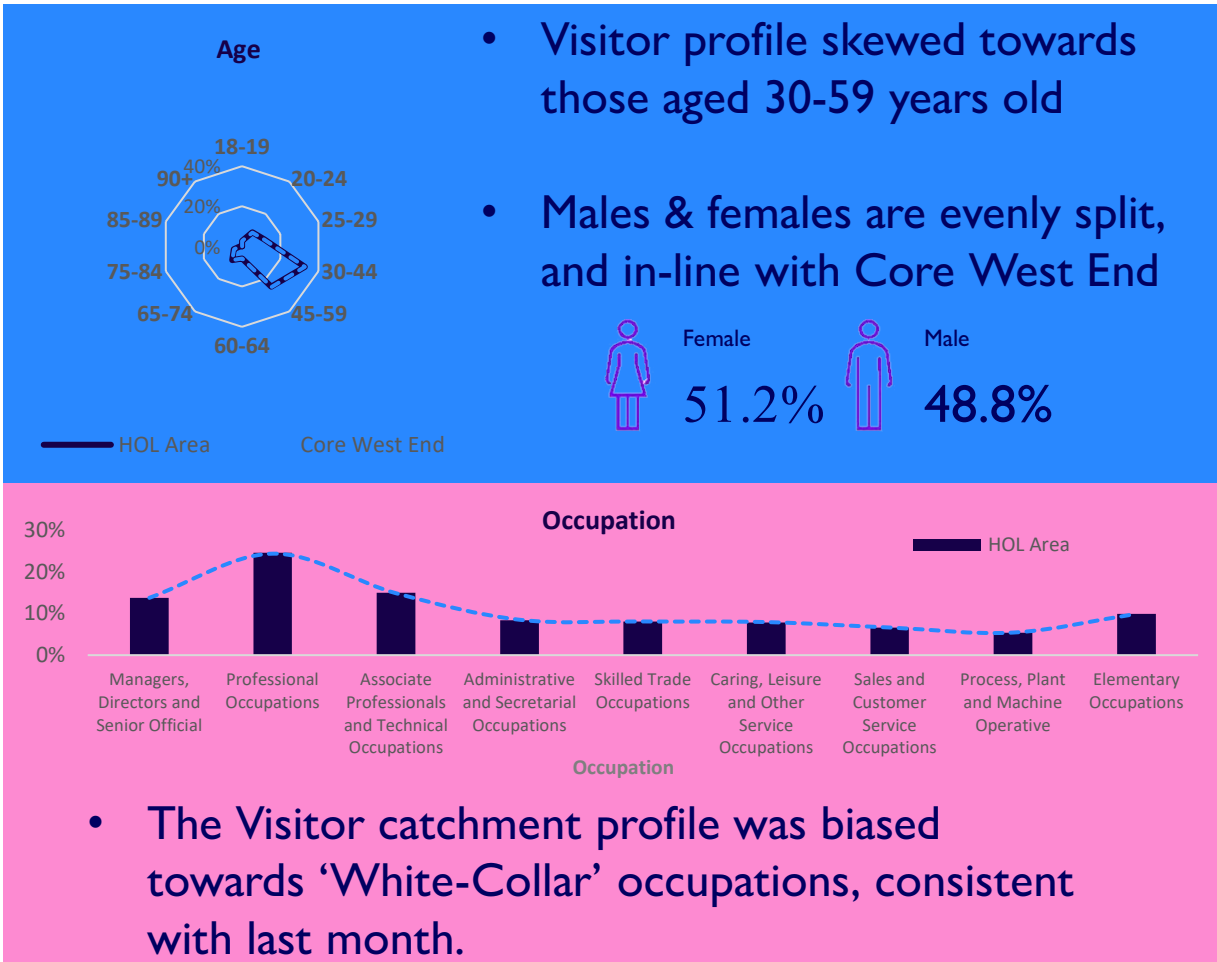
- 70.6% of HOL visitors from 5 core Mosaic groups (a decrease of 3.9% compared to May).
- The demographic profile was consistent with last month for the majority of districts. Jermyn St district saw the greatest change with a decrease in 'City Prosperity' visitors matched by an increase in 'Rental Hubs' visitors. This is potentially due to road works around Jermyn street as well as potentially workers starting to take summer holidays.





# Appendix: demographics

## Catchment biased towards middle-aged, white-collar workers



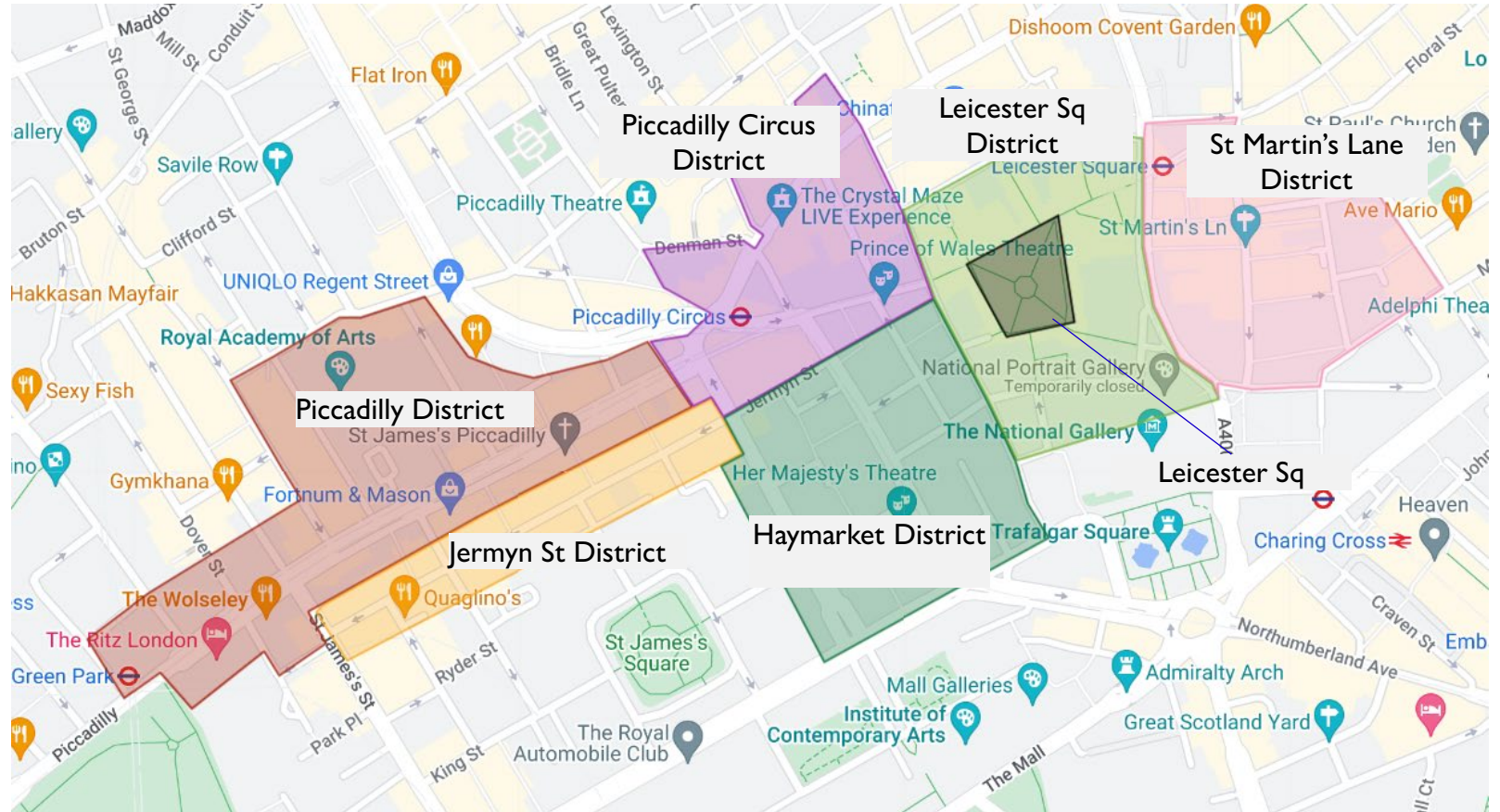


# Appendix

## Location definition



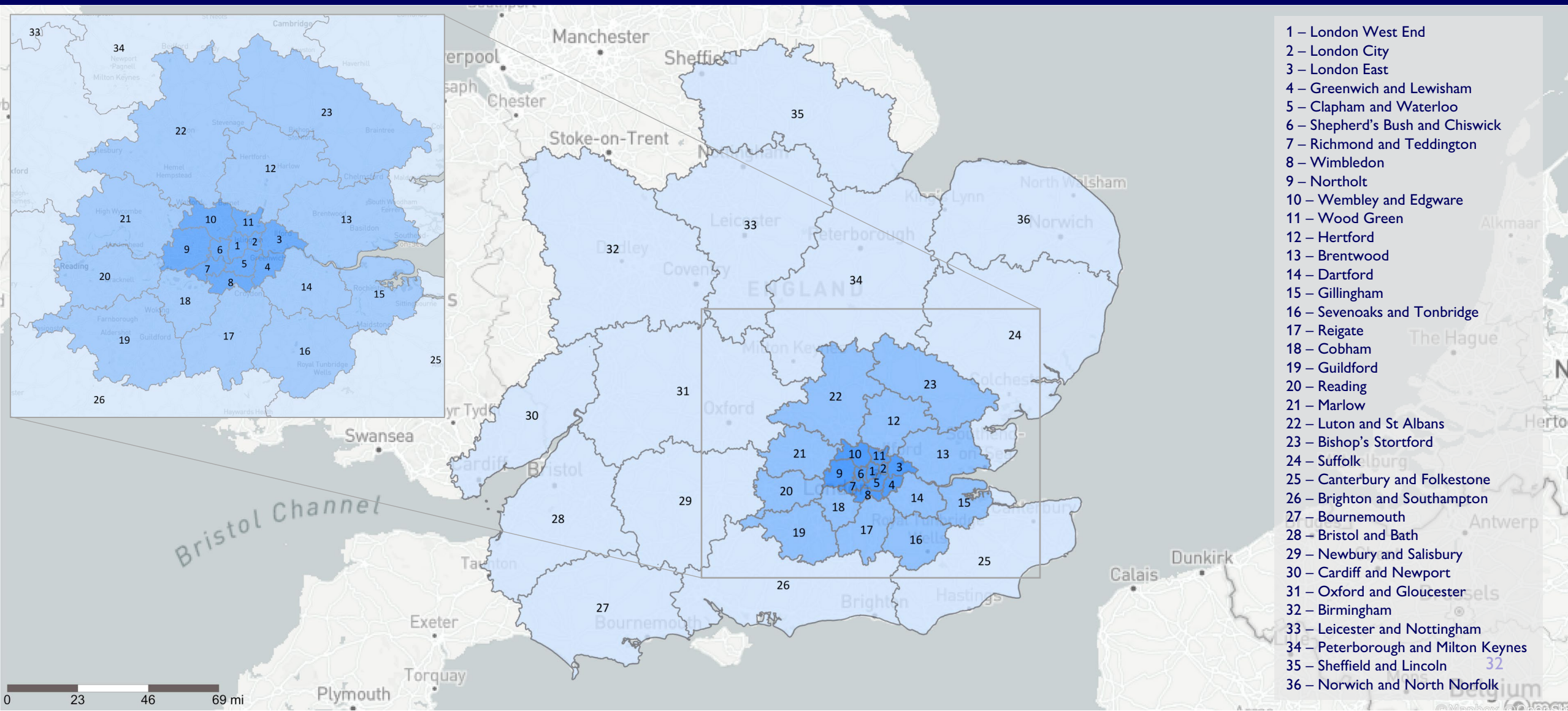
- Seven key areas within HOL are used for analysis:
  - Piccadilly District
  - Jermyn St District
  - Piccadilly Circus District
  - Haymarket District
  - Leicester Sq District
  - Leicester Sq
  - St Martin's Lane District
- In addition, the Core West End area has been defined as a benchmark location.





# Appendix

## Location Definition



# Appendix

## Mosaic Groups



TYPE	NAME	DESCRIPTION
A	City Prosperity	High status city dwellers living in central locations and pursuing careers with high rewards.
B	Prestige Positions	Established families in large detached homes living upmarket lifestyles.
C	Country Living	Well-off owners in rural locations enjoying the benefits of country life.
D	Rural Reality	Householders living in less expensive homes in village communities.
E	Senior Security	Elderly people with assets who are enjoying a comfortable retirement.
F	Suburban Stability	Mature suburban owners living settled lives in midrange housing.
G	Domestic Success	Thriving families who are busy bringing up children and following careers.
H	Aspiring Homemakers	Younger households settling down in housing priced within their means.
I	Family Basics	Families with limited resources who budget to make ends meet.
J	Transient Renters	Single people renting low cost homes for the short term.
K	Municipal Tenants	Urban residents renting high density housing from social landlords.
L	Vintage Value	Elderly people with limited pension income, mostly living alone.
M	Modest Traditions	Mature homeowners of value homes enjoying stable lifestyles.
N	Urban Cohesion	Residents of settled urban communities with a strong sense of identity.
O	Rental Hubs	Educated young people privately renting in urban neighbourhoods.

# Appendix

## Mosaic definition



- Experian's Mosaic customer segmentation divides a consumer base into groups of individuals that are similar in specific ways, such as:

- Age
- Interests
- Life Stage
- Spending habits

UK Population



51m individuals

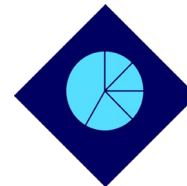


25m households

Mosaic



15 groups



66 types

A02 Uptown Elite

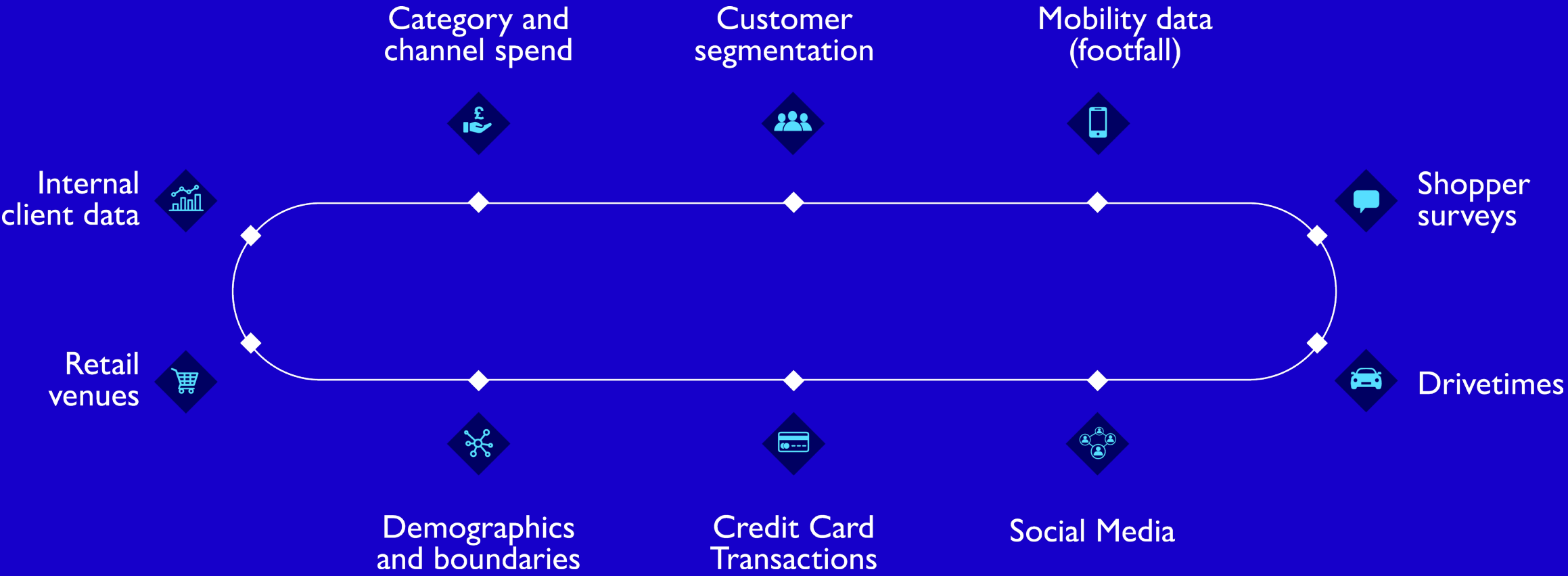


Uptown Elite are affluent, older families who live in desirable neighbourhoods within inner suburbs



# Appendix

## What we do





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