

# Visitor Insights

## October 2022

Shaping a  
world-class  
West End

Issued:  
TBC

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01

# Summary





# Summary

## October 2022



18.9 m  
(-1%)

Visitors to HOLBA  
area down 1% month  
on month



151 mins  
(-1%)

Visitors typically spend  
just over 2 and a half  
hours in the area. Down  
2 mins vs YTD average.



14.8 m  
(+1.7%)

People live within  
the HOLBA area  
Core catchment  
(little change on  
prev. month)

02

# Visitor Volumes





# Visitor Volumes Footfall - districts



Footfall down 1% on September but up 13% vs October 2021

Jermyn St District is worst performing month on month (-7%) whilst Leicester Sq District is best (+1%)



District	Month-on-Month			Year-on-year		
	Total	Domestic	International	Total	Domestic	International
HOLBA area	-1%	-5%	11%	13%	2%	61%
Piccadilly District	-3%	-8%	19%	6%	-4%	46%
Jermyn St District	-7%	-12%	6%	19%	-9%	200%
Leicester Sq District	1%	2%	1%	8%	1%	26%
Piccadilly Circus District	0%	-8%	16%	31%	-1%	147%
St Martin's Lane District	-5%	2%	-20%	5%	-1%	33%
Haymarket District	-1%	-6%	14%	19%	2%	87%
Core West End	-1%	-4%	10%	3%	-8%	70%

# Visitor Volumes

## Footfall – street level



Increase in international visitors month on month across majority of streets (with exception of Jermyn St)

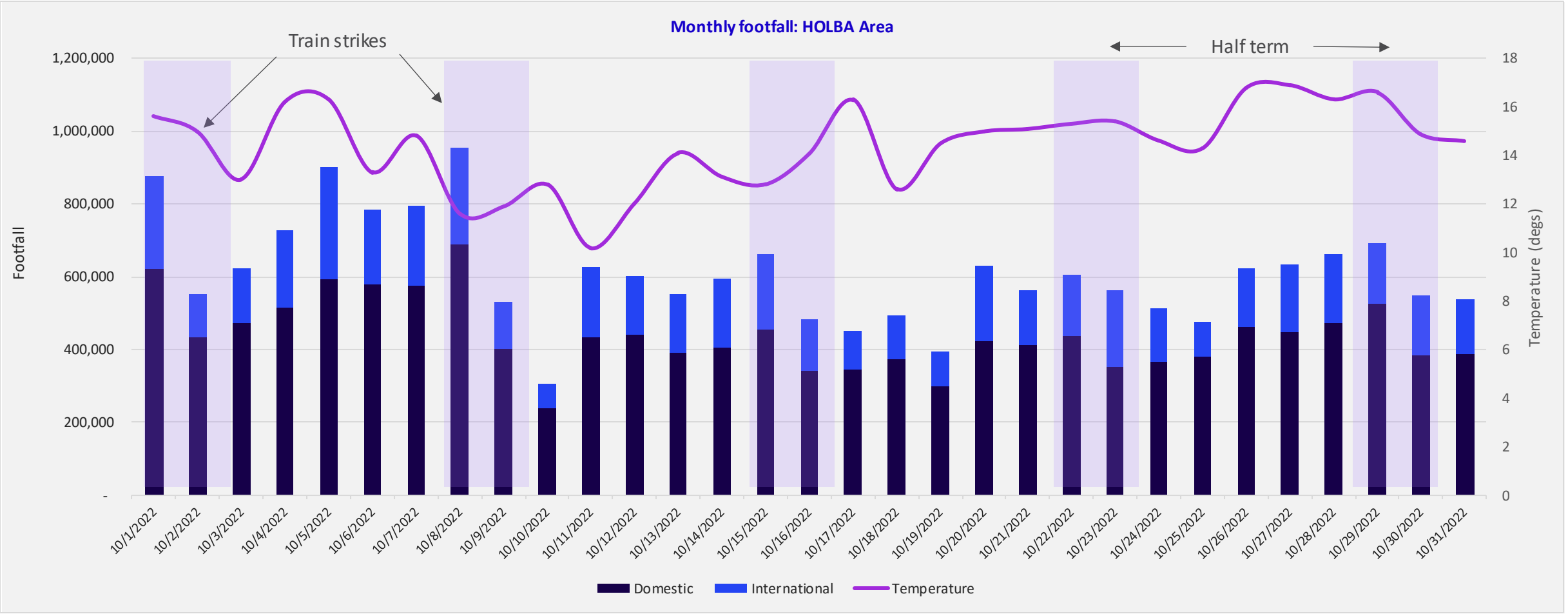
Increase in overall visitors in 5 of 8 streets month on month



Street	Month-on-Month			Year-on-year		
	Total	Domestic	International	Total	Domestic	International
HOLBA area	-1%	-5%	11%	13%	2%	61%
Piccadilly	0%	-6%	22%	8%	-1%	47%
Jermyn St	-21%	-12%	-73%	-29%	-24%	-67%
Leicester Sq	37%	6%	102%	65%	12%	241%
Piccadilly Circus	7%	-7%	33%	19%	-13%	140%
St Martin's Lane	8%	0%	29%	5%	-15%	106%
Haymarket	3%	0%	10%	-13%	-22%	17%
Haymarket - Regent St / St James	-3%	-12%	15%	-5%	-30%	121%
Core West End	-1%	-4%	10%	3%	-8%	70%

# Visitor Volumes

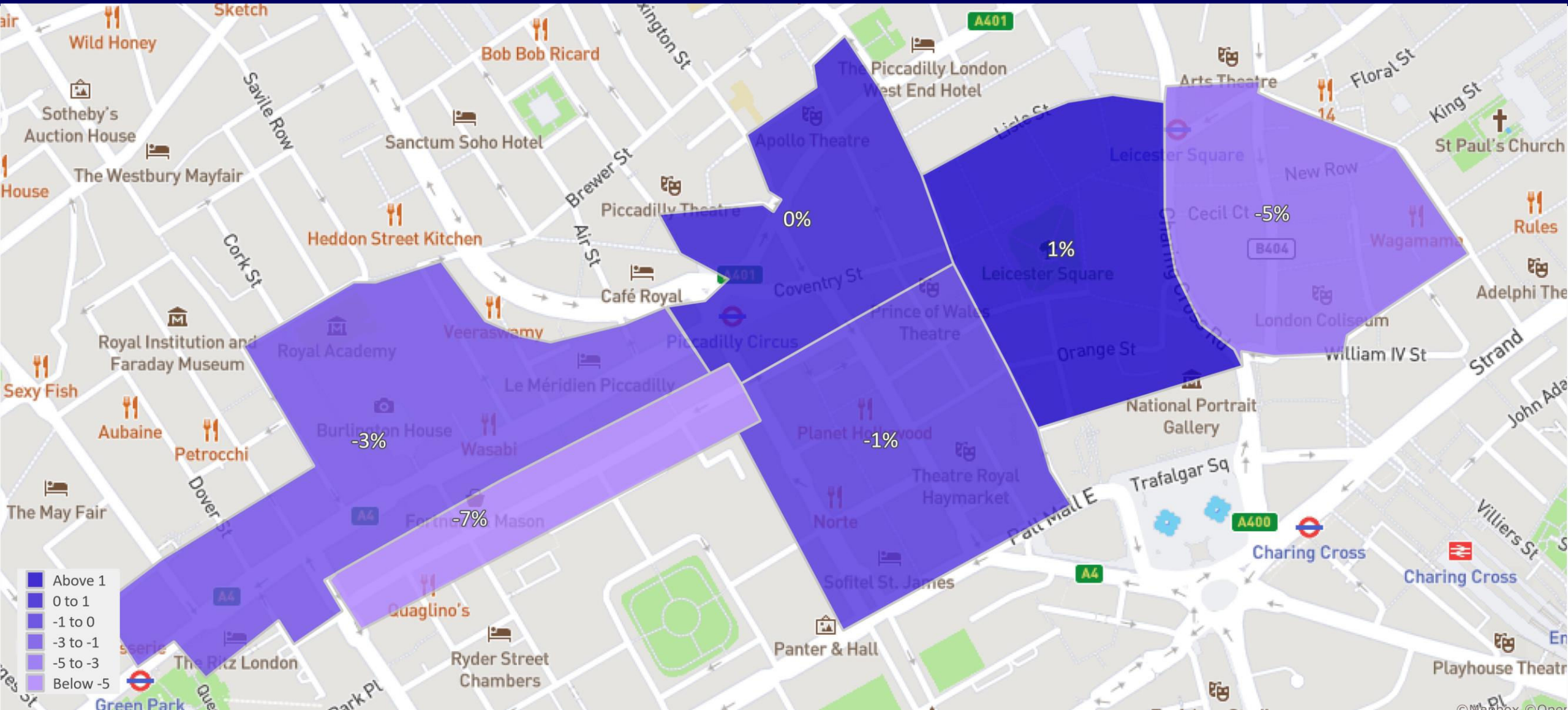
## Strong footfall volumes during first week of month





# Visitor Volumes

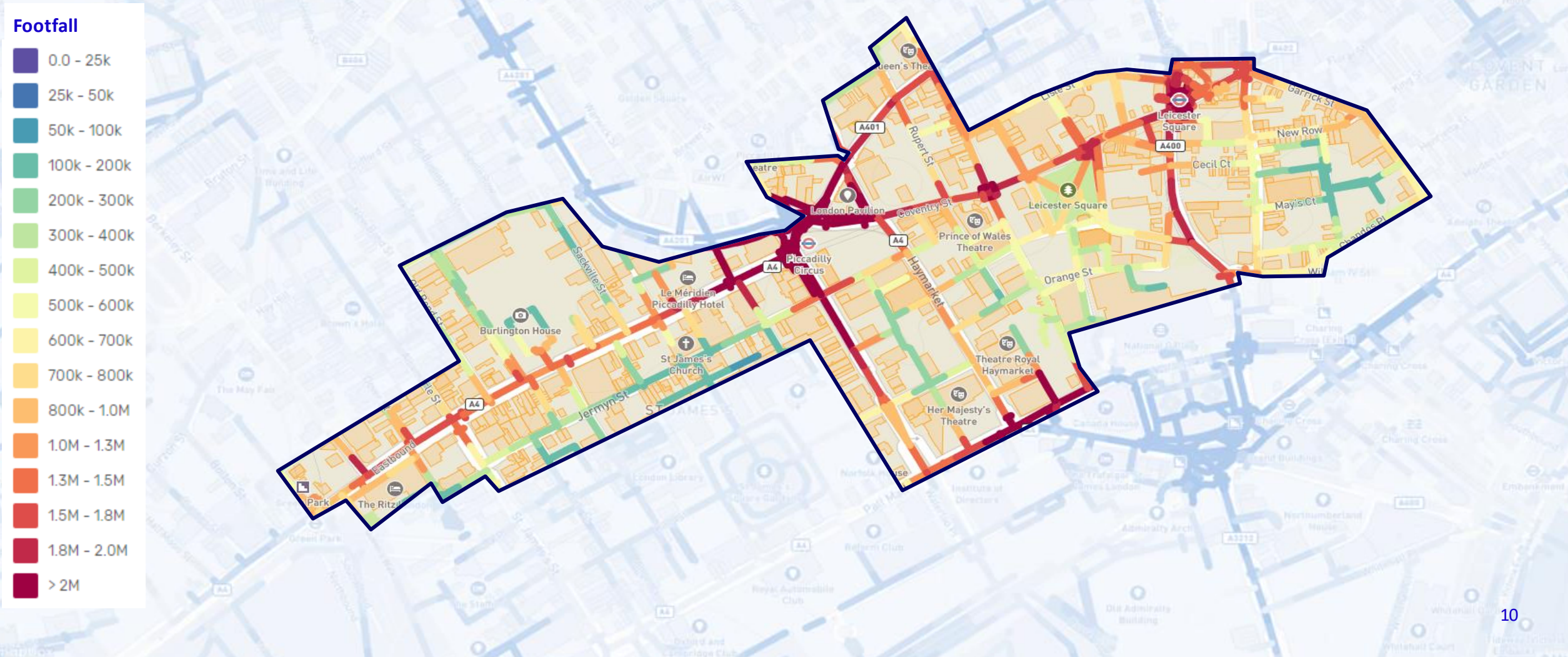
## October vs. September 2022





# Visitor Volumes

## Segment footfall





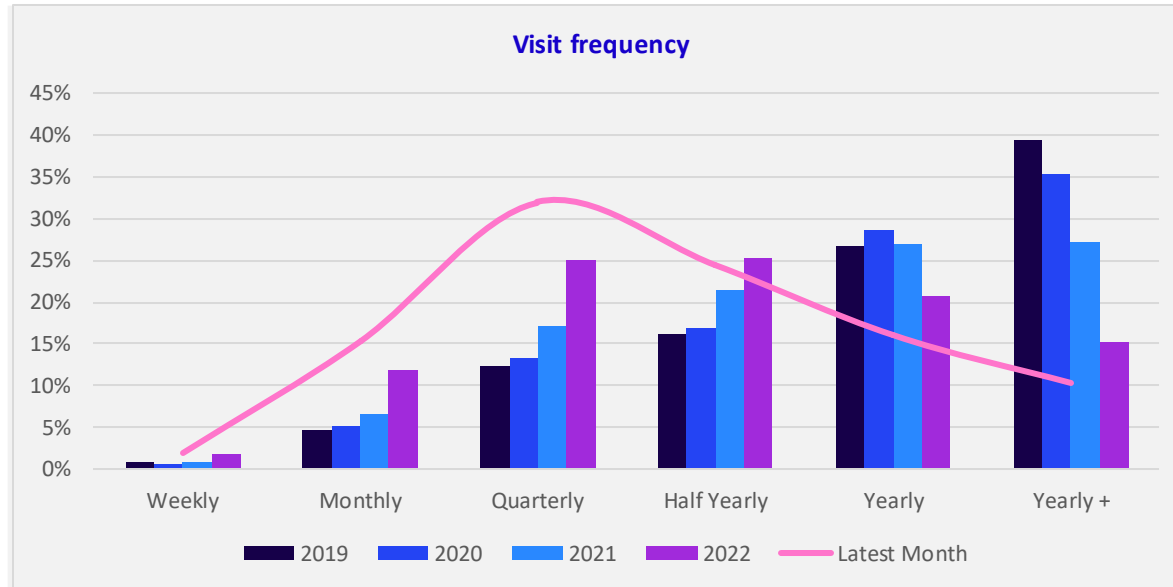
# 03

# Visitor Behaviour

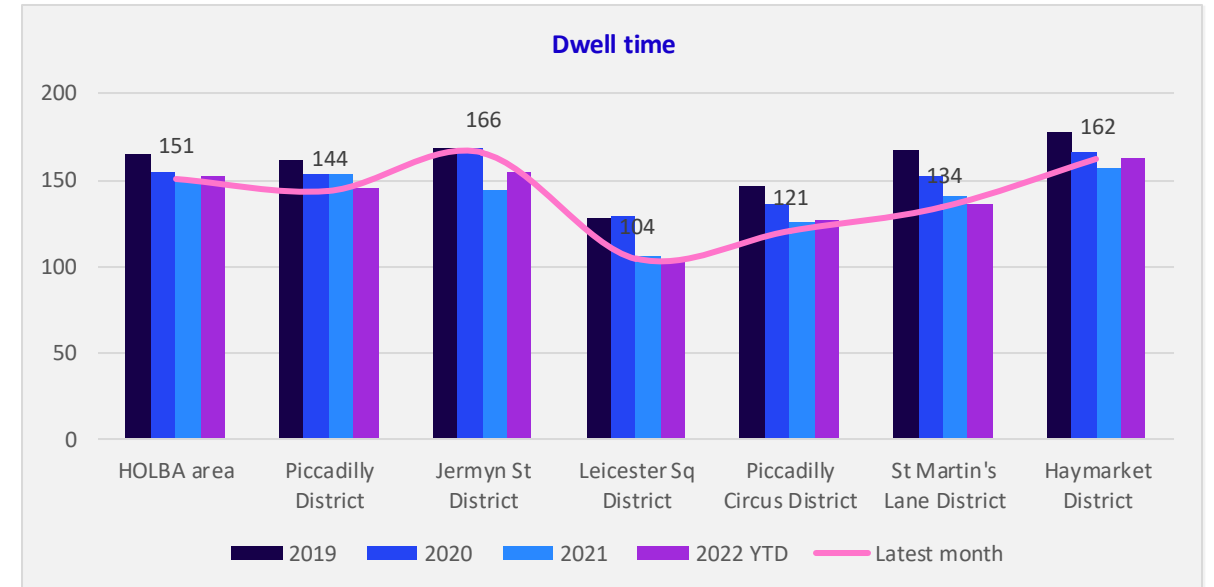


# Visitor Behaviour: Frequency

## People visiting HOLBA more regularly



- Increase in proportion of visitors visiting monthly and quarterly
- Conversely decrease in proportion of visitors visiting yearly and beyond



- Dwell time reduced slightly in October versus 2022 YTD, 151 mins versus 154 mins
- Jermyn St District has the longest dwell time at 166 mins