Visitor Insights
November report 2024

Shaping a
world-class
West End

Issued:
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Heart of London

HEART OF LONDON BUSINESS ALLIANCE

Colliers

Background
Introduction and context

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

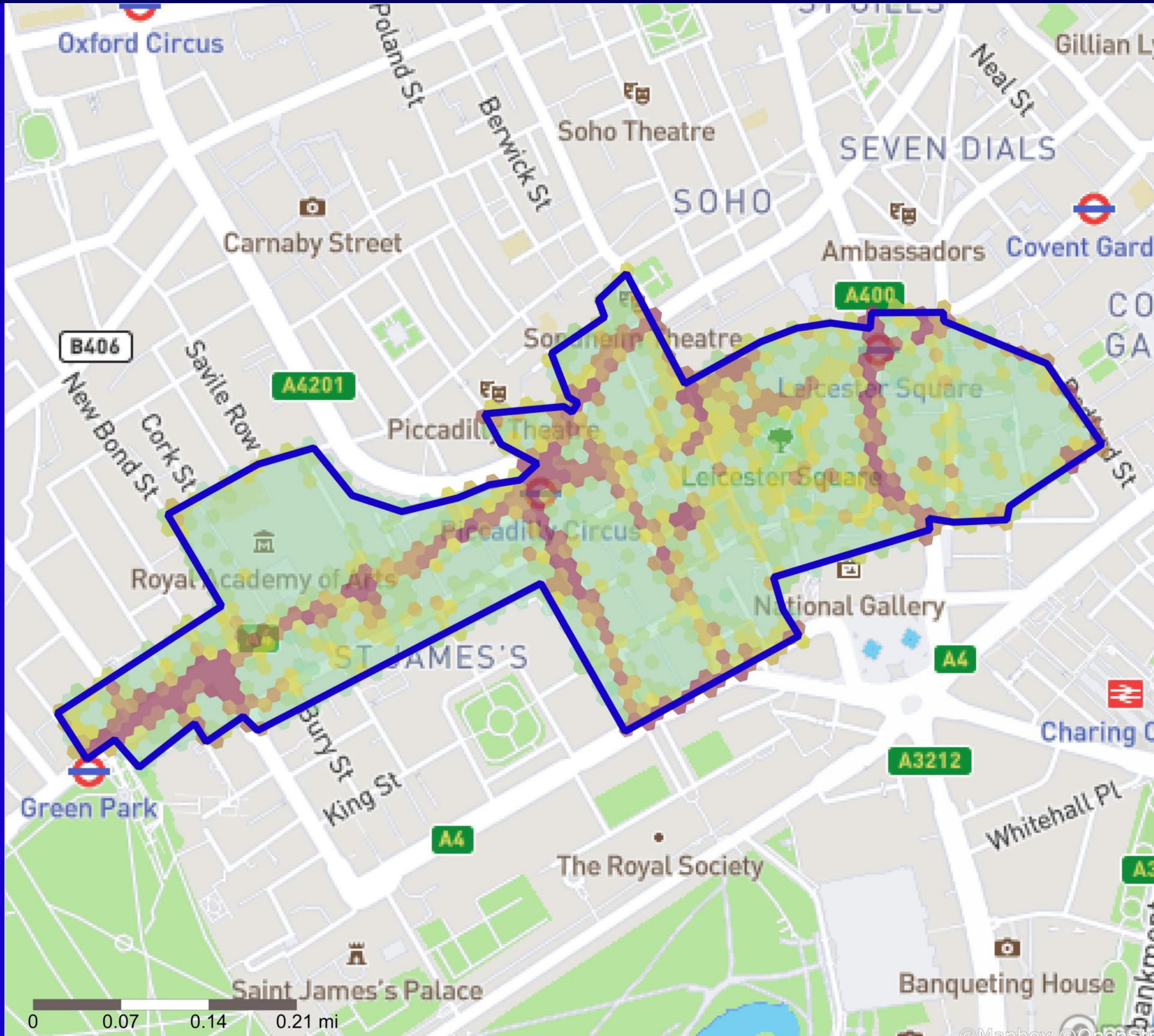
This monthly report provides key insights from preceding calendar month including information about:

- 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



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Exec Summary
November 2024

Predictions of a strong festive season appear to be holding as year-to-date (YtD) footfall continues to surpass last year. In November this year, visitors are up 22% compared to November '23.

This is in part due to the increase of international tourists we've seen in the HOL area in November, especially compared to the Core West End, likely due to the area's high density of cultural, leisure and retail offering over the festive period.

Additionally, our data shows that international visitors are 13% more likely to visits multiple districts within the HOL area, compared to last month. This is an interesting development as post-pandemic footfall patterns have seen people cluster around the key hotspots, such as Piccadilly Circus, with less movement into the smaller streets. It's promising then to see this cross visitation between districts increase compared to last month.

Also this month, we're pleased to include quarterly spend figures for July to September, which were delayed. As well as include spend data from international sources, a new data set.

If you have any questions, please let me know.

Matt Harris, Data and Insights Manager

Summary
November 2024

7.8 m (+3%)

Visitors to HOL area up 3% month-on-month (MoM).

Year-to-date (YtD) footfall +2% ahead of 2023.

2 hrs 14 mins (+8%)

Visitors typically spent just over 2 hours in the area.

Up 23 mins vs YtD average.

80.5% (+0.9%)

80.5% of visits from Core catchment, with more visitors coming from Inner London and surrounding suburbs.

02

Visitor Volumes

Visitor Volumes Summary
November 2024

• Visitor volumes across the HOL area are up 3% on last month, 4 percentage points higher than the Core West, and up 22% compared to November '23.

• International footfall increases across all districts in the HOL area.

• The core catchment area increased by 0.9%.

• There was an increase in the share of international visitors (out of the visitor numbers as a whole) by 4.4% year-on-year (YoY). International footfall makes up 38.4% of total footfall to the HOL area in November.

• Predictions of a strong festive season appear to be holding as YtD footfall continues to surpass last years. The HOL area has seen a 2% increase in its cumulative total of footfall, compared to this time last year.

Visitor Volumes
Footfall volumes up 22% year-on-year

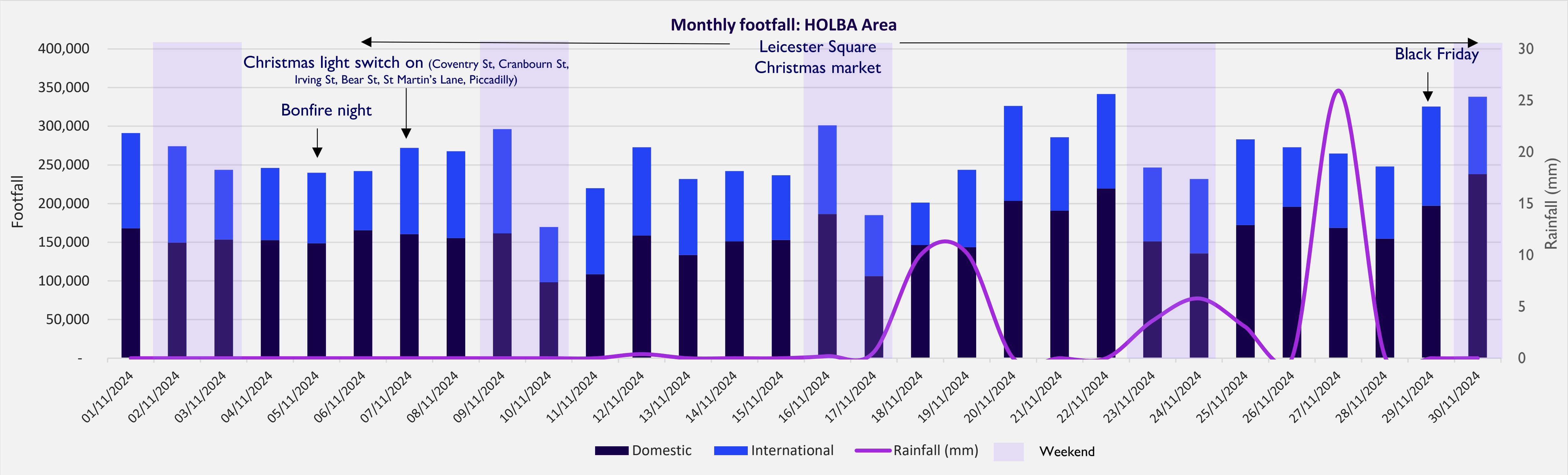
Footfall up 3% month-on-month (MoM) and up 22% year-on-year YoY.

International visits are performing better than domestic visits both MoM and YoY in majority of districts.

District	Month-on-Month			Year-on-Year		
	Total	*Domestic*	*International*	Total	*Domestic*	*International*
HOL Area	3%	*3%*	*4%*	22%	*14%*	*37%*
Piccadilly District	16%	*19%*	*12%*	15%	*25%*	*1%*
Jermyn St District	14%	*3%*	*42%*	23%	*61%*	*-13%*
Leicester Sq District	2%	*-10%*	*21%*	40%	*27%*	*59%*
Piccadilly Circus District	-4%	*-11%*	*6%*	-4%	*-24%*	*33%*
St Martin's Lane District	14%	*0%*	*35%*	33%	*12%*	*70%*
Haymarket District	11%	*11%*	*11%*	-1%	*-8%*	*11%*
Core West End	-1%	*1%*	*-3%*	29%	*9%*	*83%*
HOL Area - major street avg	12%	*12%*	*12%*	-8%	*-9%*	*-6%*

- Visits are up 3% across the HOL area MoM, with strongest growth seen in Piccadilly District.
- Strong MoM visitation in majority of districts as the build up to Christmas intensifies.
- International visitation is up in all districts and out performing the Core West End.

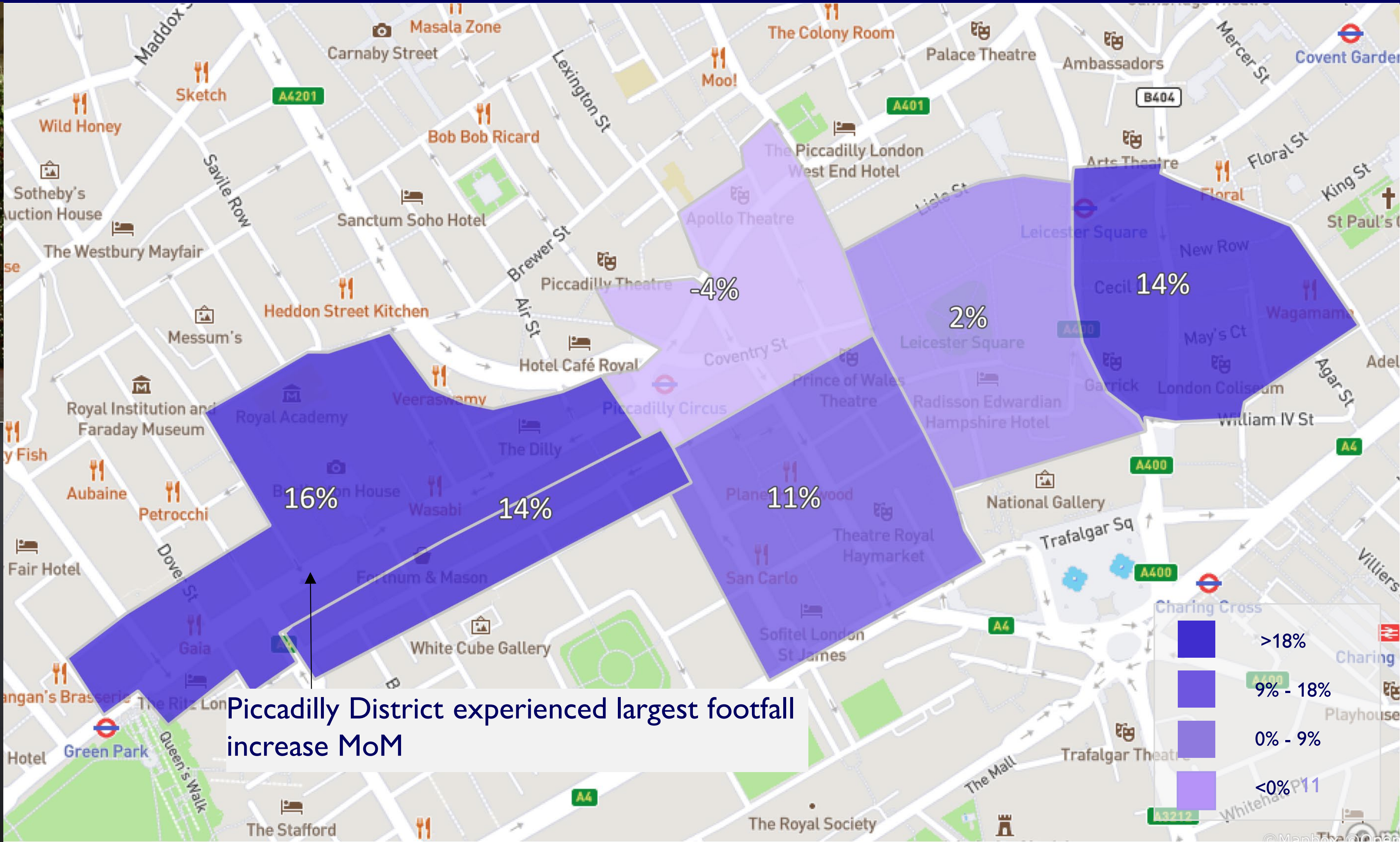
Visitor Volumes
Strong footfall in last week of November



- Strong footfall in the last week of November, likely influenced by Black Friday, Thanksgiving and pay day, with visits averaging 13% higher than the rest of the month.
- Friday 22nd November marked the busiest day of the month.

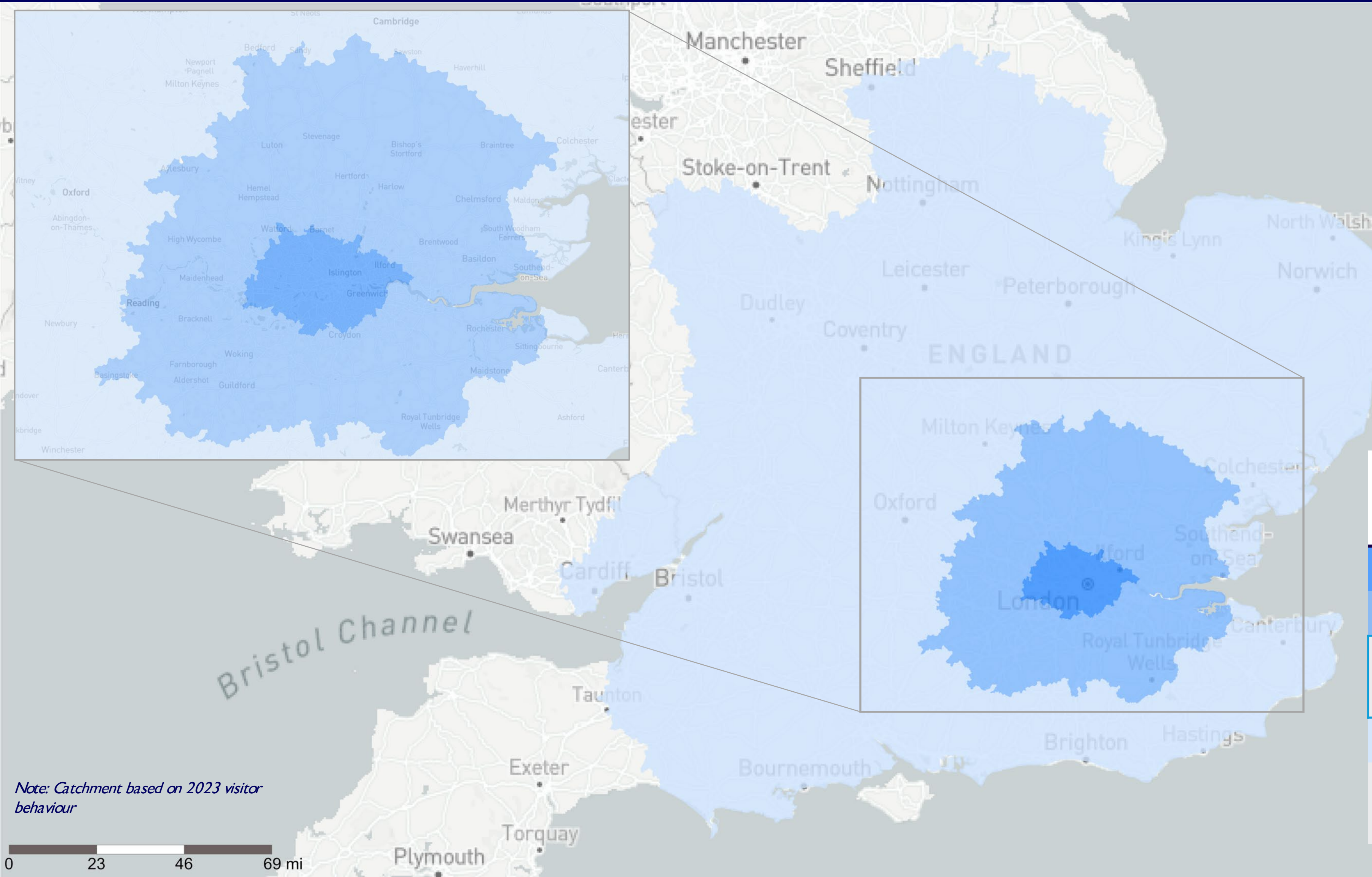
Visitor Volumes

November vs. October 2024: Piccadilly saw largest footfall increase



Piccadilly District experienced largest footfall increase MoM

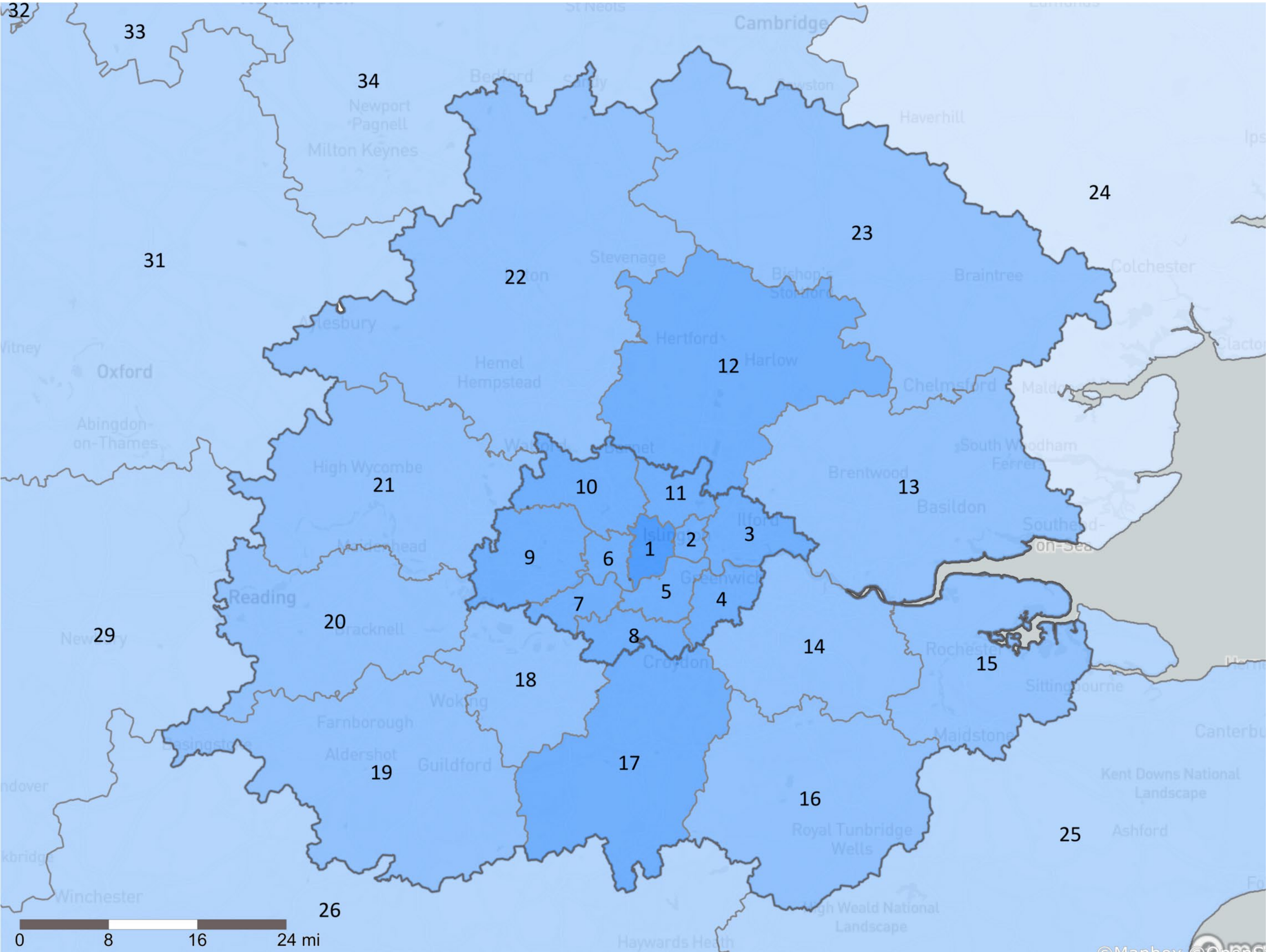
Visitor Volumes
HOL's Core catchment has a population of 16.3million



Catchment band	Population (Millions)
-*Primary*	7.0
-*Secondary*	9.2
Core ***(Primary + Secondary)*** *75% of regular visitors*	**16.2**
-*Tertiary*	24.1
Total ***(Core+ Tertiary)*** *90% of regular visitors*	**40.3**

Note: Catchment based on 2023 visitor behaviour

Visitor Volumes
4.0% increase in visits from Primary Catchment

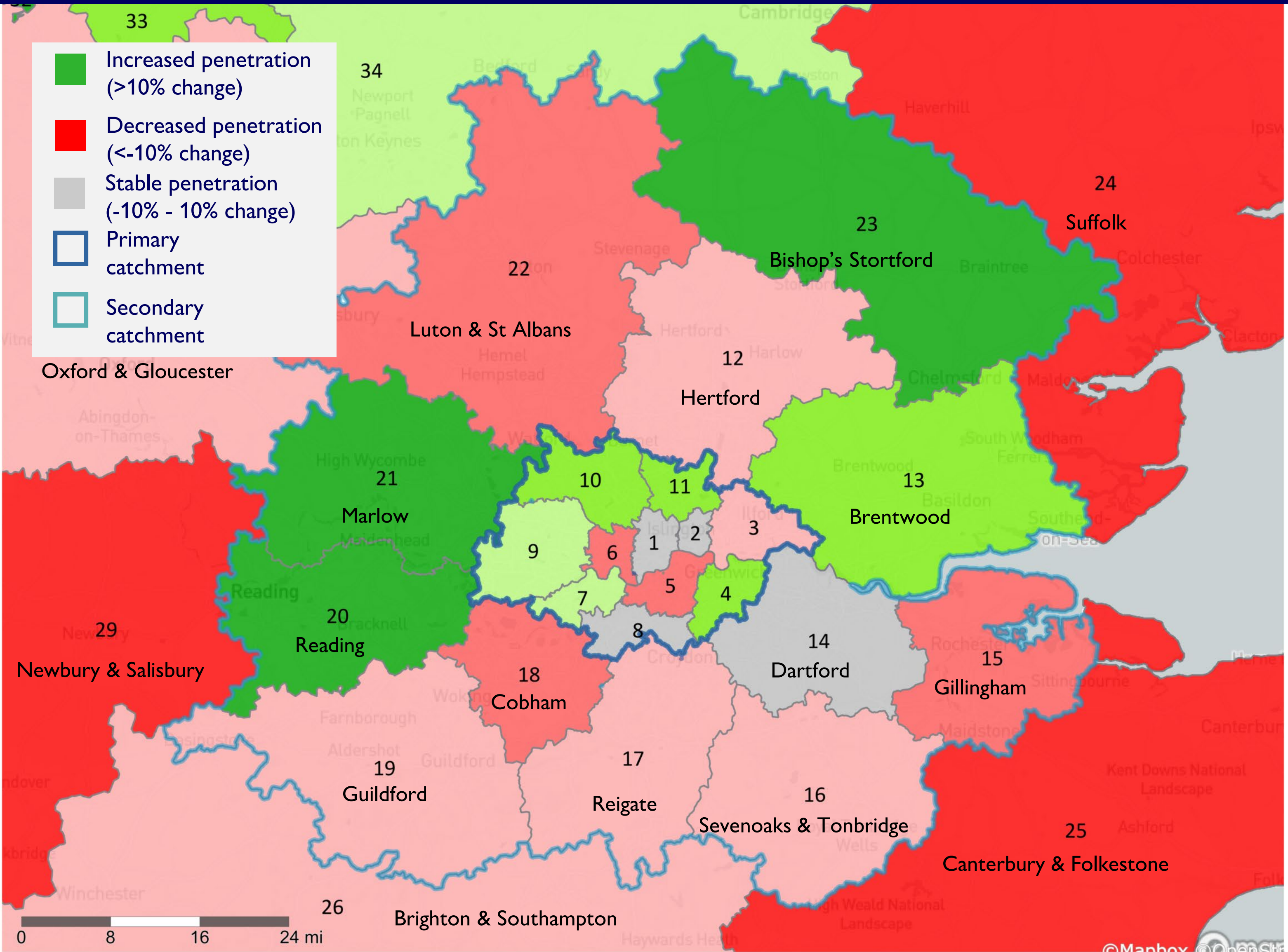


- Increase in visits from those living closer to the area (primary catchment) MoM in November (+4.0%).
- -9.7% decrease in visits from tertiary catchment and -4.9% decrease in visits from secondary catchment.

Catchment band	Latest month visit %	Change vs. previous month
-Primary	56.5%	4.0%
-Secondary	24.0%	-4.9%
Core	80.5%	0.9%
-Tertiary	13.5%	-9.4%
Total	94.0%	-0.5%
-Pull in	6.0%	0.5%

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

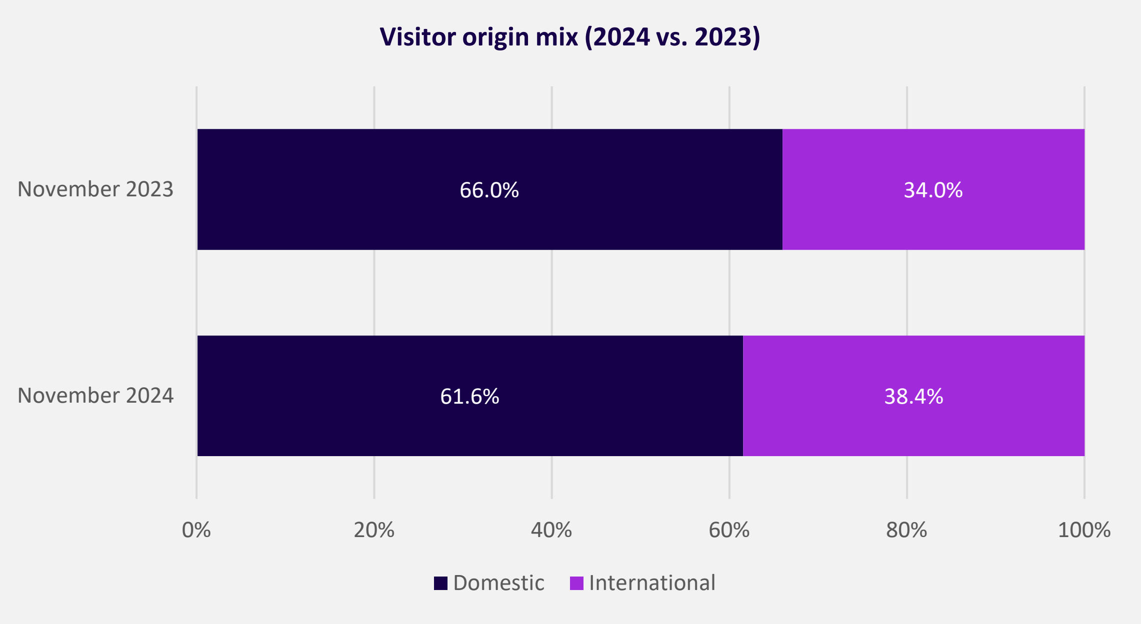
Visitor Volumes
Increase in visitor penetration in parts of Core catchment



- The map represents the MoM change in penetration by catchment zone. Red areas represent zones which contributed fewer visits, while green areas represent zones that contributed more.
- There is an increase in visits from zones within easy reach of HOL area (Marlow, Reading, Greenwich & Lewisham, Wood Green, Wembley & Edgware), and northeast (Bishop's Stortford and Brentwood).
- There is a decrease in visits from south edge of Core Catchment (Cobham, Gillingham) and tertiary catchment.

Visitor Volumes: visitor mix
International visitor volume up on previous month

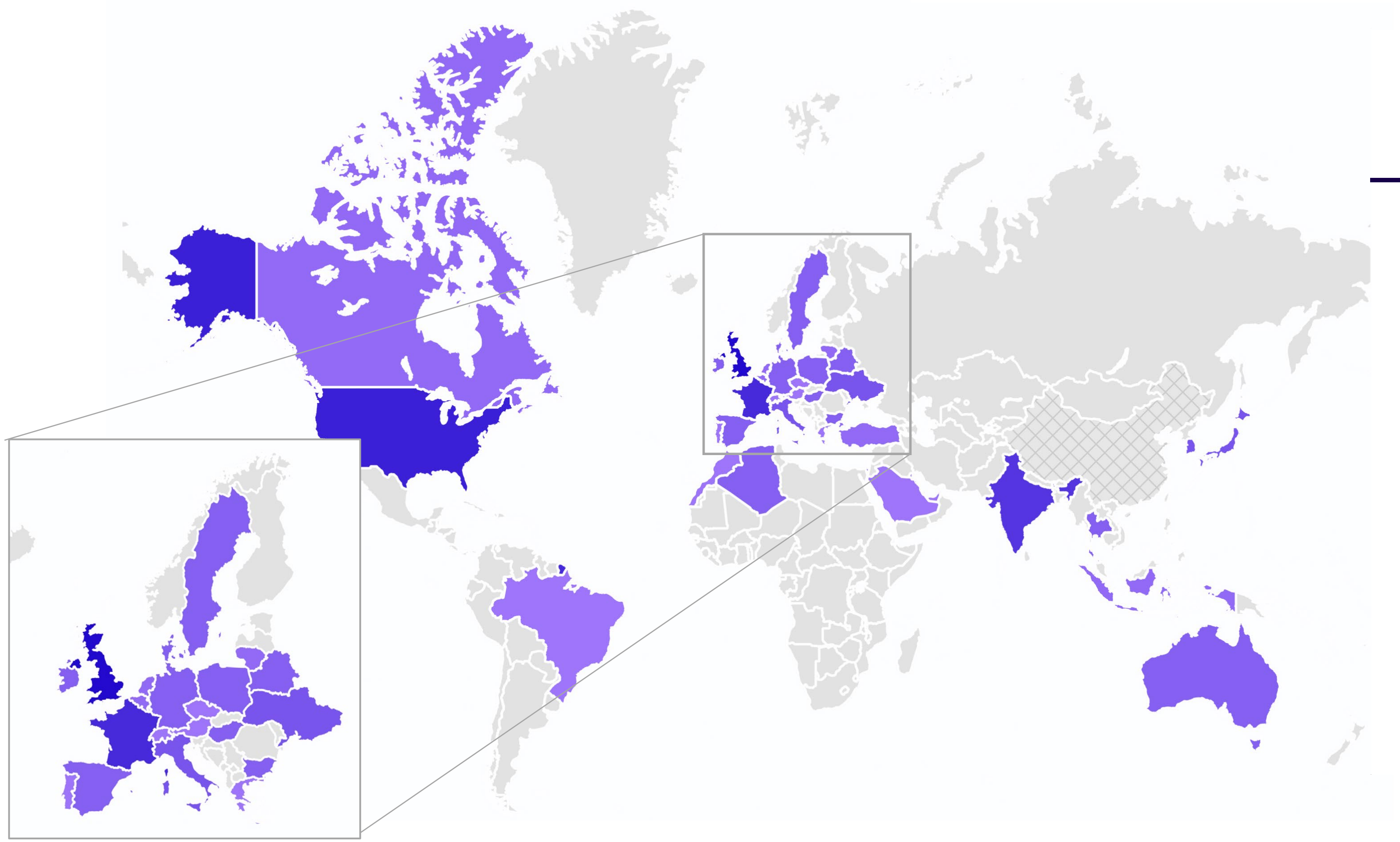
Area	International mix (%)	*+/- change in mix* Month-on-Month	*+/- change in mix* Year-on-year	*+/- change in volume* Month-on-Month	*+/- change in volume* Year-on-year
HOL area	**38.4%**	**0.2%**	**4.4%**	**3.7%**	**37.5%**
Piccadilly District	35.4%	**-1.4%**	**-4.9%**	**11.8%**	**0.9%**
Jermyn St District	36.5%	**7.2%**	**-14.9%**	**42.1%**	**-12.6%**
Leicester Sq District	44.6%	**7.1%**	**5.4%**	**21.2%**	**59.1%**
Piccadilly Circus District	48.3%	**4.6%**	**13.7%**	**6.5%**	**33.4%**
St Martin's District	46.6%	**7.5%**	**10.1%**	**35.4%**	**70.0%**
Haymarket District	41.9%	**0.0%**	**4.5%**	**11.2%**	**10.8%**
Core West End	37.9%	**-1.0%**	**11.3%**	**-3.4%**	**82.9%**



- International visitors increase by 37.5% YoY.
- Domestic and international volumes have both increased MoM as tourists come to London in the build up to Christmas.
- International visits accounted for 38.4% of visits in November 2024, vs. 34.0% last November.
- Core West End has seen more significant growth in international mix YoY, up 11.3%.

Visitor Volumes: visitor origin
38.4% of visitors to HOL area from outside the UK

- Increase in international mix in November 2024, driven mostly from Western, Eastern and Southern Europe visitors.

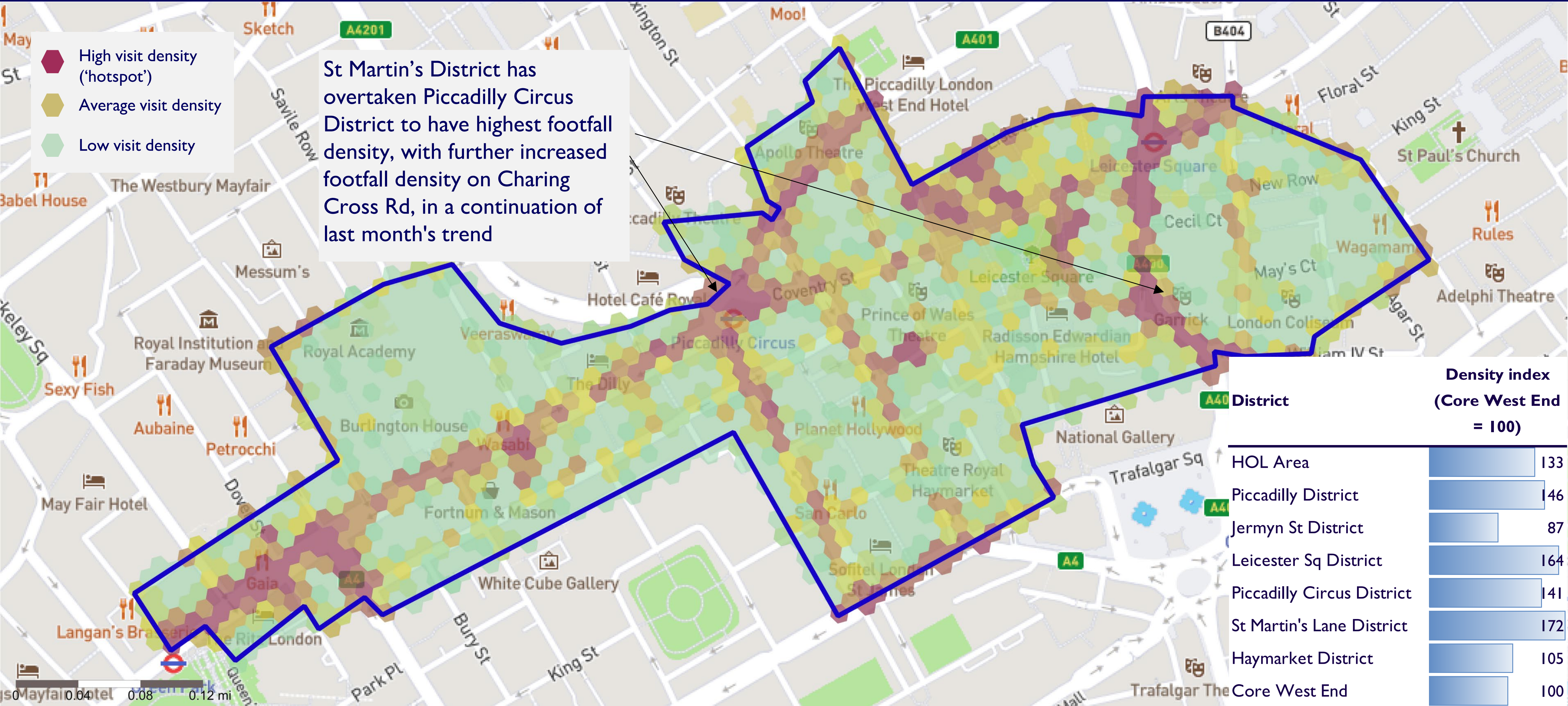


	Region	%		+/- percentage point change
1	United Kingdom	61.6	↓	-0.2
2	Northern America	9.2	↓	-0.3
3	Western Europe	6.6	↑	0.1
4	Eastern Europe	5.8	↑	1.9
5	Southern Asia	4.9	↓	-0.3
6	Southern Europe	2.8	↑	0.3
7	Eastern Asia	2.5	↓	-0.3
8	Northern Europe	2.4	↓	-0.2
9	Western Asia	1.3	↓	-1.0
10	Africa	1.0	↑	0.8
	Europe (excl. UK)	17.6	↑	2.1
	Rest of the world	20.9	↓	-1.9
	Non UK	38.4	↑	0.2

Business *Note: Data unavailable for visitors from China*

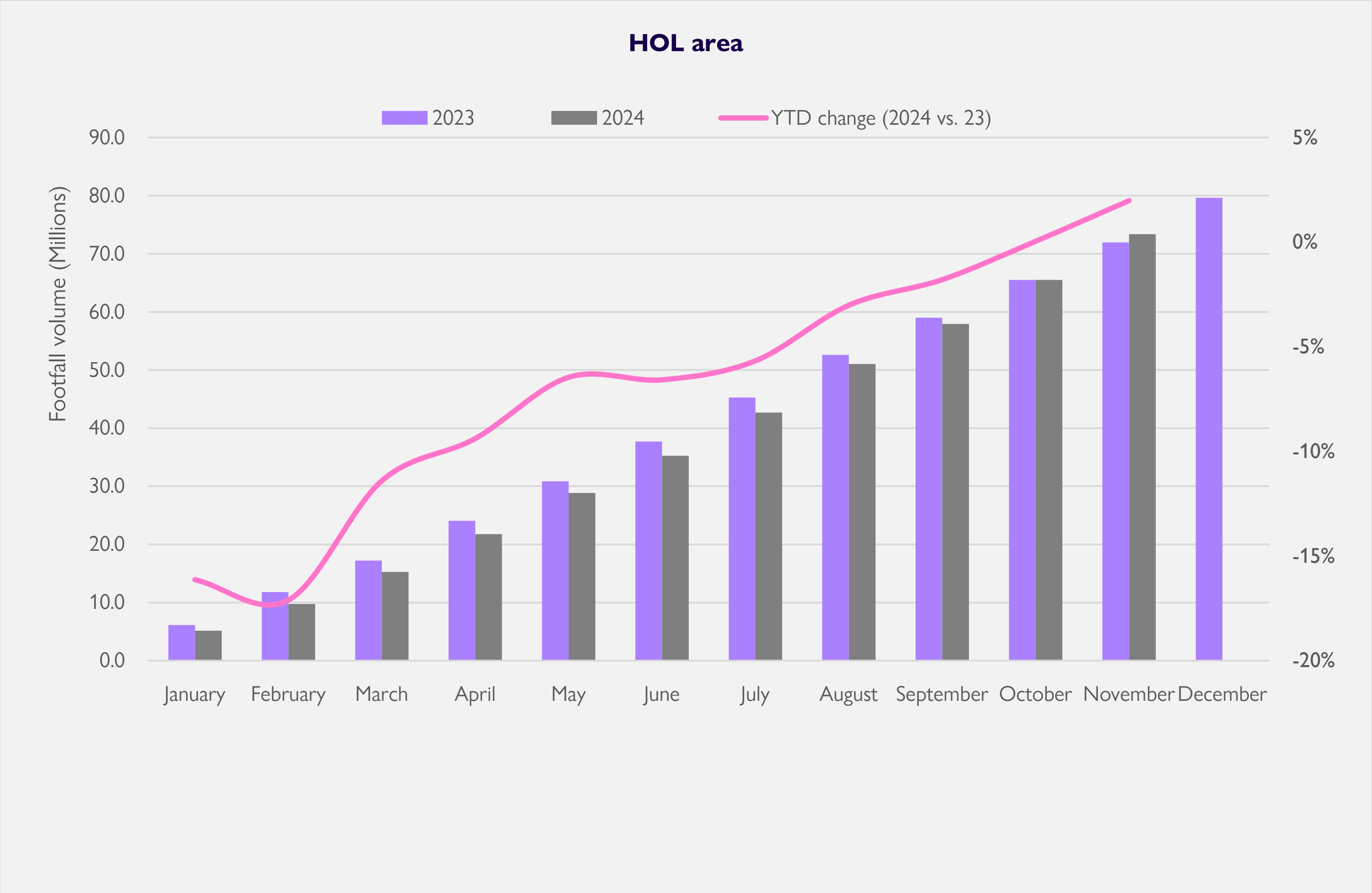
Visitor Volumes
St Martin’s Lane has highest footfall density

St Martin’s District has overtaken Piccadilly Circus District to have highest footfall density, with further increased footfall density on Charing Cross Rd, in a continuation of last month's trend



District	Density index (Core West End = 100)
HOL Area	133
Piccadilly District	146
Jermyn St District	87
Leicester Sq District	164
Piccadilly Circus District	141
St Martin's Lane District	172
Haymarket District	105
Core West End	100

Visitor Volumes: YtD performance
2024 YtD visits ahead of 2023 levels



- Cumulative visits in 2024 have now exceeded 2023 visits as of November, thanks to sustained recovery vs. previous year since June.
- YtD visit volumes are now slightly above 2023 levels (+2%).

Visitor Volumes: TFL station usage
TfL station usage

TfL data currently unavailable. Reporting will resume as soon as possible

03 Visitor Behaviour

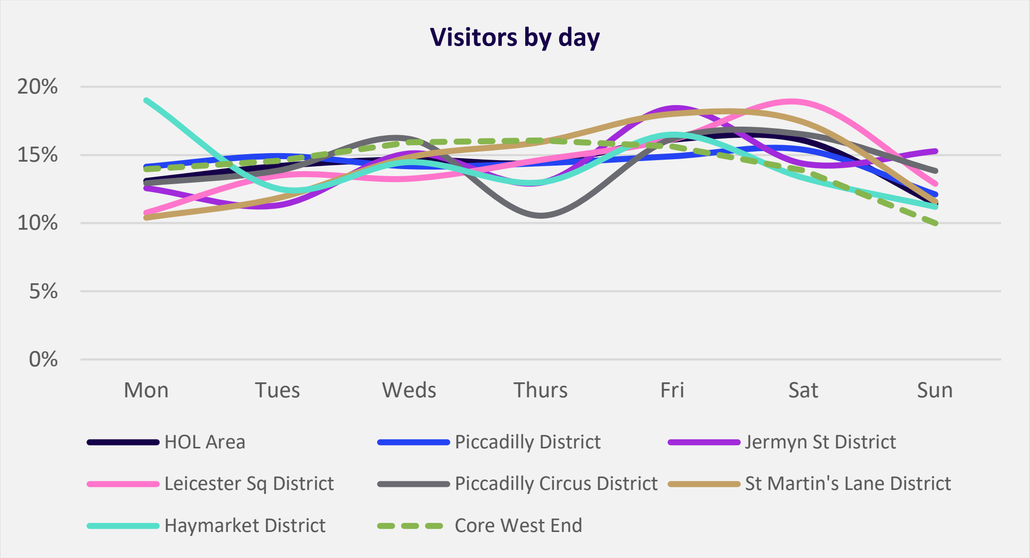
Visitor Behaviour Summary
November 2024

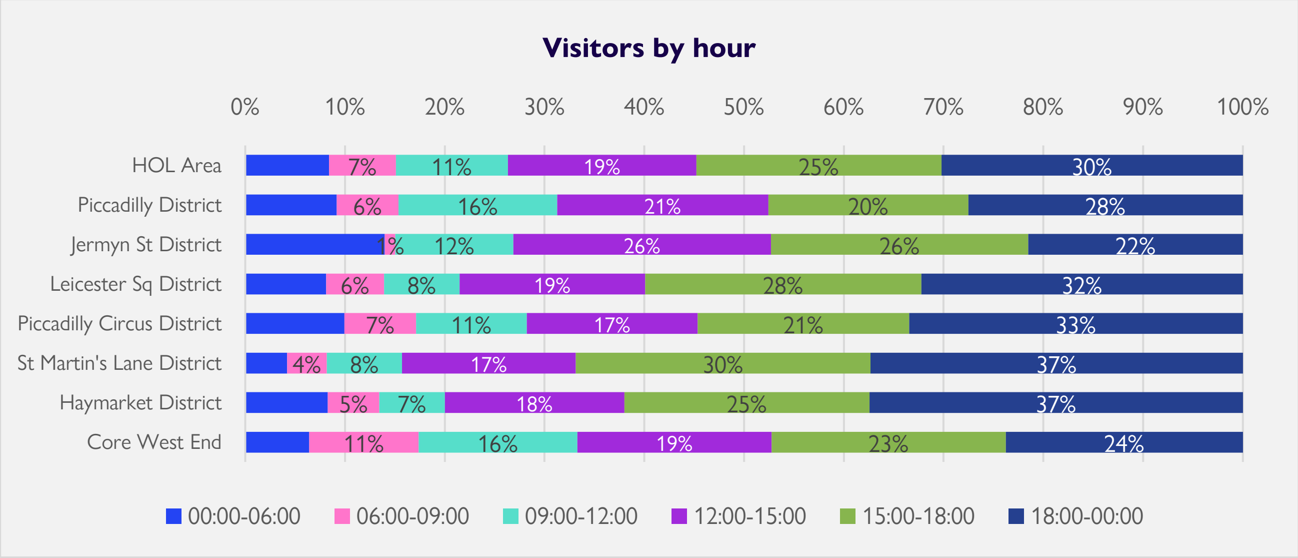
- Last month we saw a rise in footfall on Thursdays, however, this has subsided again, with Fridays and Saturdays being the most dominant days once more. This is likely due to more tourists visiting the area on the lead up to Christmas.

- The average dwell time sat at 2 hours and 14 minutes in November increasing by 9 minutes MoM. This is significantly higher than the YtD average indicating people are spending more time in the area than they have historically.

- Cross visitation also increased compared to last month, with cross visitation in the international segment increasing 13%. This means that the average visitor is visiting more districts than in previous months, however this is still lower than 2023.

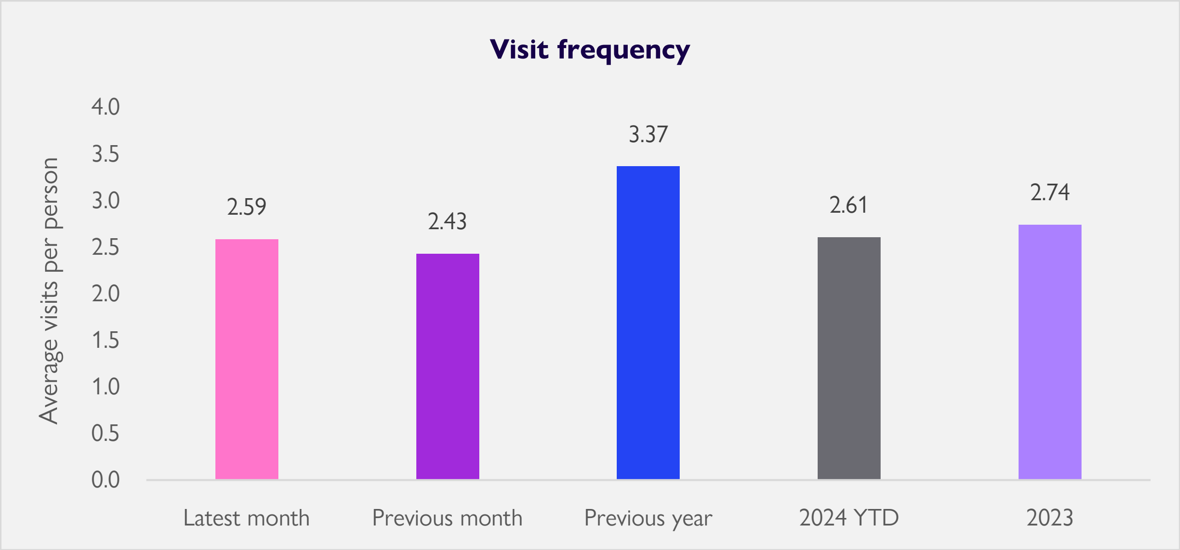
Visitor Behaviour
32.2% of visitors to HOL area visit on a Friday or Saturday

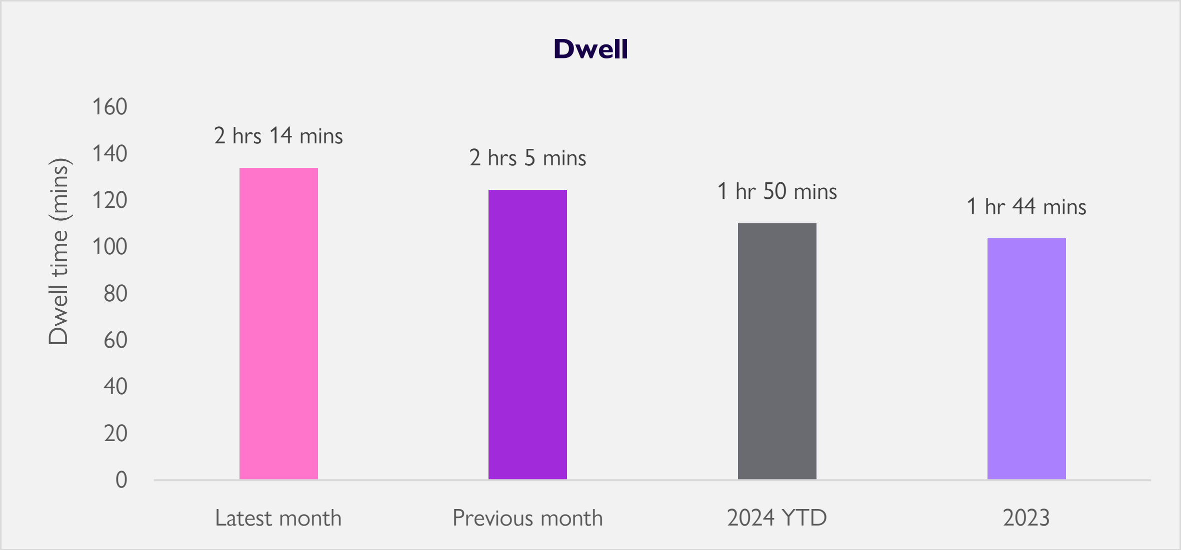




- Friday and Saturday return as the most popular days across the HOL area, following a shift to Thursday in October.
- There is a high concentration of international visitors on Fridays and Saturdays, while domestic visits are slightly more spread out through the week.
- Visitor volumes typically peak during lunchtime and into the afternoon.

Visitor Behaviour
Visitors came more frequently and stayed for longer than in October

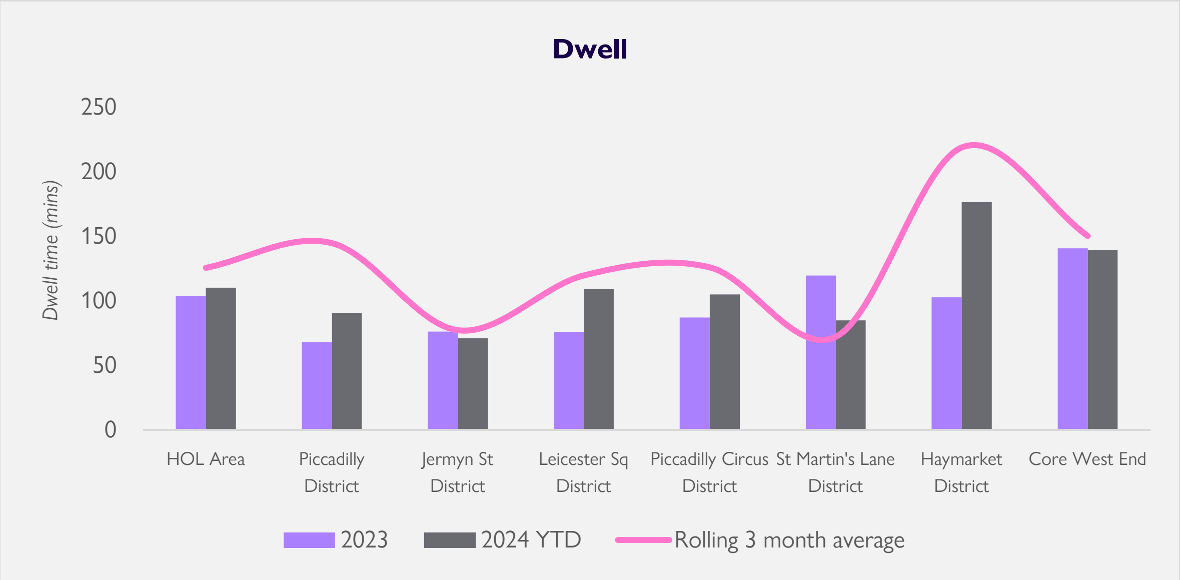


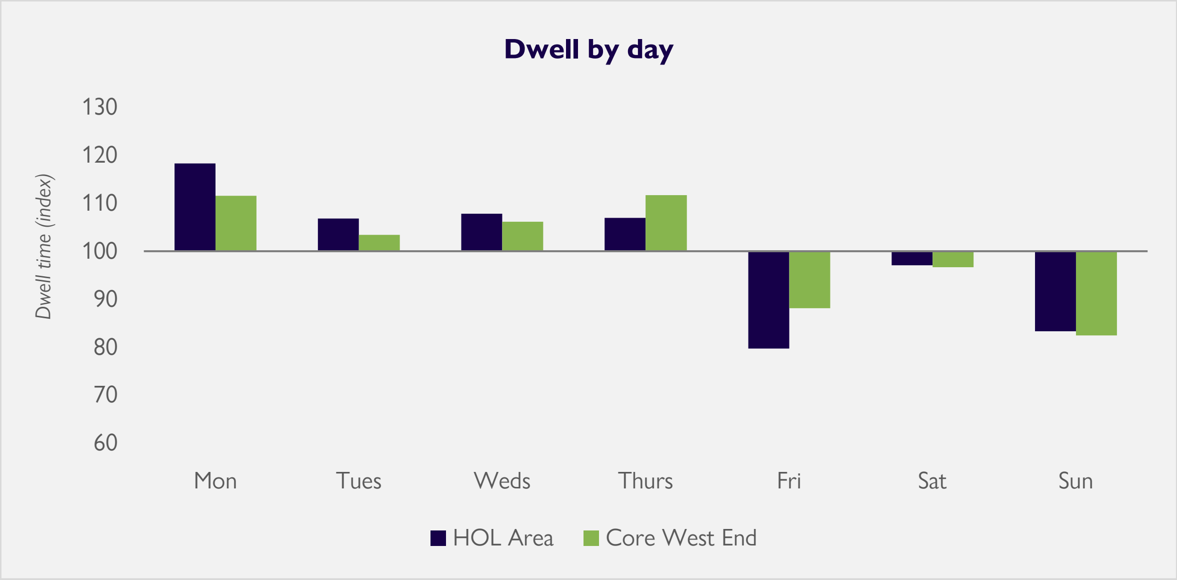


- The average visitor visited the HOL area 2.59 times in November, up from 2.43 in October.

- Dwell time increased 9 mins in November vs. October.
- 44.5% of visitors to HOL area dwell less than an hour.

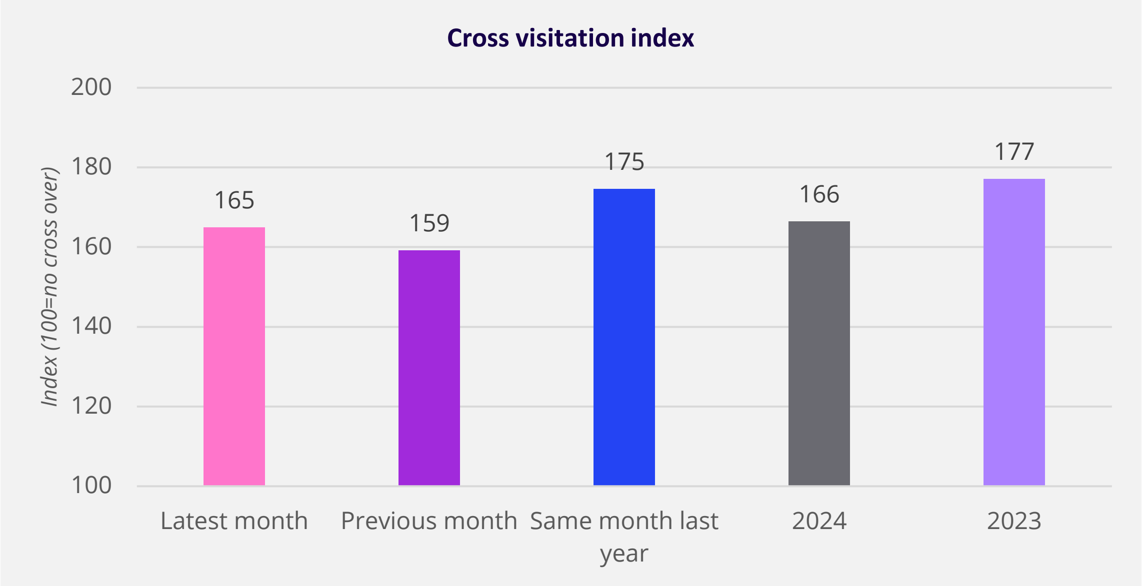
Visitor Behaviour: Dwell time
Dwell time increased in most districts over autumn period

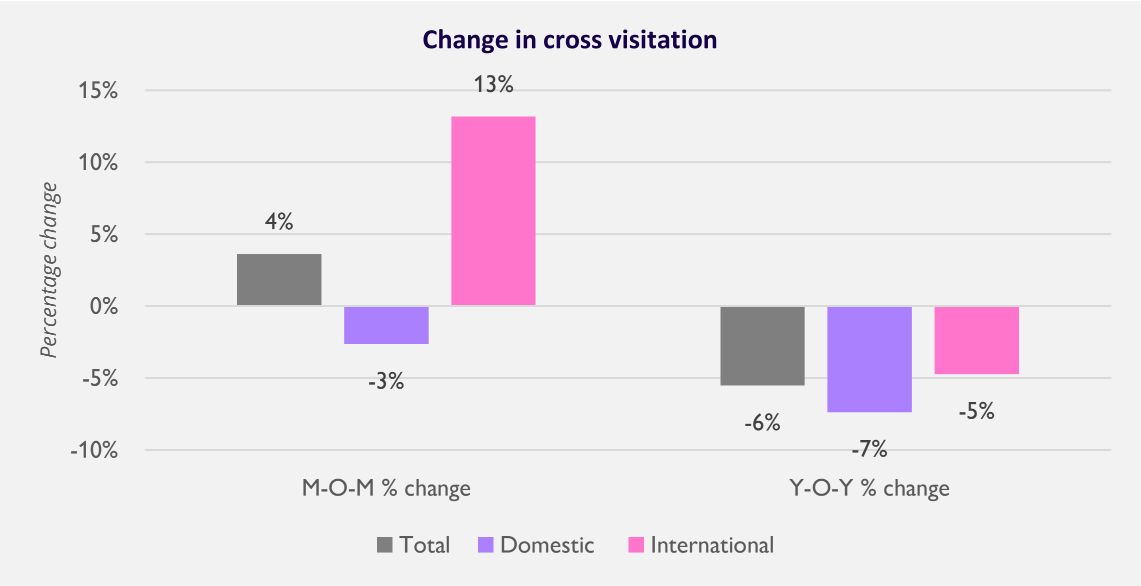




- Dwell time increased in most districts over the last 3 months.
- The Haymarket District saw the largest increase in dwell time over last 3 months vs. 2024 YtD.
- Haymarket District also had the longest dwell time in November, at 2 hours and 56 minutes.
- The HOL area had longer than average dwell times on Monday to Wednesday, likely reflective of workers in the area.
- The pattern for the wider Core West End area is similar to the HOL area.

Visitor Behaviour: Cross visitation
Cross visitation up vs. October but down vs. November 2023





- Cross visitation looks to help understand the number of visitors visiting multiple districts per trip.
- If all visitors visited one district per trip the index would be 100 (indicating no cross over). If visitors visit 2 or more districts per trip the index will be greater than 100. (Worked example in appendix).
- The was a -6% decrease in cross visitation index YoY, meaning -6% fewer people have visited more than one district within the HOL area.

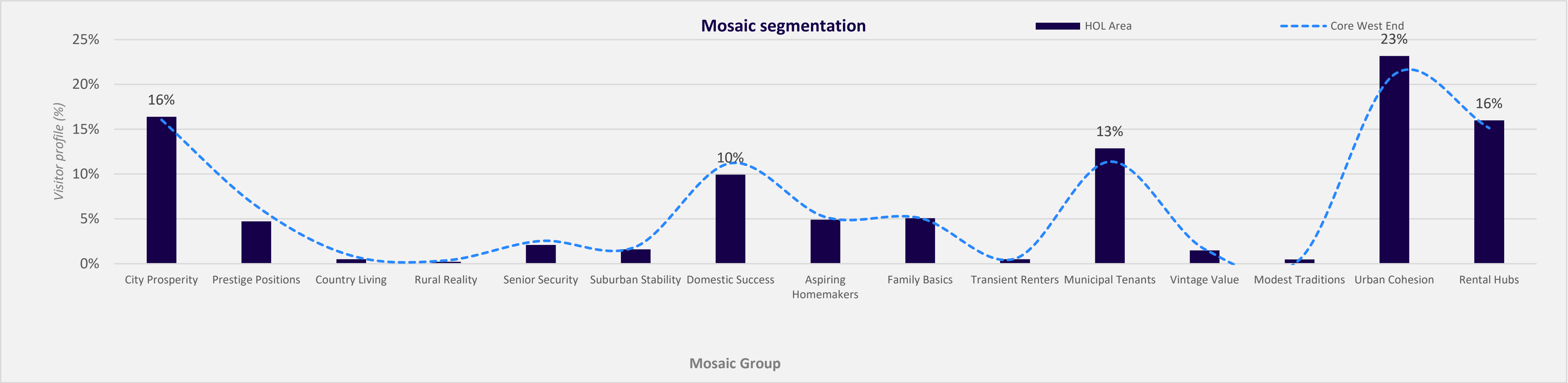
04 Visitor Profile

Visitor Profile Summary
November 2024

- Mosaic demographics show five consistent audience groups across our area, Urban cohesion, City Property, Rental Hubs, Municipal Tenants and Domestic Success. These five groups capture 78% of visitors in November. For more details on what type of people make up these groupings please see the appendix.

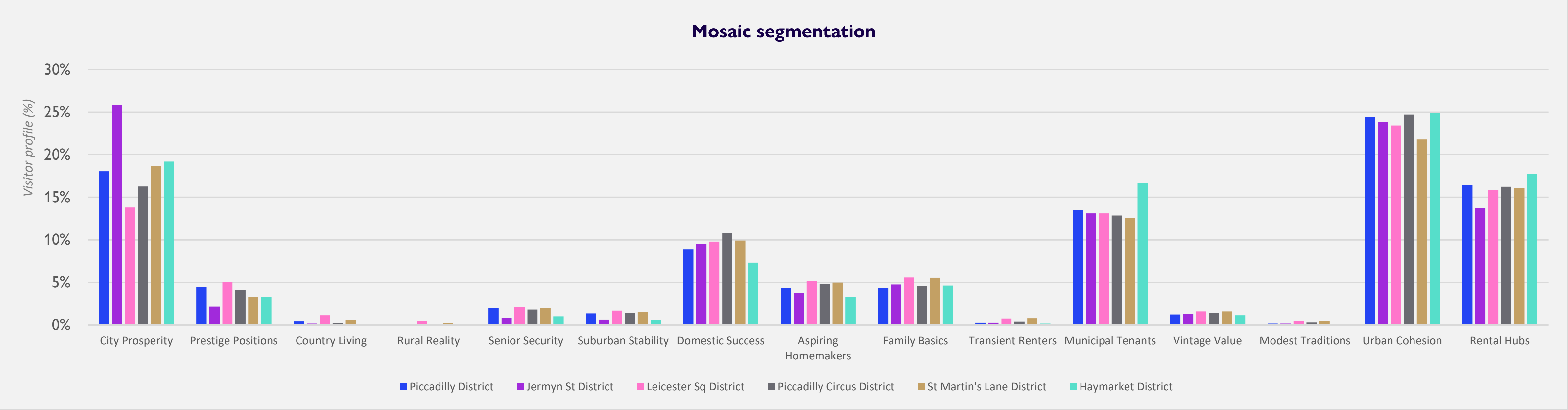
- All groups, with the exception of Domestic Success, saw an increase visitors and more peripheral groups saw decreases compared to last month.

Visitor Profile: Mosaic profile
‘Urban Cohesion’ and ‘City prosperity’ dominant Mosaic groups



- Visitor profile biased primarily towards 3 Mosaic groups ‘Urban Cohesion’, ‘City Prosperity’ and ‘Rental Hubs’.
  - Urban Cohesion are residents of settled urban communities with a strong sense of identity.
  - City Prosperity are high status city dwellers living in central locations and pursuing careers with high rewards.
  - Rental Hubs are educated young people privately renting in urban neighbourhoods.
  - Profile very similar to Core West End visitors.

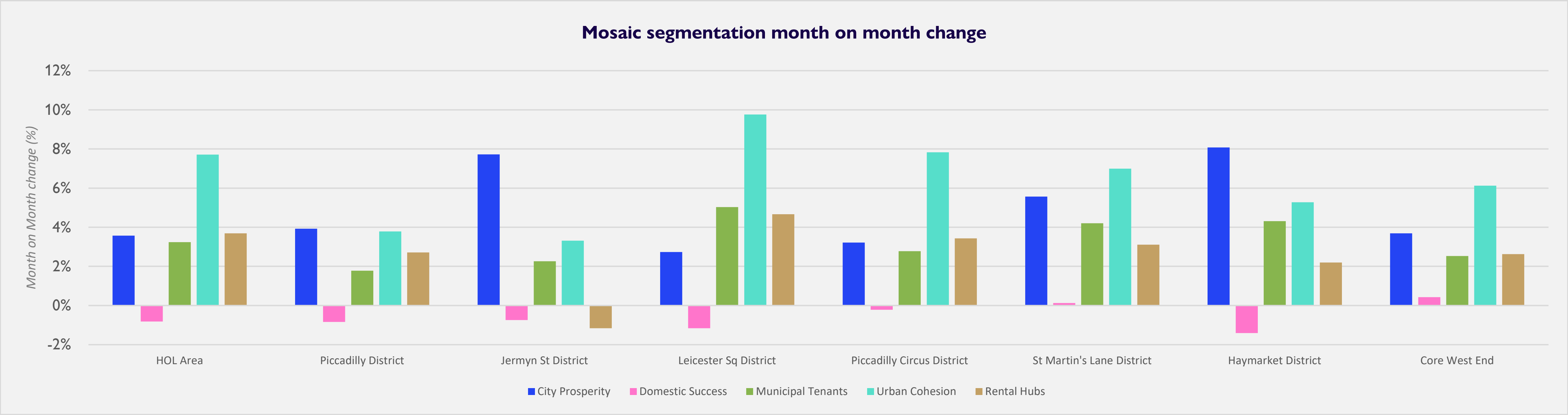
Visitor Profile: Mosaic profile
78.4% of domestic visitors from 5 Mosaic groups



- There is a consistent domestic visitor profile across the districts with the same 5 Mosaic groups representing >78% of all visitors. The increased concentration of visits from these groups is likely due to the bounce back to normal levels after the half term holidays altering visit patterns last month.

- Haymarket District has the highest proportion of Urban Cohesion visitors (24.9%) while Jermyn St District has highest proportion of City Prosperity (25.9%), likely due to the higher presence of office workers.

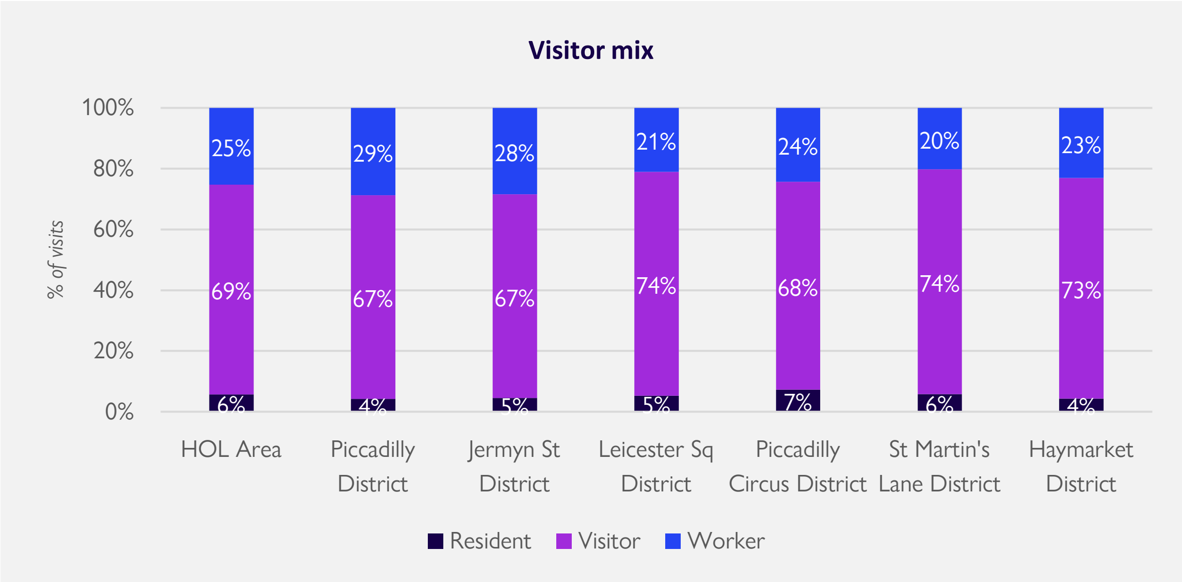
Visitor Profile: Mosaic profile
Increase in 4 out of 5 core Mosaic groups in majority of districts



- 78.4% of visitors to the HOL area are from 5 core Mosaic groups (up +28.5% vs. October).
- There are large decreases in more peripheral groups such as Prestige Positions, Country Living and Rural Reality seen in November.
- Whilst the overall trend for the 5 core groups was positive, Domestic Success was somewhat of an outlier, with a -0.8% decrease in visits vs. October.

Visitor Profile

Resident visits up in all districts vs. November 2023



	Change vs. previous year		
Area	**Resident**	**Visitor**	**Worker**
HOL Area	**18.5%**	**-1.0%**	**-0.7%**
Piccadilly District	**14.9%**	**-1.0%**	**0.4%**
Jermyn St District	**17.0%**	**-0.3%**	**-1.5%**
Leicester Sq District	**19.0%**	**-2.0%**	**3.1%**
Piccadilly Circus District	**19.4%**	**-2.0%**	**0.8%**
St Martin's Lane District	**18.9%**	**-1.9%**	**2.5%**
Haymarket District	**22.6%**	**-1.3%**	**0.8%**

- Exploring the domestic visitor base, ‘visitors’ are the largest group in all districts (vs. workers and residents).
- Leicester Sq continues to have the highest percentage of ‘visitor’ visits (74%) due to strong tourism focus. Conversely Piccadilly District had the highest percentage of workers (29%).
- Visitor mix relatively consistent with November ‘23, with only small changes observed in majority of districts by visitors and workers.
- However, all districts saw an increase in residents in November ‘24 vs. November ‘23, although their small sample size means this may not actually reflect as large a change as it appears.

Anonymised and aggregated by BT, via the High Streets Data Partnership
Visitor mix definitions laid out in appendix

05 Visitor spend (Q2 2024)

Visitor Spend Summary
November 2024

- Transaction counts (the number of individual transactions) has remained fairly stable both Quarter on Quarter and Year on Year increasing and decreasing by 1% respectively. However, despite an increase in visits, the value of the spend was down by 5% compared to Q1 2024.

- Both spend and transactions were performing well in July, however this then dropped off into August and September.

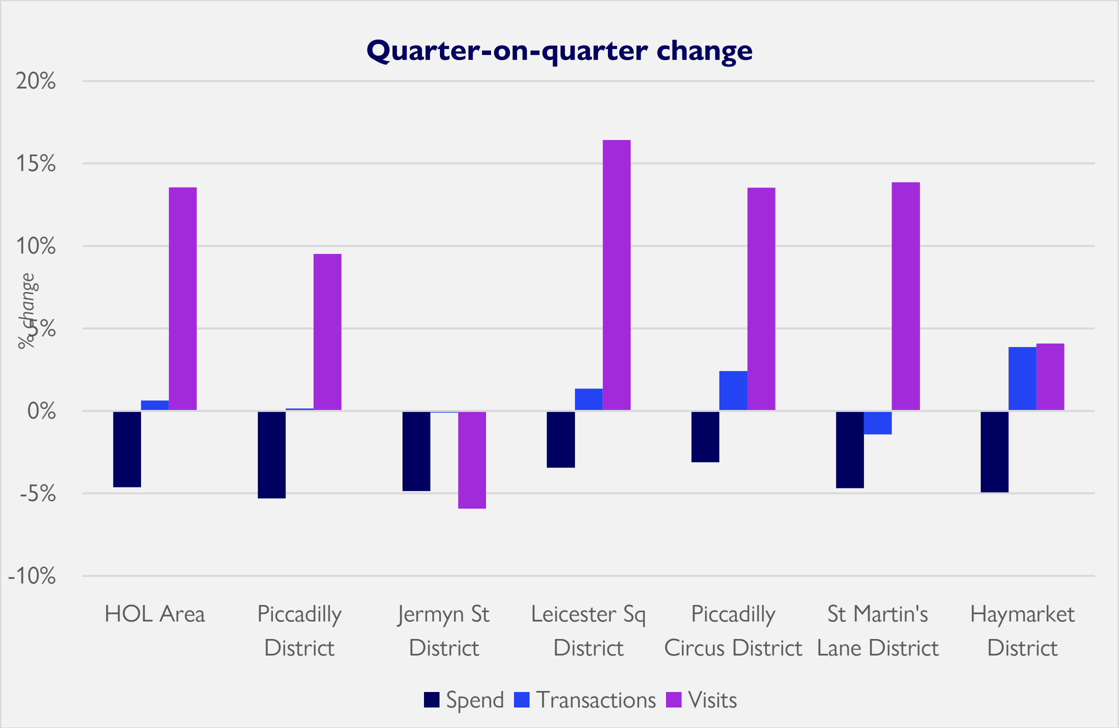
- Apparel spend looks to be the hardest hit with weekday apparel sales down 11% on the previous quarter and down 35% on last year. Conversely, F&B showed a small increase across both weekday and weekend categories and both compared to the previous quarter and year.

- Spend distribution still shows Saturday as the highest spend days across all districts, however there is some variance on when the spend occurs across the day. More leisure focused areas see the majority of their spend between 6pm and 9pm whereas more retail and worker focused areas such as Piccadilly and Jermyn Street see the majority of spend from 12pm to 3pm.

Visitor spend *(Q2 2024: Jul-Sep)*
Spending down in Q2 in all districts vs. last quarter

Q2 FY2024: Jul-Sep 2024

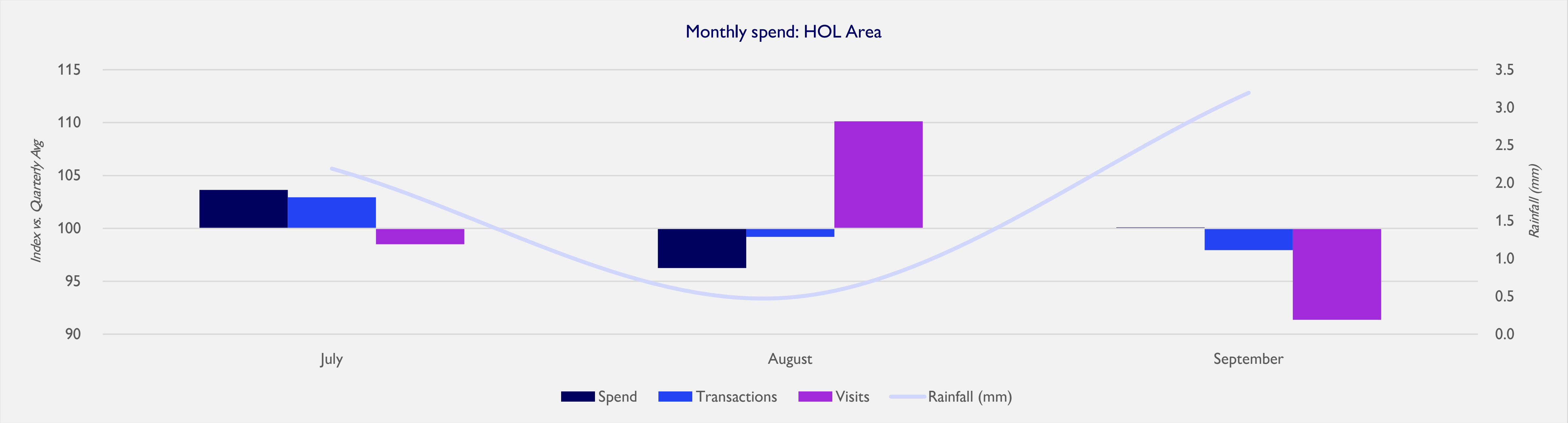
District	Spend: Quarter-on-quarter Total	Spend: Year-on-year Total	Transactions: Quarter-on-quarter Total	Transactions: Year-on-year Total	Visits: Quarter-on-quarter Total	Visits: Year-on-year Total
HOL Area	-5%	-8%	1%	-1%	14%	7%
Piccadilly District	-5%	-11%	0%	-7%	10%	-15%
Jermyn St District	-5%	-1%	0%	4%	-6%	-16%
Leicester Sq District	-3%	-10%	1%	-3%	16%	17%
Piccadilly Circus District	-3%	-3%	2%	3%	14%	-12%
St Martin's Lane District	-5%	-10%	-1%	-7%	14%	14%
Haymarket District	-5%	-7%	4%	6%	4%	-21%



- Spending is down -5% in the HOL area in Q2 vs. Q1, despite an increase in visits to majority of districts in the same time period.
- There is a reduction in average transaction value vs. Q1.

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

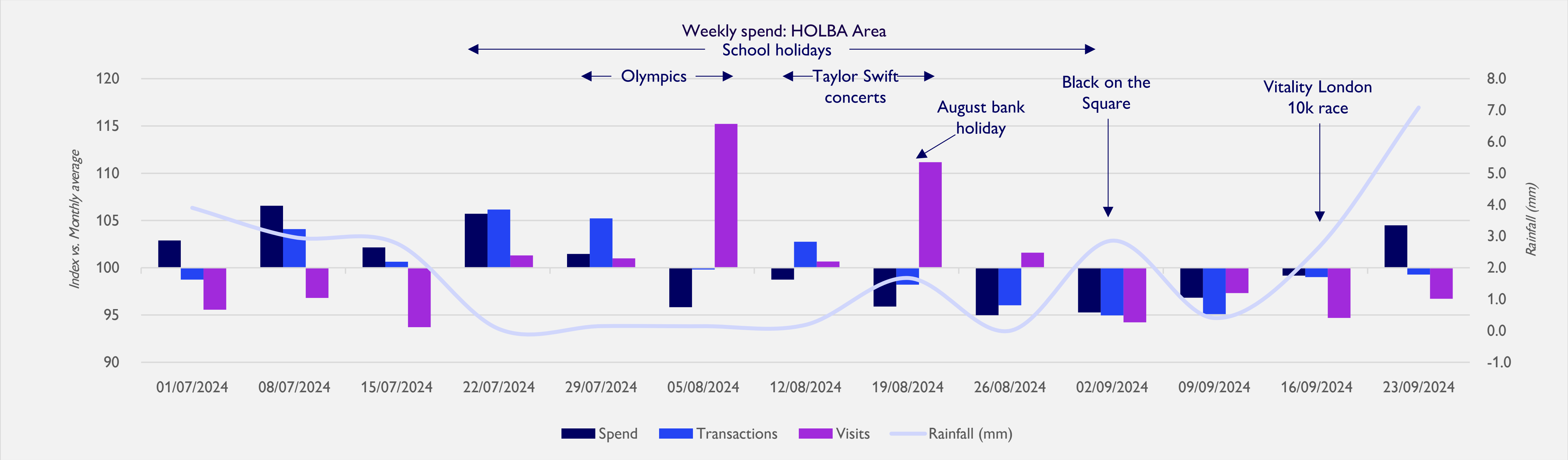
Visitor spend *(Q2 2024: Jul-Sep)*
More activity in July and September than August



- There is a slightly higher volume of spend in July and September whilst August saw the inverse.
- Visits were highest in August due to school holidays and bank holiday and declined to below quarter average in September as tourism decreased, indicating lower spending per trip by tourists vs. other visitor segments.

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

Visitor spend *(Q2 2024: Jul-Sep)*
Highest spend seen in July



- Higher volume of spend and transactions early in the quarter before a decrease in August.
- The impact of higher rainfall towards start and end of the quarter on spending was limited. Visits do appear to have decreased in those weeks but suggest that those that do still visit are more purpose-driven and spend more per trip.

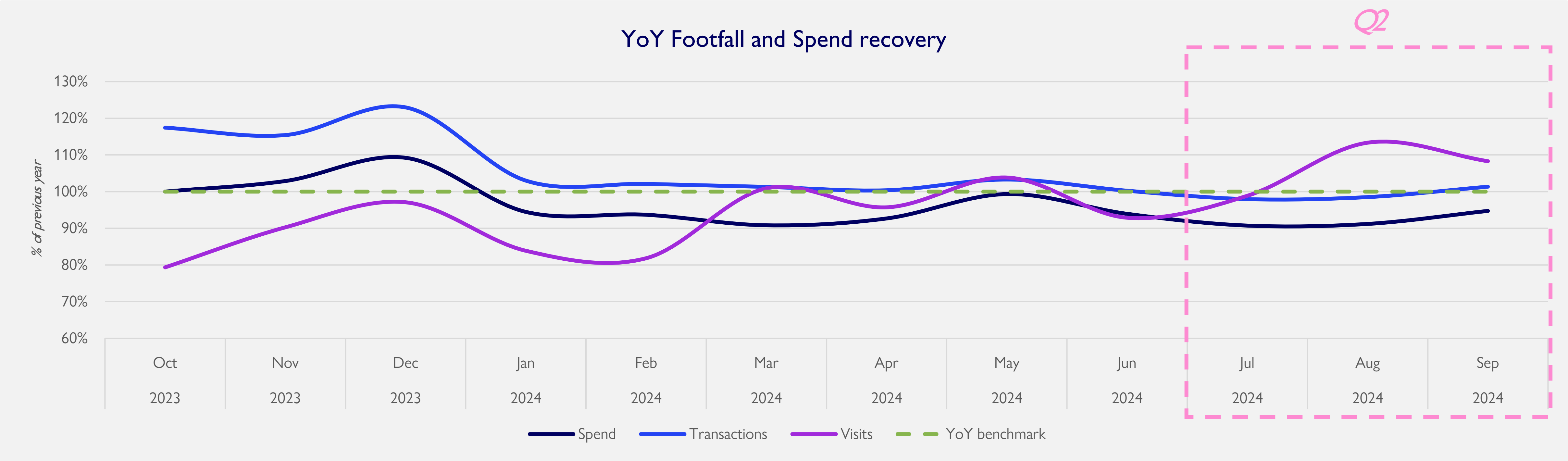
Note: Historic MasterCard figures have been adjusted for inflation
Anonymised and aggregated by MasterCard, via the High Streets Data Partnership

Visitor spend (Q2 2024: Jul-Sep)
Strong F&B performance in Q2

	Eating – Weekday	Eating – Weekend	Apparel – Weekday	Apparel – Weekend	Total Retail – Weekday	Total Retail – Weekend
Quarter-on-quarter (%)	3%	1%	-11%	-8%	-4%	-6%
Year-on-year (%)	4%	5%	-35%	-32%	-9%	-7%
YtD vs. last year(%)	3%	3%	-32%	-28%	-7%	-5%

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

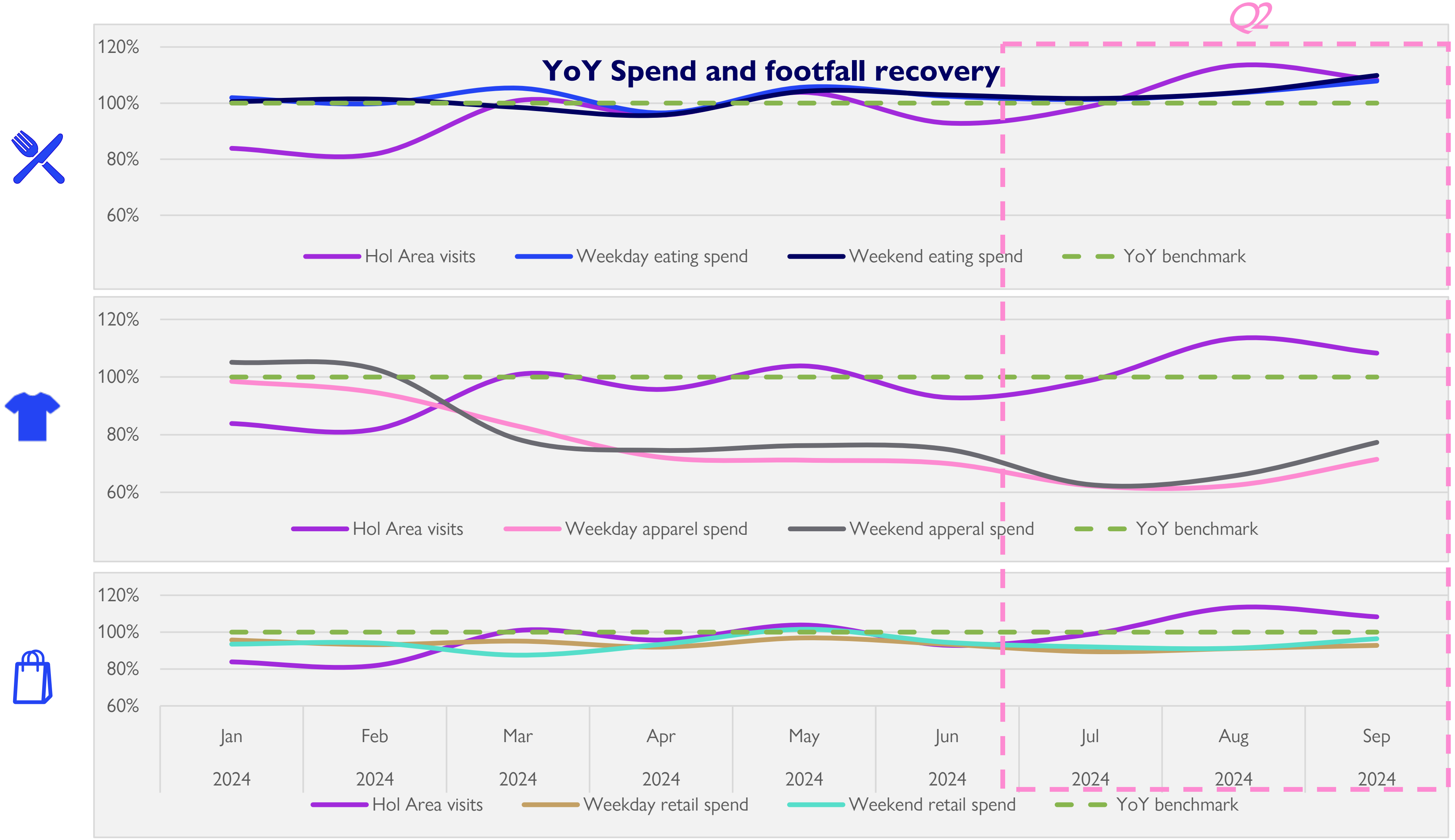
Spend recovery update (Q2 2024: Jul-Sep)
Spend and transactions consistent with 2023 levels



- Spend (value) and transactions (volume) are both around the 2023 levels throughout the majority of 2024, although they suffered a slight decrease in July and August.
- Conversely, visits saw a sharp rise in Q2, likely due to increased tourism in summer holidays (international visits in Jul-Sep were an average of 21% higher than the rest of 2024)

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

Spend recovery update (Q2 2024: Jul-Sep)
Visits have been outperforming spend in majority of categories



- Visits have risen sharply in Q2 following a period of consistent performance with 2023, whilst spend has been closer to or behind 2023 levels so far in 2024 in majority of categories.
- Weekday and weekend apparel spend had larger decrease in Q2 than other categories vs. 2023, although showed signs of resurgence in September as tourist spend decreased. However, apparel is not a significant category in the area in terms of retail offer.

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

Visitor spending (Q2 2024: Jul-Sep)
Saturday continues to have highest spend levels

Spend volume hotspots

Index (vs. district average)

District	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
HOLBA area	79	90	99	106	113	133	81
Piccadilly District	87	95	102	108	109	126	72
Jermyn St District	86	98	104	113	112	122	66
Leicester Sq District	73	83	92	99	113	144	96
Piccadilly Circus District	74	85	94	105	115	140	88
St Martin's Lane District	75	87	99	104	112	139	83
Haymarket District	80	95	102	106	114	126	76

Quarter-on-quarter change in spend

% change (volume)

District	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
HOLBA area	-13%	-8%	-12%	-16%	-20%	-18%	-18%
Piccadilly District	-15%	-11%	-17%	-19%	-25%	-20%	-22%
Jermyn St District	-7%	-5%	-10%	-9%	-15%	-15%	-11%
Leicester Sq District	-14%	-4%	-9%	-13%	-16%	-16%	-15%
Piccadilly Circus District	-15%	-8%	-12%	-15%	-21%	-19%	-21%
St Martin's Lane District	-9%	-5%	-7%	-13%	-14%	-15%	-14%
Haymarket District	-10%	-3%	-13%	-16%	-23%	-22%	-21%

- Saturdays saw the largest volume of spend across the HOL area and in all districts, consistent with previous reports.
- Spend in the HOL area is down every day Q2 vs. Q1, with Friday-Sunday spend impacted most.

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

Business

Visitor spending (Q2 2024: Jul-Sep)
12 - 3pm has highest spend levels

Spend volume hotspots

Index (vs. district average)

District	12am - 3am	3am - 6am	6am - 9am	9am - 12pm	12pm - 3pm	3pm - 6pm	6pm - 9pm	9pm - 12am
HOLBA area	29	6	10	54	210	193	182	115
Piccadilly District	29	4	8	62	258	232	113	93
Jermyn St District	31	7	12	85	255	229	109	73
Leicester Sq District	30	5	7	37	171	170	242	139
Piccadilly Circus District	41	7	7	38	169	168	226	144
St Martin's Lane District	17	5	14	49	199	180	227	111
Haymarket District	18	10	18	67	201	183	198	106

Quarter-on-quarter change in spend

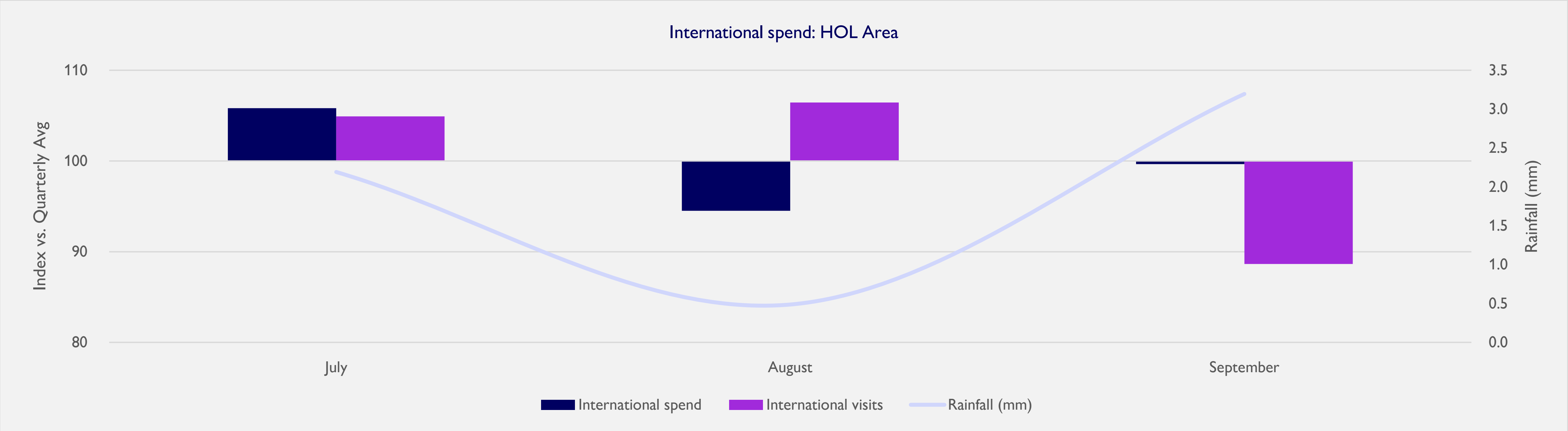
% change (volume)

District	12am - 3am	3am - 6am	6am - 9am	9am - 12pm	12pm - 3pm	3pm - 6pm	6pm - 9pm	9pm - 12am
HOLBA area	-19%	-8%	-20%	-19%	-14%	-14%	-14%	-17%
Piccadilly District	-16%	3%	-22%	-25%	-18%	-16%	-19%	-22%
Jermyn St District	-10%	-38%	-9%	-14%	-11%	-7%	-11%	-10%
Leicester Sq District	-17%	-16%	-16%	-14%	-10%	-13%	-13%	-14%
Piccadilly Circus District	-22%	4%	-16%	-17%	-13%	-14%	-17%	-20%
St Martin's Lane District	-19%	7%	-9%	-9%	-7%	-12%	-12%	-15%
Haymarket District	-37%	-19%	-14%	-13%	-12%	-14%	-17%	-20%

- 12pm – 3pm saw the largest volume of spend across the HOL area, but four districts saw highest volumes between 6pm – 9pm, driven by a strong evening economy.
- The volume of spend in the HOL area decreased vs. the previous quarter in every time period, while three districts saw slight increases in night-time spend between 3am – 6am.

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

Visitor spend – International *(Q2 2024: Jul-Sep)*
International spend higher in July than August and September

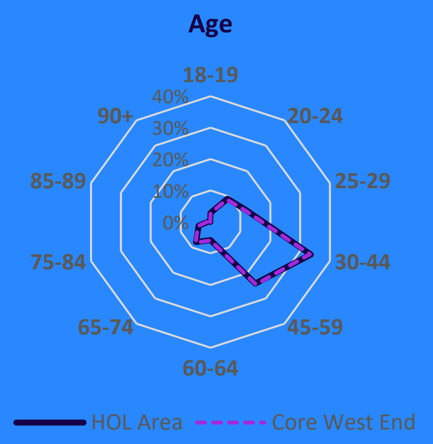


- Highest volume of international spend in July, whilst August saw the lowest.
- International visits were highest in August due to summer holidays but declined to significantly below quarter average in September as tourism season came to a close, further indicating lower spending per trip by tourists vs. other visitor segments.
- International and domestic spend highly correlated, implying that visitors in August don't have same propensity to spend as those in other months.

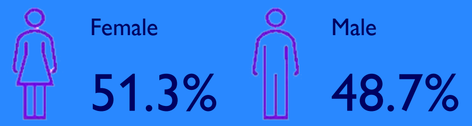
Note: Historic MasterCard figures have been adjusted for inflation
Anonymised and aggregated by MasterCard, via the High Streets Data Partnership

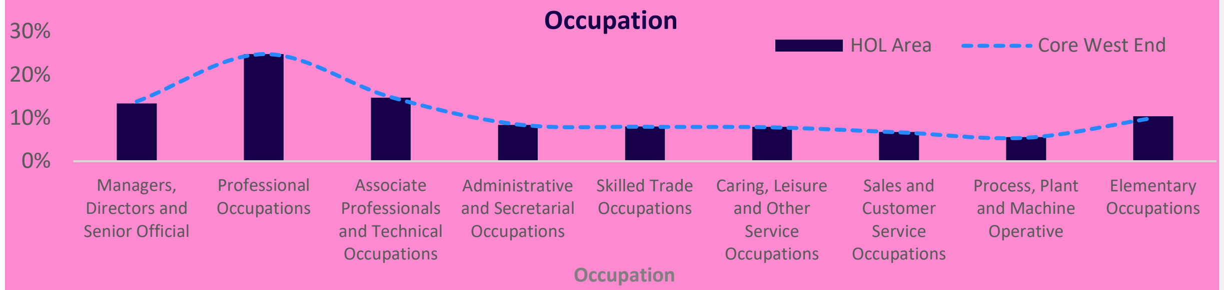
06 Appendix

Appendix: demographics
Catchment biased towards middle-aged, white-collar workers

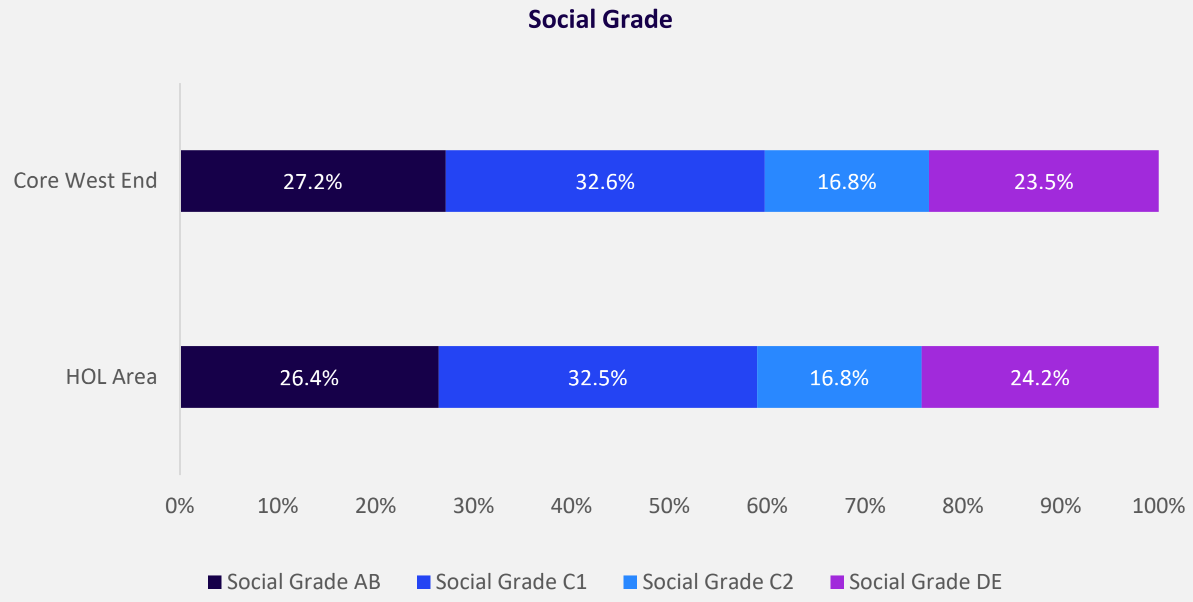


- Visitor profile skewed towards those aged 30-59 years old.
- Males & females are evenly split, and in-line with Core West End.





- Visitor catchment profile biased towards ‘white collar’ occupations, consistent with last month.



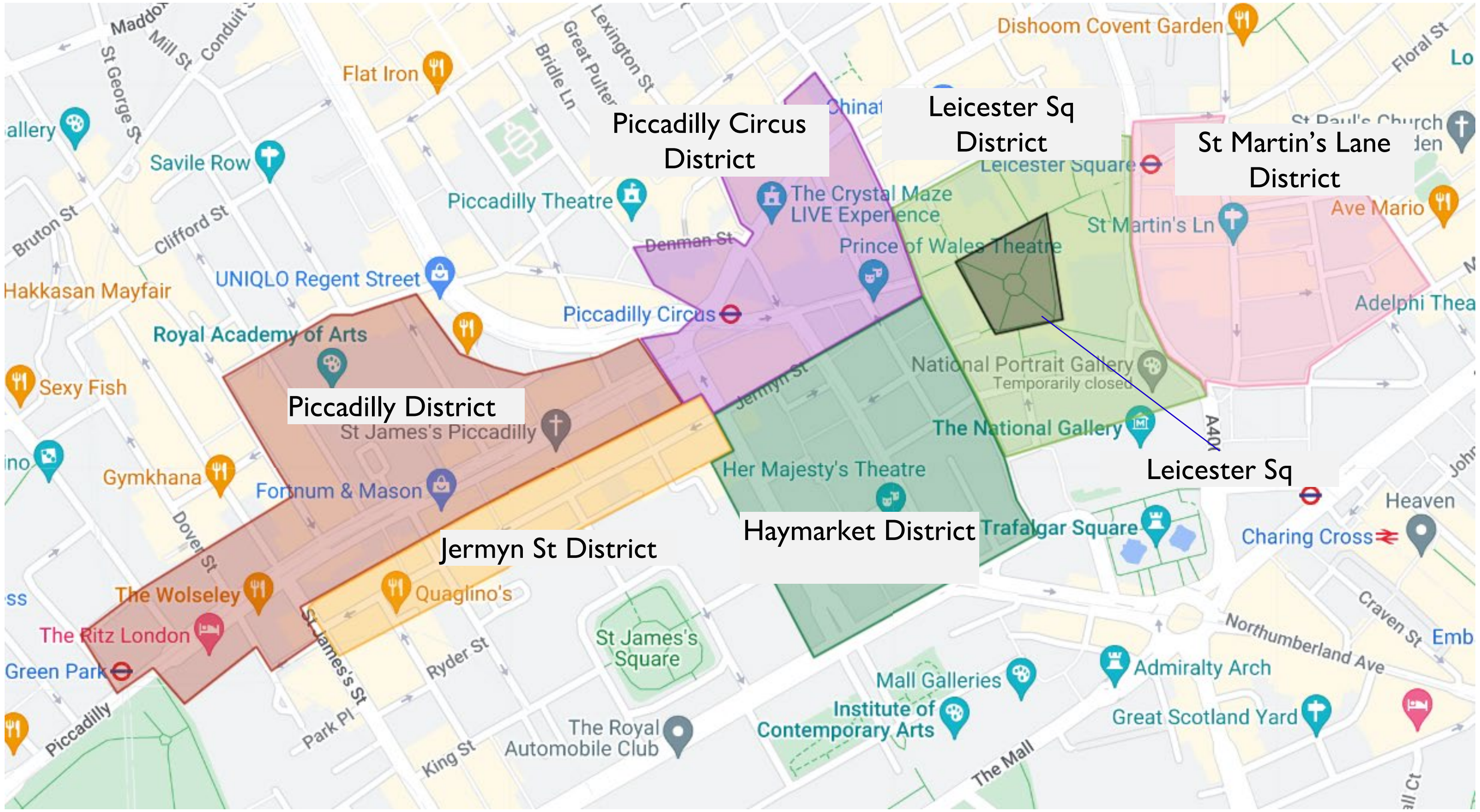
- 26.4% HOL area visitor catchment profile in Social Grade AB, vs 27.2% for Core West End.
- West End profile influenced by presence of affluent Bond St shoppers.

Appendix
Location definition

- 7 key areas within HOL used for analysis:

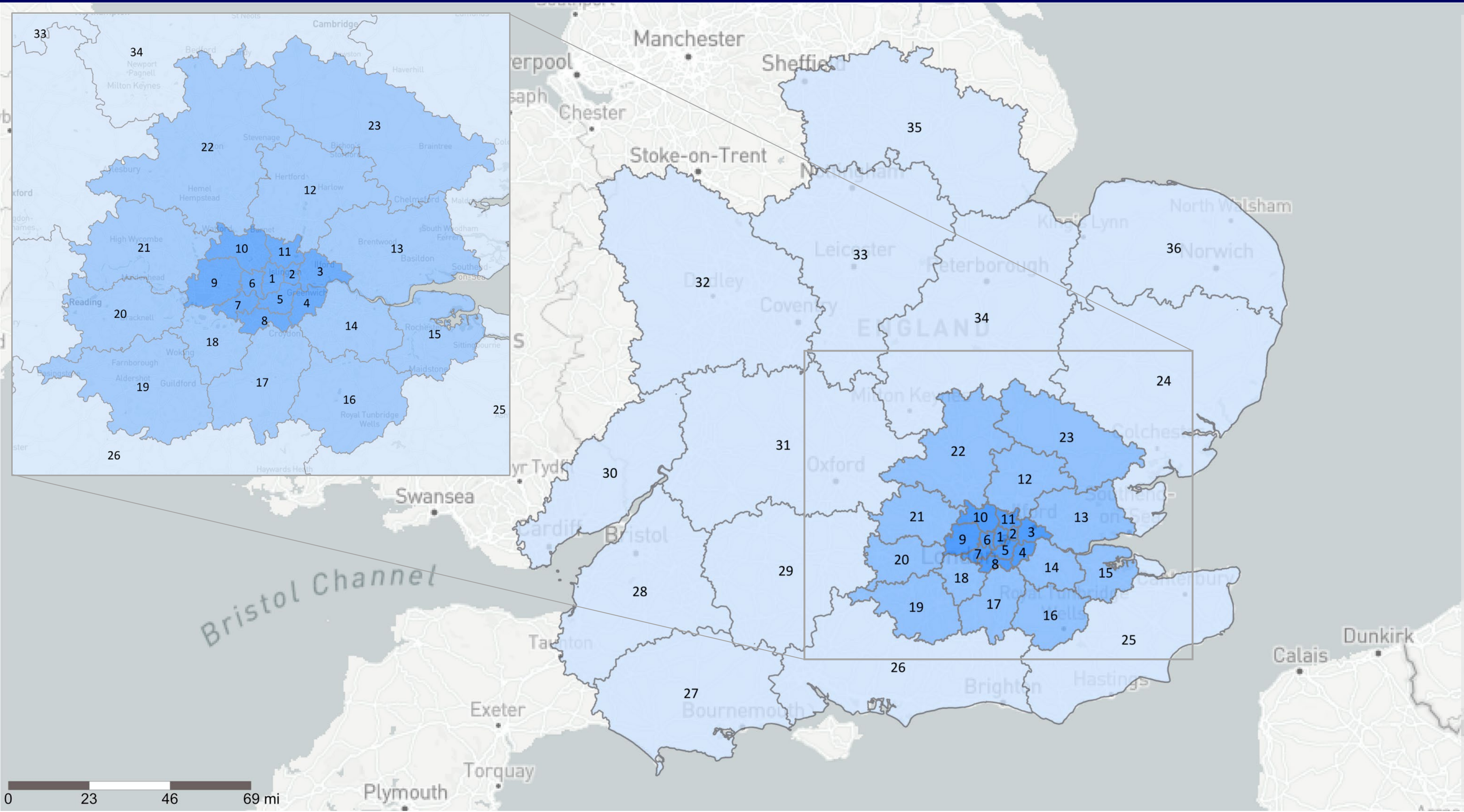
  - Piccadilly District
  - Jermyn St District
  - Piccadilly Circus District
  - Haymarket District
  - Leicester Sq District
  - Leicester Sq
  - St Martin’s Lane District

- In addition Core West End area has been defined as a benchmark location.



Business

Appendix
Location definition

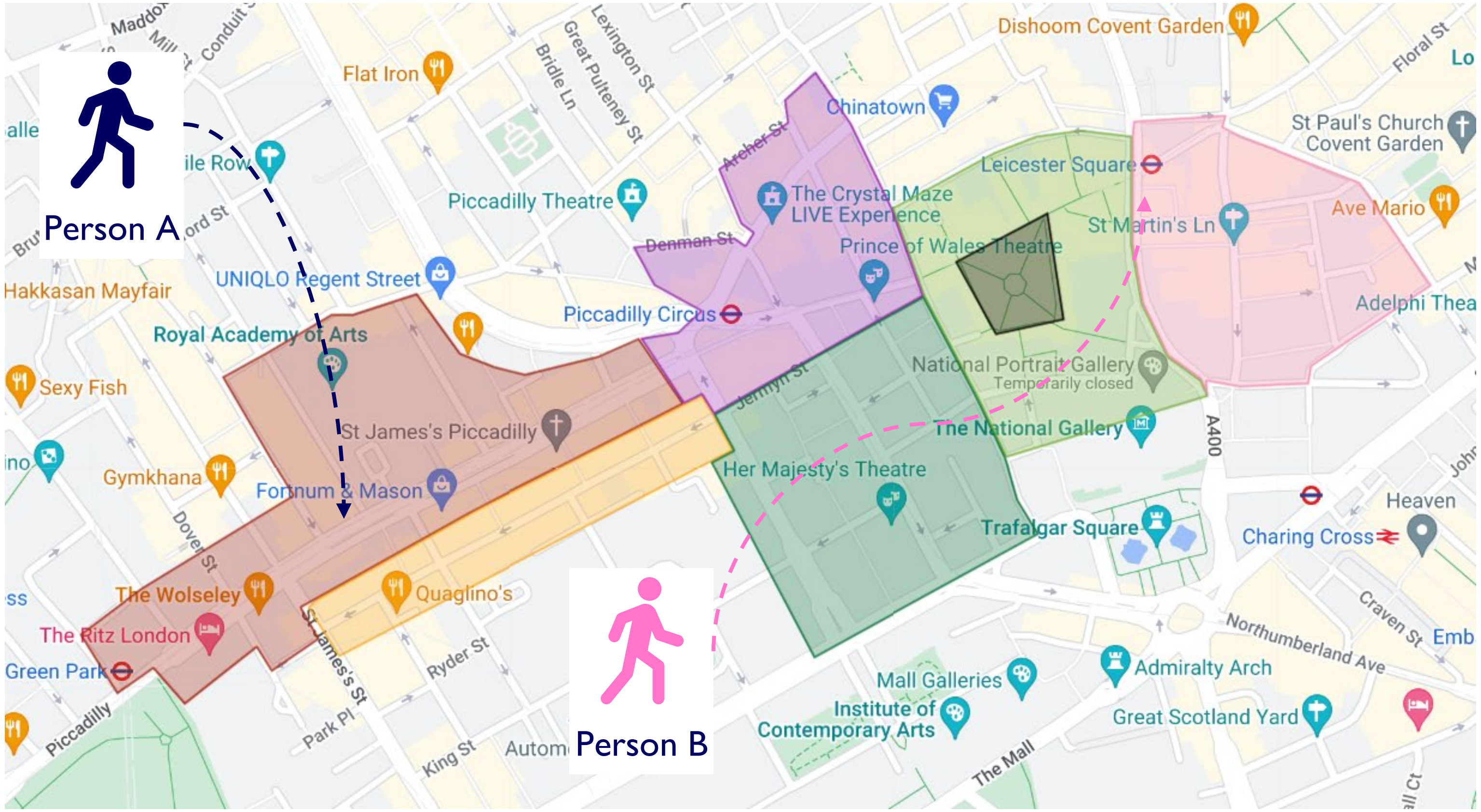


1 – London West End
2 – London City
3 – London East
4 – Greenwich and Lewisham
5 – Clapham and Waterloo
6 – Shepherd's Bush and Chiswick
7 – Richmond and Teddington
8 – Wimbledon
9 – Northolt
10 – Wembley and Edgware
11 – Wood Green
12 – Hertford
13 – Brentwood
14 – Dartford
15 – Gillingham
16 – Sevenoaks 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

Appendix
Cross visitation example

Cross visitation example

- Person A only visits Piccadilly District – counts as 1 visit to Piccadilly District and 1 visit to HOLBA (cross visitation index = 100).
- Person B walks through 3 districts – this counts a visit to each of the districts but only 1 visit to HOLBA area (cross visitation index = 300).



Appendix
BT visitor mix definitions

- 3 key visitor types used within BT data:

Resident: the number of residents of that MSOA/hex who spend more than 10 minutes in that location in that time period. A person's residential location is where they have spent most of their evening and night time in the latest month.

person's

Worker: the number of workers of that MSOA/hex who spend more than 10 minutes in that location in that time period. A work location is based on where they have spent most of their working hours based on the latest available calendar month.

Visitor: the number of non-residents and non-workers who spend at least 10 minutes in in that MSOA/hex in that time period.

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
Disclaimer

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