



NOVEMBER 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.

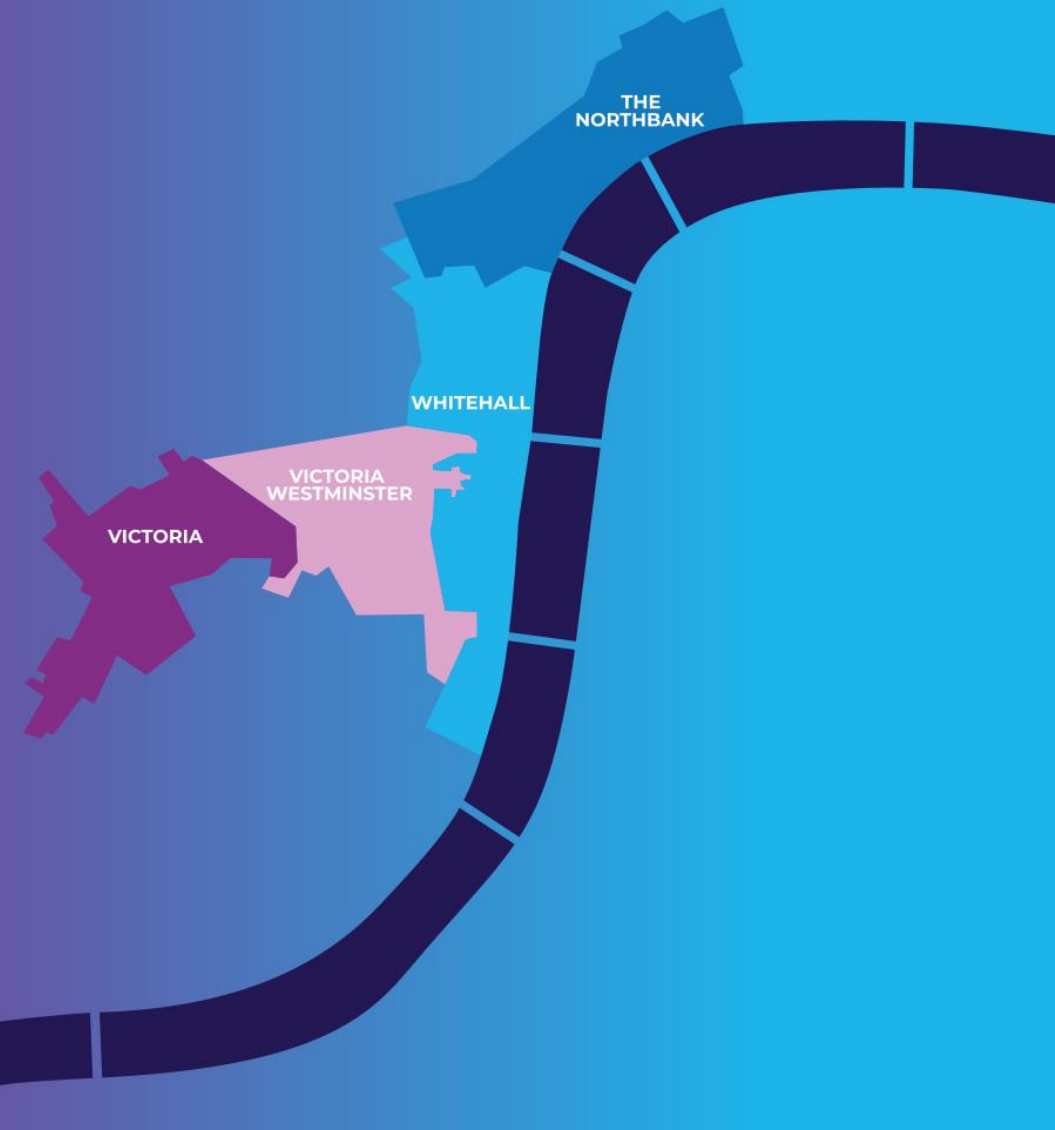
VICTORIA: The Victoria Business Improvement District (BID) is a business-led and business-funded body formed to support economic growth in Victoria and to create a vibrant destination for those who work, visit or live in the area.

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

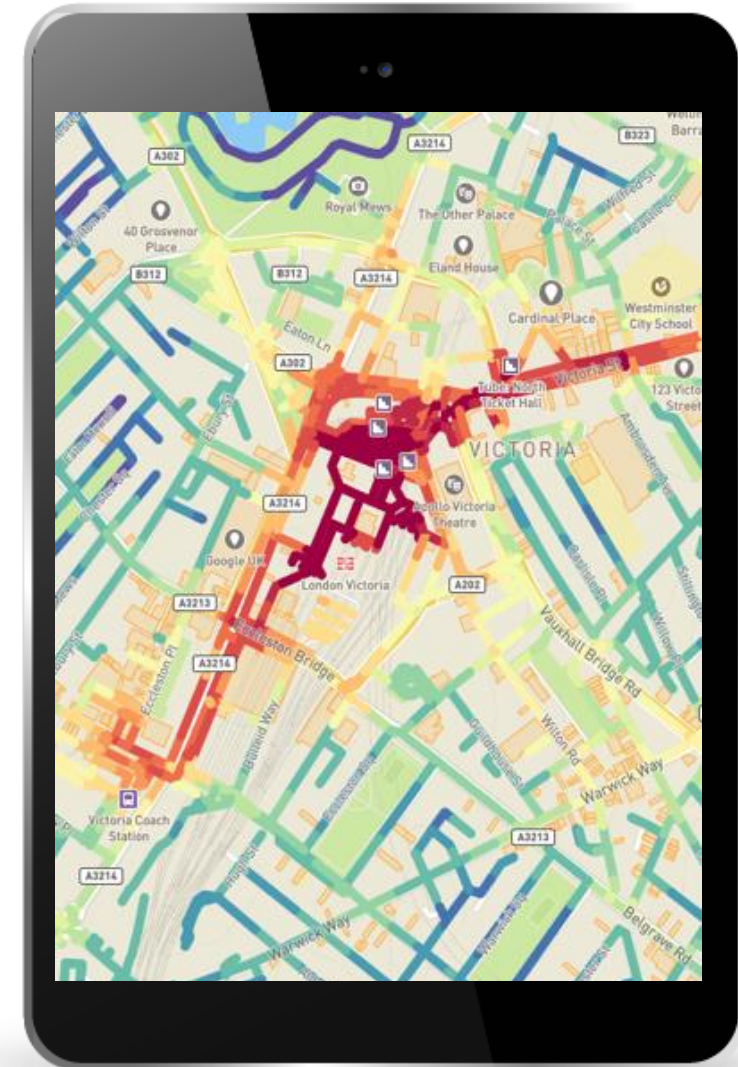
London Heritage Quarter partners with Colliers to provide data and insights on visitors to the area. Monthly visitor reports provide key insights around:

- ❑ 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.





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01

VISIT PERFORMANCE

VISIT PERFORMANCE | VICTORIA BID

VISITS TO VICTORIA BID UP +15% YEAR-ON-YEAR

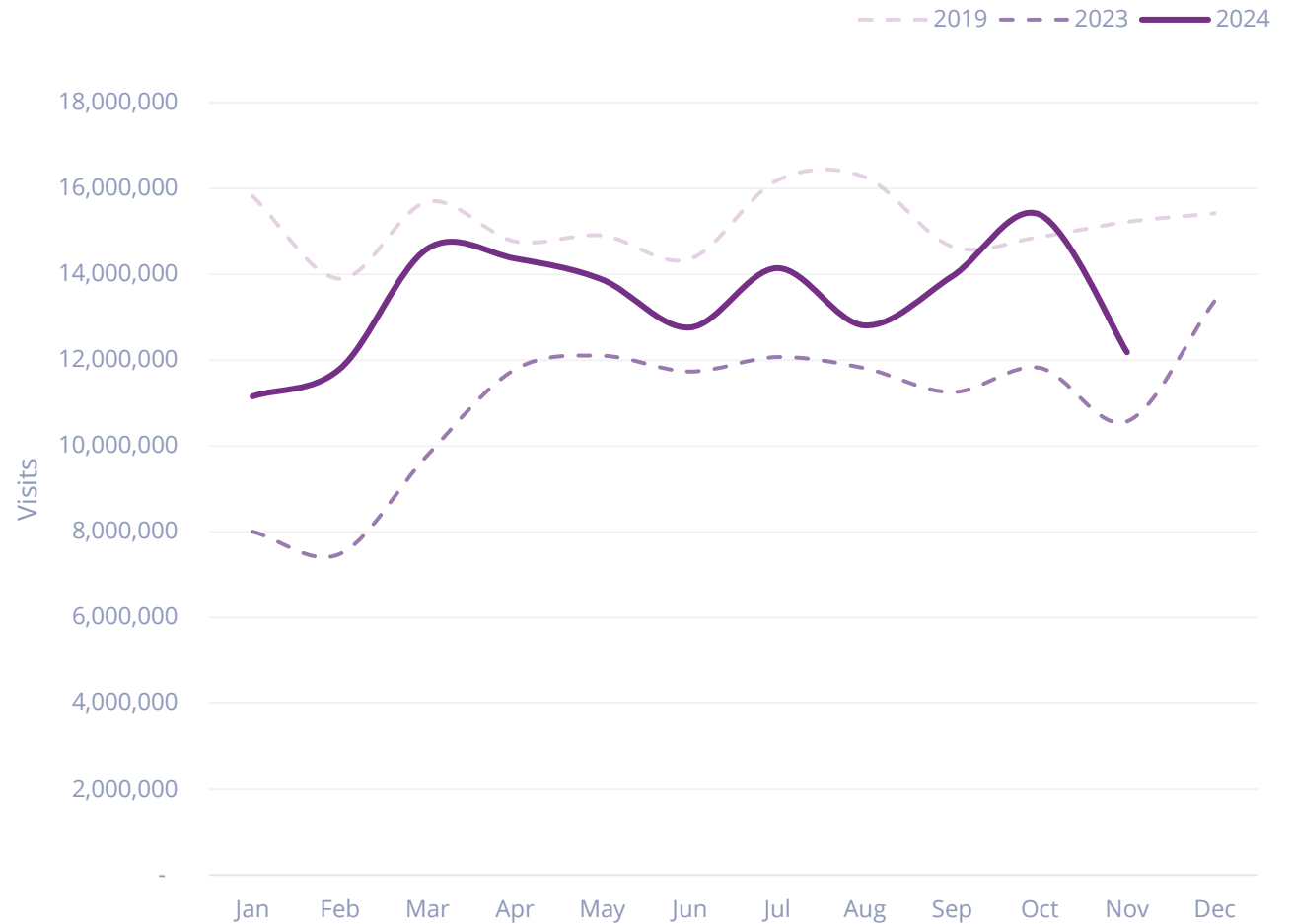
Visits to Victoria BID up +15.2% year-on-year in November 2024, despite decline vs. previous month

Total visits to Victoria BID in November 2024 were **12.2 million**, with November out-performing visitation vs. same month last year, and in-line with performance seen for most months in 2024. Performance relative to prior month was down -21%, following strong visitation in October due to half term. Performance in Victoria BID follows similar trend witnessed in benchmark West End locations for November.

November 2024

Area	Footfall (millions)	Month-on-Month	Year-on-Year	vs. 2019
Victoria BID	12.2	-20.9%	+15.2	-20.0%
West End (Benchmark)	21.4	-7.2%	+29.8%	-45.1%

Monthly Overview

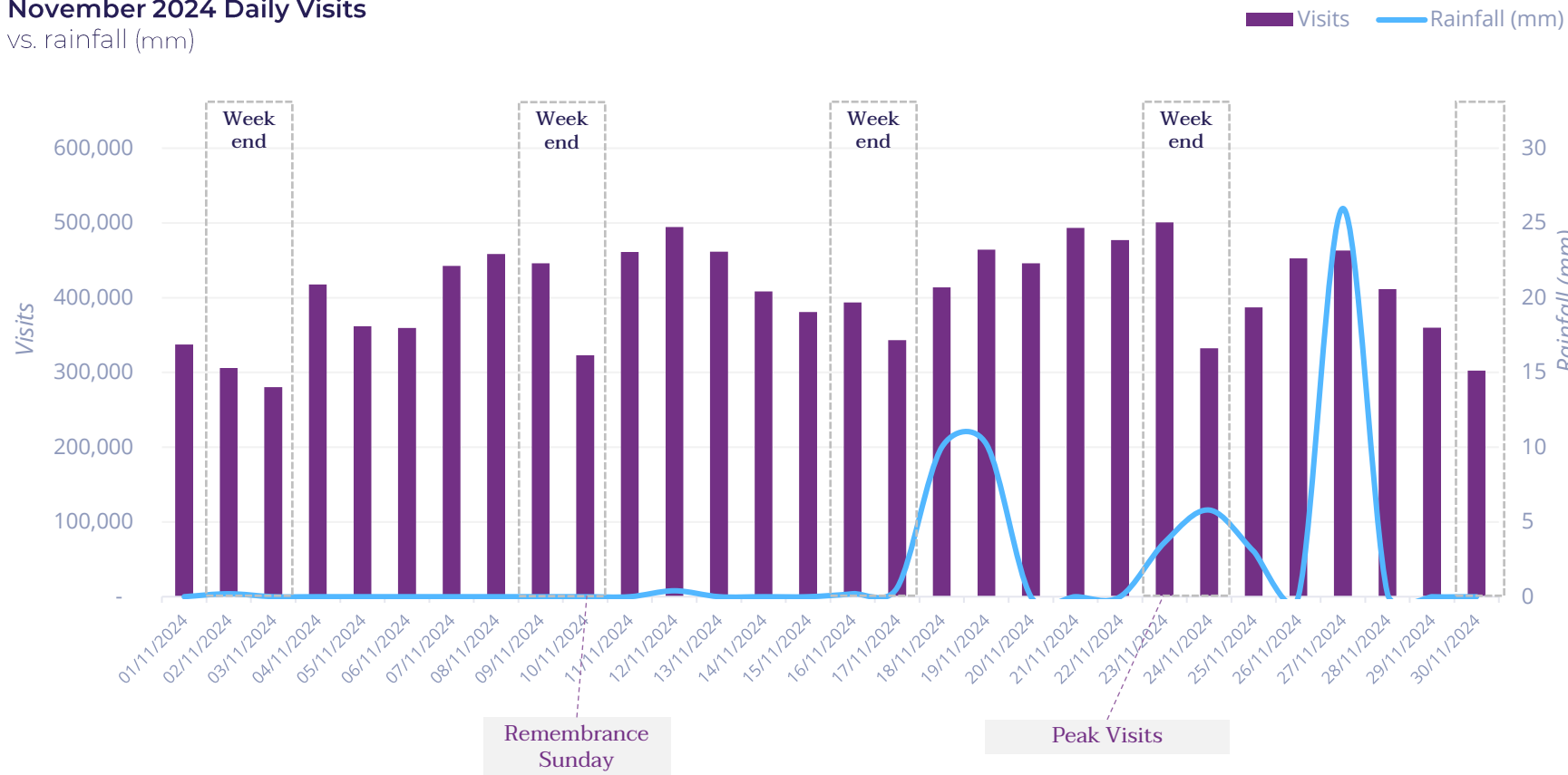


Source: Colliers LocateFootfall
See Appendix for defined BID boundaries

VISIT PERFORMANCE | VICTORIA BID

SLIGHT UPLIFT IN PROPORTION OF VISITS ON WEEKENDS INDICATIVE OF SOCIAL AND LEISURE VISITORS

November 2024 Daily Visits vs. rainfall (mm)



Visit distribution to Victoria BID differed vs. previous month; uplift in weekend visits to the area relative to other days in the month

Peak visits occurred on Saturday 23rd November, with 501k visits to the BID (+28% higher than average Saturday in November).

Increased visits on weekends to the BID indicative of nearing the festive period, with increased social and leisure visits to the area.

Source: Colliers LocateFootfall
See Appendix for defined BID boundaries

Positive year-on-year performance across all clusters contributing to +15.2% growth in visits in Victoria BID vs. November 2023

VISIT PERFORMANCE | VICTORIA BID

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

November 2024

Area	Footfall	Month-on-Month	Year-on-Year	vs. 2019
Victoria BID	12,180,233	-20.9%	+15.2%	-20.0%
Buckingham Palace Road	2,029,904	-17.0%	+18.5%	-18.1%
Parliament Square	2,509,192	-11.3%	+11.1%	-6.0%
Terminus Place	1,101,958	-39.9%	+21.2%	-57.3%
Victoria Street – West	1,284,767	-23.2%	+14.7%	-45.2%
St. James’ Park Station	159,044	-23.1%	+10.0%	-78.1%
Victoria Street – East	962,687	-22.1%	+8.8%	-15.9%
Whitehall	4,132,682	-20.0%	+16.7%	+26.0%
West End (Benchmark)	21,416,217	-7.2%	+29.8%	-45.1%

Visits to Victoria BID in November 2024 saw growth across all clusters year-on-year, with largest growth experienced around Terminus Place (+21.2% vs. Nov-23).

Following strong performance in October 2024, visits to Victoria BID were down across all clusters in November, with the trend also seen in the wider West End benchmark location. Overall, visits to Victoria BID were down -20.9% vs. the previous month, however volumes remained relatively in-line with average monthly visitation volumes in 2024 to date.

Similar performance trends were witnessed in the wider West End benchmark location, both month-on-month and year-on-year; West End benchmark slightly outperformed Victoria BID’s year-on-year growth and witnessed slightly slower decline vs. previous month in November 2024.

Source: Colliers LocateFootfall
See Appendix for defined BID boundaries

VISIT PERFORMANCE | NORTHBANK BID

+25.9% GROWTH IN VISITS YEAR-ON-YEAR TO NORTHBANK

Visits to Northbank BID up +26% vs. same month last year, in November 2024

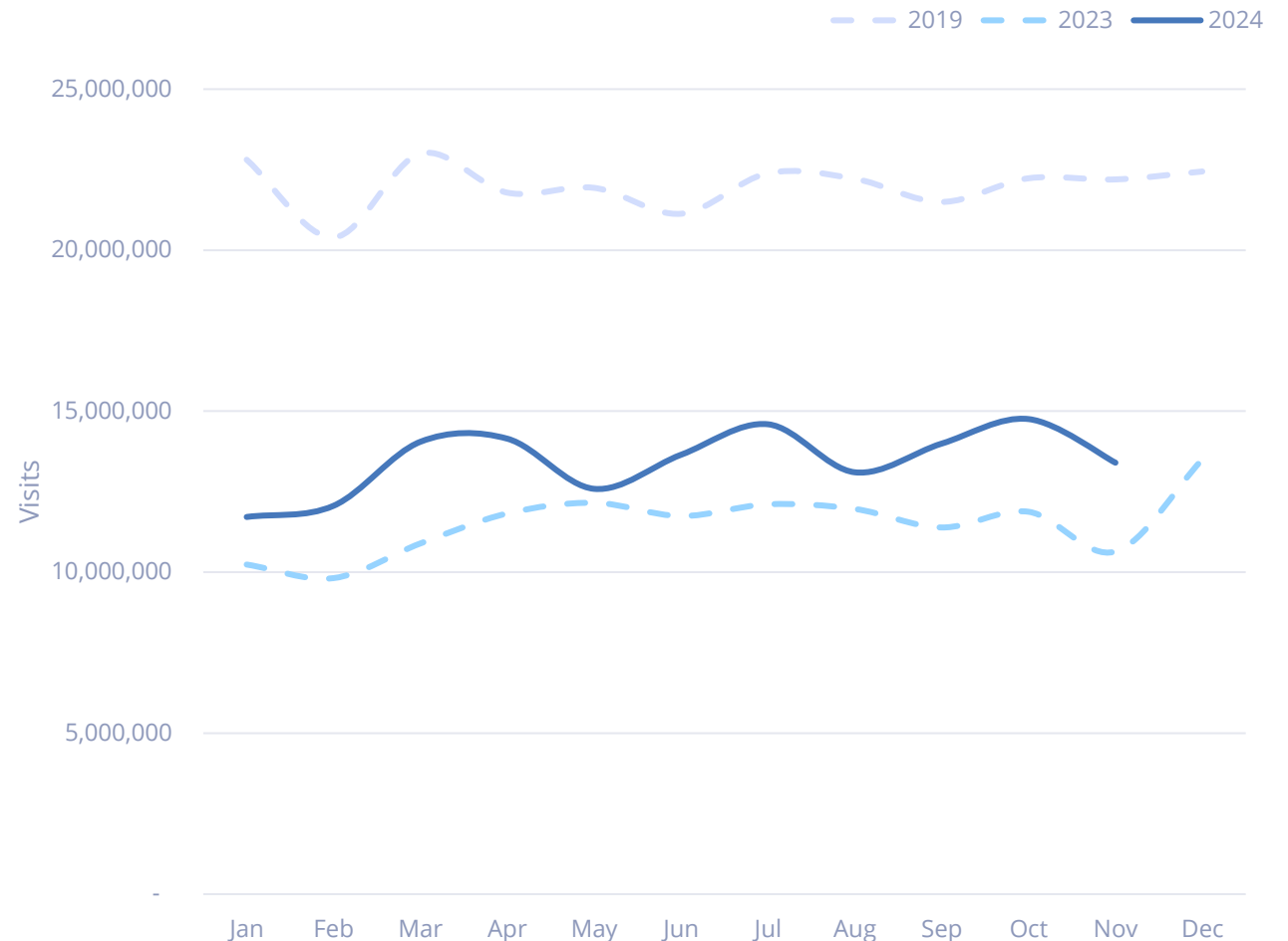
Total visits to Northbank BID were **13.4 million**, a slight decline of **-9%** vs. previous month, and **+26%** vs. same month last year.

As has been seen in all months of 2024 to-date, visit volumes were above previous year – with year-to-date performance **+18.3%** above same period in 2024.

November 2024

Area	Footfall (millions)	Month-on-Month	Year-on-Year	vs. 2019
Northbank BID	13.4	-9.2%	+25.9%	-39.6%
West End (Benchmark)	21.4	-7.2%	+29.8%	-44.9%

Monthly Overview

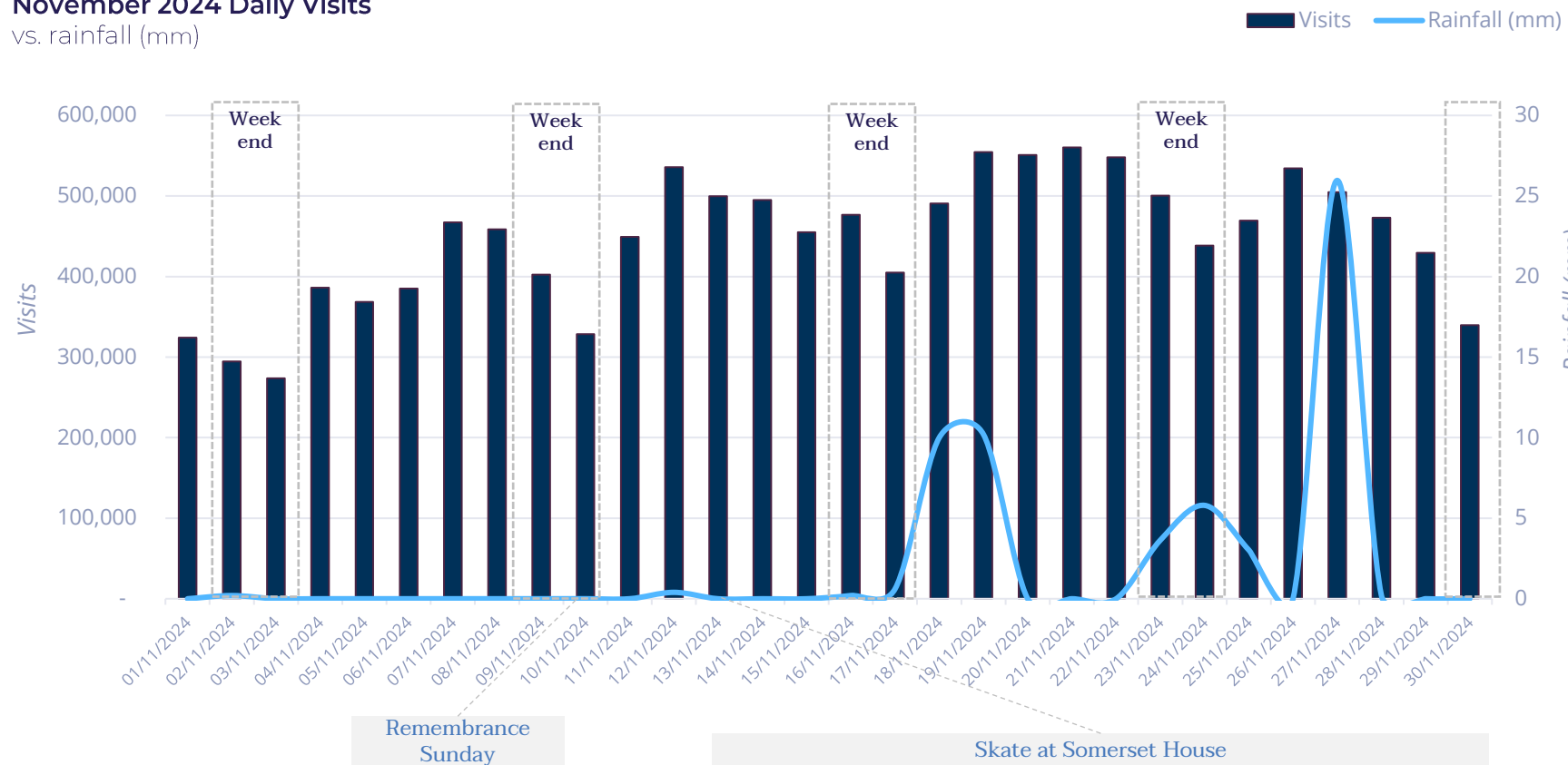


Source: Colliers LocateFootfall
See Appendix for defined BID boundaries

VISIT PERFORMANCE | NORTHBANK BID

INCREASE IN VISITS IN MIDDLE PERIOD OF NOVEMBER 2024, IN-LINE WITH OPENING OF XMAS ACTIVATIONS

November 2024 Daily Visits vs. rainfall (mm)



Visits to Northbank BID peaked in the third week of the month, with visitation up +16.5% vs. average week in November

Visits increased to Northbank BID following the opening of Skate at Somerset House on 13th November. Visits were up +22% week-on-week in the Somerset/Arundel cluster in the week of Skate opening (w/c 11th Nov - Week 45)

Peak visits occurred between Tuesday 19th – Friday 22nd November, with 500,000+ visits to the BID on each of these days, compared to 446,000 average daily visits.

Source: Colliers LocateFootfall
See Appendix for defined BID boundaries

Strong year-on-year growth across all clusters within Northbank BID in November 2024, contributing to visit volumes up +25.9%

VISIT PERFORMANCE | NORTHBANK BID

POSITIVE PERFORMANCE ACROSS ALL CLUSTERS YEAR-ON-YEAR IN NOVEMBER

Area	Footfall	Month-on-Month	Year-on-Year	vs. 2019
The Northbank - Total Area	13,399,299	-9.2%	+25.9%	-39.6%
Strand - Central	2,158,415	-13.5%	+15.4%	-18.6%
Strand - West	2,189,783	-14.3%	+17.1%	-54.1%
Maiden Lane + Tavistock	581,700	-9.4%	+13.5%	-37.9%
Aldwych D	4,347,713	-21.2%	+15.8%	+10.7%
Strand Aldwych	463,990	-12.5%	+22.5%	-77.8%
Somerset / Arundel	1,803,165	-10.9%	+17.3%	-11.7%
Riverfront	3,079,994	-7.8%	+18.7%	-2.9%
Adelphi	335,733	-12.8%	+17.7%	-66.6%
Victoria Embankment Gardens	423,000	-6.3%	+12.5%	-36.7%
Villiers Street	1,146,982	-18.3%	+18.8%	-52.6%
Northumberland Avenue	2,317,423	-7.7%	+29.5%	-28.3%
Trafalgar Square	4,538,607	-12.3%	+12.1%	+3.1%
West End (Benchmark)	21,416,217	-7.2%	+29.8%	-45.1%

Visit performance was slightly more resilient in Northbank BID in November 2024 compared to Victoria BID, witnessing stronger year-on-year growth (+25.9%), and less decline month-on-month (-9.2%).

Strongest performance year-on-year was seen along Northumberland Avenue (+29.5%) and Strand Aldwych (22.5%); however, all clusters experienced year-on-year growth in November.

Northbank BID experienced similar growth rate year-on-year to wider West End benchmark location, and similar decline vs. October 2024.

Source: Colliers LocateFootfall
See Appendix for defined BID boundaries



02

VISITOR BEHAVIOUR

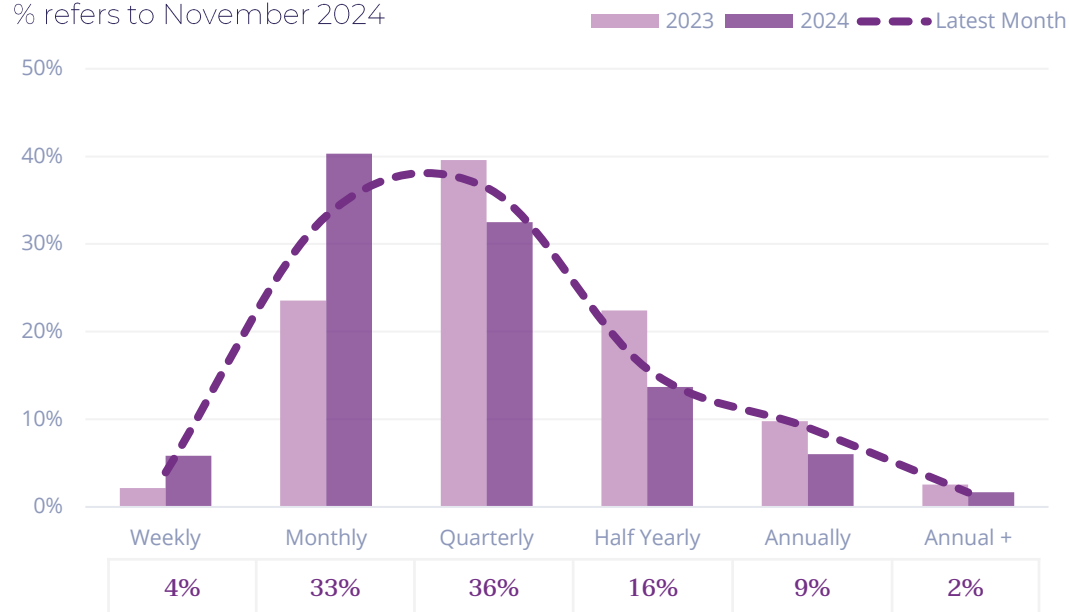


VISIT BEHAVIOUR | VICTORIA BID

+4% INCREASE IN AVERAGE DWELL TIME VS. YEAR-TO-DATE AVERAGE IN NOVEMBER 2024

Visit Frequency

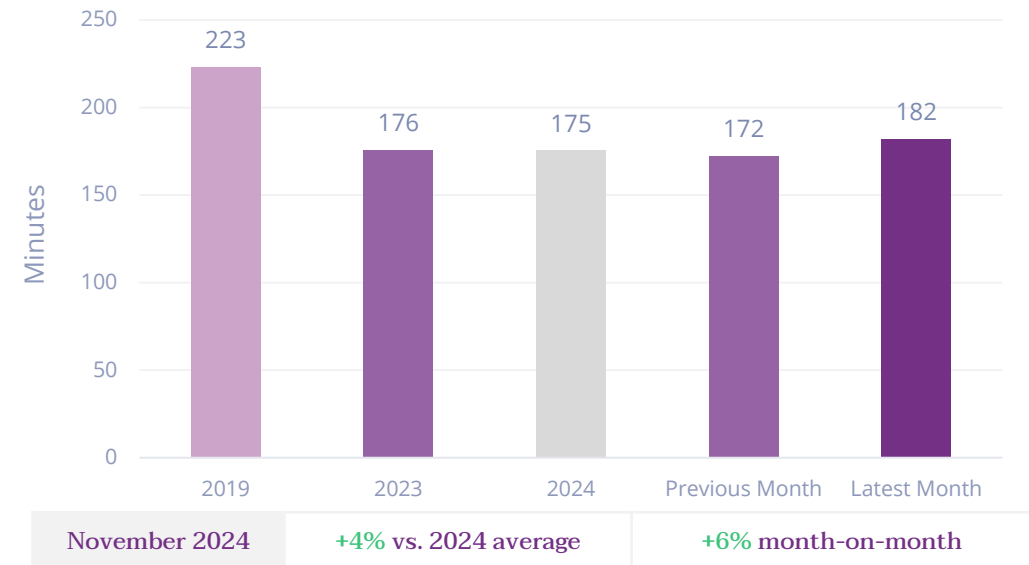
% refers to November 2024



Visit frequency distribution in-line with 2024 average, despite slight shift to visitors visiting quarterly & half-yearly rather than monthly. This slight shift is indicative of the start of festive season capturing a larger share of visitors from further afield on leisure and social trips.

Average Dwell

November 2024



Increase in the average dwell time in Victoria BID during November 2024, relative to previous month (+10mins) and to the 2024 average (+7mins).

Visitor dwell **+6%** vs. October 2024, and **+4%** vs. 2024 average.

Source: Colliers LocateFootfall
See Appendix for defined BID boundaries

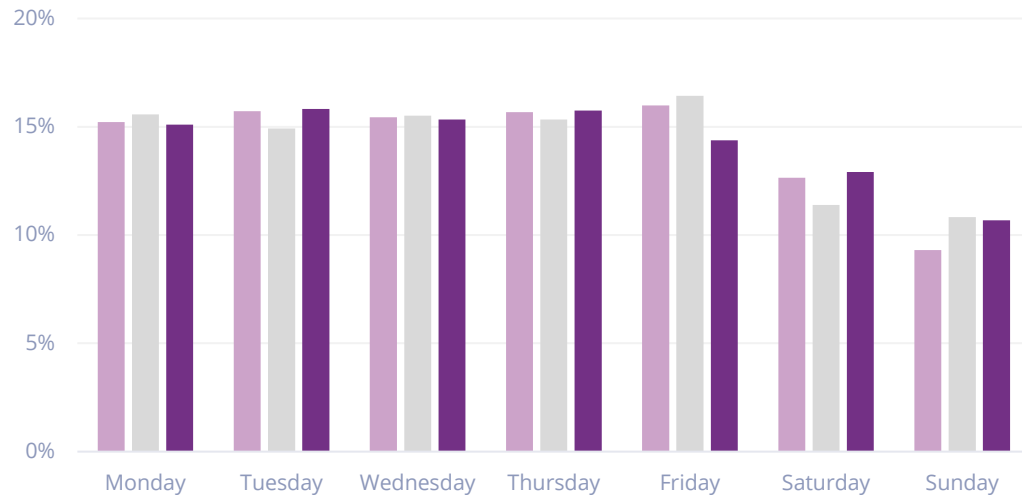
VISIT BEHAVIOUR | VICTORIA BID

SLIGHT INCREASE IN VISITS TO VICTORIA BID ON SATURDAYS IN NOVEMBER 2024

Visit Share by Day

% refers to November 2024

■ 2023 ■ Previous Month ■ 2024

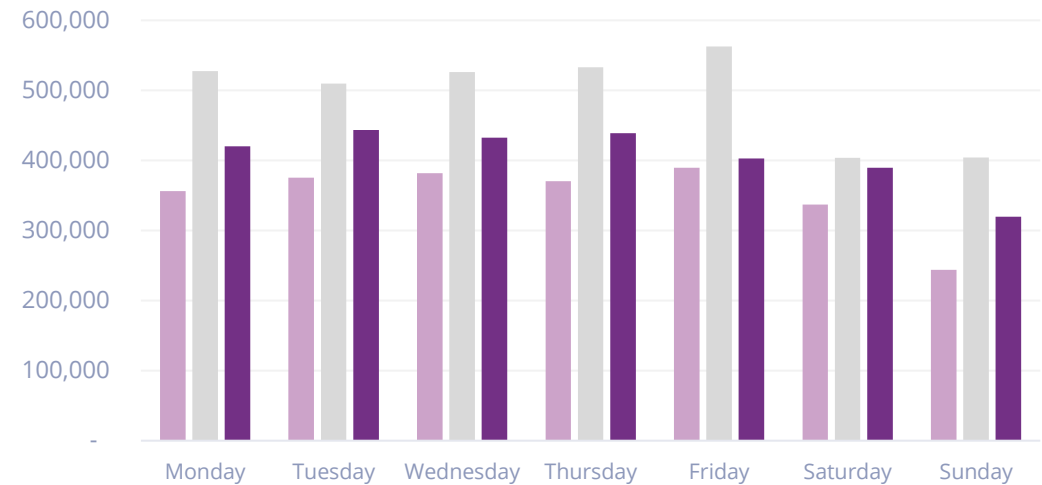


15%	16%	15%	16%	14%	13%	11%
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Average Visits by Day

Raw Visit Volumes refers to November 2024

■ 2023 ■ Previous Month ■ 2024



419,994	443,336	432,495	438,915	402,752	389,769	319,669
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Slight increase in the proportion of visitors visiting the BID during the weekend in November, indicative of increased social and leisure visits as the festive period approaches. However, peak visitation occurred on **Thursdays** (16%), a similar share to as seen on Tuesdays, representing the continued worker presence across the BID.

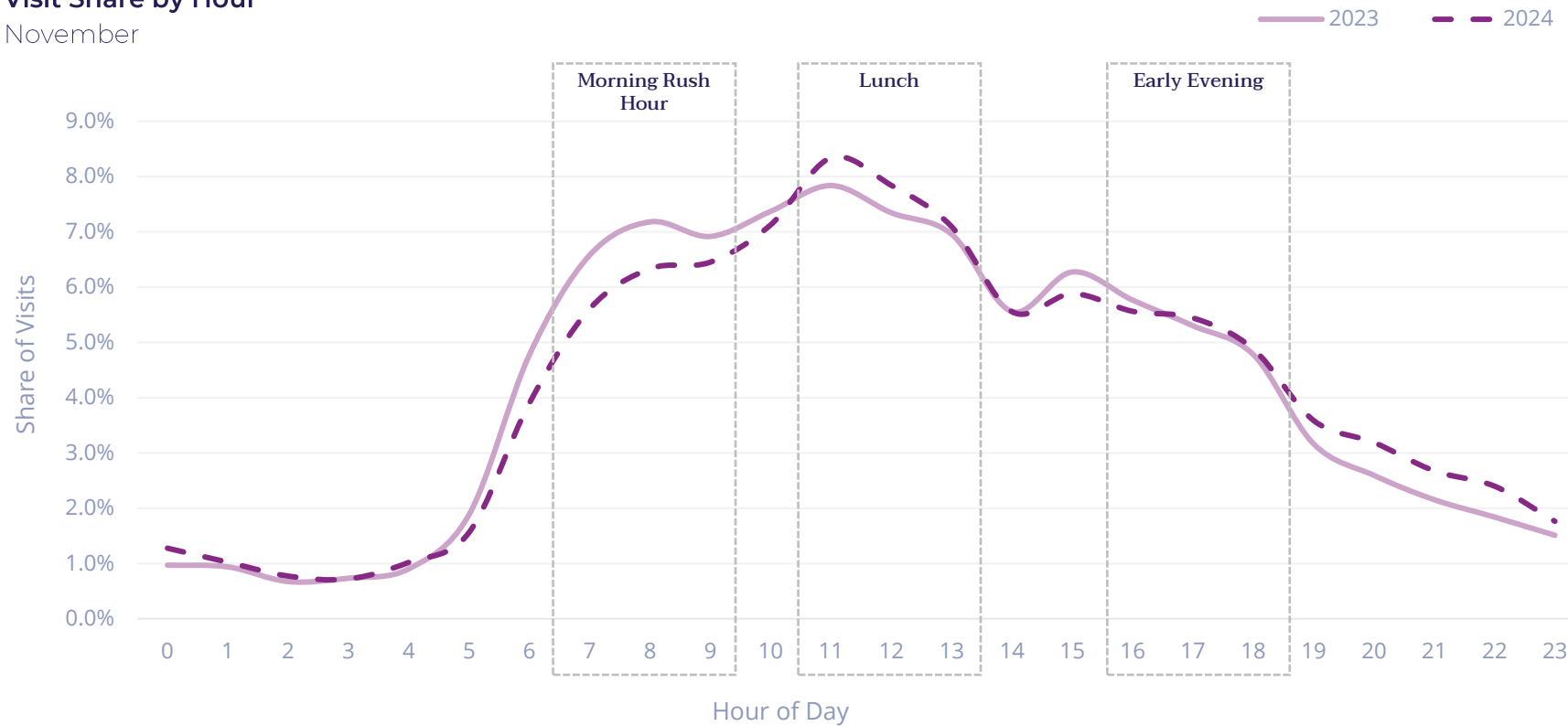
Despite a lower share of visits on Fridays in November 2024 vs. 2023, average visits on this day still surpassed average volumes seen in October 2023.

Source: Colliers LocateFootfall
See Appendix for defined BID boundaries

VISIT BEHAVIOUR | VICTORIA BID

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

Visit Share by Hour
November



Share of visits throughout the day in-line with trend seen in previous year, with slightly higher peak around Lunch (11am-1pm)

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 (8.3%), before a gradual share of visits throughout late afternoon/early evening.

Greater share of visits post 7pm in November 2024 vs. previous year (13.6% of visits in Nov-24 vs. 11.3% in Nov-23)

Source: Colliers LocateFootfall
See Appendix for defined BID boundaries

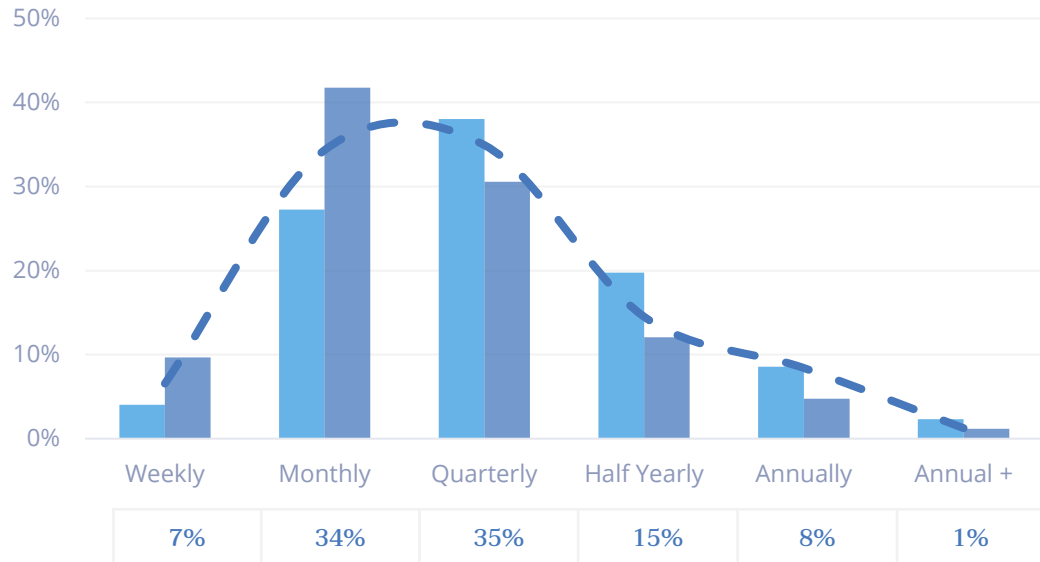
VISIT BEHAVIOUR | NORTHBANK BID

NOVEMBER CAPTURED A LESS-FREQUENT VISITOR TO NORTHBANK, WITH INCREASE VISITING QUARTERLY

Visit Frequency

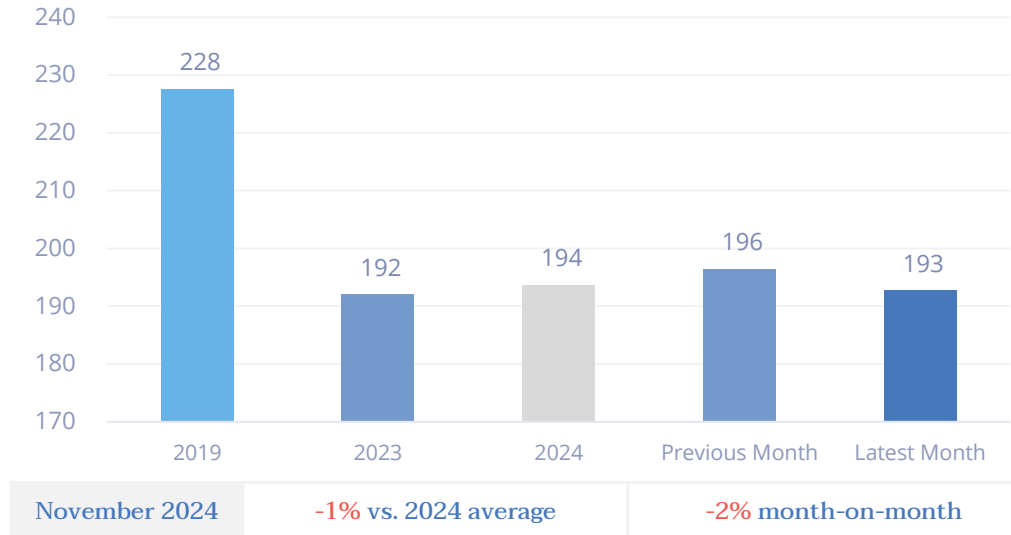
% refers to November 2024

2023 2024 Latest Month



Average Dwell

November 2024



As seen in Victoria BID, November 2024 saw a slight shift in visit frequency to Northbank BID, with an increase in share of visitors visiting quarterly compared to 2024 average; **35%** of visitors in November 2024, vs. 31% average across the year to date.

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

Dwell time down **-1%** vs. 2024 average, and **-2%** vs. October 2024.

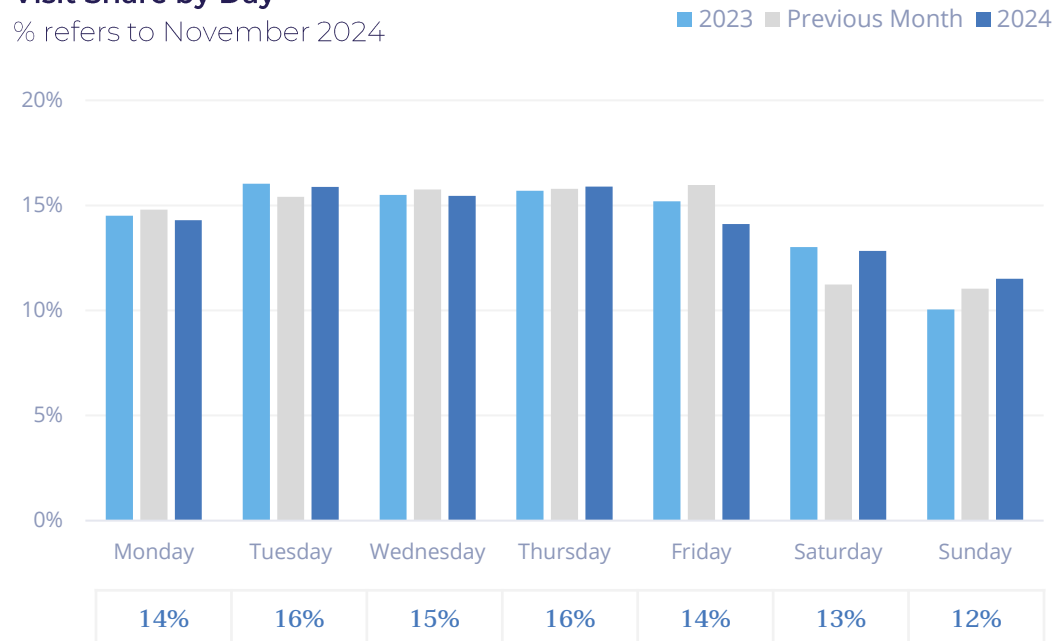
Source: Colliers LocateFootfall
See Appendix for defined BID boundaries

VISIT BEHAVIOUR | NORTHBANK BID

SLIGHT INCREASE IN PROPORTION OF VISITS ON WEEKENDS IN NOVEMBER 2024 VS OCTOBER

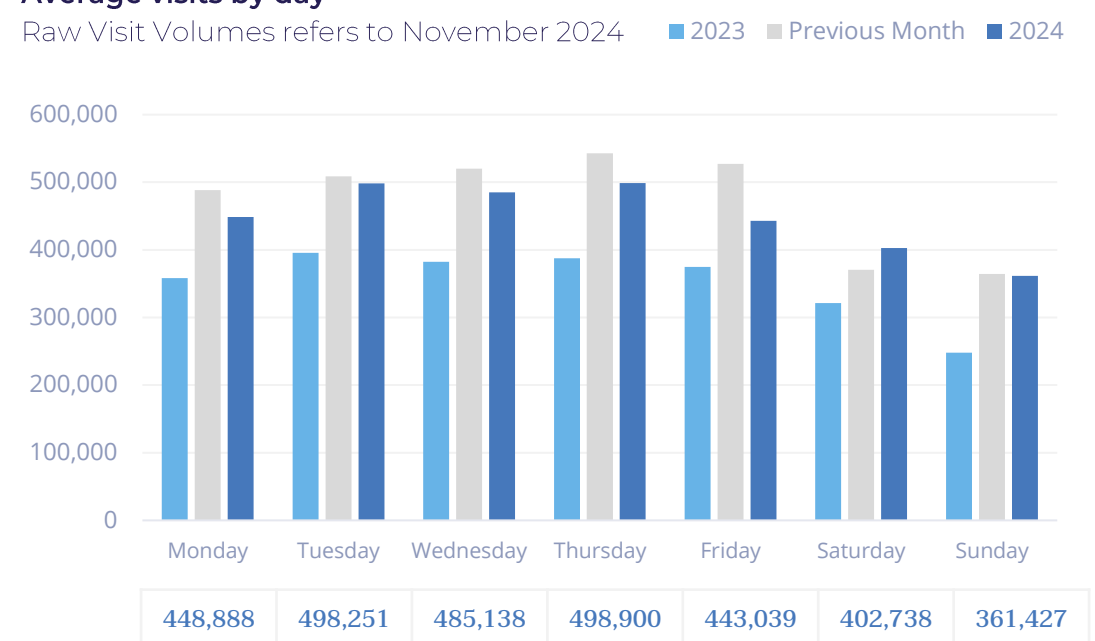
Visit Share by Day

% refers to November 2024



Average visits by day

Raw Visit Volumes refers to November 2024



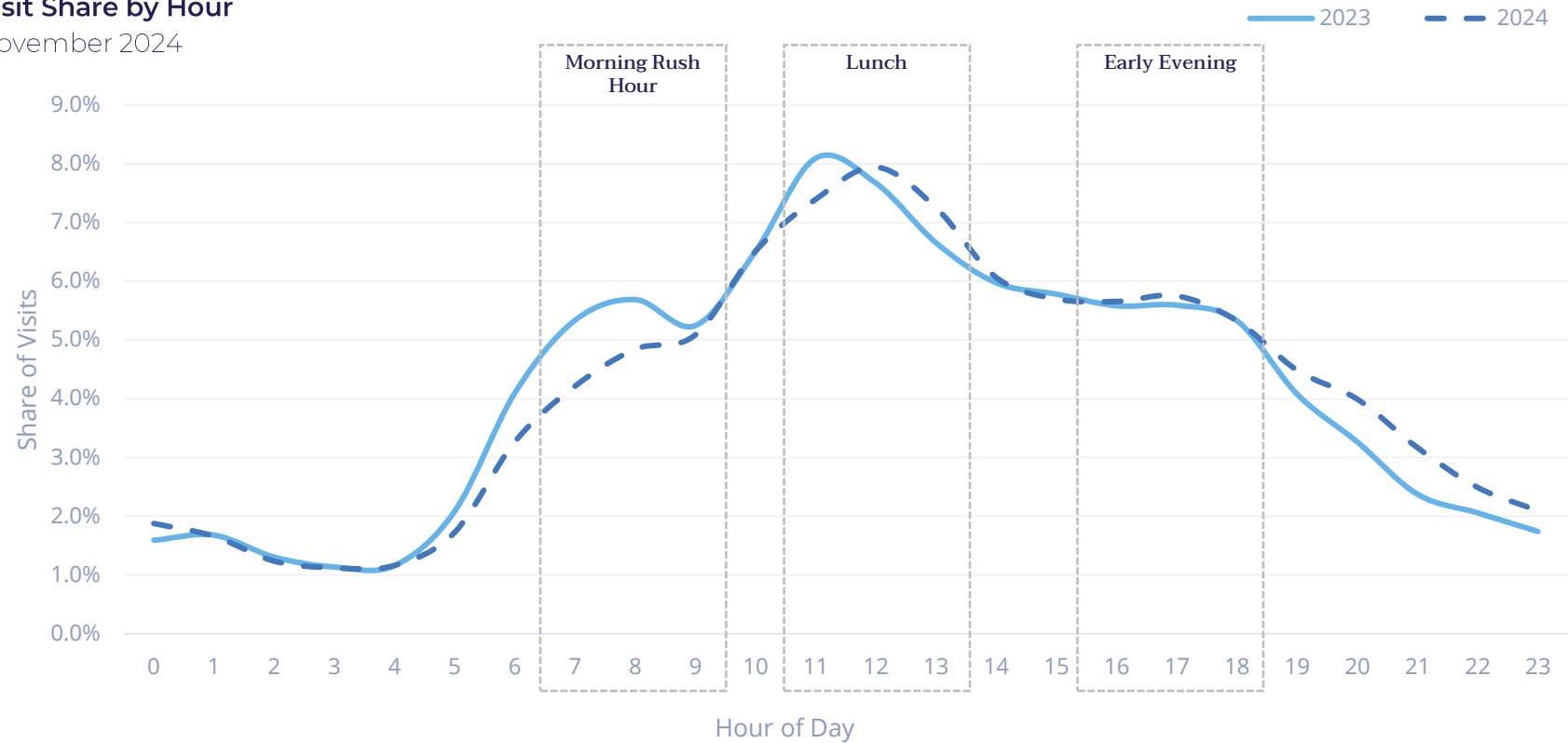
Visit distribution broadly in-line with October 2024 across Northbank BID, with a slightly higher share of visits on the weekends, indicative of social visits. Despite consistent proportion of visits throughout the working week, average visits on each day has increased relative to previous year across Monday – Friday, representing an increase in visits to the BID in total.

Source: Colliers LocateFootfall
See Appendix for defined BID boundaries

VISIT BEHAVIOUR | NORTHBANK BID

HIGHER SHARE OF EVENING VISITS TO NORTHBANK BID POST-7PM IN NOVEMBER 2024

Visit Share by Hour
November 2024



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

Peak visits occurred in Northbank BID between 11am – 12pm (7.9% of daily visits).

Slight uplift in share of visits during the evening after 7pm, compared to prior year (16.2% vs. 13.5%), however overall trend throughout afternoon/early-evening is consistent between the two years.

Source: Colliers LocateFootfall
See Appendix for defined BID boundaries

03

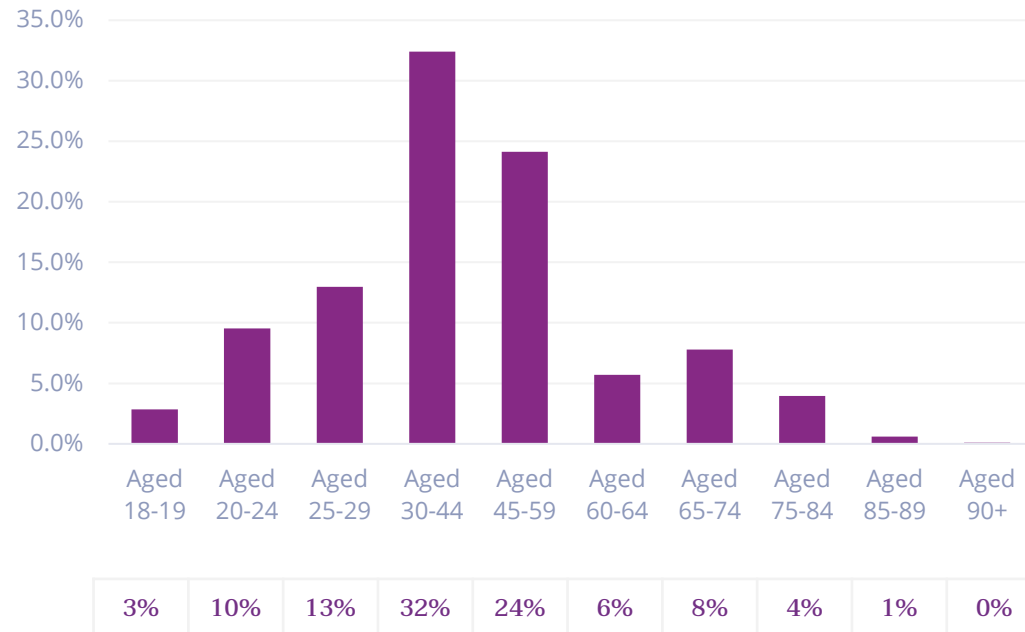
VISITOR SEGMENTATION



VISIT SEGMENTATION | VICTORIA BID

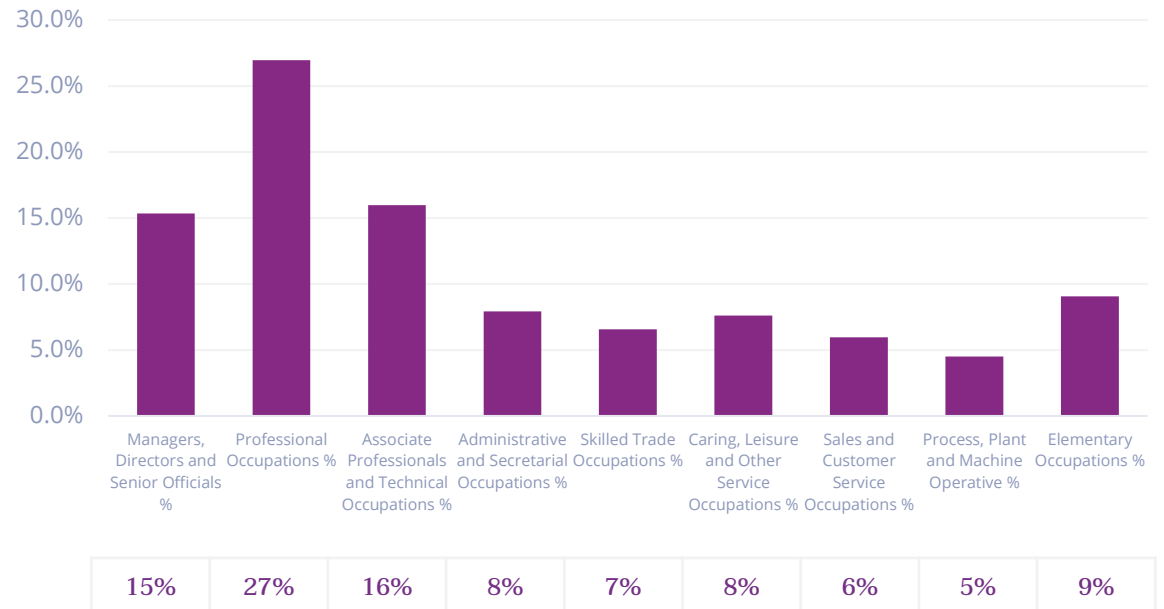
VICTORIA BID CATCHMENT PROFILE SKEWED TOWARDS HIGH-INCOME, MIDDLE-AGED VISITORS

Age Profile



Victoria BID has a bias towards mid-ranged age groups, particularly aged 30-44 years old (32.4%) and 45-59 years old (24.1%)

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 26.9% 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'

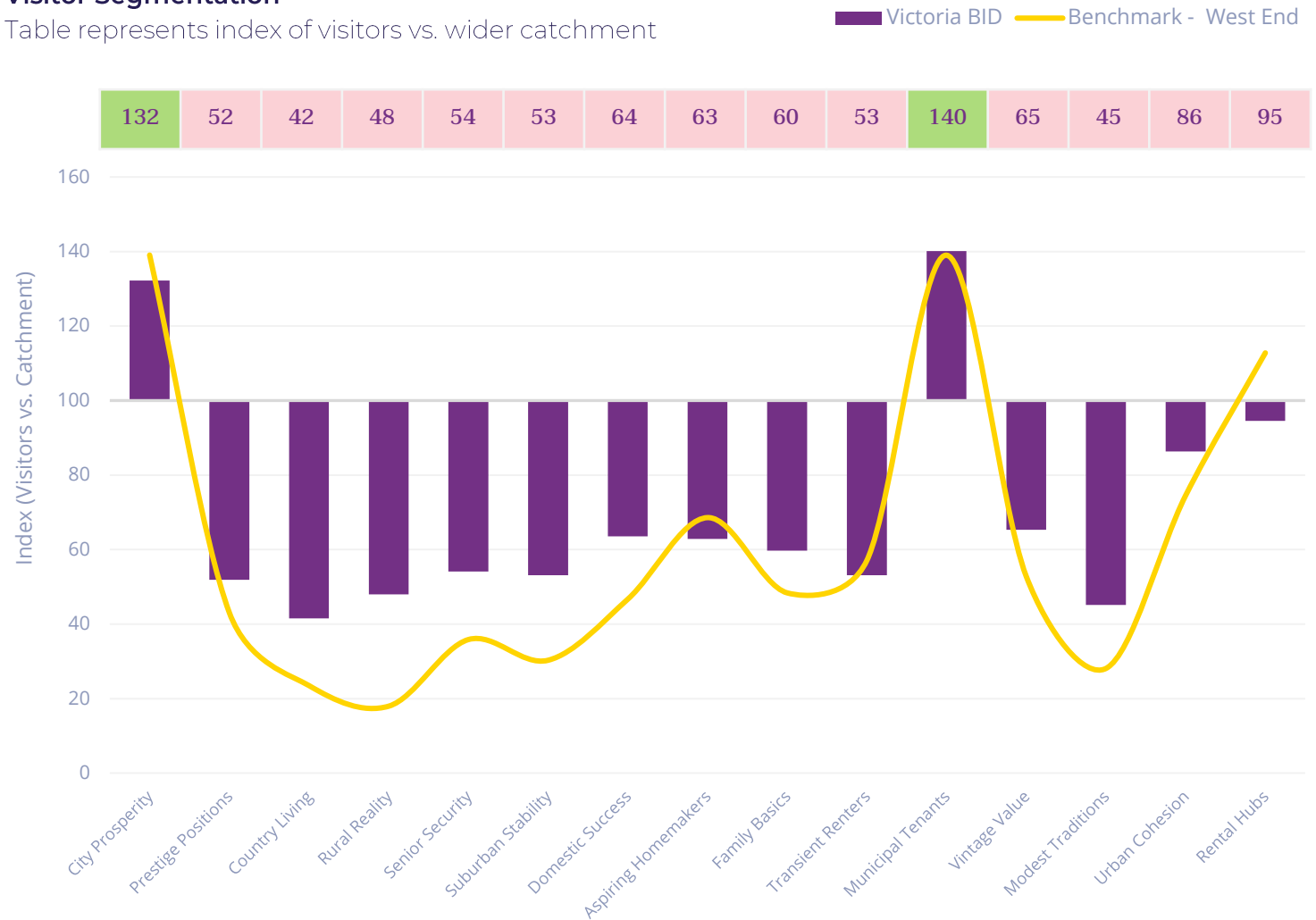
City Prosperity are high-income residents who have expensive homes in desirable metropolitan locations (Age: 26-35 | Income: £100k-£150k)

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

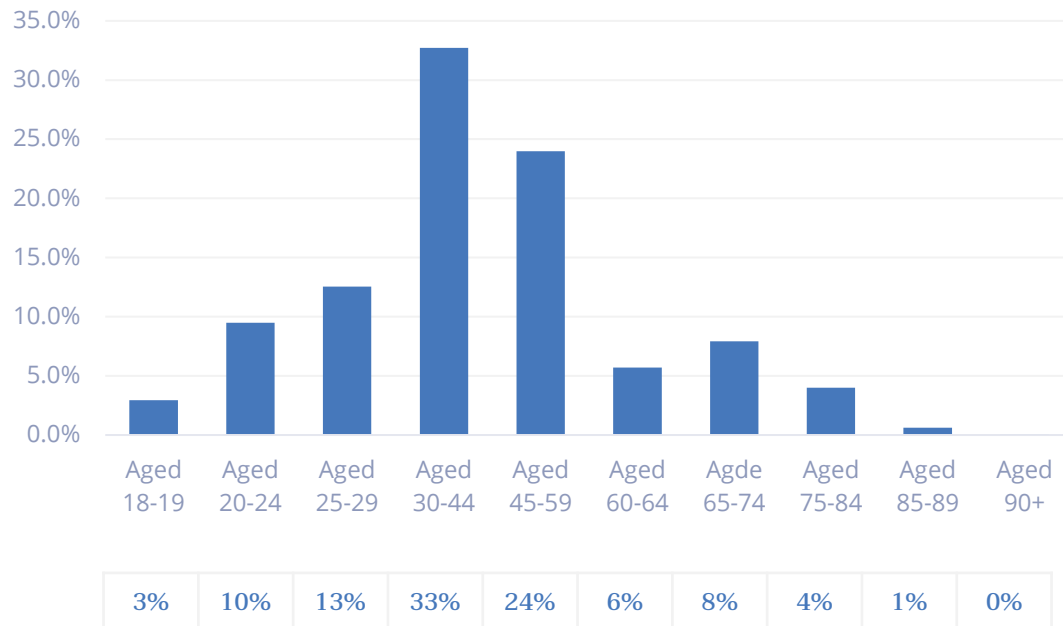


Source: Colliers LocateFootfall | Mosaic Experian
See Appendix for defined BID boundaries

VISIT SEGMENTATION | NORTHBANK BID

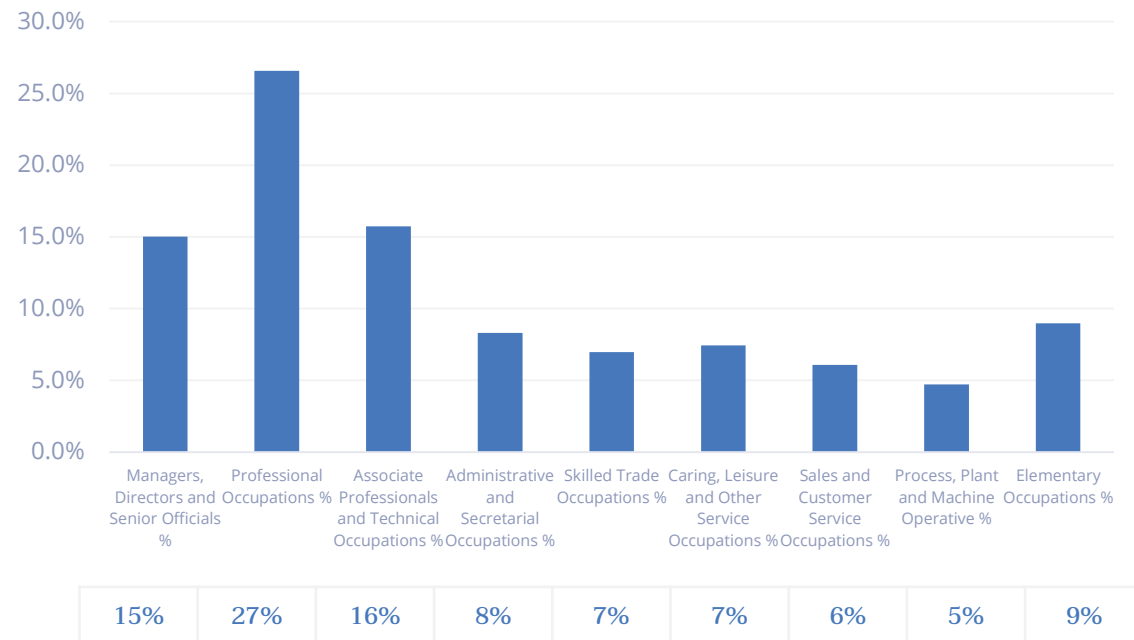
41.6% OF NORTHBANK BID VISITORS WITHIN MANAGERIAL OR PROFESSIONAL OCCUPATIONS CATEGORIES

Age Profile



Northbank BID has a bias towards mid-ranged age groups, particularly aged **30-44 years old (32.7%)** and **45-59 years old (24.0%)**

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

26.6% 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

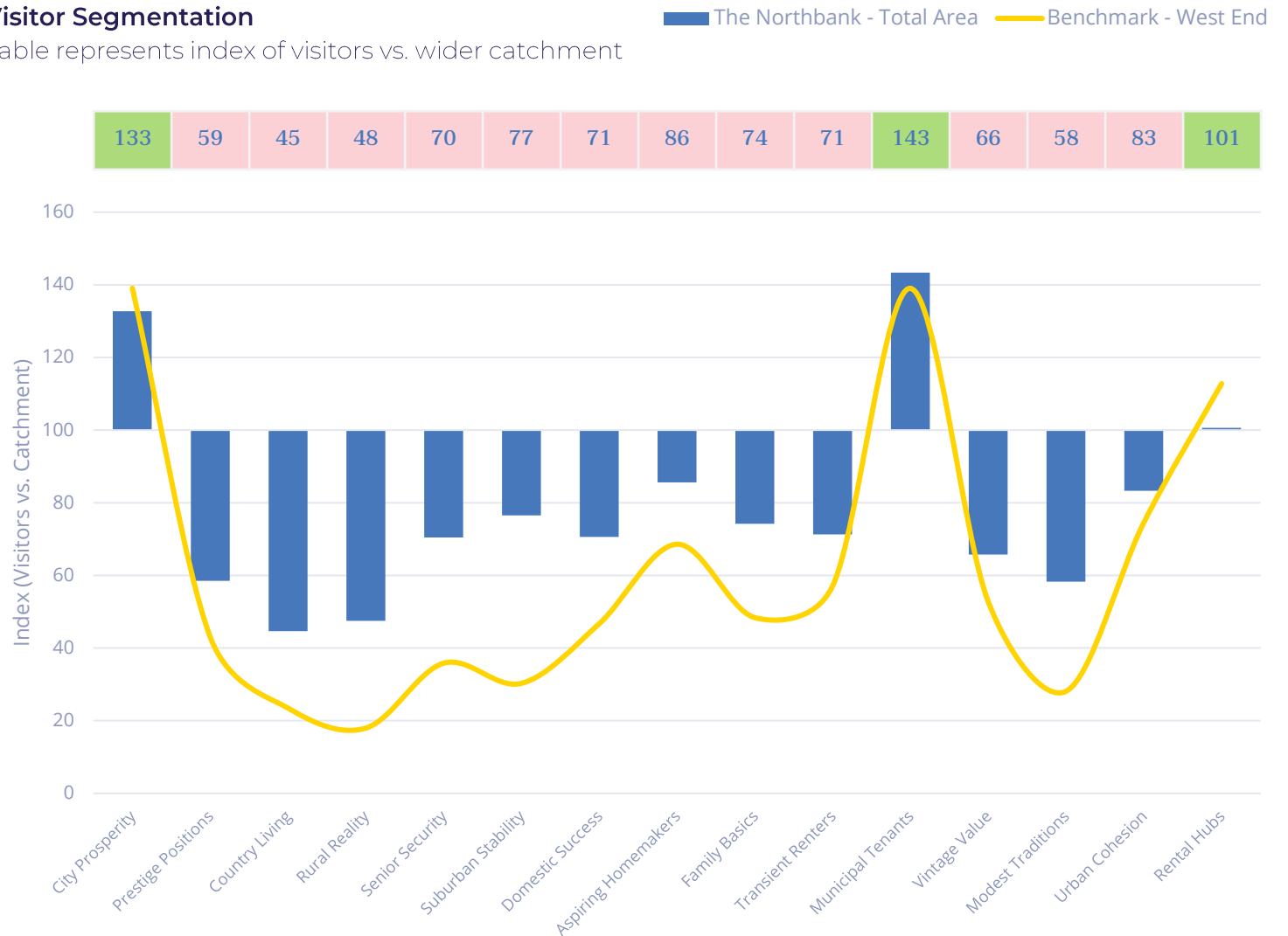
Visitor profile remains in line with West End, with a strong bias towards 2 Mosaic groups 'City Prosperity' and 'Municipal Tenants'

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

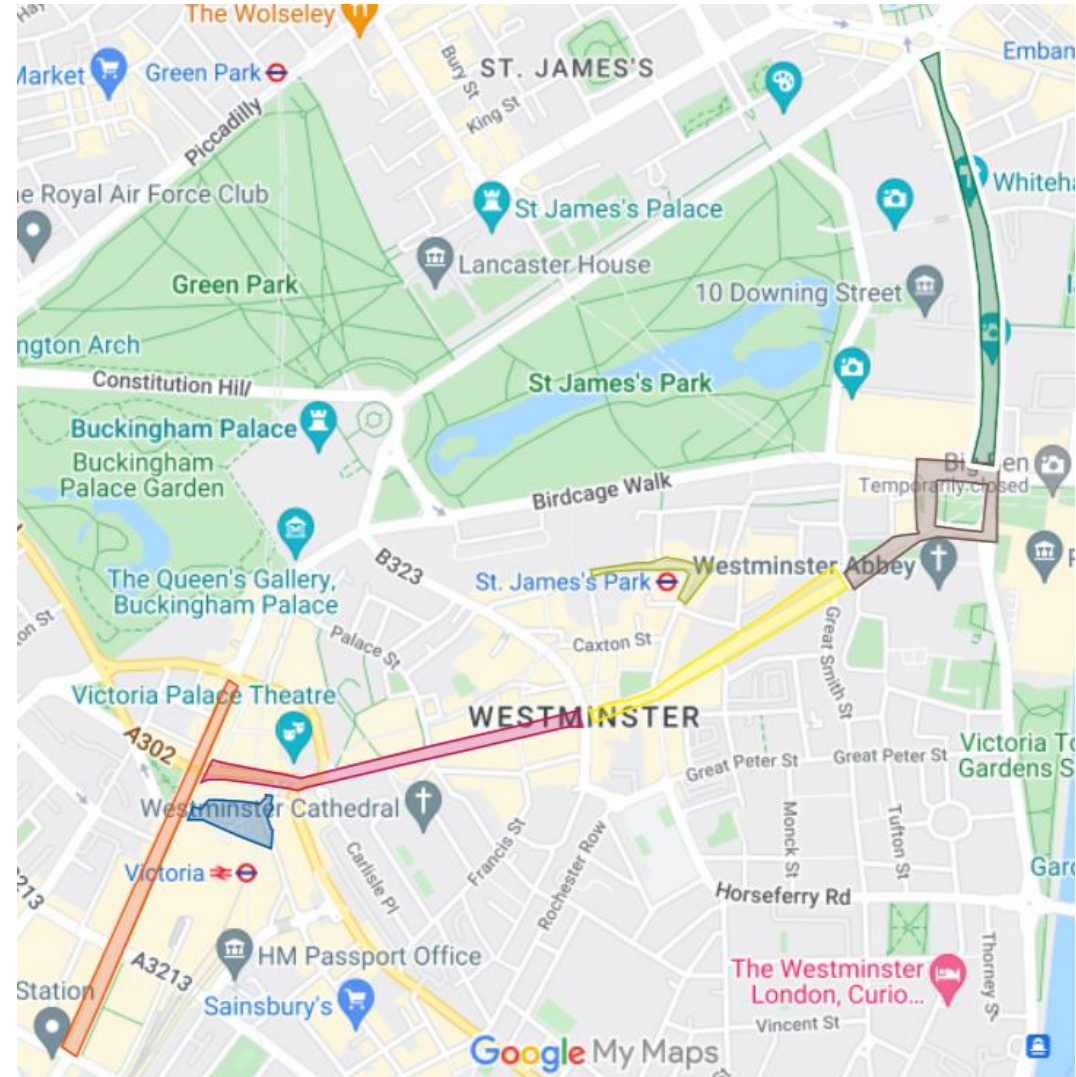
APPENDIX | VICTORIA BID

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

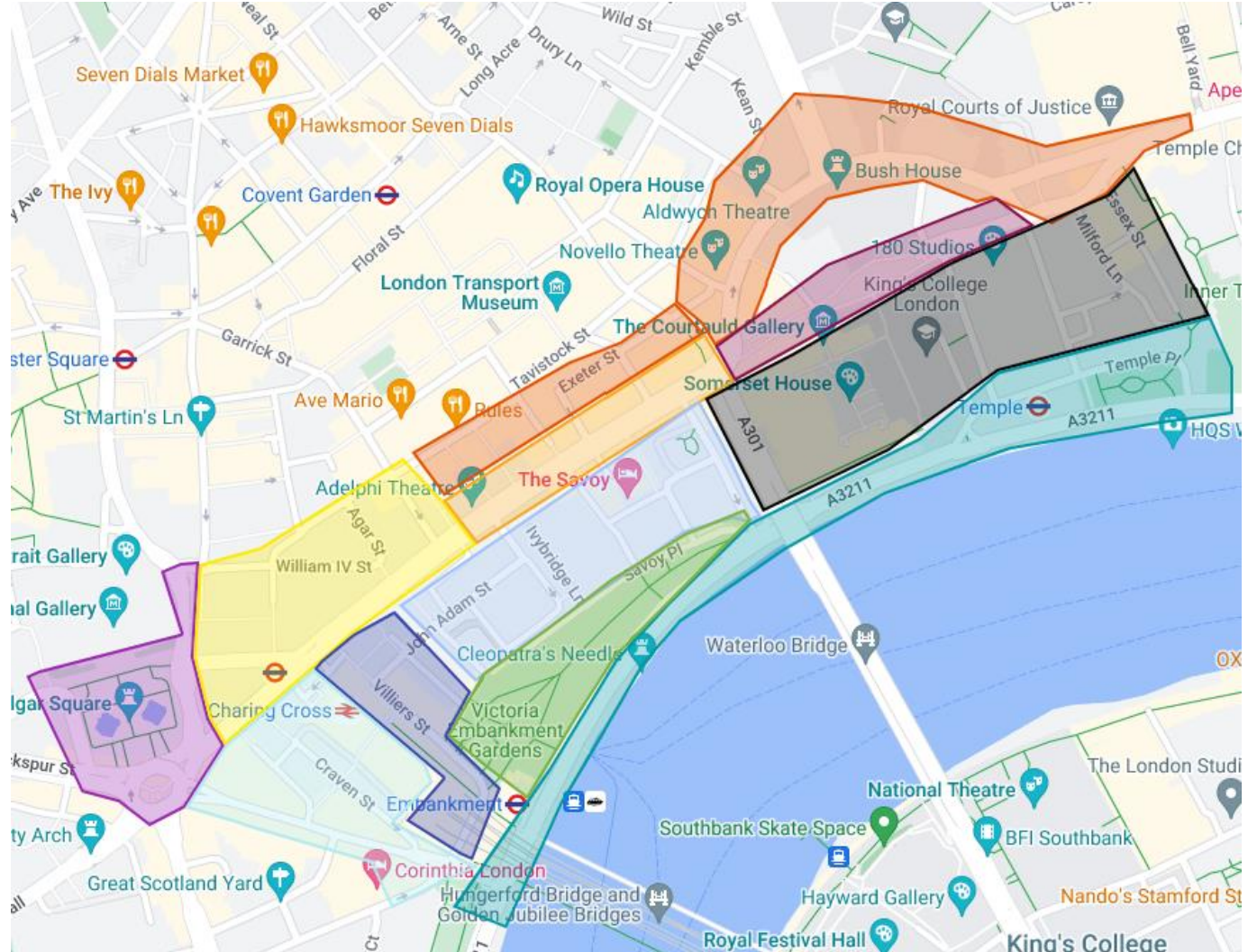


APPENDIX | NORTHBANK BID

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.



APPENDIX | MOSAIC EXPERIAN

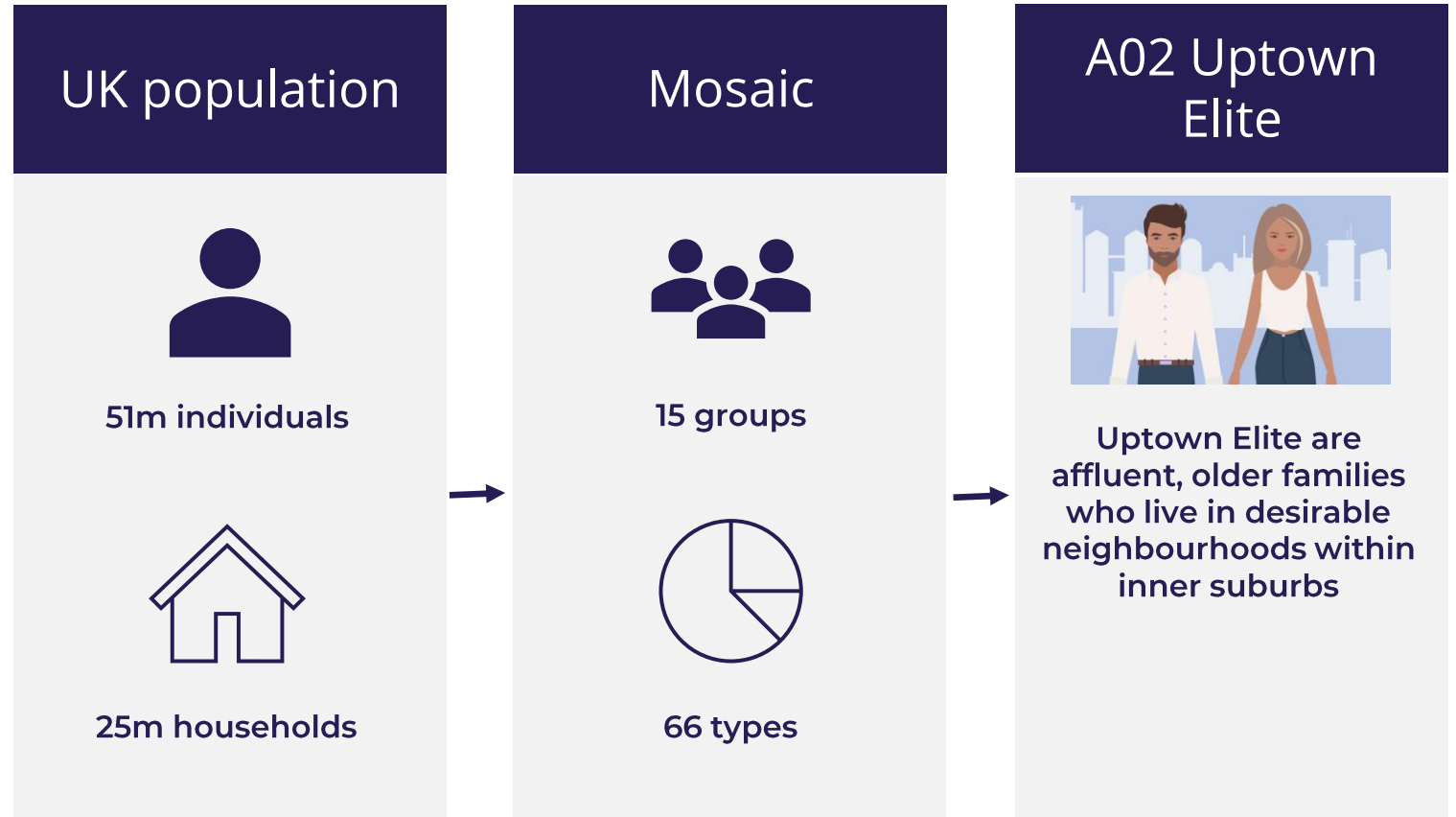
EXPERIAN'S MOSAIC SEGMENTATION

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



Colliers

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

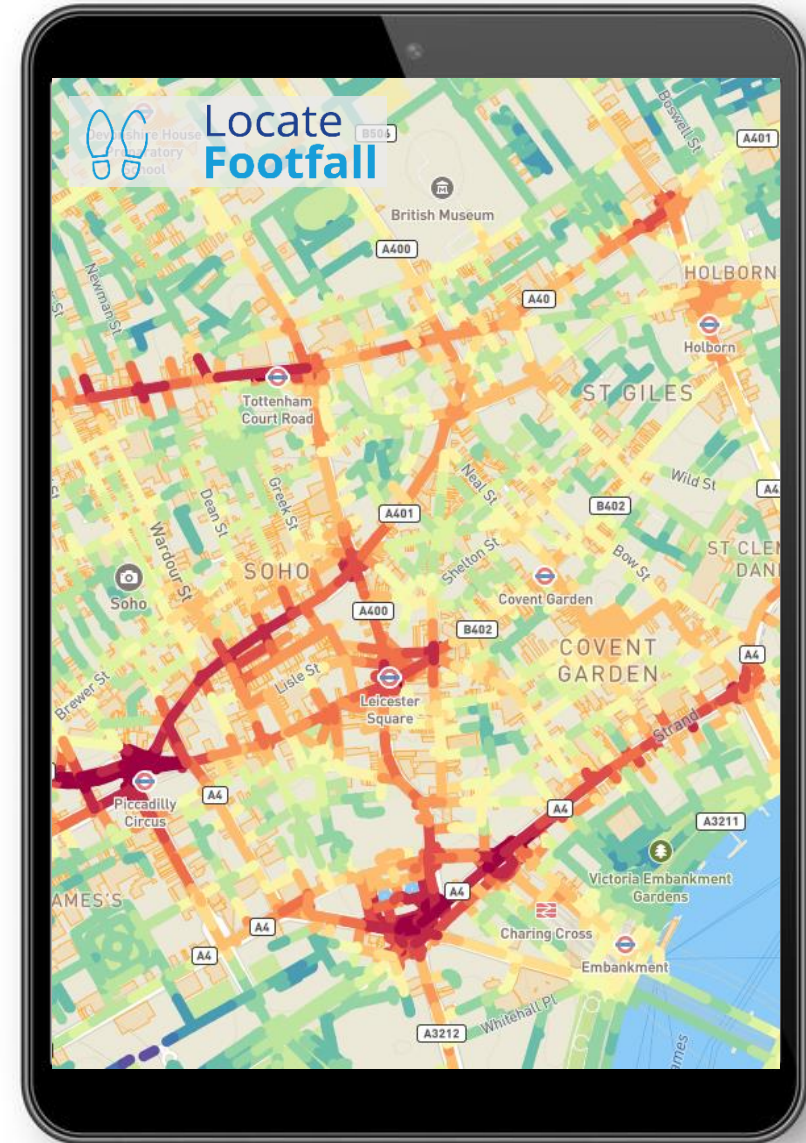
Footfall Intelligence

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



Colliers LocateFootfall platform

OVERVIEW



Locate Footfall



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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