



OCTOBER 2024

LONDON HERITAGE QUARTER MONTHLY INSIGHTS

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LONDON HERITAGE QUARTER MONTHLY INSIGHTS

INTRODUCTION

What is London Heritage Quarter?

Stretching from Belgravia through to Parliament Square and along the Strand to the Royal Courts of Justice, London Heritage Quarter is a collective of four Business Improvement Districts representing over one thousand organisations.

NORTHBANK: The Northbank Business Improvement District (BID) covers one of London's most iconic areas and includes Trafalgar Square, Strand and Aldwych.

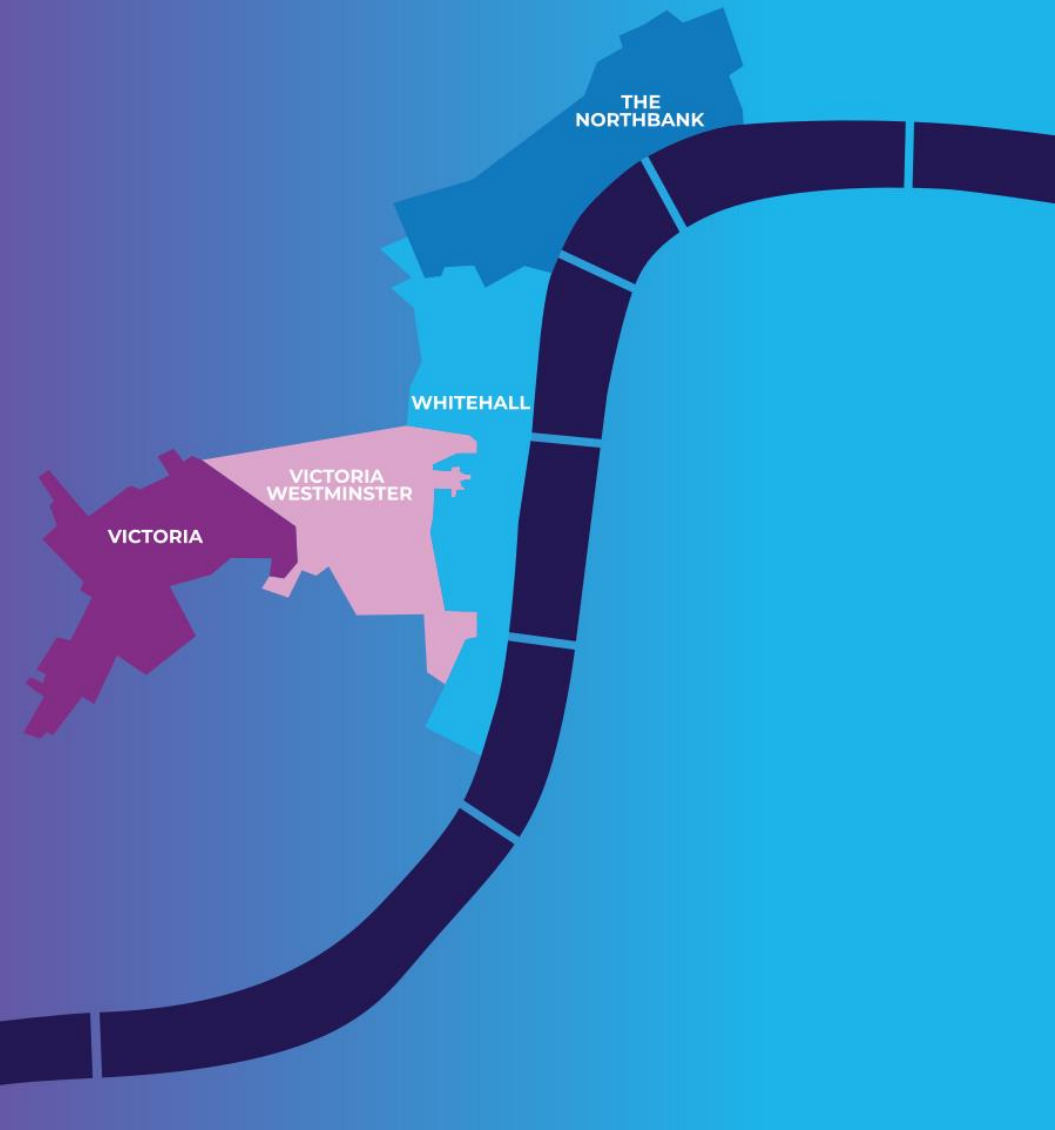
VICTORIA: The Victoria Business Improvement District (BID) is a business-led and business-funded body formed to support economic growth in Victoria and to create a vibrant destination for those who work, visit or live in the area.

VICTORIA WESTMINSTER: The Victoria Westminster BID covers an area of national significance. The footprint includes St James's Park tube station, Parliament Square and Westminster Abbey, along with a variety of historic and cultural assets, established hotels and blue-chip organisations.

WHITEHALL: The Whitehall BID footprint is one of historical and political significance. The footprint includes Westminster tube station, Downing Street, The Palace of Westminster and Horse Guards Parade, along with a variety of hotels, and historic and cultural assets such as the Tate Britain.

In this report, Victoria BID refers to Victoria, Victoria Westminster & Whitehall

Source: London Heritage Quarter



LONDON HERITAGE QUARTER MONTHLY INSIGHTS

METHODOLOGY

London Heritage Quarter partners with Colliers to provide data and insights on visitors to the area. Monthly visitor reports provide key insights around:

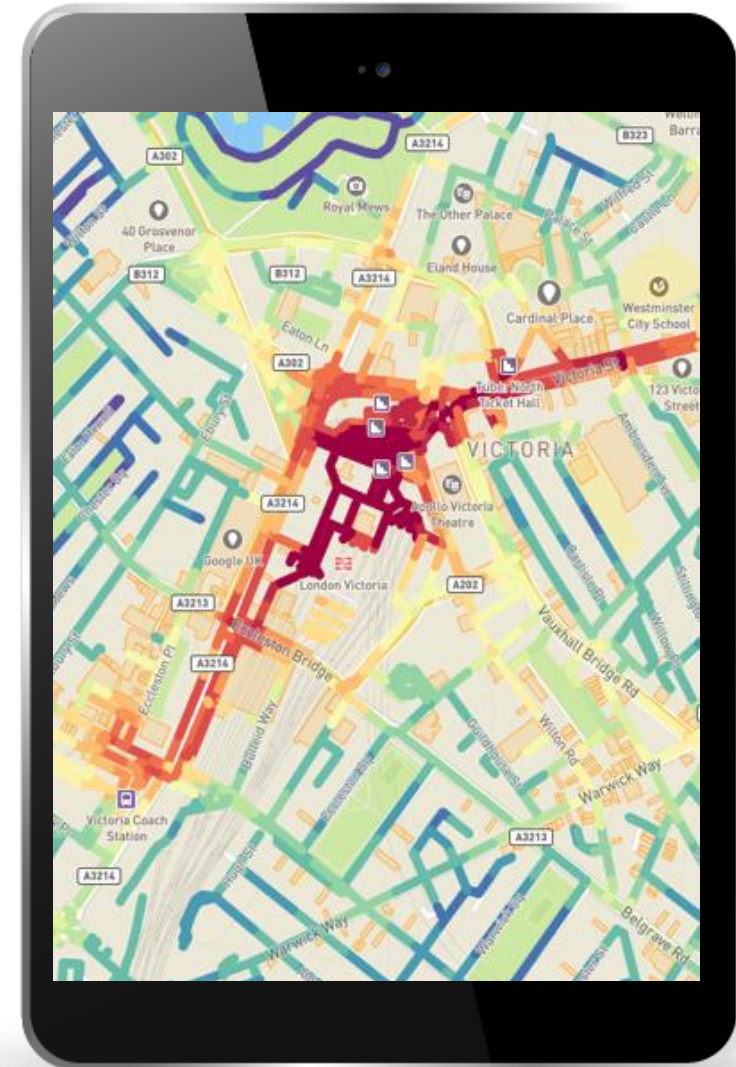
- ❑ Visitor footfall
- ❑ Visitor profile
- ❑ Visitor behaviour

Visitor insights data is sourced from Colliers LocateFootfall platform and profiled using Experian's Mosaic segmentation

Colliers works with London Heritage Quarter BIDs to provide ongoing visitor insights to support BID managers and members in driving activity and growth across the area. The report covers insights comparing Northbank & Victoria BID (comprising Victoria, Victoria Westminster & Whitehall), and individual character clusters within these.

Visitor insights data is sourced from Colliers' LocateFootfall platform and profiled using Experian's MOSAIC segmentation. The platform is powered by extensive mobility data from a pool of billions of records, and is the product of a range of unique partnerships across the Data & PropTech markets, harnessing big data and A.I to deliver unique crowd-level profile & behavioural insights.

See Appendix for defined BID boundaries





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01

VISIT PERFORMANCE

VISIT PERFORMANCE | VICTORIA BID

VISITS TO VICTORIA BID UP +30% YEAR-ON-YEAR

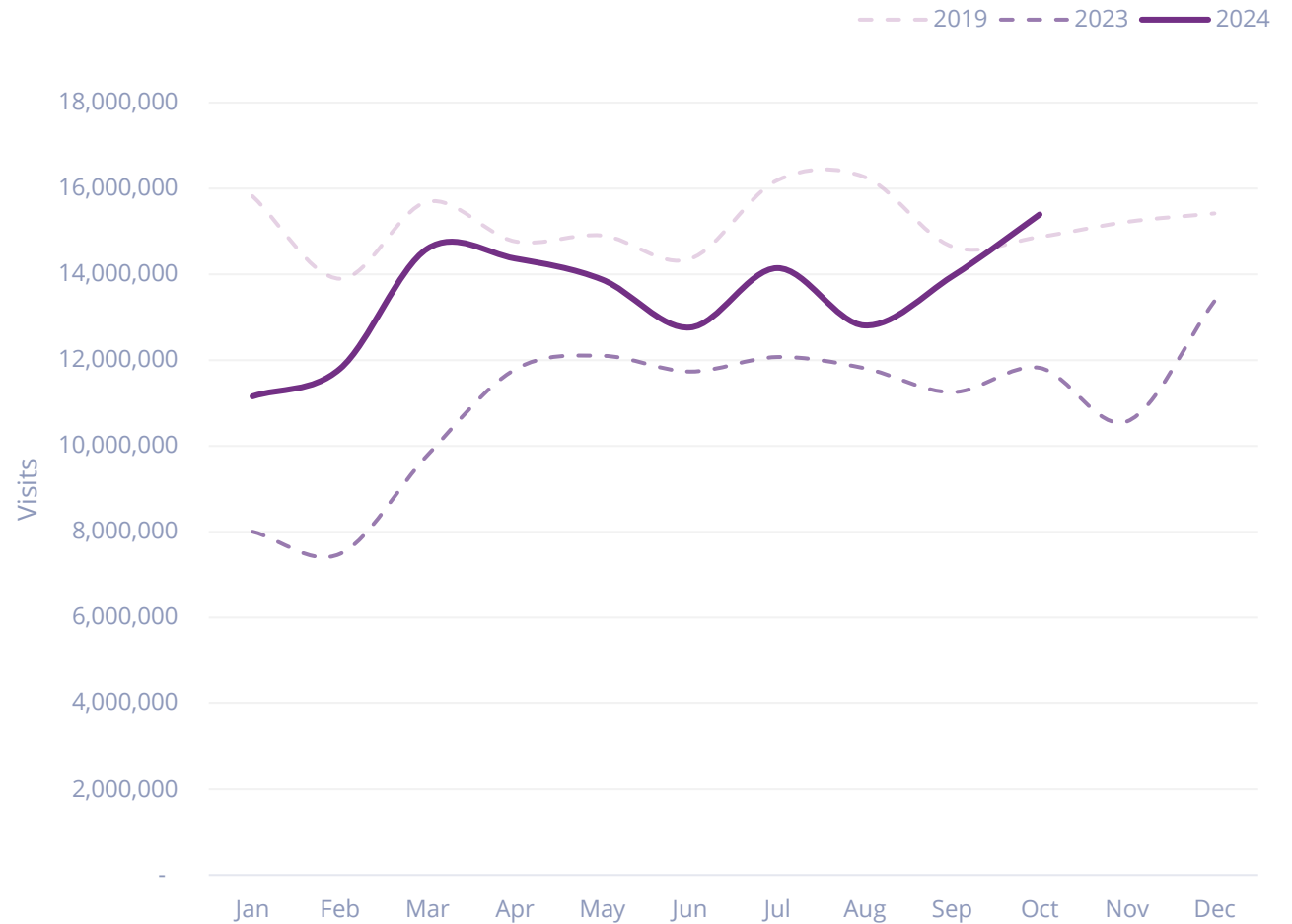
Strong visit performance to Victoria BID during October 2024, with continued growth year-on-year and month-on-month

Total visits to Victoria BID in October 2024 were **15.4 million**, with October out-performing visitation vs. same month last year, as well as same month in 2019, for the first time this year. Performance relative to prior month and year followed similar trend as seen in wider West End benchmark, albeit at a faster growth rate.

October 2024

Area	Footfall (millions)	Month-on-Month	Year-on-Year	vs. 2019
Victoria BID	15.4	+10.3%	+30.2%	+3.5%
West End (Benchmark)	23.1	+8.7%	24.8%	-38.3%

Monthly Overview

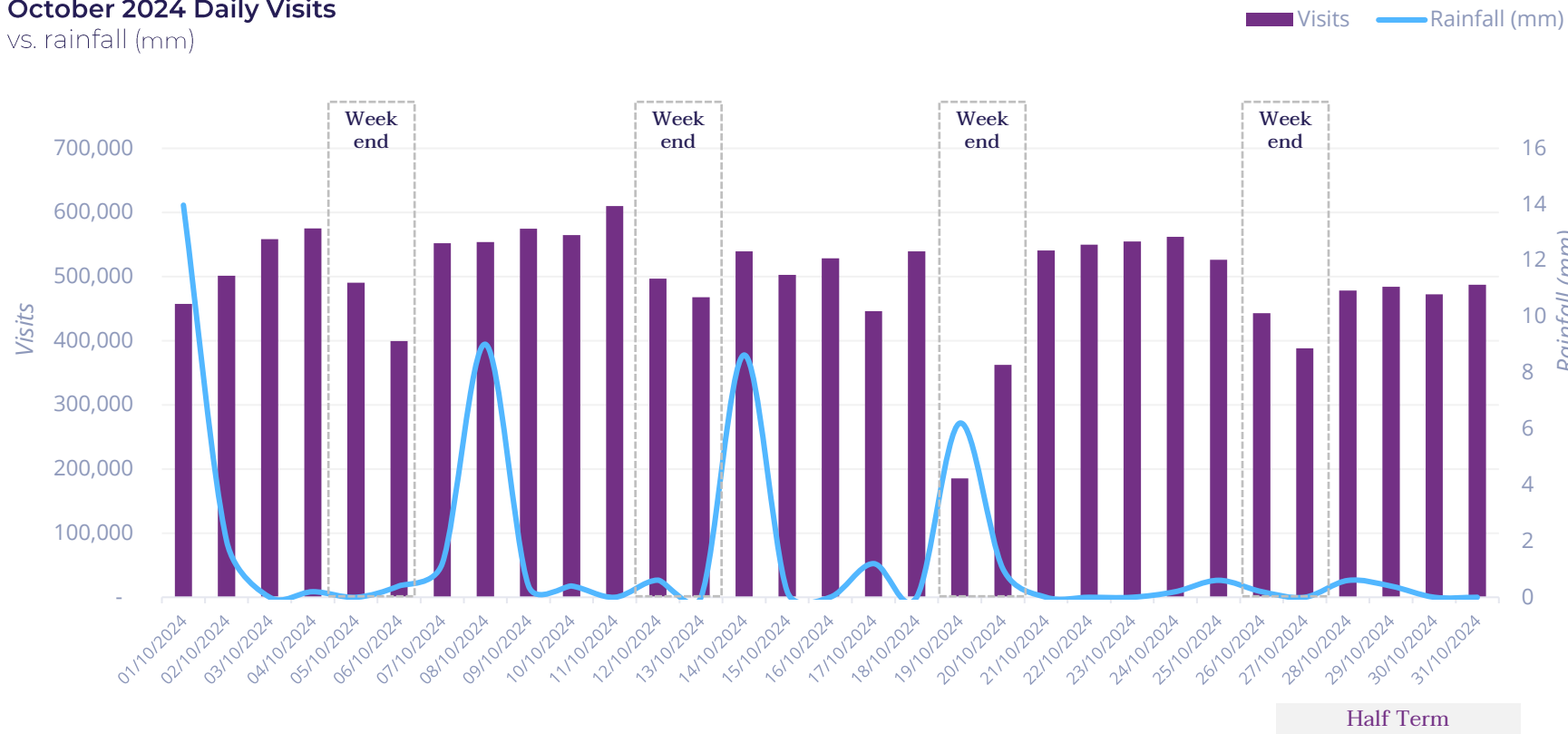


Source: Colliers LocateFootfall
See Appendix for defined BID boundaries

VISIT PERFORMANCE | VICTORIA BID

CONSISTENT VISIT DISTRIBUTION THROUGHOUT OCTOBER, DESPITE SLIGHT UPLIFT IN THE FIRST HALF

October 2024 Daily Visits vs. rainfall (mm)



Visit volumes to Victoria BID followed similar distribution throughout October, despite slight uplift in the second week of the month

Peak visits occurred on Friday 11th October, with 610k visits to the BID (+8.4% higher than average Friday in October).

Despite impacting visitation on Saturday 19th, wet weather had little impact on visit behaviour this month; with the weather typically colder and wetter in October, visitors may already be expecting this poor weather and continue with their trip, rather than re-arranging / redirecting to other areas.

Source: Colliers LocateFootfall
See Appendix for defined BID boundaries

Strong year-on-year and month-on-month performance across all clusters within Victoria BID in October 2024

VISIT PERFORMANCE | VICTORIA BID

GROWTH YEAR-ON-YEAR ACROSS ALL CLUSTERS IN OCTOBER 2024

October 2024

Area	Footfall	Month-on-Month	Year-on-Year	vs. 2019
Victoria BID	15,391,708	+10.3%	+30.2%	+3.5%
Buckingham Palace Road	2,446,716	+13.2%	+28.2%	+1.9%
Parliament Square	2,827,699	+6.0%	+12.2%	+0.5%
Terminus Place	1,834,145	+27.6%	+79.7%	-20.2%
Victoria Street – West	1,672,548	+17.1%	+33.5%	-25.4%
St. James’ Park Station	206,852	+34.4%	+32.1%	-66.1%
Victoria Street – East	1,236,279	+8.3%	+26.4%	+12.0%
Whitehall	5,167,470	+4.2%	+29.8%	+51.8%
West End (Benchmark)	23,084,124	+8.7%	+24.8%	-38.3%

Visits to Victoria BID in October 2024 saw growth across all clusters month-on-month, with largest growth experienced around St James’ Park Station (+34.4% vs. September), following strong visitation to this cluster in September.

Strong performance was also seen year-on-year across the district, with all clusters experiencing double digit growth in visitation. Overall, visits to Victoria BID were up +30% vs. the same month last year, representing continued strong performance to Victoria BID in October 2024.

Similar performance trends were witnessed in the wider West End benchmark location, with performance up +8.7% month-on-month and +24.8% year-on-year; Victoria BID slightly out-performing benchmarked West End’s rate of growth month-on-month and year-on-year.

Source: Colliers LocateFootfall
See Appendix for defined BID boundaries

VISIT PERFORMANCE | NORTHBANK BID

+24.2% GROWTH IN VISITS TO NORTHBANK VS. 2024

Visits to Northbank BID up vs. same month last year, and vs. previous month, in October 2024

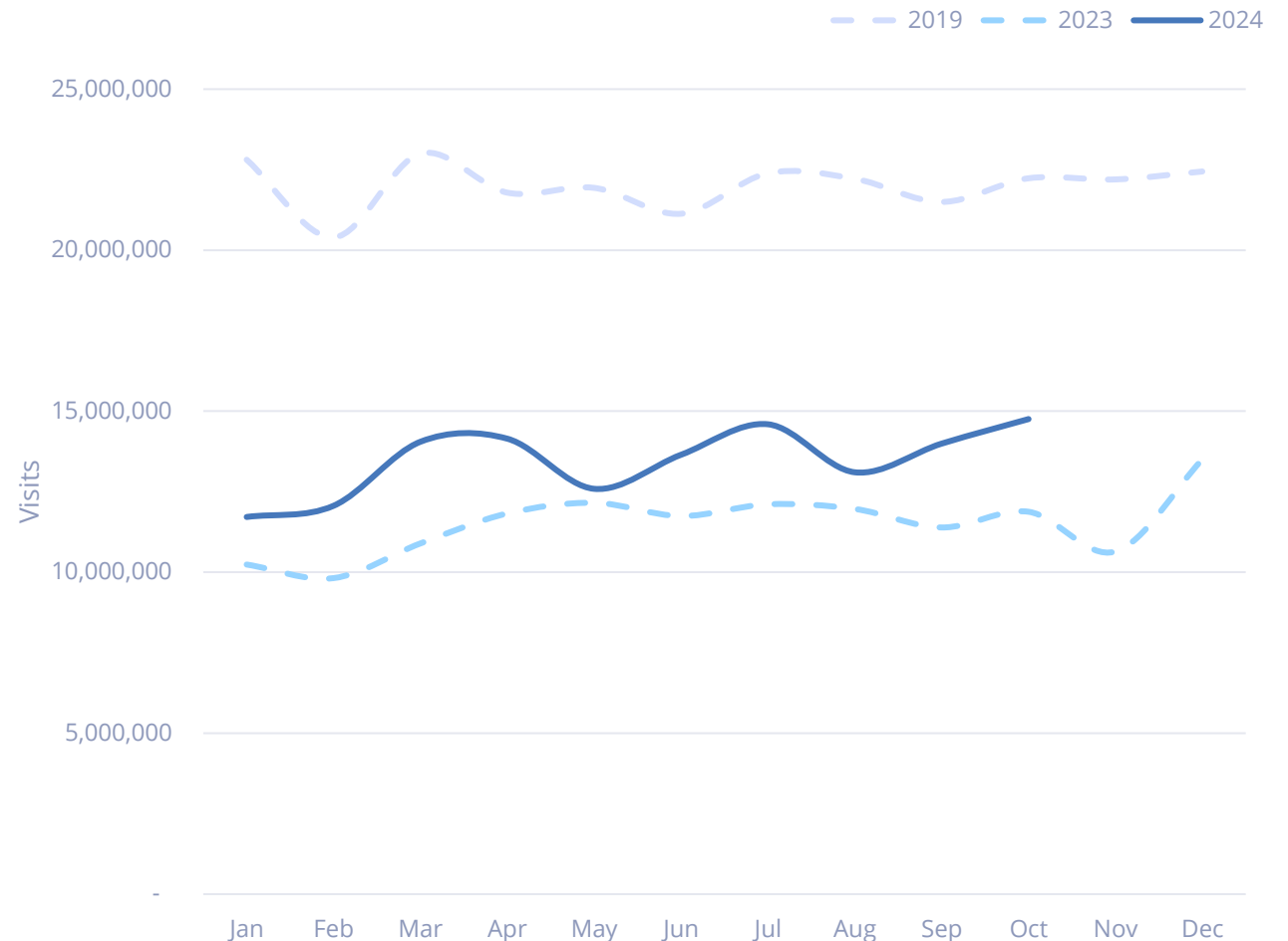
Total visits to Northbank BID were **14.8 million**, a growth of **+5%** vs. previous month, and **+24%** vs. same month last year.

As has been seen in all months of 2024 to-date, visit volumes were above previous year – with year-to-date performance **+17.5%** above same period in 2024.

October 2024

Area	Footfall (millions)	Month-on-Month	Year-on-Year	vs. 2019
Northbank BID	14.8	+5.4%	+24.2%	-33.6%
West End (Benchmark)	23.1	+8.7%	24.8%	-38.3%

Monthly Overview

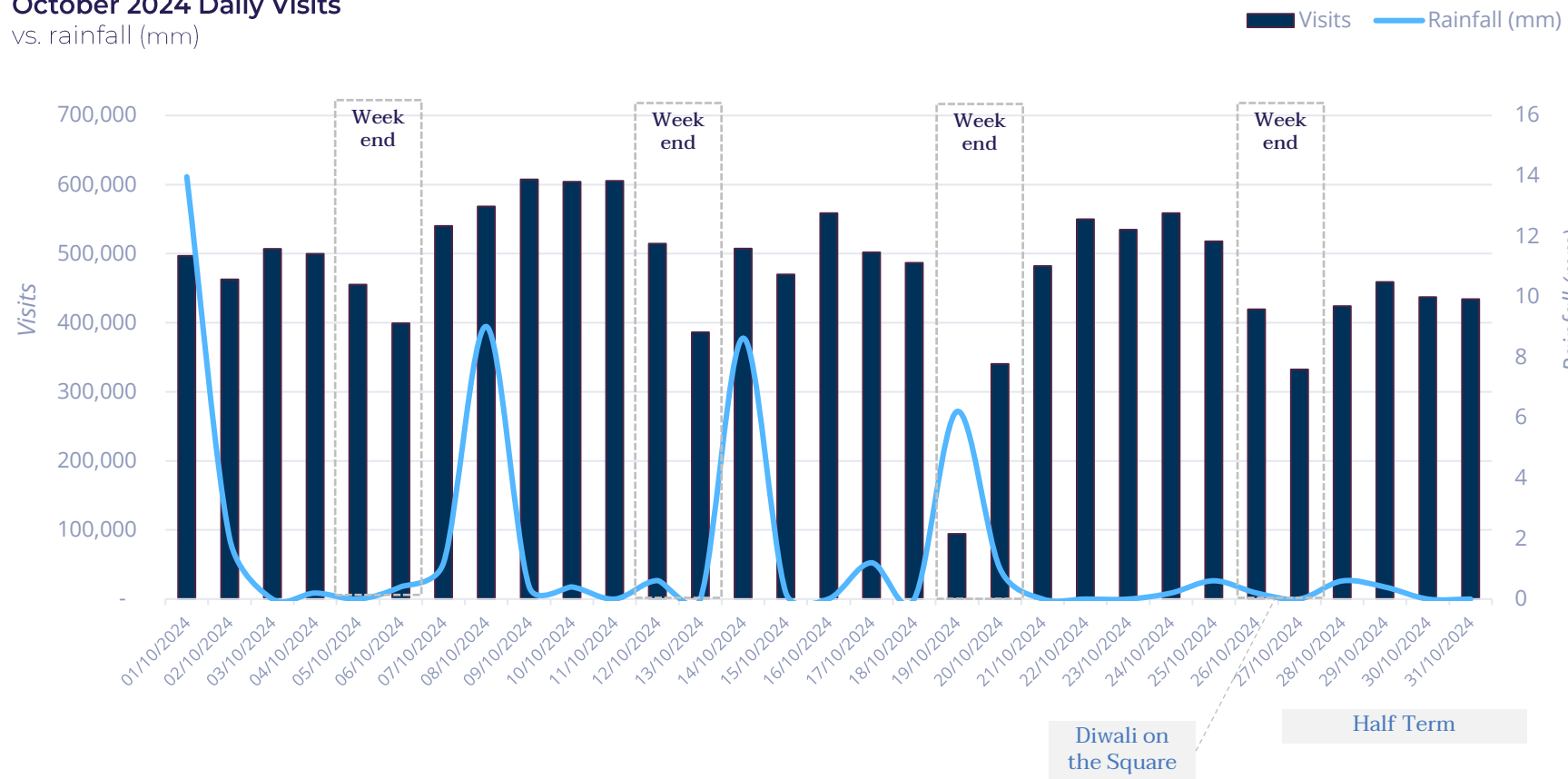


Source: Colliers LocateFootfall
See Appendix for defined BID boundaries

VISIT PERFORMANCE | NORTHBANK BID

INCREASE IN VISITS IN SECOND WEEK OF OCTOBER 2024 TO NORTHBANK BID

October 2024 Daily Visits vs. rainfall (mm)



Visits to Northbank BID peaked in the second week of the month, with visitation up +16% vs. average week in October

Despite this slight increase in visitation at the start of the month, distribution of visitors follows similar pattern throughout October, with higher share of visits towards the mid/end of the working week (Weds-Fri) across the BID.

Peak visits occurred between Wednesday 9th – Friday 11th October, with 600,000+ visits to the BID on each of these days, compared to 475,000 average daily visits.

Source: Colliers LocateFootfall
See Appendix for defined BID boundaries

Strong growth across all clusters within Northbank BID in October 2024, contributing to +24.2% growth year-on-year

VISIT PERFORMANCE | NORTHBANK BID

POSITIVE PERFORMANCE ACROSS ALL CLUSTERS IN OCTOBER 2024

As seen in Victoria BID, performance in Northbank saw growth vs. same month last year (+24.2%) and vs. September 2024 (+5.4%). Strongest performance year-on-year was seen along Aldwych D (+31%), with all clusters experiencing year-on-year growth.

Month-on-month, Villiers Street (+23%) experienced the strongest growth, with all 12 clusters experiencing growth vs. September 2024, contributing to an overall increase in visits to Northbank BID of +5.4% vs. previous month.

Northbank BID experienced stronger growth than the wider West End benchmark area year-on-year, despite slightly smaller growth month-on-month.

Area	Footfall	Month-on-Month	Year-on-Year	vs. 2019
The Northbank - Total Area	14,754,722	+5.4%	+24.2%	-33.6%
Strand - Central	2,493,981	+11.8%	+18.0%	-4.5%
Strand - West	2,554,817	+13.9%	+20.9%	-46.0%
Maiden Lane + Tavistock	641,733	+13.8%	+9.4%	-34.6%
Aldwych D	5,516,945	+7.4%	+31.4%	+40.3%
Strand Aldwych	530,322	+18.0%	+25.3%	-72.2%
Somerset / Arundel	2,023,120	+4.6%	+18.5%	+0.3%
Riverfront	3,341,976	+3.3%	+15.6%	+9.1%
Adelphi	384,858	+18.1%	+19.3%	-62.3%
Victoria Embankment Gardens	451,627	+12.7%	+8.4%	-31.1%
Villiers Street	1,403,233	+23.3%	+28.6%	-40.0%
Northumberland Avenue	2,510,340	+6.6%	+25.2%	-14.7%
Trafalgar Square	5,175,716	+6.5%	+13.5%	18.9%
West End (Benchmark)	23,084,124	+8.7%	+24.8%	-38.2%

Source: Colliers LocateFootfall
See Appendix for defined BID boundaries



02

VISITOR BEHAVIOUR

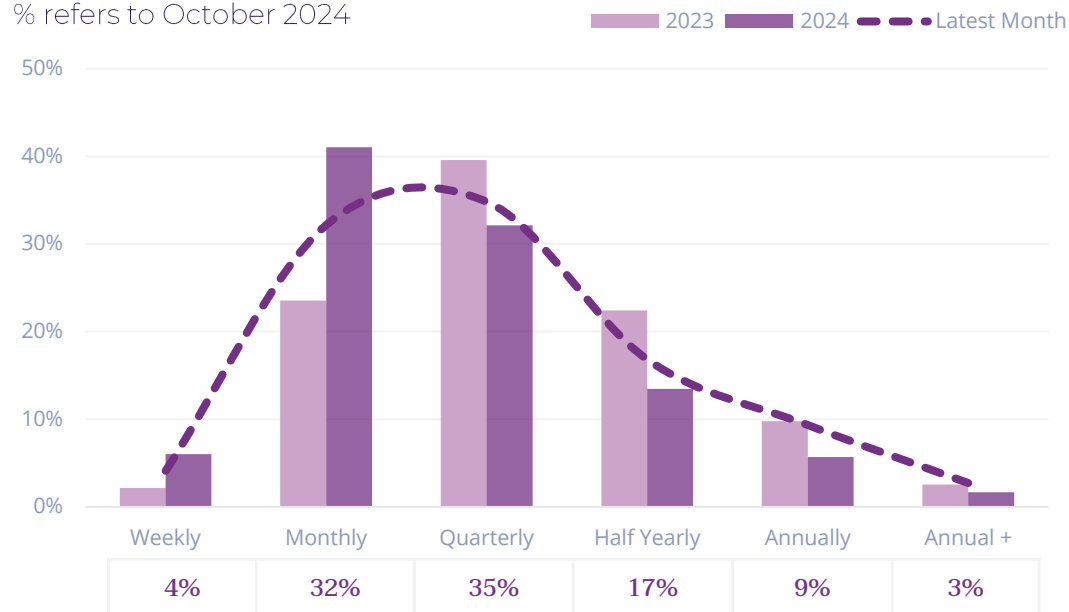


VISIT BEHAVIOUR | VICTORIA BID

SLIGHT SHIFT IN VISIT FREQUENCY IN OCTOBER REFLECTIVE OF VISITORS FROM FURTHER AFIELD

Visit Frequency

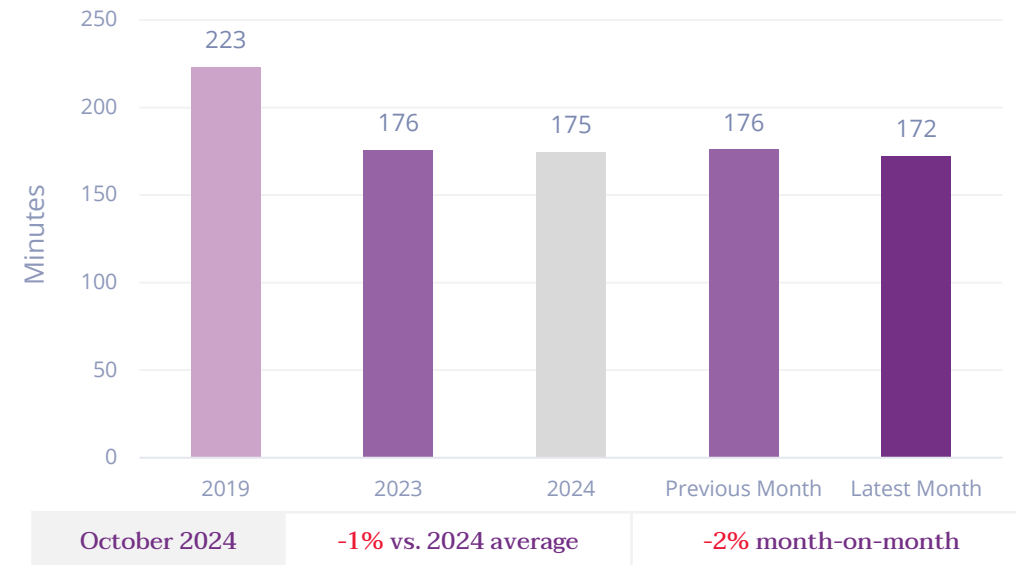
% refers to October 2024



Slight shift in visit frequency in October 2024, with an increase in share of visitors visiting the BID annually (**9%** vs. 6% 2024 Average). This slight shift reflects half-term towards to the end of October capturing a larger share of visitors from further afield on leisure and social trips.

Average Dwell

October 2024



Slight decrease in the average dwell time in Victoria BID during October 2024, relative to previous month and to the 2024 average.

Visitor dwell -2% vs. September 2024, and -1% vs. 2024 average.

Source: Colliers LocateFootfall
See Appendix for defined BID boundaries

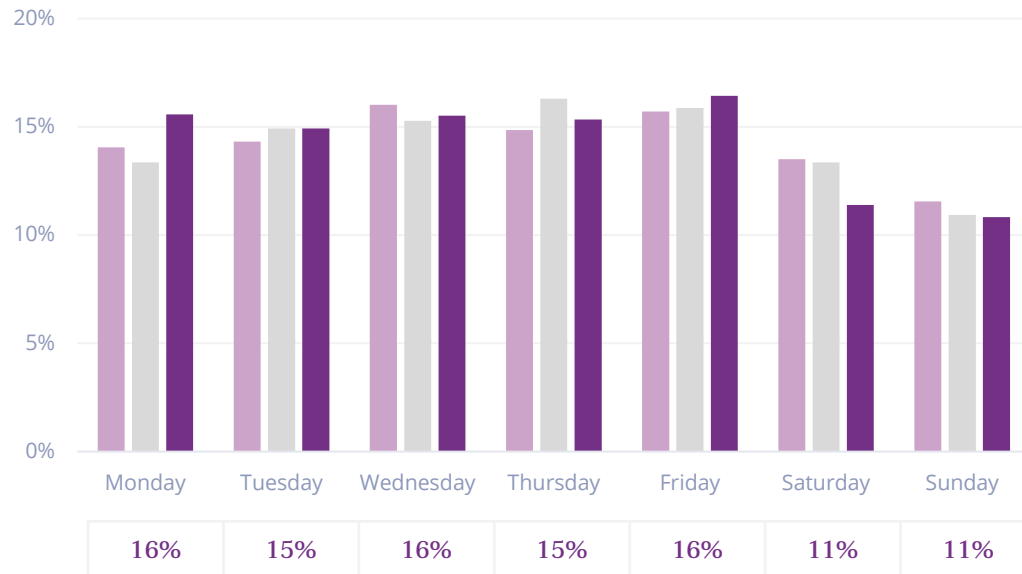
VISIT BEHAVIOUR | VICTORIA BID

CONTINUED INCREASE IN SHARE OF VISITS TO VICTORIA BID DURING THE WORKING WEEK

Visit Share by Day

% refers to October 2024

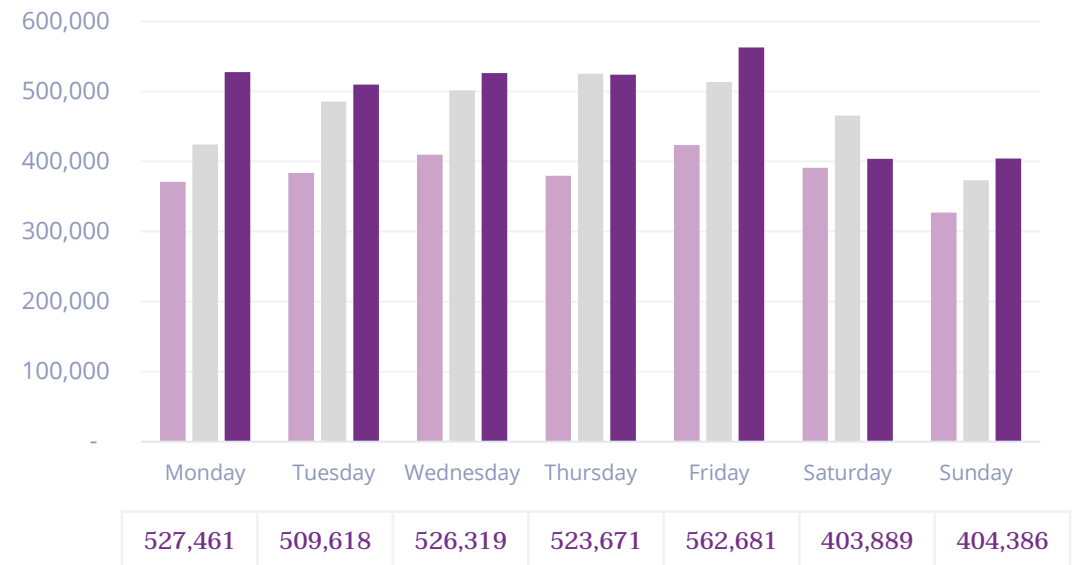
■ 2023 ■ Previous Month ■ 2024



Average Visits by Day

Raw Visit Volumes refers to October 2024

■ 2023 ■ Previous Month ■ 2024



Slight increase in the proportion of visitors visiting the BID during the working-week in October. Peak visitation occurred on **Fridays (16%)**, a similar share to as seen on Mondays & Wednesdays.

Despite a lower share of visits on the weekend in October 2024, average visits on these days still surpassed average volumes seen on weekends in October 2023.

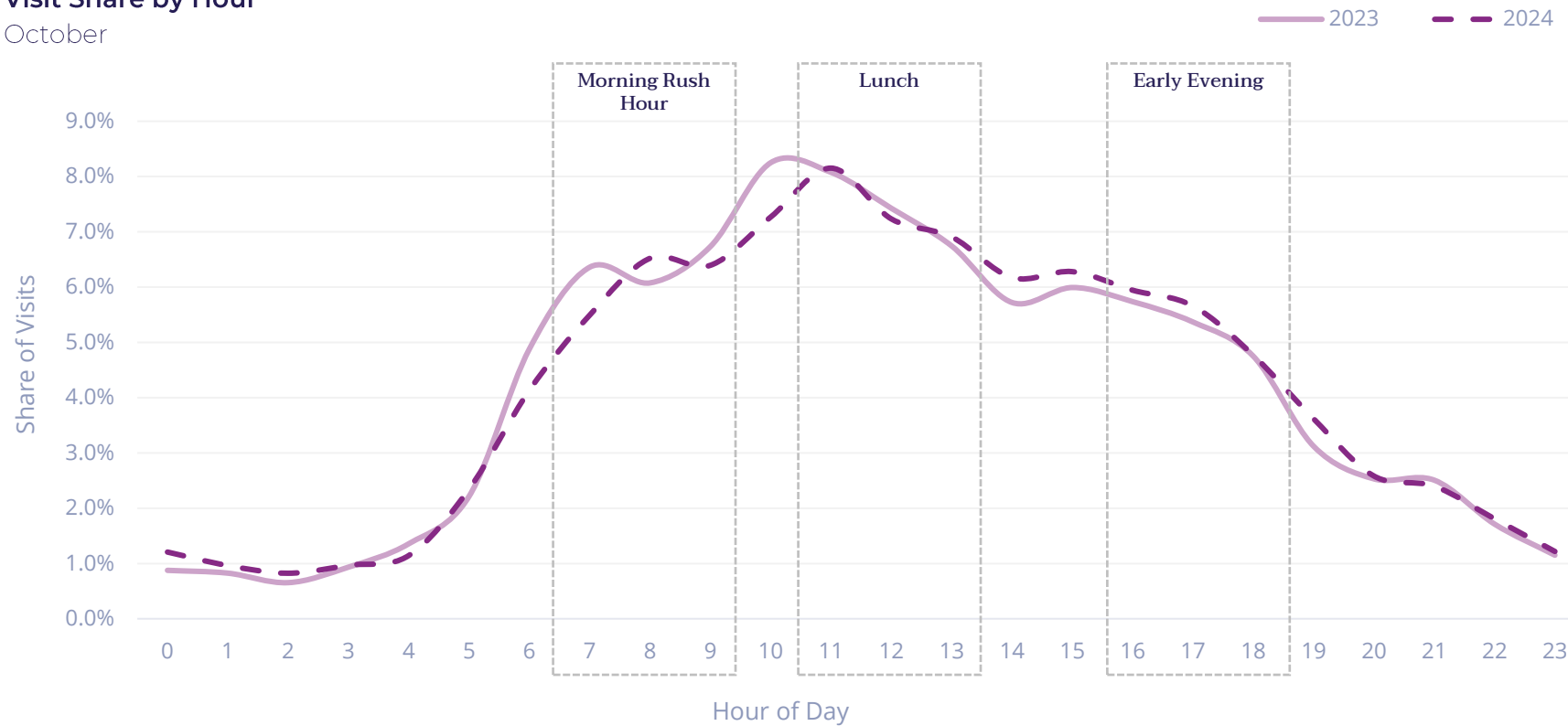
Source: Colliers LocateFootfall
See Appendix for defined BID boundaries

VISIT BEHAVIOUR | VICTORIA BID

DISTRIBUTION OF VISITS THROUGHOUT THE DAY FOLLOWS A SIMILAR TREND TO OCTOBER 2023

Visit Share by Hour

October



Share of visits throughout the day in-line with trend seen in previous year, with peak visits occurring at 11am (8.2%)

Visit distribution throughout the day to Victoria BID displays three clear phases: a peak in morning rush hour at ~8am (6.5% of daily visits), a lunchtime peak (8.2%), before a gradual share of visits throughout late afternoon/early evening.

Slight difference in Morning Rush Hour peak in October 2024 vs. 2023, shifting an hour later to 8am, vs. 7am in 2023.

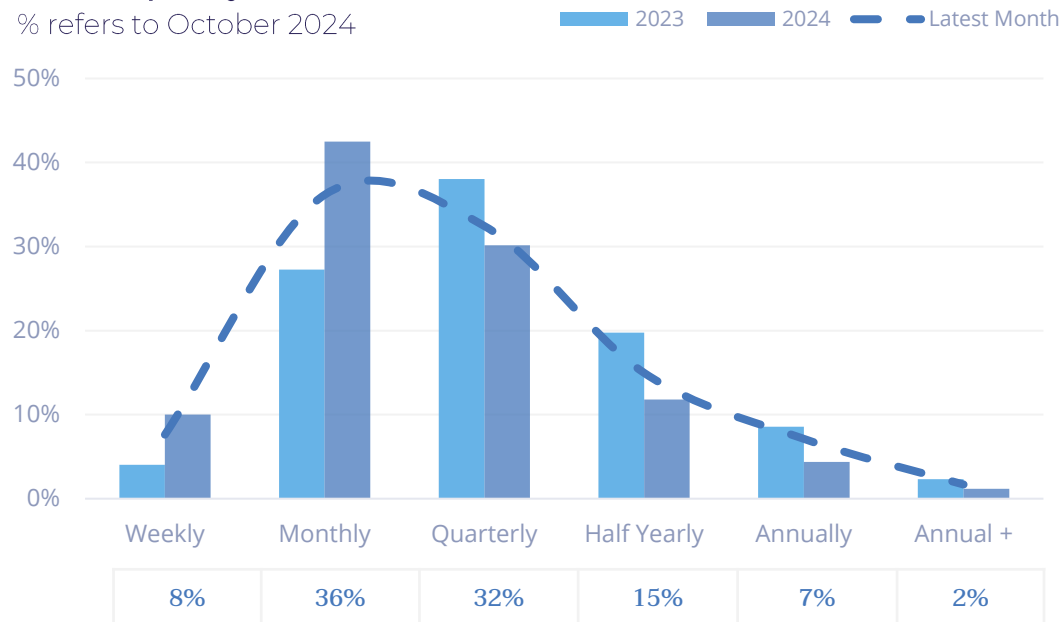
Source: Colliers LocateFootfall
See Appendix for defined BID boundaries

VISIT BEHAVIOUR | NORTHBANK BID

OCTOBER CAPTURED A LESS-FREQUENT VISITOR TO NORTHBANK, BUT WITH A SLIGHT INCREASE IN DWELL

Visit Frequency

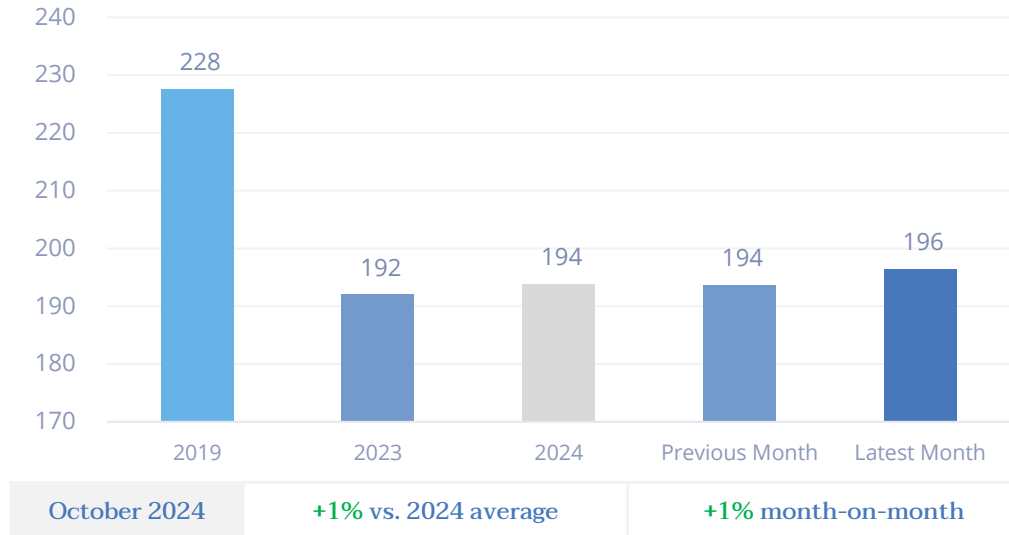
% refers to October 2024



As seen in Victoria BID, October 2024 saw a slight shift in visit frequency to Northbank BID, with an increase in share of visitors visiting annually compared to 2024 average; **7%** of visitors in October 2024, vs. 4% average across the year to date.

Average Dwell

October 2024



Slight increase in dwell time in October 2024 vs. previous month and compared to 2024 average year-to-date.

Dwell time down **+1%** vs. 2024 average, and **+1%** vs. September 2024.

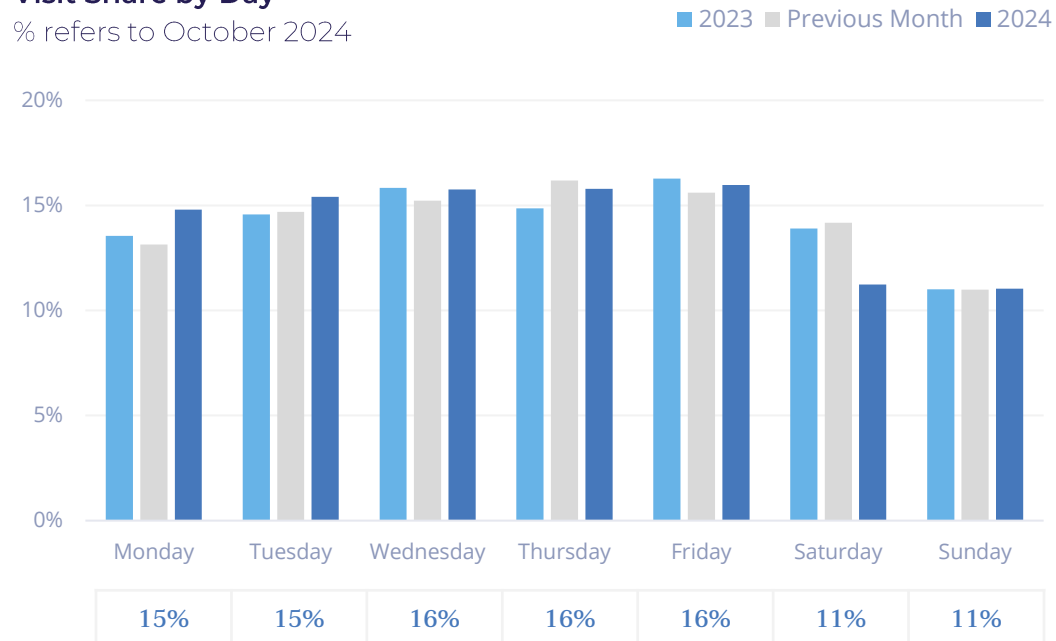
Source: Colliers LocateFootfall
See Appendix for defined BID boundaries

VISIT BEHAVIOUR | NORTHBANK BID

CONSISTENT DISTRIBUTION ACROSS WEEK COMPARED TO PREVIOUS MONTH AND PREVIOUS YEAR

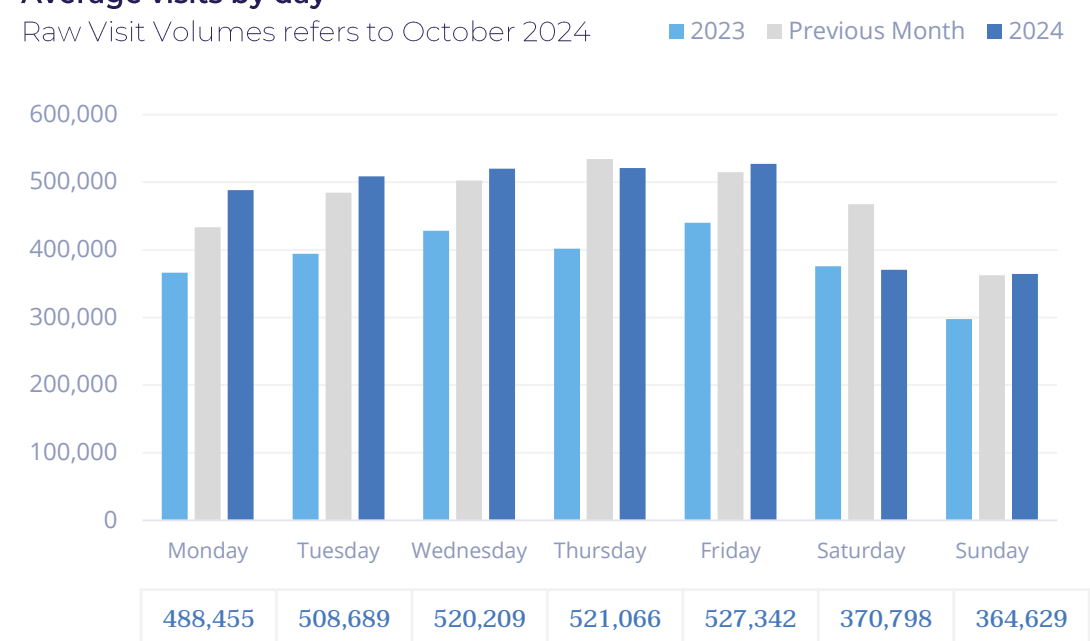
Visit Share by Day

% refers to October 2024



Average visits by day

Raw Visit Volumes refers to October 2024



Visit distribution broadly in-line with September 2024 across Northbank BID, with a slightly higher share of visits towards the start of the week (Monday – Wednesday). Despite consistent proportion of visits throughout the working week, average visits on each day has increased relative to previous year across Monday – Friday.

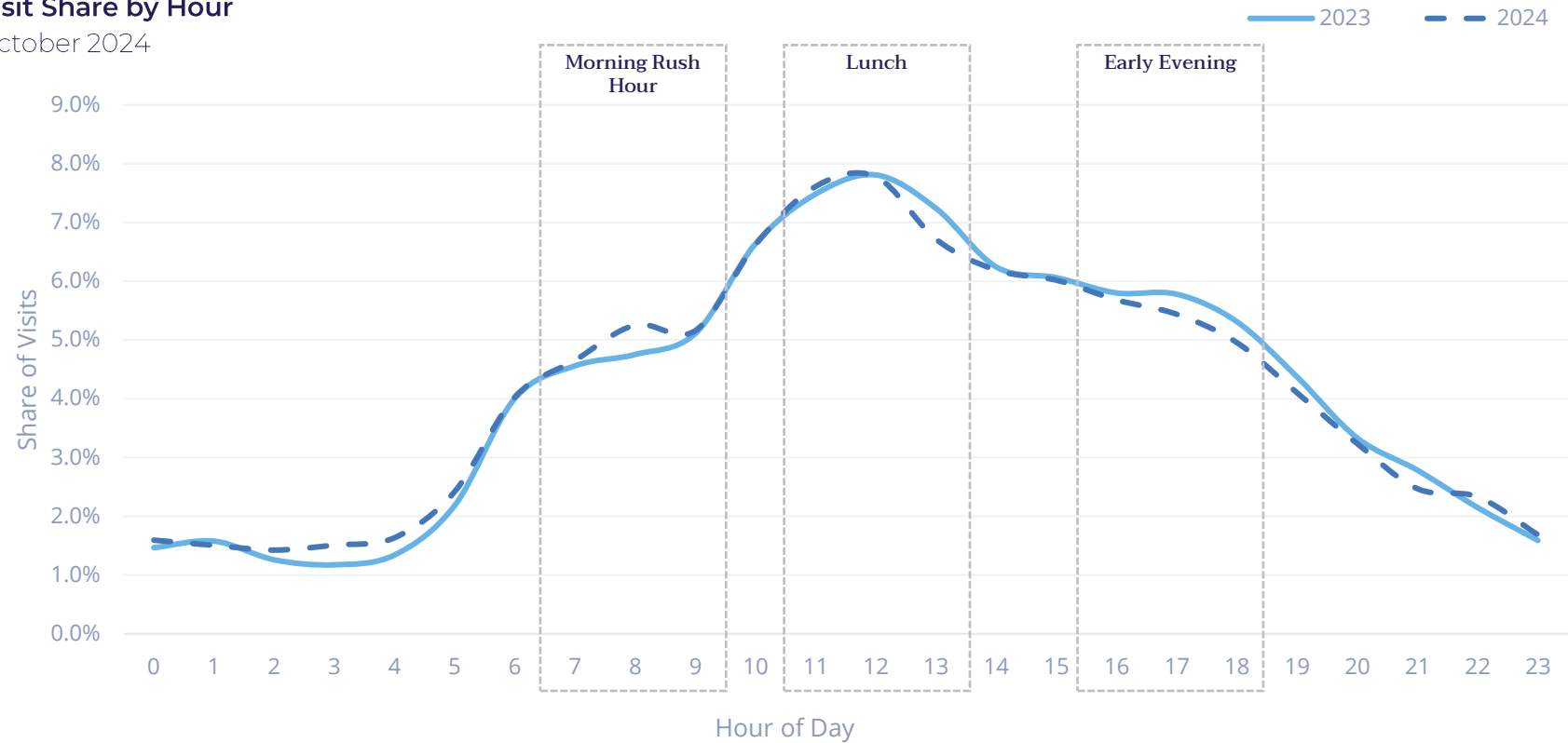
Source: Colliers LocateFootfall
See Appendix for defined BID boundaries

VISIT BEHAVIOUR | NORTHBANK BID

CONSISTENT SHARE OF VISITS THROUGHOUT THE DAY IN OCTOBER 2024 VS. PRIOR YEAR

Visit Share by Hour

October 2024



Visit distribution throughout October 2024 in-line with trend seen in previous year

Peak visits occurred in Northbank BID between 11am – 12pm (7.8% of daily visits).

Slight uplift in share of visits during the morning rush hour, particularly around 8am, compared to prior year (5.3% vs. 4.8%), however overall trend throughout the morning is relatively consistent.

Source: Colliers LocateFootfall
See Appendix for defined BID boundaries

03

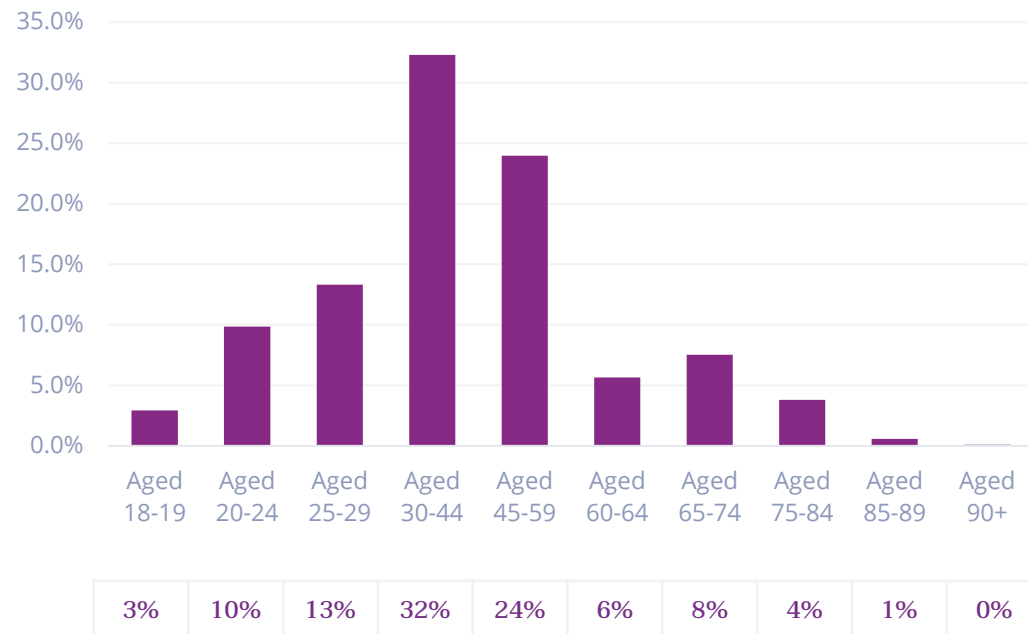
VISITOR SEGMENTATION



VISIT SEGMENTATION | VICTORIA BID

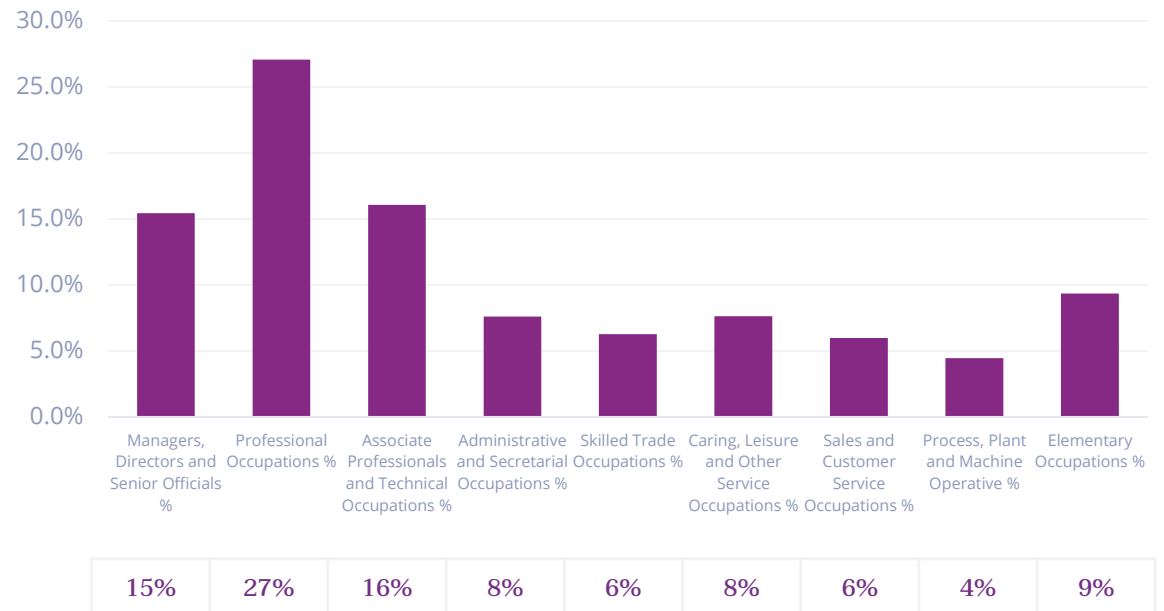
VICTORIA BID CATCHMENT PROFILE SKEWED TOWARDS HIGH-INCOME, MIDDLE-AGED VISITORS

Age Profile



Victoria BID has a bias towards mid-ranged age groups, particularly aged 30-44 years old (32.3%) and 45-59 years old (24.0%)

Occupation Splits



Victoria BID biased towards 'white collar', typically higher-paid occupations (towards left hand side of the graph) than the UK average.

Professional Occupations accounts for 27.1% of visitor profile.

Source: Colliers LocateFootfall | ORC
See Appendix for defined BID boundaries

VISIT SEGMENTATION | VICTORIA BID

VISITOR PROFILE OVER-INDEXES ON CITY PROSPERITY & MUNICIPAL TENANTS

Visitor profile remains in line with West End, with a bias towards 2 Mosaic groups 'City Prosperity' and 'Municipal Tenants'

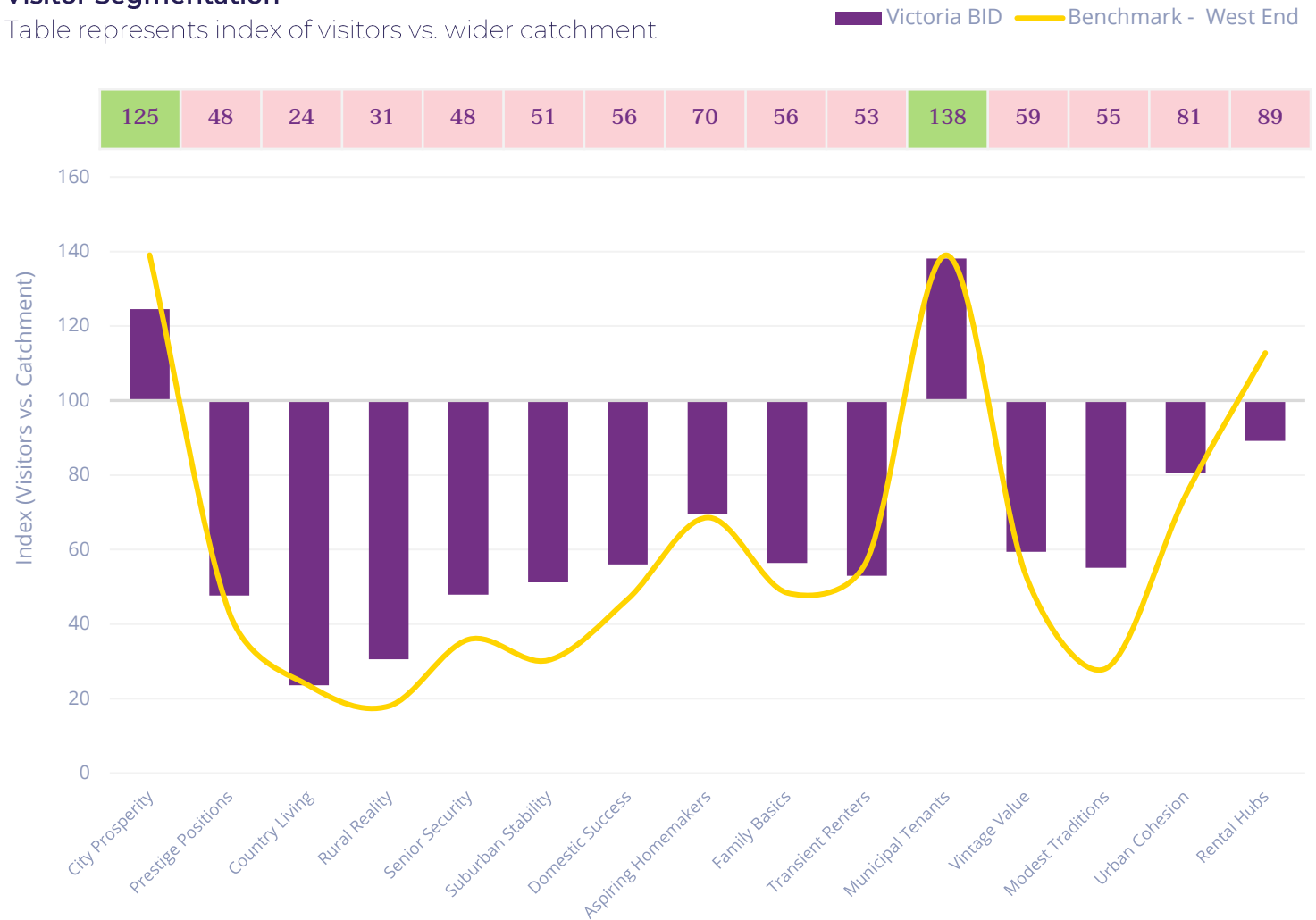
City Prosperity are high-income residents who have expensive homes in desirable metropolitan locations (Age: 26-35 | Income: £100k-£150k)

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

(Age: 56-65 | Income: <£15k)

Visitor Segmentation

Table represents index of visitors vs. wider catchment

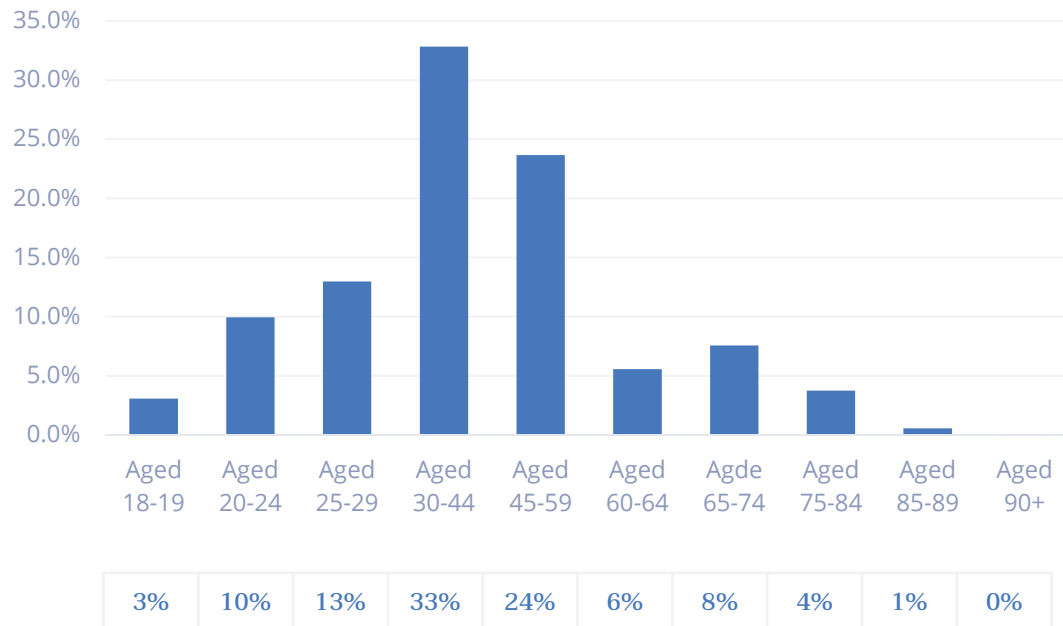


Source: Colliers LocateFootfall | Mosaic Experian
See Appendix for defined BID boundaries

VISIT SEGMENTATION | NORTHBANK BID

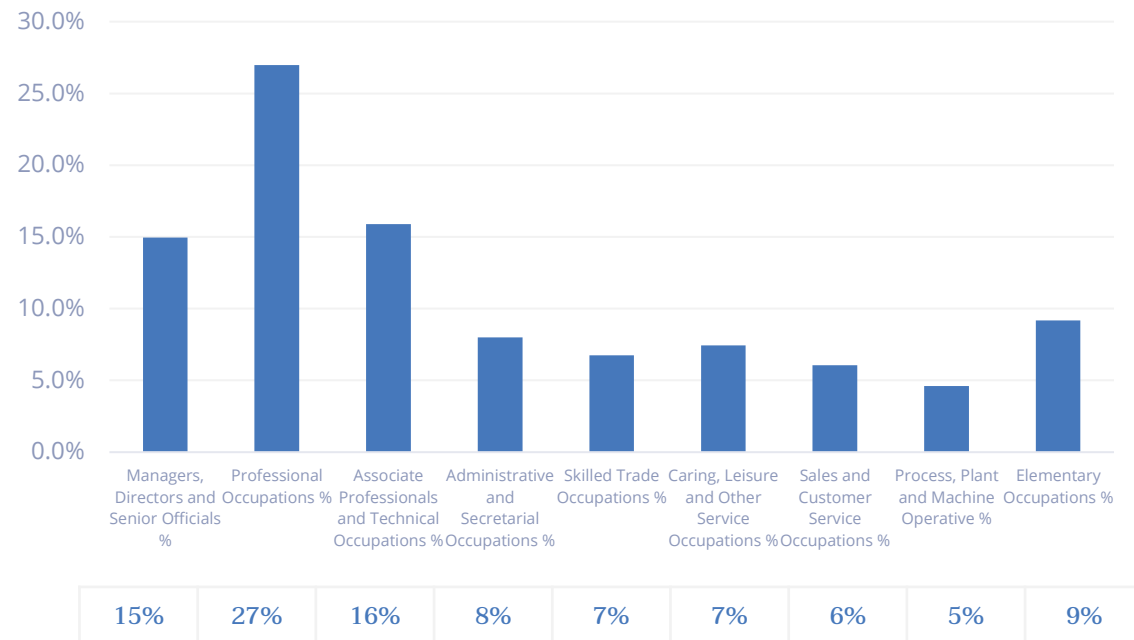
41.9% OF NORTHBANK BID VISITORS WITHIN MANAGERIAL OR PROFESSIONAL OCCUPATIONS CATEGORIES

Age Profile



Northbank BID has a bias towards mid-ranged age groups, particularly aged **30-44 years old (32.8%)** and **45-59 years old (23.7%)**

Occupation Splits



Bias towards **'white collar'**, typically higher paid occupations (towards left hand side of the graph) than the UK average; typical for Central London

27.0% of visitors in **Professional Occupations**

Source: Colliers LocateFootfall | ORC
See Appendix for defined BID boundaries

VISIT SEGMENTATION | NORTHBANK BID

NORTHBANK BID OVER-INDEXES ON CITY PROSPERITY, MUNICIPAL TENANTS & RENTAL HUBS

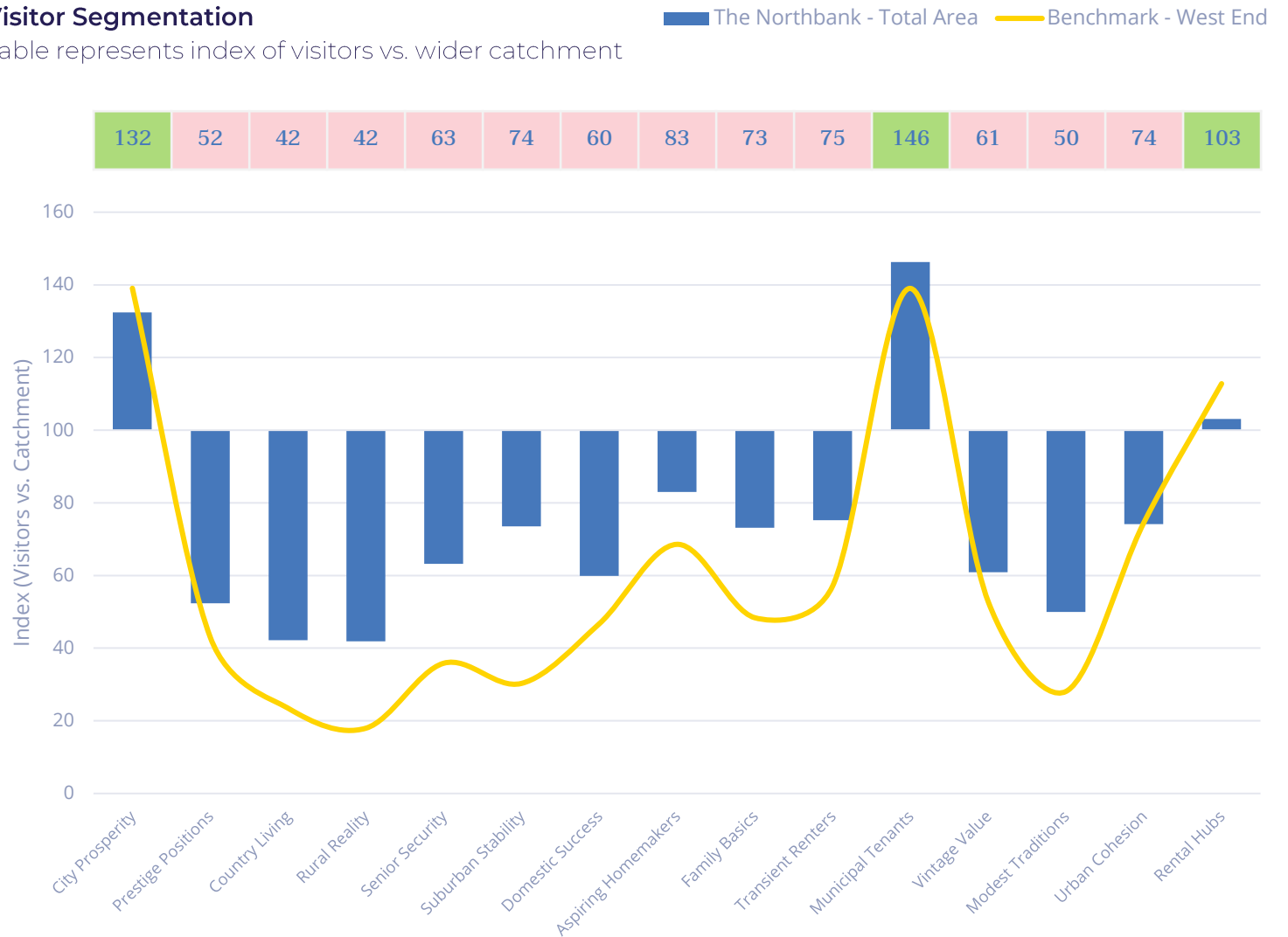
Visitor profile remains in line with West End, with a strong bias towards 2 Mosaic groups 'City Prosperity' and 'Municipal Tenants'

City Prosperity are high-income residents who have expensive homes in desirable metropolitan locations (Age: 26-35 | Income: £100k-£150k)

Municipal Tenants are residents who rent inexpensive city homes in central locations (Age: 56-65 | Income: <£15k)

Visitor Segmentation

Table represents index of visitors vs. wider catchment



Source: Colliers LocateFootfall | Mosaic Experian
See Appendix for defined BID boundaries



04

APPENDIX

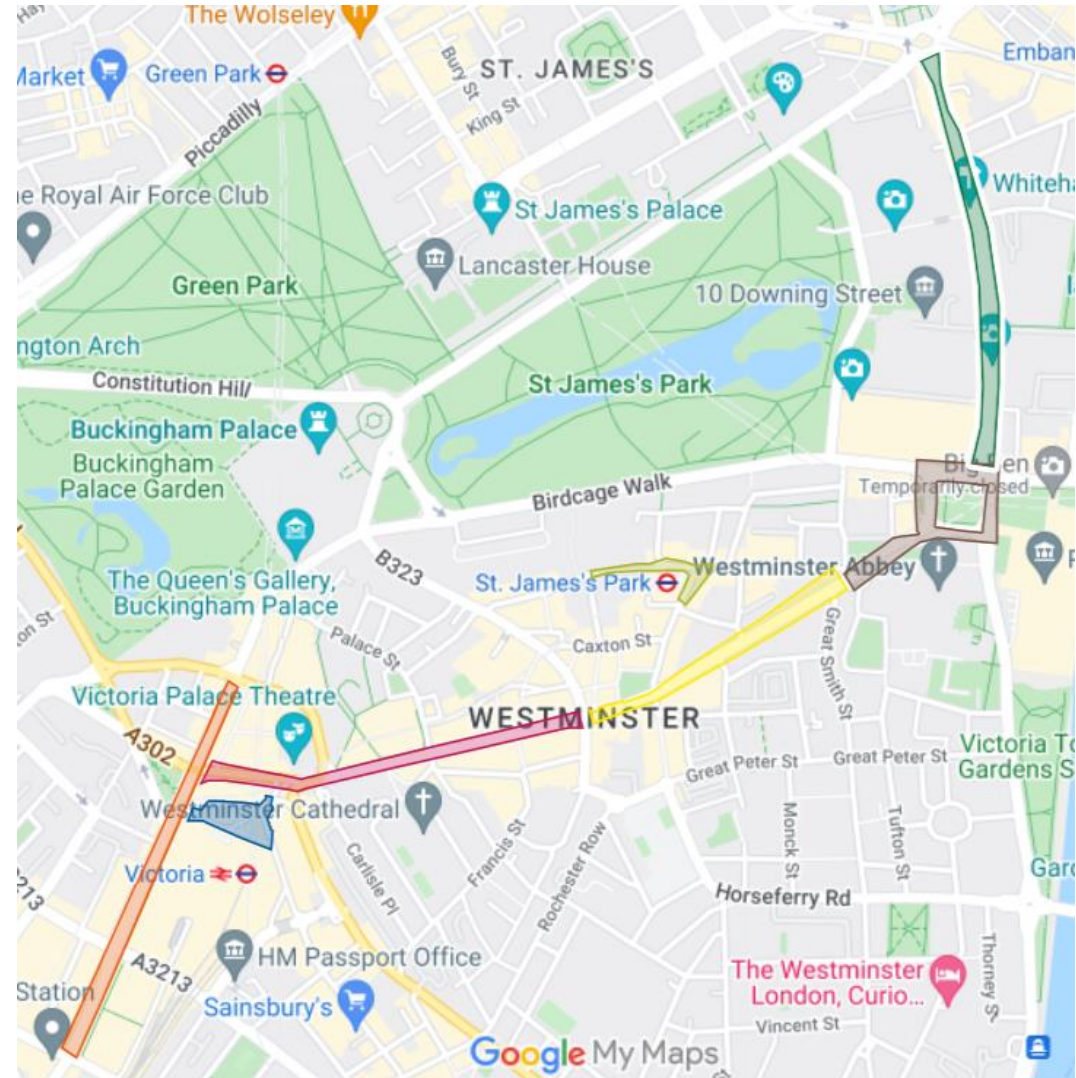
APPENDIX | VICTORIA BID

VICTORIA BID STUDY AREAS

Victoria BID insights have been tracked across 7 study areas within the BID area:

1. Whitehall
2. Buckingham Palace Road
3. Parliament Square
4. St James' Park Station
5. Terminus Place
6. Victoria Street – East
7. Victoria Street – West

In addition, London West End is used as a benchmark location to make comparisons throughout the report

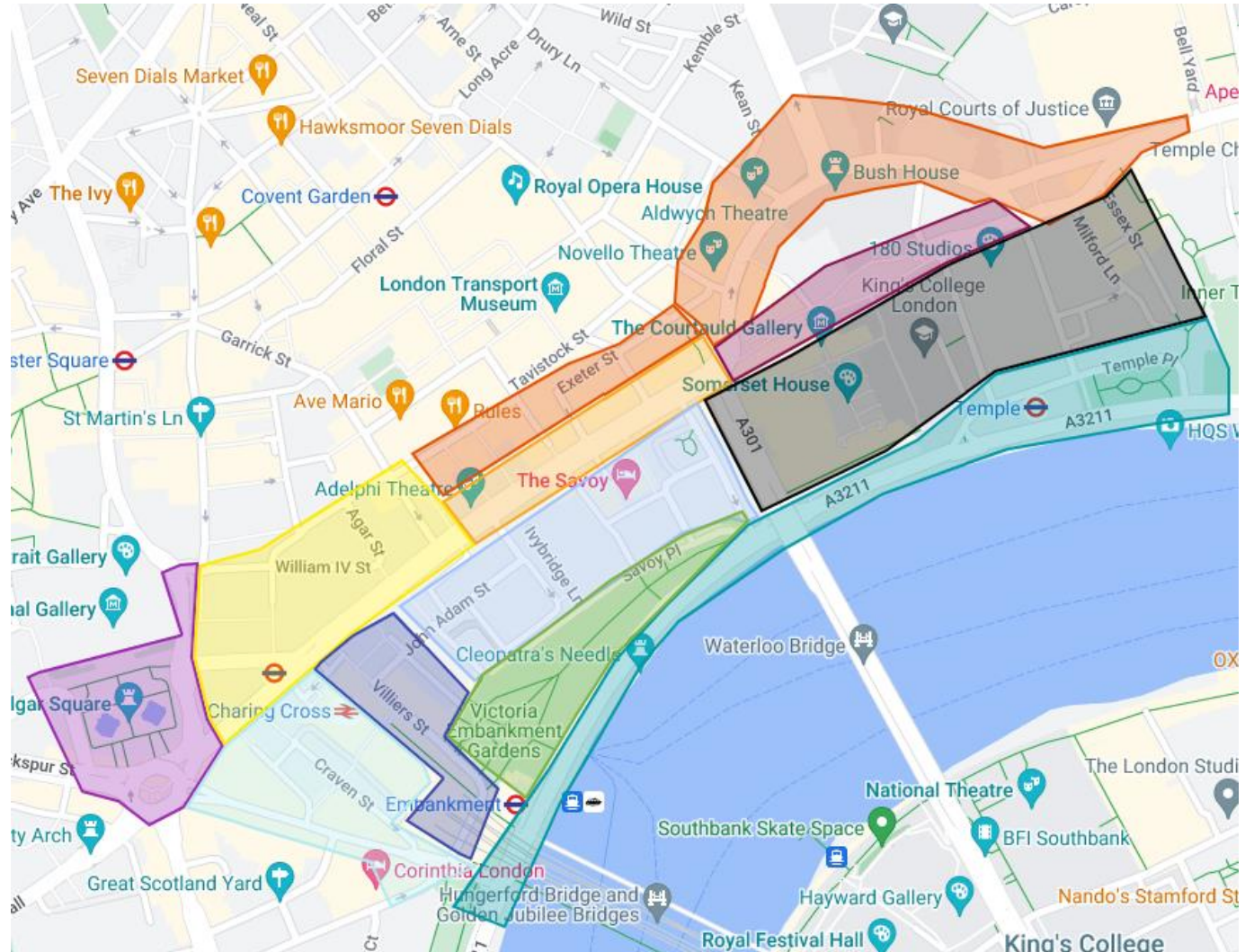


APPENDIX | NORTHBANK BID

NORTHBANK BID STUDY AREAS

Northbank BID insights have been tracked across 12 study areas within the BID area:

1. Trafalgar Square
2. Strand – West
3. Strand – Central
4. Maiden Lane & Tavistock
5. Aldwych ‘D’
6. Strand/Aldwych
7. Somerset/Arundel
8. Riverfront
9. Adelphi
10. Victoria Embankment Gardens
11. Villiers Street
12. Northumberland Avenue



APPENDIX | LONDON HERITAGE QUARTER

WEST END BENCHMARK

Victoria BID & Northbank BID insights are benchmarked against wider West End to provide context.



VICTORIA BID

NORTHBANK BID

APPENDIX | MOSAIC EXPERIAN

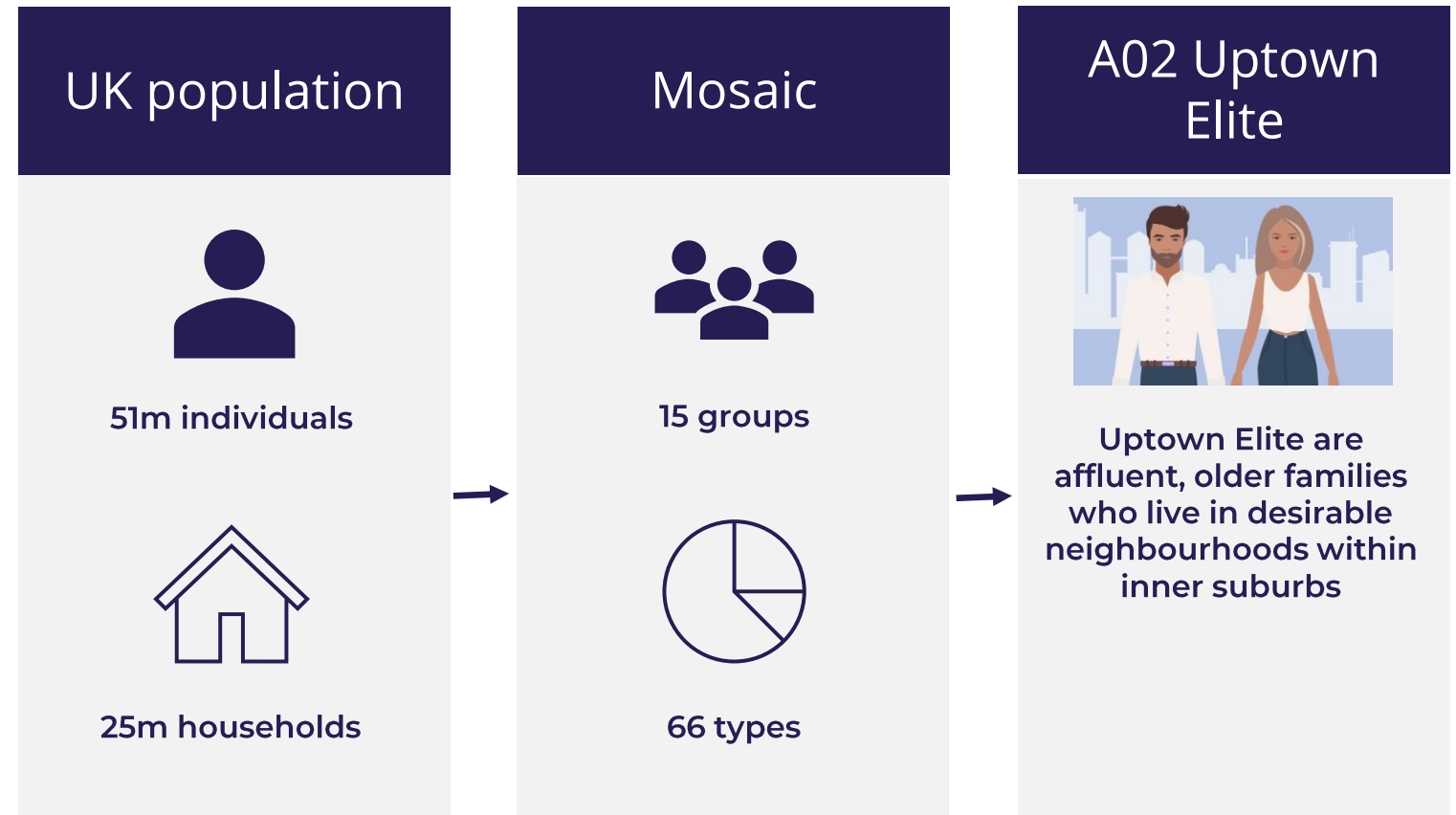
EXPERIAN'S MOSAIC SEGMENTATION

Experian is a multi-national data analytics and consumer credit reporting company, which produces Mosaic – a simple, but powerful framework to help understand customers and visitors.

Experian's Mosaic Customer segmentation tool provides detailed classification of the UK consumer market, based on demographic, behavioural and lifestyle characteristics, providing a universal, and easy-to-understand segmentation.

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



APPENDIX | MOSAIC EXPERIAN

EXPERIAN'S MOSAIC SEGMENTATION DESCRIPTIONS

Type Name	Description	Age	Income
A City Prosperity	High status city dwellers living in central locations and pursuing careers with high rewards.	26-35	£100-150k
B Prestige Positions	Established families in large detached homes living upmarket lifestyles.	55-65	£150k+
C Country Living	Well-off owners in rural locations enjoying the benefits of country life.	66+	£70-99k
D Rural Reality	Householders living in less expensive homes in village communities.	56-65	£20-30k
E Senior Security	Elderly people with assets who are enjoying a comfortable retirement.	66+	£20-30k
F Suburban Stability	Mature suburban owners living settled lives in mid-range housing.	56-65	£30-39k
G Domestic Success	Thriving families who are busy bringing up children and following careers.	36-45	£70-99k
H Aspiring Homemakers	Younger households settling down in housing priced within their means.	26-35	£40-49k
I Family Basics	Families with limited resources who budget to make ends meet.	36-45	£20-29k
J Transient Renters	Single people renting low cost homes for the short term.	26-35	£20-29k
K Municipal Tenants	Urban residents renting high density housing from social landlords.	56-65	<£15k
L Vintage Value	Elderly people with limited pension income, mostly living alone.	66+	<£15k
M Modest Traditions	Mature homeowners of value homes enjoying stable lifestyles.	56-65	£20-29k
N Urban Cohesion	Residents of settled urban communities with a strong sense of identity.	36-45	£20-29k
O Rental Hubs	Educated young people privately renting in urban neighbourhoods.	26-35	£30-39k

Source: Mosaic – Experian
All descriptions for segmentation types provided by Experian

The Colliers logo is a blue rounded rectangle with the word "Colliers" in white serif font. Below the text are three horizontal stripes: a yellow one on top, a red one in the middle, and a blue one on the bottom.

Data-driven, objective location strategy

We work with Occupiers and Landlords/Investors to optimize store/branch estates and real estate assets



WHAT WE DO...



For Occupiers

Roll-out
prioritisation



Network
optimisation

Cannibalisation
analytics



Predictive
performance
forecasting



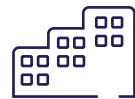
For Landlords



Sustainable
rent modelling



Consumer
surveys



Development
appraisal

Geographic
marketing
recommendations



Tenant mix
strategy



For Public Sector

Venue
rankings



Visitor
profiling



Capacity
studies

For all

Customer
profiling +
segmentation



Channel 'halo'
analytics



Footfall
reporting



Turnover
forecasting



Catchment
definitions and
profiling



Colliers LocateFootfall

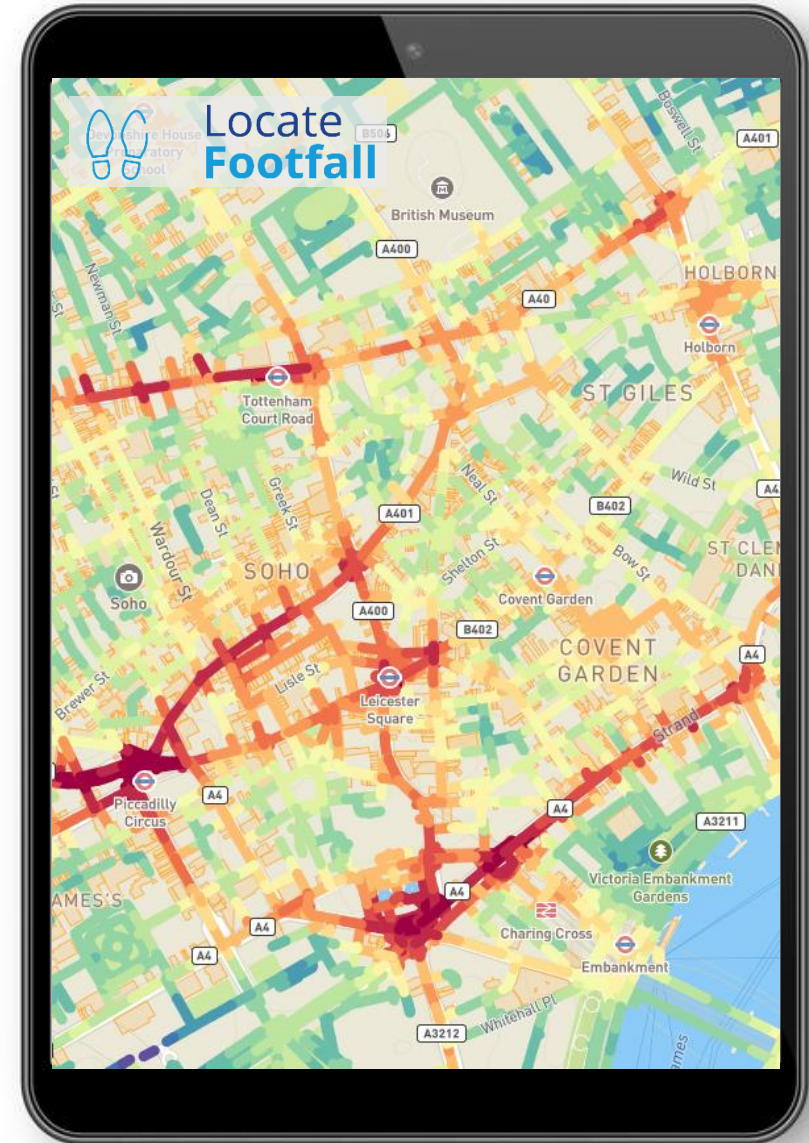
Footfall Intelligence

Using mobile data, we are able to profile visitors from a data pool of billions of records

Part of Colliers' proprietary LocateInsights Platform, LocateFootfall delivers unique crowd level profile & behavioural insights for use across the UK retail sector.

The platform is the product of a range of unique partnerships across the Data & Proptech markets, harnessing big data and A.I via a simple browser based tool.

- ✓ Market leading intelligence from 80+ data sources
- ✓ Sample size of over 9 million active smartphone users
- ✓ Delivers data instantly without hardware installation
- ✓ Location data at any level of geography, over any time period



OVERVIEW



LocateFootfall



80+ DATA SOURCES

Data is derived from three core sources; GPS data from mobile apps, Wifi providers and Telecoms providers. Three sources combined deliver national coverage, to the highest levels of granularity.



Anonymised

Personal data eliminated and hashed to keep an anonymised ID only

Aggregated

IDs grouped to crowd data, no individual is identifiable

Extrapolated

Algorithms applied so the insights represent the entire population

Colliers LocateFootfall platform

GDPR

GDPR insists that no personal data is to be used for marketing purposes, without permission even if it is anonymised...

- *In short, all mobile devices used in the data provided from the platform have opted in.*
- *All personal information is anonymised leaving only an 'anonymised identifier' for each individual. This is not personally identifiable information, and it cannot be linked against other datasets.*
- *Our data vendors have been operational long before GDPR came in to effect in 2018 – long standing security processes and strong legal frameworks.*
- *All data available in our platform is extrapolated to represent the national population - Under no circumstances is an individual ever identifiable in our data.*

Partner Accreditations:





About us

COLLIERS RETAIL STRATEGY & ANALYTICS

The Colliers Retail Strategy & Analytics platform consists of the very best talent from all over the country. Our enterprising approach and global reach mean we deliver location strategy solutions that drive exceptional results for every client, everywhere.



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