NEW
WEST END
COMPANY

West End Visitor Insights

West End Visitor Insights

New West End Company (NWEC) has commissioned this research to provide its members insights in relation to West End visitor origin, behaviours, perception and satisfaction. These insights being derived from an in-depth on-street visitor surveys across the West End. This wave of research builds upon historical survey data that has been collected by New West End Company since 2019 and is the first of 2 in-depth annual surveys that will be complimented and topped up with continuous consumer surveying throughout the year.

Insights include:

- Who is the visitor, where are they from and why are they visiting?
- How are visitors behaving when in the West End... and how do they interact with the West End offer?
- How do visitors rate their experience in the West End... what do they like or dislike and do they have any concerns?
- What might make visitors return more often or what improvements could be made?

Five core attributes monitored to understand visitor experience and satisfaction

Quality	Support	Convenience	Presentation	Community
• Retail shops • Food & drink outlets • Hotels • Cultural facilities • Lifestyle facilities • Well-being facilities • Provision of outdoor dining	• Access to maps to navigate the area • Availability & quality of Wi-Fi • Access to information on things to do in the area • Access to general visitor support • Cycle parking • Car parking	• Opening hours • Ease of being able to get to the street via public transport • The amount of pedestrian space available • Ability to get around the street easily • Availability of rubbish bins • Availability of recycling bins	• General appearance of the street • Quality of street lighting • Cleanliness of the street • Historic buildings and monuments • Air quality • Amount of traffic in the street • Green space available around the street	• General atmosphere of the street • Personal safety in the street • Street events e.g. Christmas lights, summer streets or traffic free days • Quality of street entertainment

- **Visitors are asked "How satisfied or dissatisfied are you with your overall experience on the street they are visiting today, on a scale of 0-10, where 0 is extremely dissatisfied and 10 is extremely satisfied?**
  - New West End Company have been collecting these ratings since 2019 to measure visitor experience and satisfaction, how this has evolved over time and to enable the identification of improvements or focus areas for the district at an overall level, by street and by visitor segment

- The West End attracts a diverse mix of visitors across a wide range of reasons to visit and so segmenting visitors into distinct groups by visit reason or demographics allows us to better understand drivers of satisfaction and the needs and wants of specific visitor groups.

Segmenting by reason to visit…

- Reason to visit is the key driver behind someone being in the West End and so understanding the differences in visitor satisfaction and experience or needs and wants by visit reason is a core part of this analysis
- Visit reasons have been segmented into the following core visitor groups
  - **Shopping:** Those that have stated the main reason they are in the district is for shopping, browsing/ window shopping or visiting a specific store
  - **Work, business & study:** Those that have stated they are at their place of work or a business meeting, working in a co-working space or they study in the area
  - **Culture & Leisure:** Those who have stated their main reason to visit the district is for food & drink, sightseeing, cultural activities, visiting a street event or display or visiting parks or green spaces
  - **Social:** Those that have stated the main reason they are in the district is to meet friends or family

Segmenting by demographics & lifestyle…

- Domestic visitors have been profiled with the Experian Mosaic consumer classification to identify and understand the core domestic visitors, who visits versus those that don't and to identify those that could be targeted to deliver growth for the district
  - Experian is a multi-national consumer credit reporting company which produces Mosaic – a simple, but powerful framework to help understand customers
  - The Mosaic customer segmentation divides the adult population in each country into groups of individuals that are similar in specific ways, such as, age, interests, life stage and spending habits

Illustrative example

UK population analysed	Segmented into Mosaic	Described
51m individuals 25m households	15 groups 66 types	City Prosperity are high-income residents with expensive homes in desirable locations. Households range in type from successful young professionals to wealthy families.

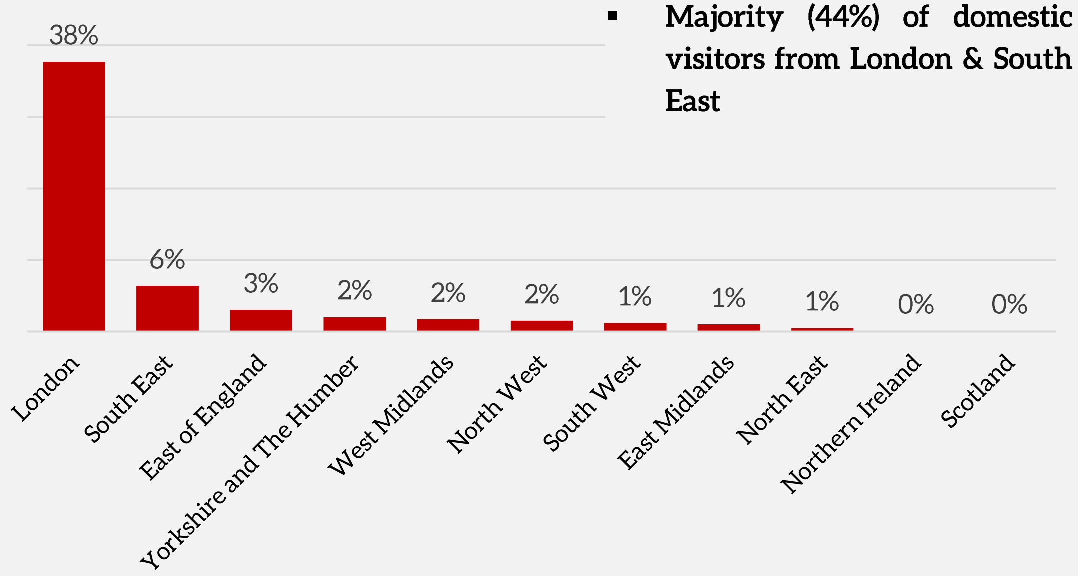
Segmenting by location…

- We also analyse results by key trading streets to provide additional insights on performance, experience and opportunities.

WHO IS VISITING

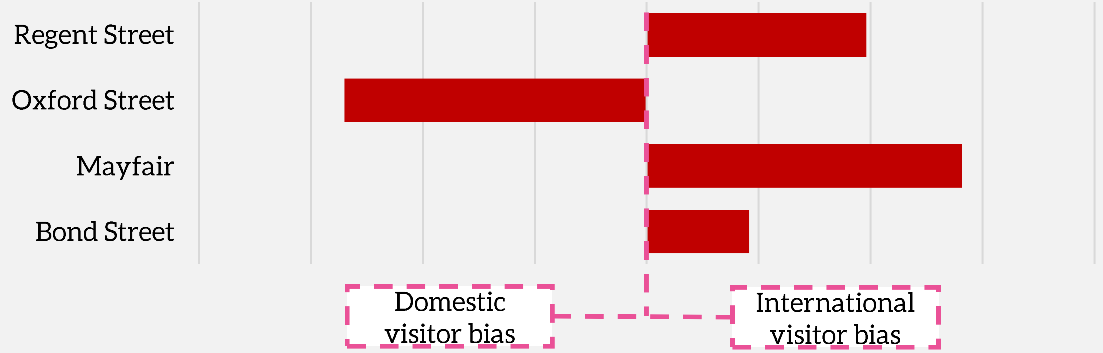
55% of visitors from the UK and 45% International… France, Germany, USA and Italy most common international origin

Domestic vs. International



- **Majority (44%) of domestic visitors from London & South East**

International Visitors

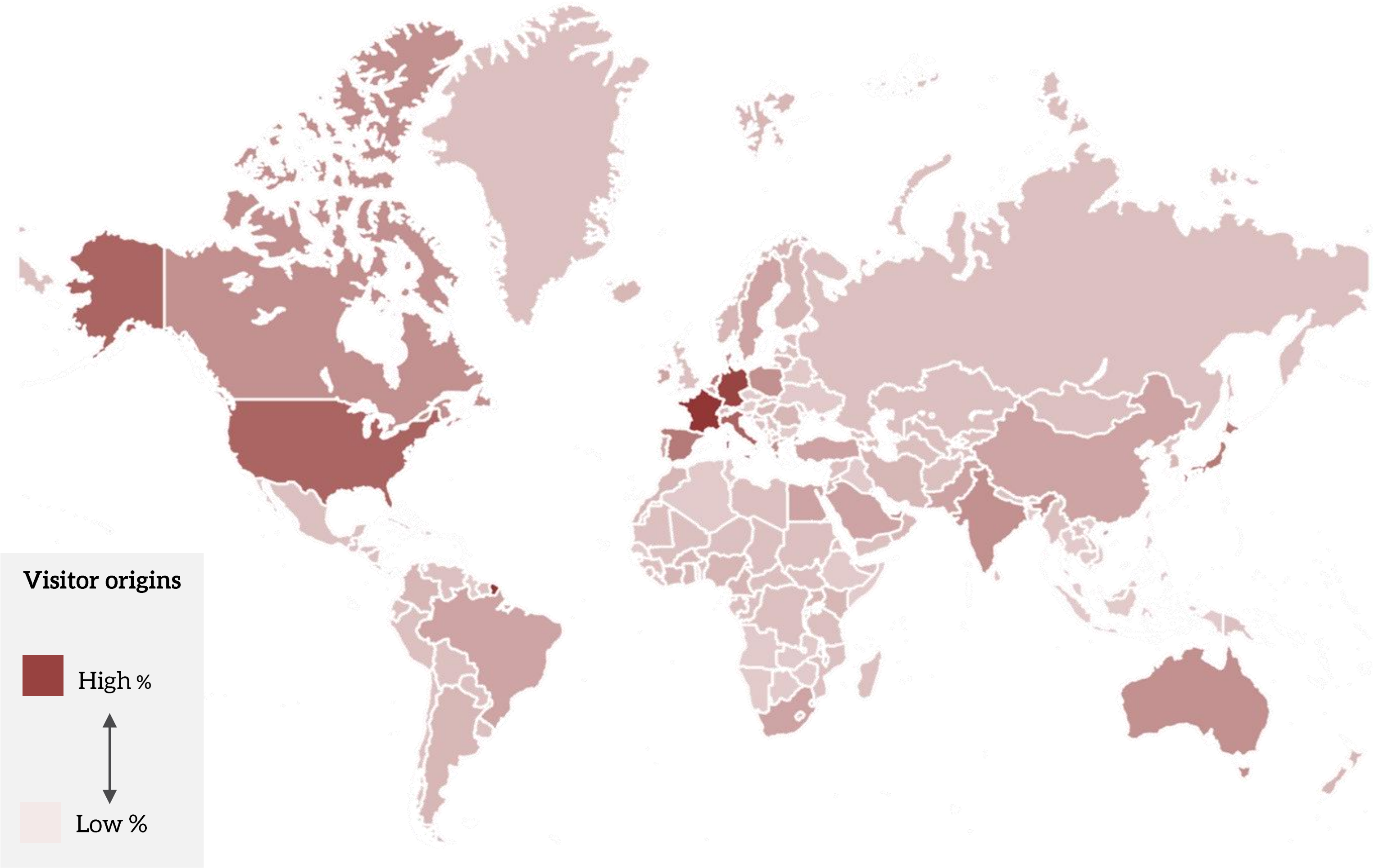


- **Mayfair, Regent Street, and Bond Street, more skewed towards international visitors, whilst Oxford Street more biased towards domestic visitors**
  - France the most common origin country for international visitors (4.7% of total visits), followed by Germany, USA, Italy and The Netherlands
  - International visits account for 45% of total visits, up from 35% in June 2023

SOURCE: NWEC Consumer Survey – June 2024

France, Germany and USA top source countries of international visitors

International visitors



- **45 % survey respondents were international visitors with 91 different nationalities captured in the survey, up from 49 in June 2023**
  - Europe is the most common origin for international visitors, with France, Germany, Italy and The Netherlands all in the top 5. USA has replaced Spain in the top 5 in June 2024 vs. June 2023
  - In total, Europe (excluding UK) accounts for 24.2% of total visitors

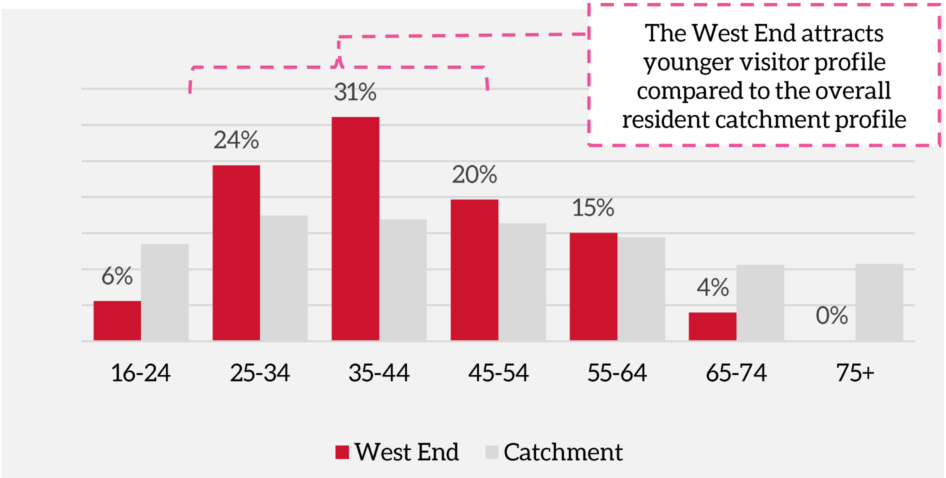
Top 5 Visitor Origins

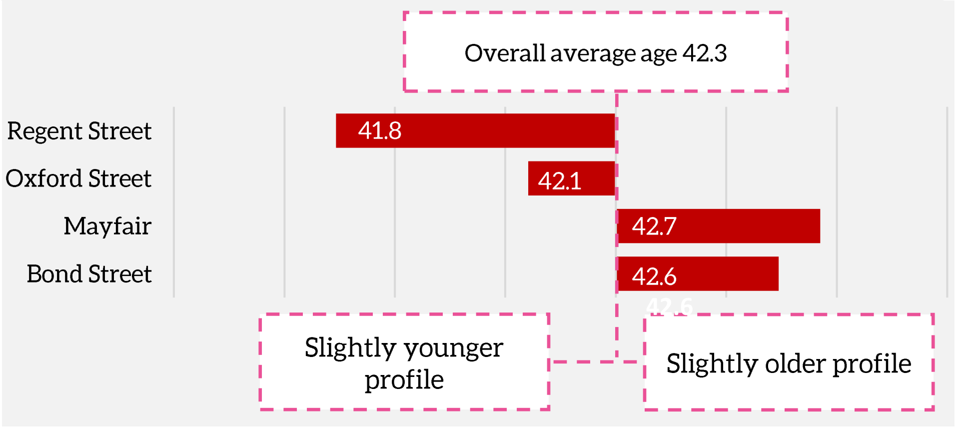
Rank		Country	% visits
#1		France	4.7
#2		Germany	3.3
#3		United States	2.2
#4		Italy	2.1
#5		The Netherlands	1.7

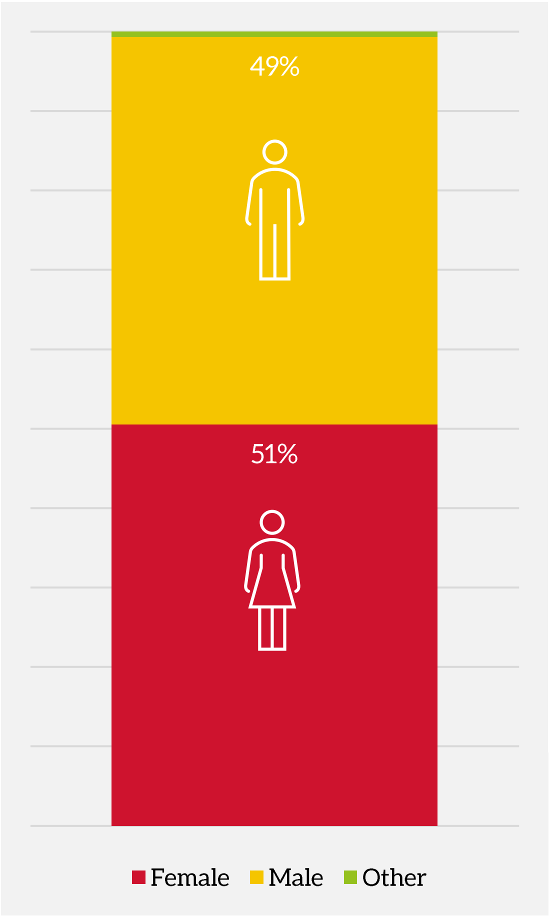
SOURCE: NWEC Consumer Survey – June 2024

West End visitor profile is skewed towards 25–44-year-olds… Regent & Oxford St has the youngest visitor profile…

Age profile







- **Age and gender distribution relatively consistent across all areas surveyed**
  - Greater proportion of 25–44-year-olds attracted to the area when compared to their presence in the West End catchment, with 55% of respondents in this demographic
  - Conversely West End under indexes in 16-24 year olds and 65+, with West End biassed towards a working age population
  - Survey respondents across all four districts have an average age of 42.3, with visitors to Mayfair having the highest average age (42.7) and Regent Street having the lowest (41.8)
  - Slight bias towards female visitors, accounting for 51% of total visits, down from 52% in June 2023

SOURCE: NWEC Consumer Survey – June 2024

Mosaic segmentation used to provide a greater depth of understanding the domestic visitor

- **Domestic visitors have been profiled with the Experian Mosaic consumer classification to identify and understand the core domestic visitors, who visits versus those that don't and to identify those that could be targeted to deliver growth for the district**
  - Experian's Mosaic UK is a consumer classification tool that segments the UK adult population into groups that share similar demographics, lifestyles, and behaviours. It's designed to help businesses understand their customers and prospects better, enabling more effective marketing strategies and business decisions.
  - The segmentation divides UK individuals and households into 15 summary groups and 66 detailed types, each with unique codes, names, and descriptions. For example, one of the groups is 'A - City Prosperity,' which includes high-status city dwellers living in central locations and pursuing careers with high rewards.

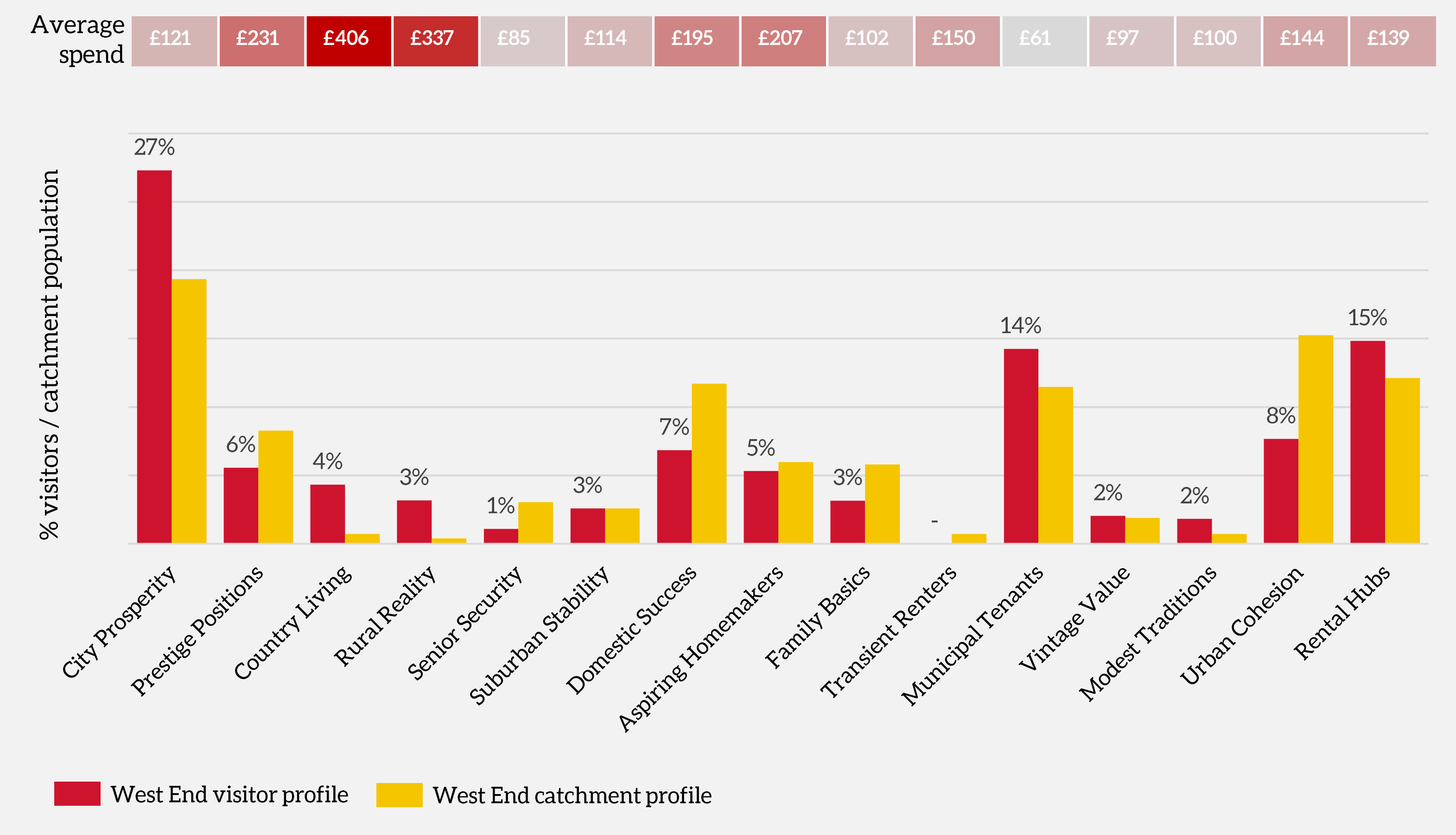
Illustrative example

UK population analysed	Segmented into Mosaic	Described
51m individuals 25m households	15 groups 66 types	City Prosperity are high-income residents with expensive homes in desirable locations. Households range in type from successful young professionals to wealthy families.

Mosaic Group	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

The West End attracts a disproportionate amount of 'City Prosperity' type visitors compared to their catchment presence

Domestic Visitor Mosaic Profile



- **West End Mosaic profile skewed heavily to 'City Prosperity' (the most affluent consumer group), accounting for 27% visits, versus 19% of the core catchment and 4% of entire UK population**
  - West End profile also biased towards 'Country Living', 'Rural Reality', 'Municipal Tenants' and 'Rental Hubs' versus the core catchment percentage, suggesting that it attracts visitors from these groups at a disproportionately high level compared to their presence in the core catchment
  - 'Prestige positions' and 'Domestic Success' both under-represented within the visitor profile when compared to their presence within the catchment. Both groups have high spend when they visit and so should be targets for increased visits

SOURCE: NWEC Consumer Survey – June 2024 | Experian Mosaic
NOTE: See appendix for more detailed Mosaic descriptions

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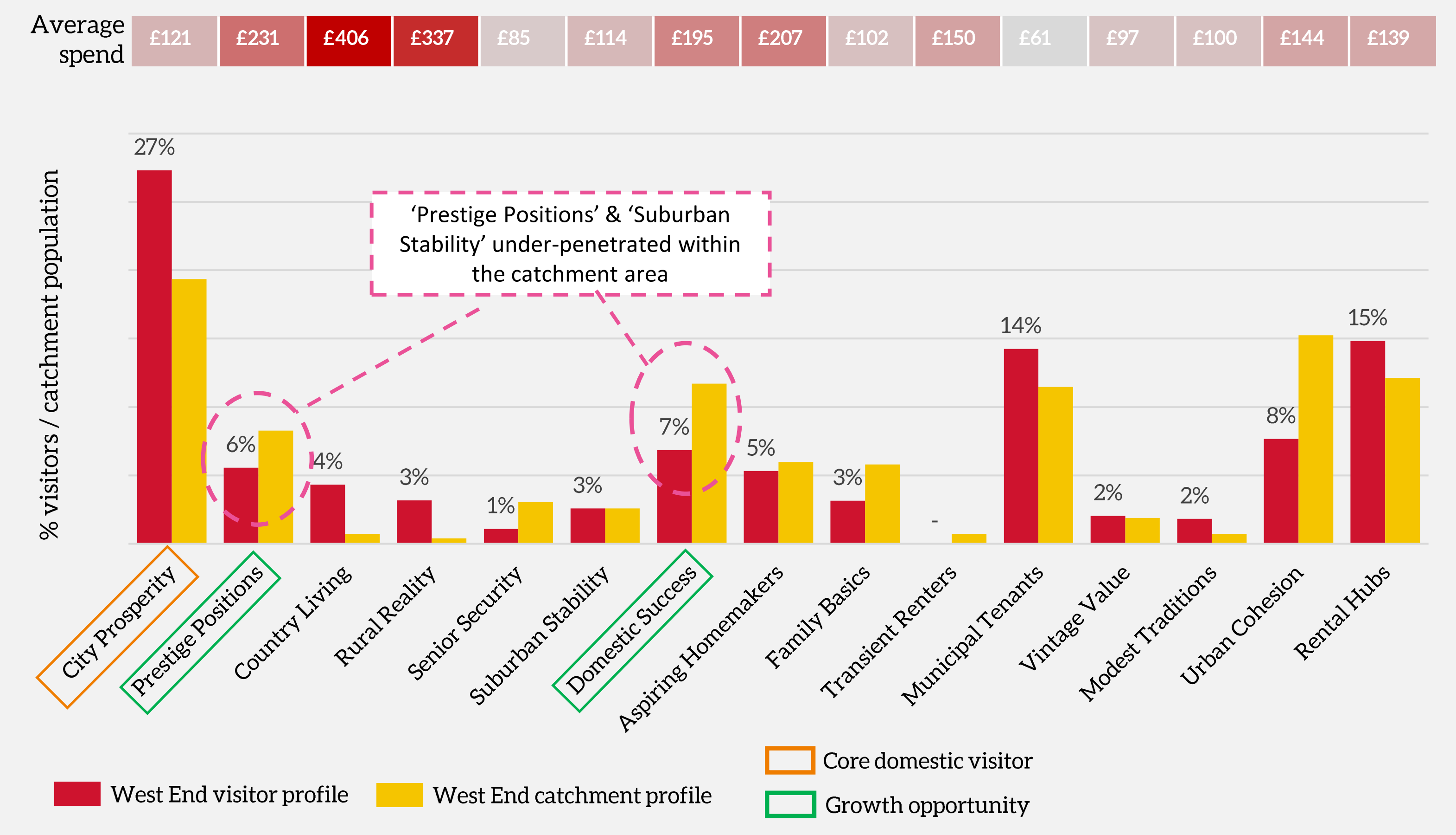
Domestic Visitor Mosaic Profile



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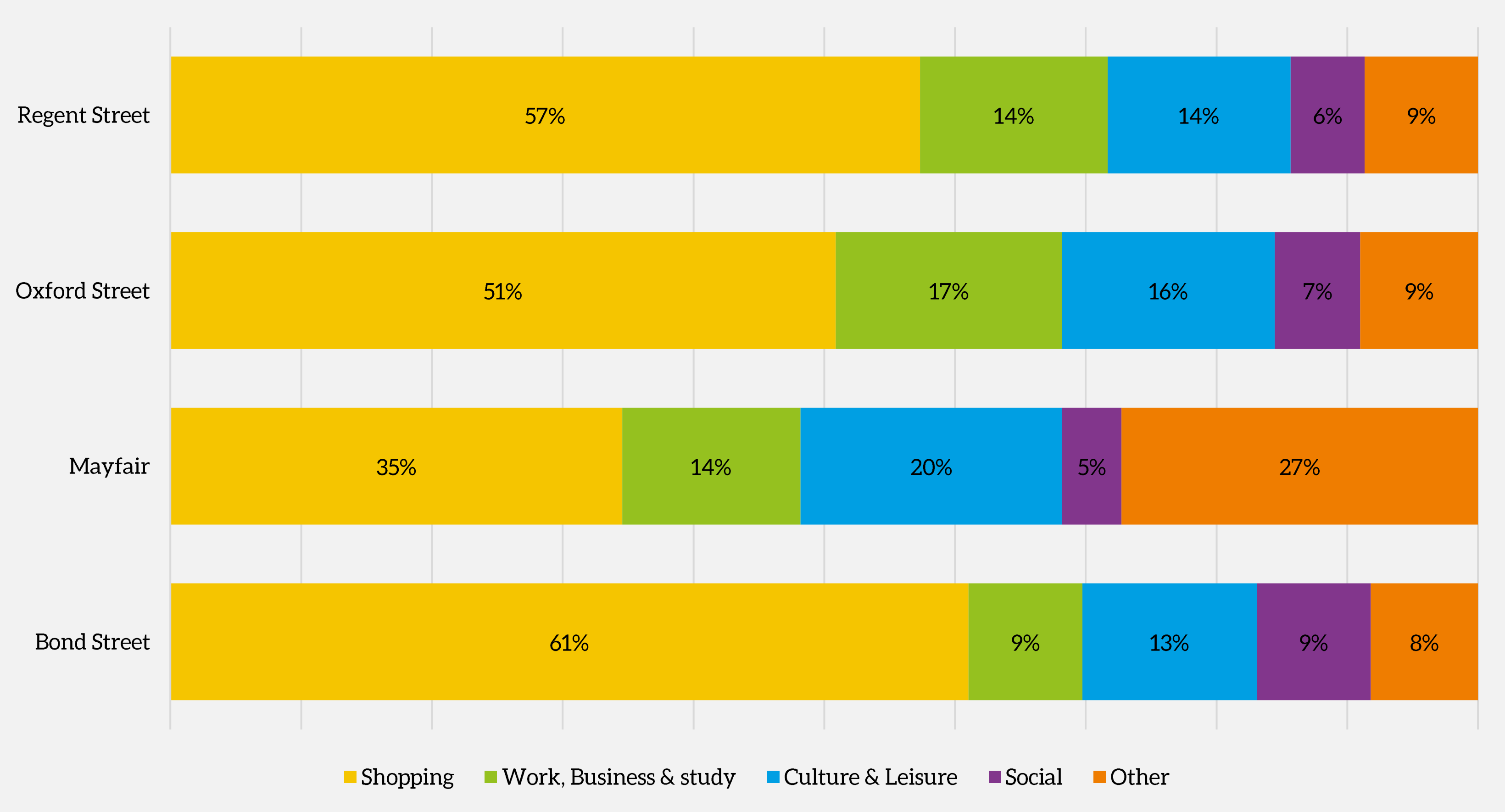
SOURCE: NWEC Consumer Survey – June 2024 | Experian Mosaic
NOTE: See appendix for more detailed Mosaic descriptions

VISIT REASONS & BEHAVIOURS

Regent Street and Bond Street more dominated by shoppers… Oxford Street & Mayfair more mixed reasons to visit

Reason for being on a specific street….?

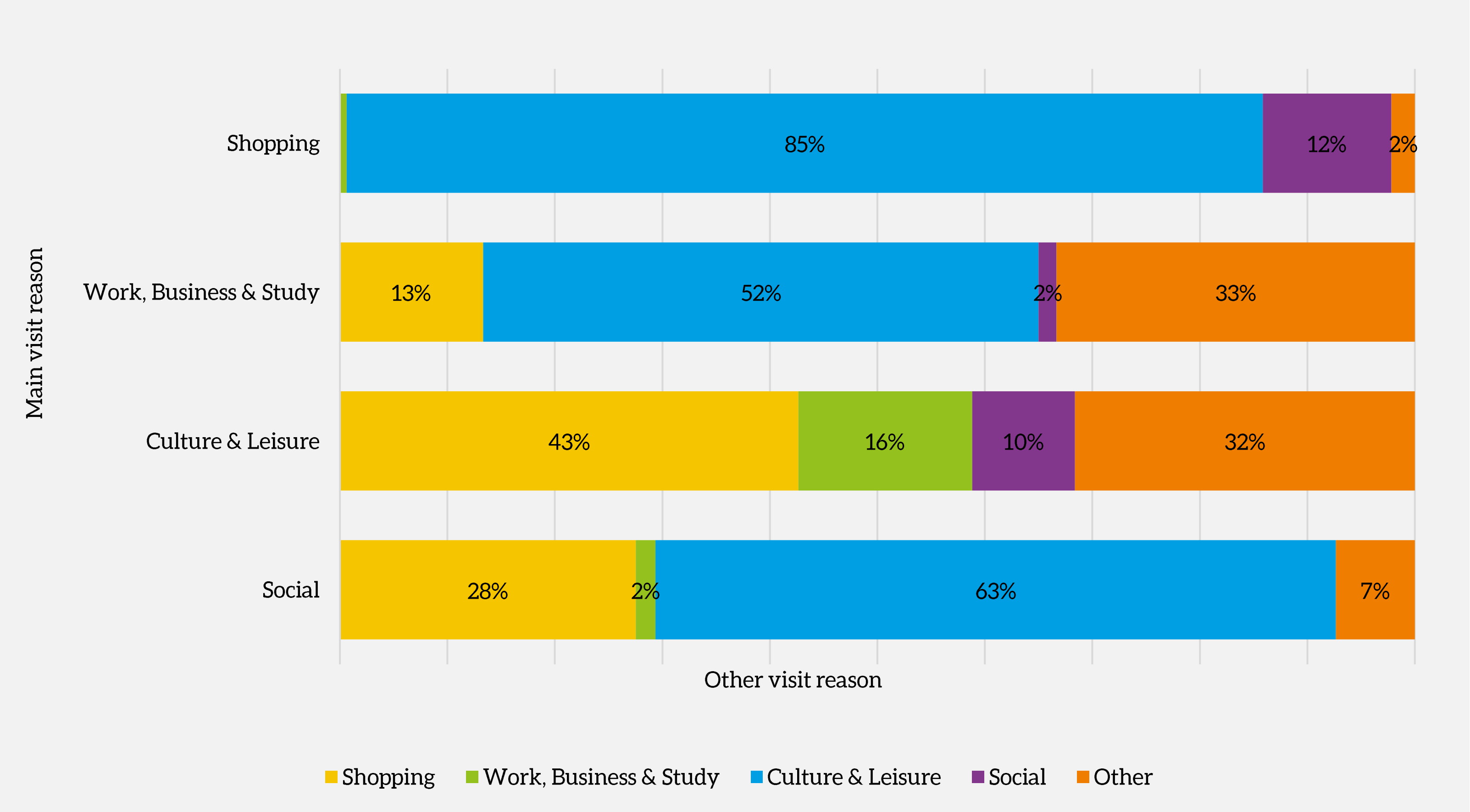


- At a street level, visitors to Regent Street and Bond Street are more towards shopping, whilst visitors to Oxford Street and Mayfair have a significantly more varied visitor mix, with Oxford Street having a high presence of workers

SOURCE: NWEC Consumer Survey – June 2024

Strong links exists between 'Shopping' and 'cultural & leisure activities'…

Reasons for being on a specific street….?

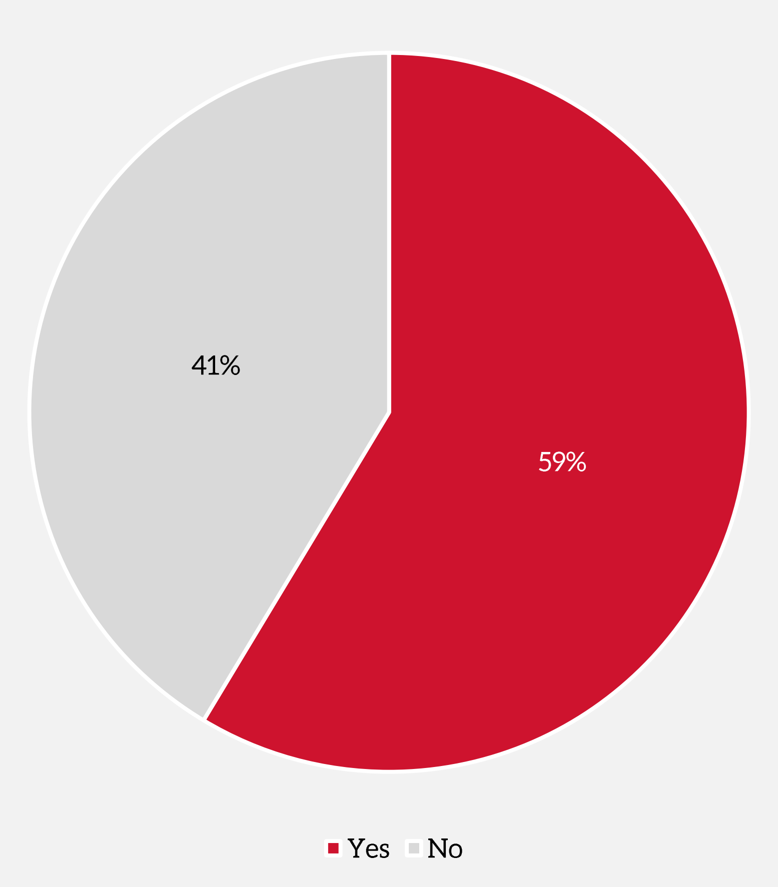


- **'Shopping' and 'cultural & leisure activities' the most linked visit reasons**
  - 85% of those whose main reason was to visit for 'shopping' stated that that 'culture and leisure' was another reason they were on the street
  - Whilst 43% of those that stated 'culture & leisure' as the main reason to visit also stated 'shopping' as another reason
  - The strong links between 'shopping' and 'culture & leisure' is a strength that should be promoted and encouraged

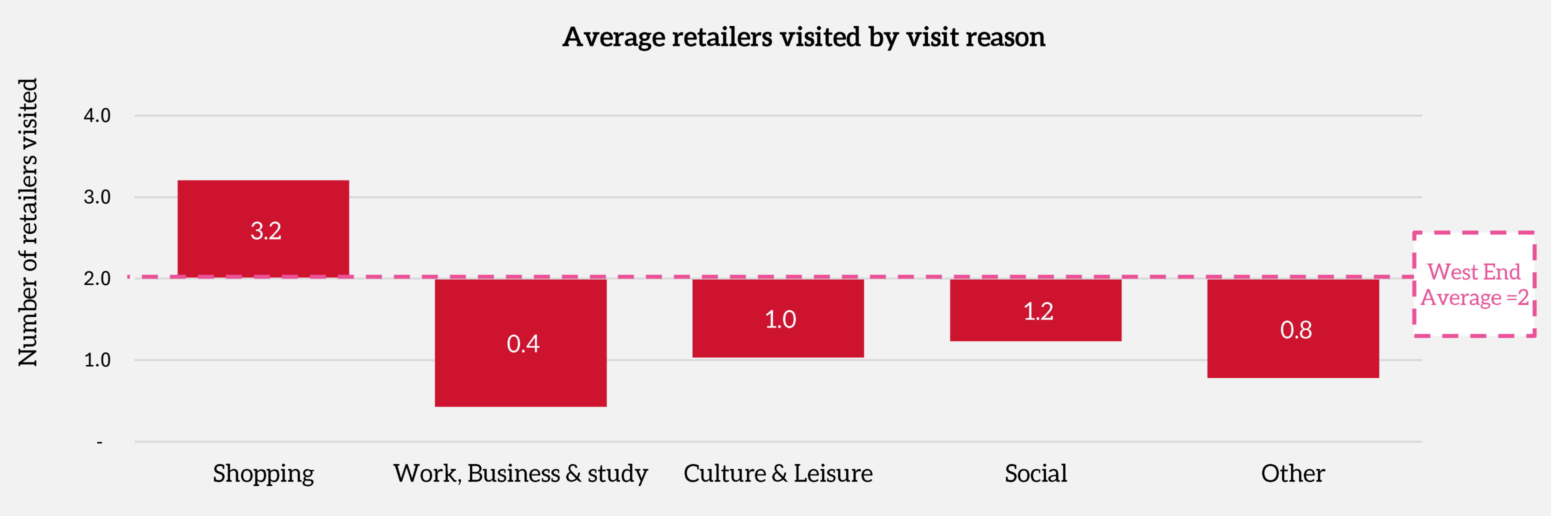
SOURCE: NWEC Consumer Survey – June 2024

Opportunity to encourage more retailer engagement from culture & leisure visitors and other non-shopper groups

Have you or do you plan to visit a retailer….?



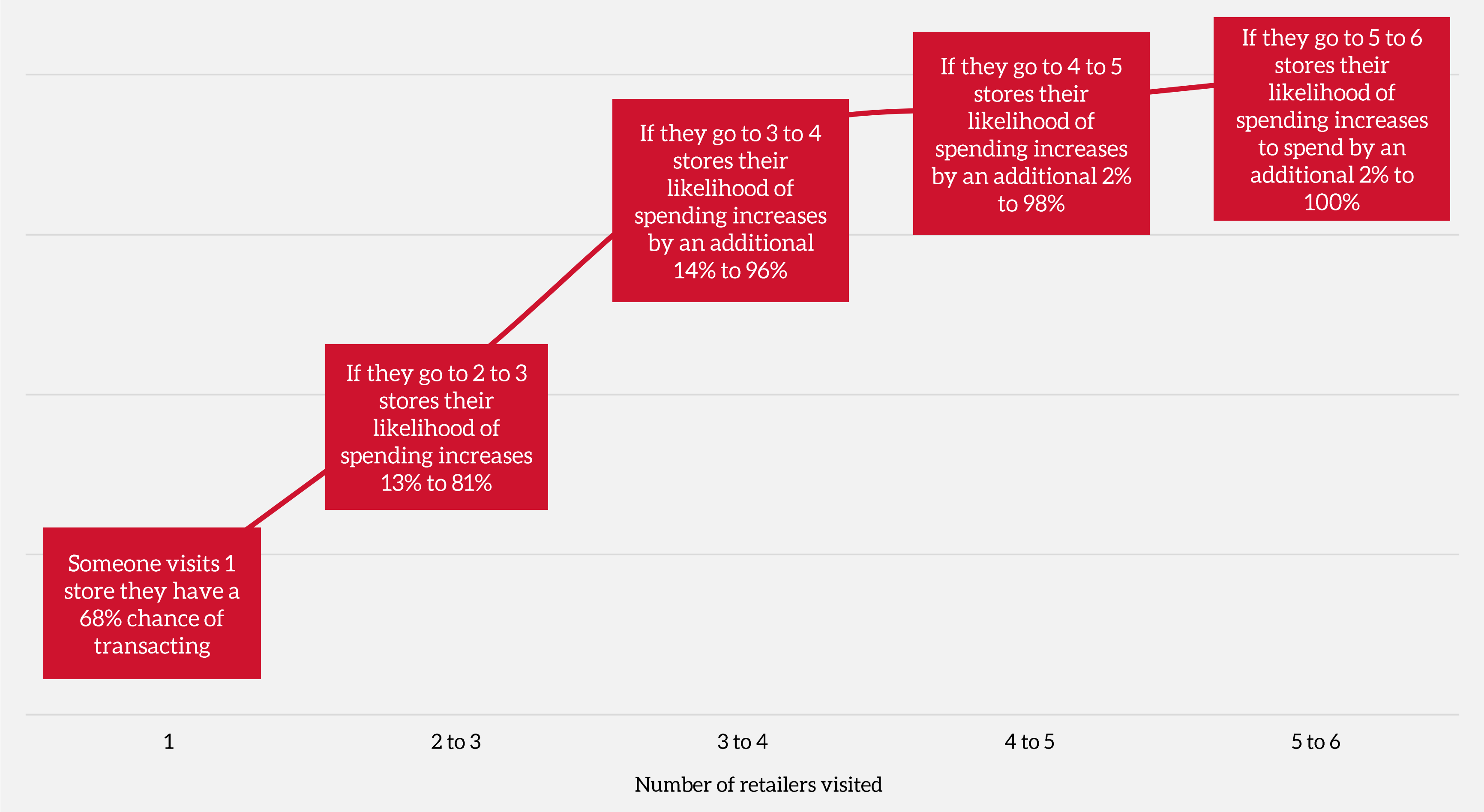
- **Around 59% of West End visitors visit at least 1 retailer as part of their trip into the West End**
  - ‘shoppers’ unsurprisingly have the highest retailer engagement and on average visit around 3.2 retailers per visit…
  - Non-shoppers have very low engagement with the ‘retail offer’… whilst these visitors are not here to shop, given this group represents 47% of visitors, getting more of these visitors interacting with stores could deliver significant additional retail sales
  - The strong link between culture & leisure and shopping was highlighted however there is still room for significant growth in relation to the number of retailers these visitors engage with; 1.0 which is below the West End average of 2.0



SOURCE: NWEC Consumer Survey – June 2024

Driving store interaction and getting visitors to visit more stores per trip will deliver sales growth for the West End…

Retailers visited and spent in….?

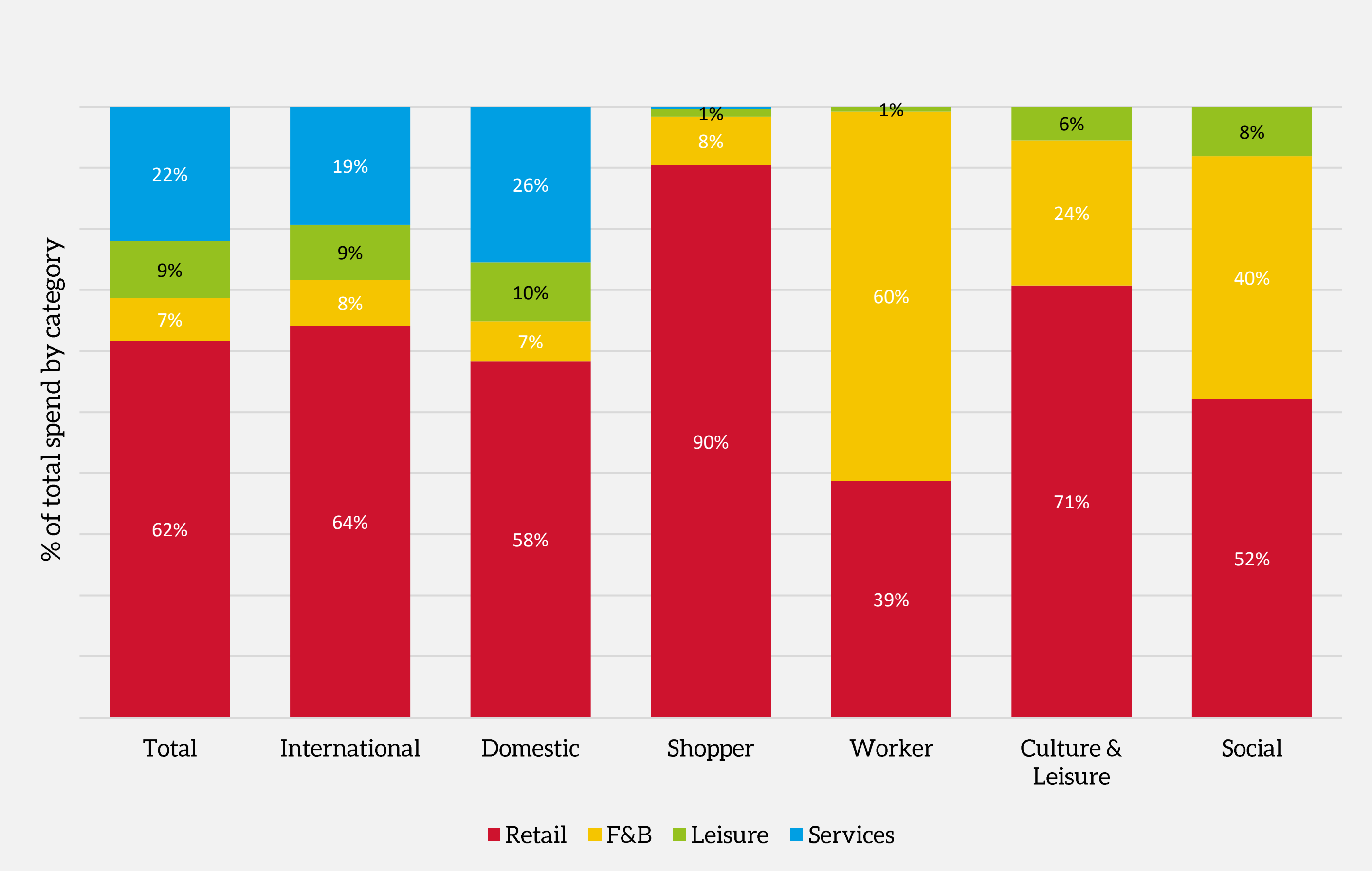


- **The more retailers a West End visitor visits, the more those visits typically convert to spend**
- **For example:**
  - Someone visits 1 store they have a 68% chance of transacting
  - Encouraging them to 2 to 3 stores increases likelihood to spend by 13%
  - Getting them to 3 to 4 stores increases this by an additional 14%
  - 4 to 5 stores increases likelihood to spend by an additional 2%

SOURCE: NWEC Consumer Survey – June 2024

Highest share of spend captured by retail categories… typically 62% of a visitor's overall trip spend

Share of spending by category….



- **Highest share of spend captured by retail categories… typically 62% of total visitor's overall trip spend**
- **Shopper spending is dominated by retail with 90% of per visit spend going to retailers**
  - This is then topped up with 8% going to F&B and the remainder being leisure of services
- **Despite stating that the main reason they were in the district for 'culture & leisure' these visitors also spend the highest proportion of retail but also spend significant shares on F&B and leisure compared to a pure 'shopper'**
- **Workers have the most differing spend profile when compared to other shopper groups**
  - They are most likely to spend on F&B with 60% of their per trip expenditure going on this category and only 39% going towards retail

SOURCE: NWEC Consumer Survey – June 2024

Shoppers generate the greatest proportion of annual value in the district as an overall group

- Shoppers on average have the highest spend per trip at £295, whilst workers have the lowest at £18
- However, shoppers have the lowest visit frequency, coming on average 8 times per year, compared to a worker who comes 198 times per year.
- This means that a single 'worker' would typically have the highest annualised spend in the district, followed by someone that typically visits for 'culture and leisure'
- A single worker typically generates 1.5x times more value across the year than the average visitor, whilst someone visiting for 'culture & leisure' typically generates 1.4x more value
- However, accounting for visit volumes by visitor group.. with typically 53% of visitors coming specifically to shop they currently generate the greatest proportion of value for the district (54%).

SOURCE: NWEC Consumer Survey – June 2024

Encouraging shoppers to explore and visit more streets would increase overall per trip spending

Have you also visited or are planning to visit any of these nearby streets today….?

Interview location	Also visited: Regent street	Oxford Street	Mayfair	Bond Street	Average
Regent Street		76%	22%	50%	49%
Oxford Street	54%		14%	31%	33%
Mayfair	40%	66%		38%	48%
Bond Street	60%	78%	25%		55%
Average					

- **33% of visitors typically visit more than one street as part of their trip into the West End**
  - Oxford Street most likely to be combined with a visit from another street with 78% of Bond Street shoppers also visiting Oxford Street
  - High cross over with Oxford Street likely driven by a number of factors such as the scale of offer on the street, the draw of key department stores (e.g. Selfridges) as well as the strength the transport links (Bond St, Oxford Circus, Tottenham Court Road stations etc..)

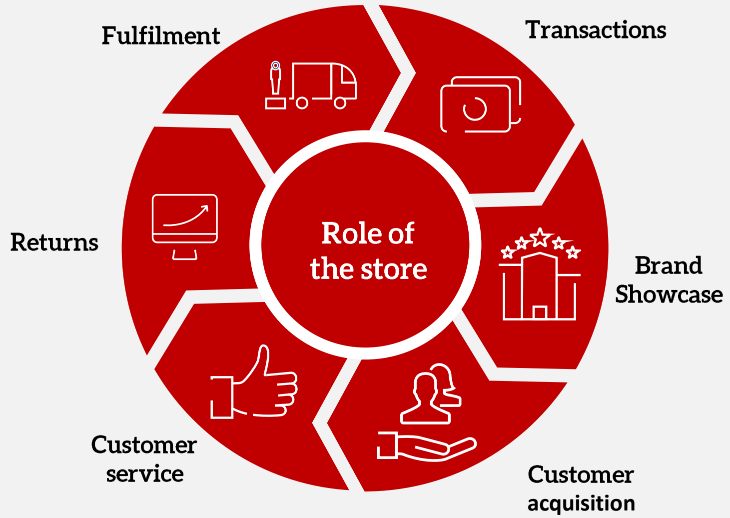
- **Encouraging shoppers to explore and visit more streets will drive up overall spending**
  - Strong positive correlation between the number of streets visited in the West End and the amount of money spent on retail highlights the importance of encouraging cross-visitation to drive increased retail Spend across the district – every additional street visited results in a £93.23 average increase in spend
  - Visitors who visit all 4 streets spend, on average, £447, 3.7x more than visitors who visit 3 or less streets, who spend an average of £106

SOURCE: NWEC Consumer Survey – June 2024

Promoting multi-channel services can drive in store visits that can convert to additional in store spend

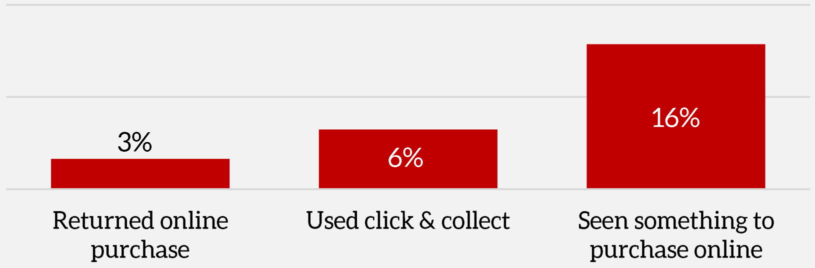
Use of multi-channel services….

Evolving role of a West End Store

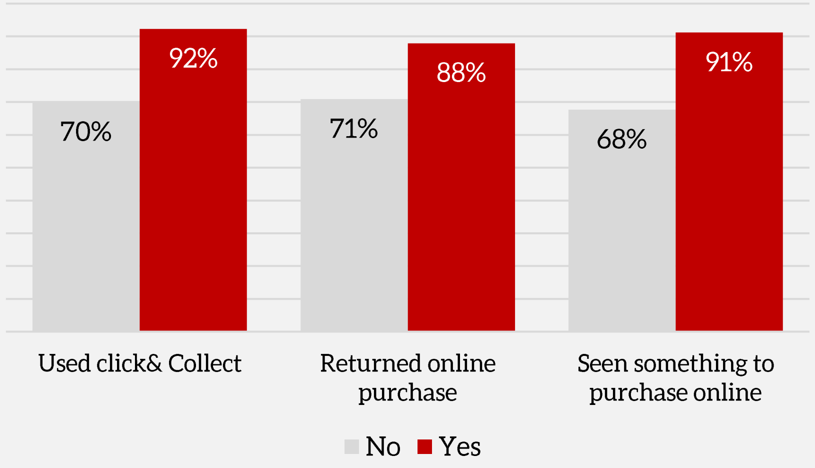


- Retailers and brands continue to evolve the role, purpose and value creation of their stores which means that a store in the West End typically generates additional value beyond store-based transactions.

Use multi-channel services



Spend conversion



- **Multi-channel capabilities create an important consumer touchpoint for retailers and brands and provide improved service for consumers**
  - Across the West End around 3% of visitors were returning an online purchase and 6% using click & collect (digital had driven in-store visits)
  - For brands a store in the West End can drive online sales and 16% of visitors had seen a product in store that they planned to go on a purchase online

- **Digital would have been a key driver of store interaction for these consumers and will be a main reason they visited the store, however for all digitally influenced shoppers, they also typically spent more in stores whilst on their trip**
  - Promoting multi-channel services can drive in store visits that can convert to additional in store spend

SOURCE: NWEC Consumer Survey – June 2024

VISITOR EXPERIENCE & RATINGS

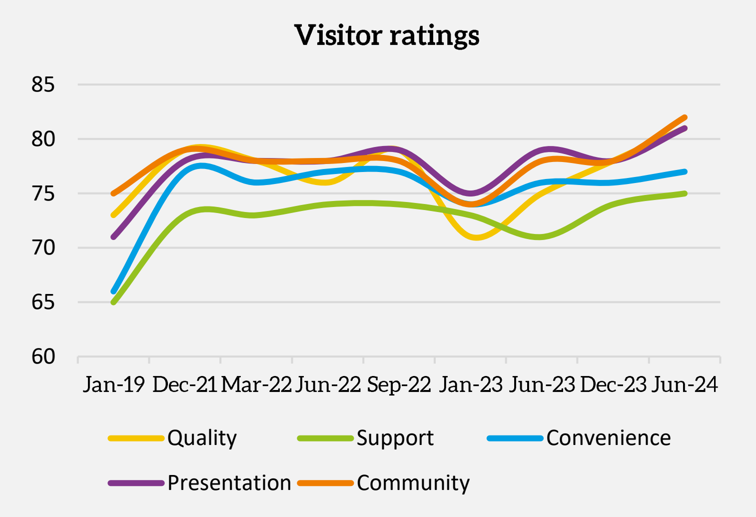
Five core attributes monitored to understand visitor experience and satisfaction

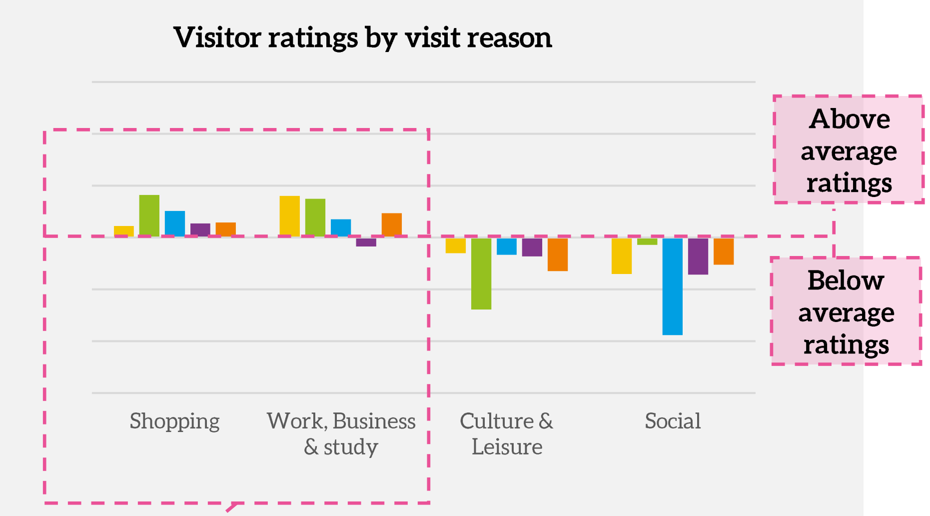
Quality	Support	Convenience	Presentation	Community
• Retail shops • Food & drink outlets • Hotels • Cultural facilities • Lifestyle facilities • Well-being facilities • Provision of outdoor dining	• Access to maps to navigate the area • Availability & quality of Wi-Fi • Access to information on things to do in the area • Access to general visitor support • Cycle parking • Car parking	• Opening hours • Ease of being able to get to the street via public transport • The amount of pedestrian space available • Ability to get around the street easily • Availability of rubbish bins • Availability of recycling bins	• General appearance of the street • Quality of street lighting • Cleanliness of the street • Historic buildings and monuments • Air quality • Amount of traffic in the street • Green space available around the street	• General atmosphere of the street • Personal safety in the street • Street events e.g. Christmas lights, summer streets or traffic free days • Quality of street entertainment

- **Visitors are asked "How satisfied or dissatisfied are you with your overall experience on the street they are visiting today, on a scale of 0-10, where 0 is extremely dissatisfied and 10 is extremely satisfied?**
  - New West End Company have been collecting these ratings since 2019 to measure visitor experience and satisfaction, how this has evolved over time and to enable the identification of improvements or focus areas for the district at an overall level, by street and by visitor segment

Core visitor groups (shoppers + workers) typically have the highest visitor satisfaction and experience ratings………

How do you rate the area….?





Core visitor groups typically have the highest visitor satisfaction and experience ratings

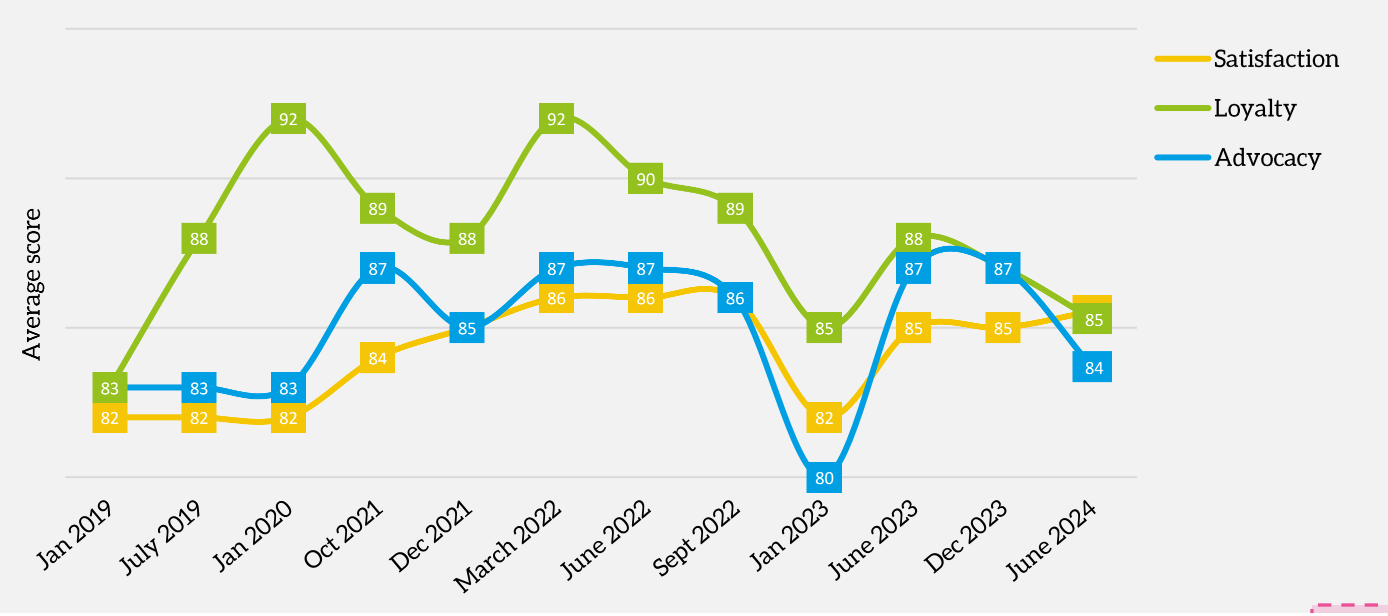
- **Overall year on year improvement on all experience metrics with the greatest improvement in quality, support and community ratings**
  - Quality score driven up by increased scores relating to 'Lifestyle Services', 'Wellbeing activities' and 'Hotels'
  - Support scores mainly driven up by increased scores relating to 'Availability of cycle parking'
  - Community scores up across all metrics however the greatest increase was for 'Personal safety in the area'

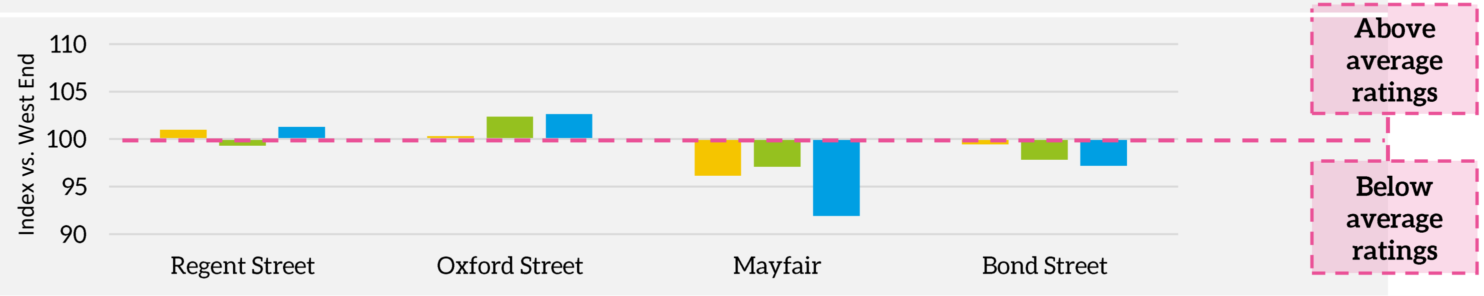
SOURCE: NWEC Consumer Survey – June 2024

Visitor satisfaction, Loyalty and Advocacy all remain very high and consistently track in the 80+ range………

Visitor satisfaction, loyalty and advocacy….

- **Visitor satisfaction, Loyalty and Advocacy all remain very high and consistently track in the 80+ range**
  - Satisfaction scores in line with peak scores achieved in March 2022 to Sept 2022
  - Oxford Street outperforming district averages for satisfaction, loyalty and advocacy, whilst Regent street also outperforming for satisfaction and advocacy
- **Visitor loyalty, satisfaction and advocacy is monitored by asking visitors the following set of questions (specifically about the street they are on):**
  - Satisfaction: How satisfied or dissatisfied are you with your overall experience on today, on a scale of 0-10, where 0 is extremely dissatisfied and 10 is extremely satisfied?
  - Loyalty: How likely are you to return?
  - Advocacy: How likely would you be to recommend o family or friends, on a scale of 0-10, where 0 is not at all likely to recommend and 10 is extremely likely to recommend?

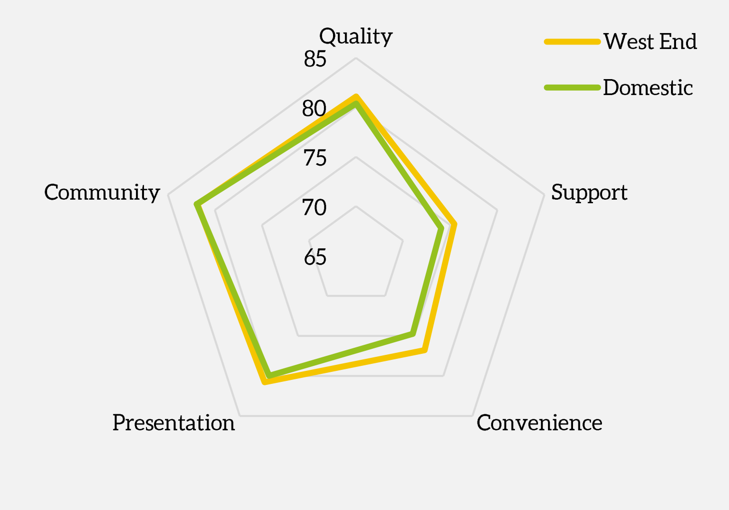


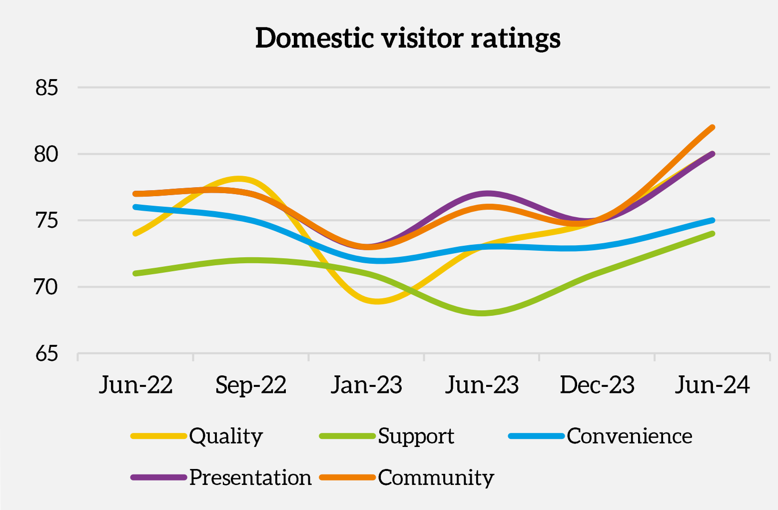


SOURCE: NWEC Consumer Survey – June 2024

Domestic visitor ratings broadly align with overall West End ratings… and have increased marginally versus June 2023

How do you rate the area….?



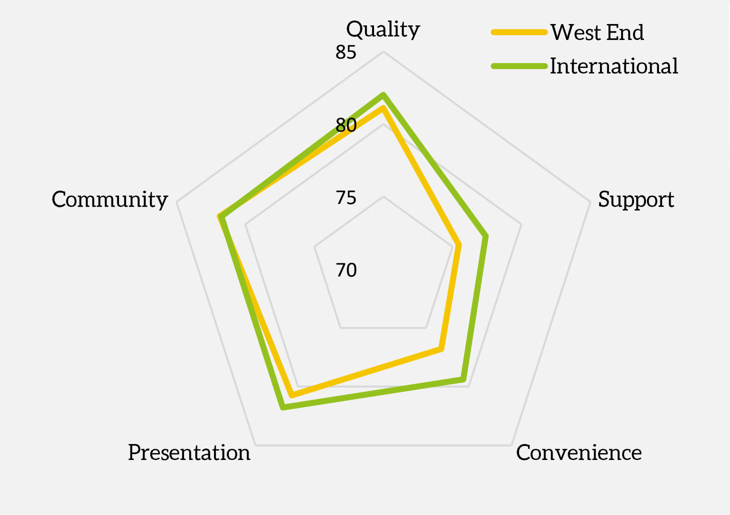


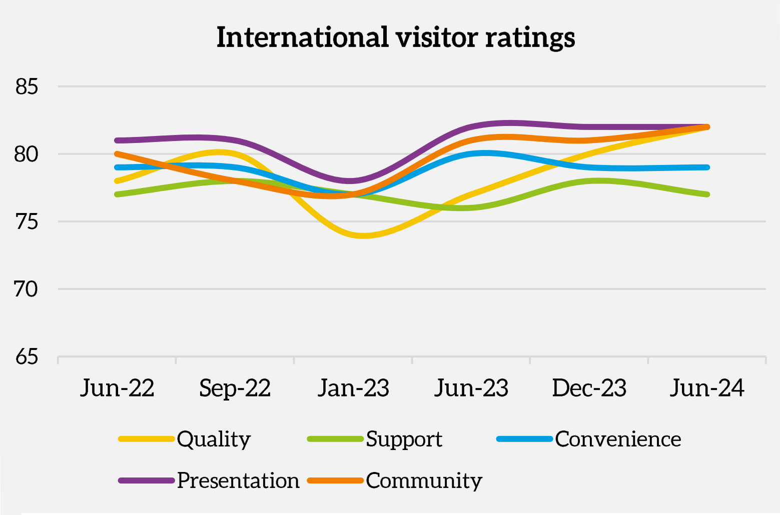
- **Domestic visitor ratings broadly align with overall West End ratings. Satisfaction is in line with Dec '23 and up marginally (+1) versus June '23**
- **Focus areas for domestic visitors where ratings are typically low are::**
  - **Quality**: Retail offer and provision of outdoor dining
  - **Convenience:** Availability of water bottle refilling stations, public toilet facilities, availability of seating and wi-fi
  - **Presentation:** Amount of traffic in the street, green space available
- **Domestic visitors have concerns in relation to amount of rough sleeping, personal safety on the street and the number of people begging**

SOURCE: NWEC Consumer Survey – June 2024

International visitor ratings all higher than West End average.. highest for those coming to shop

How do you rate the area….?



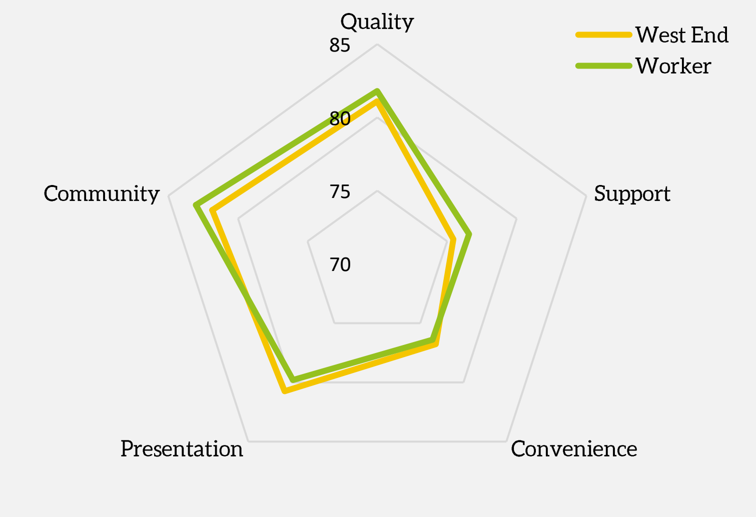


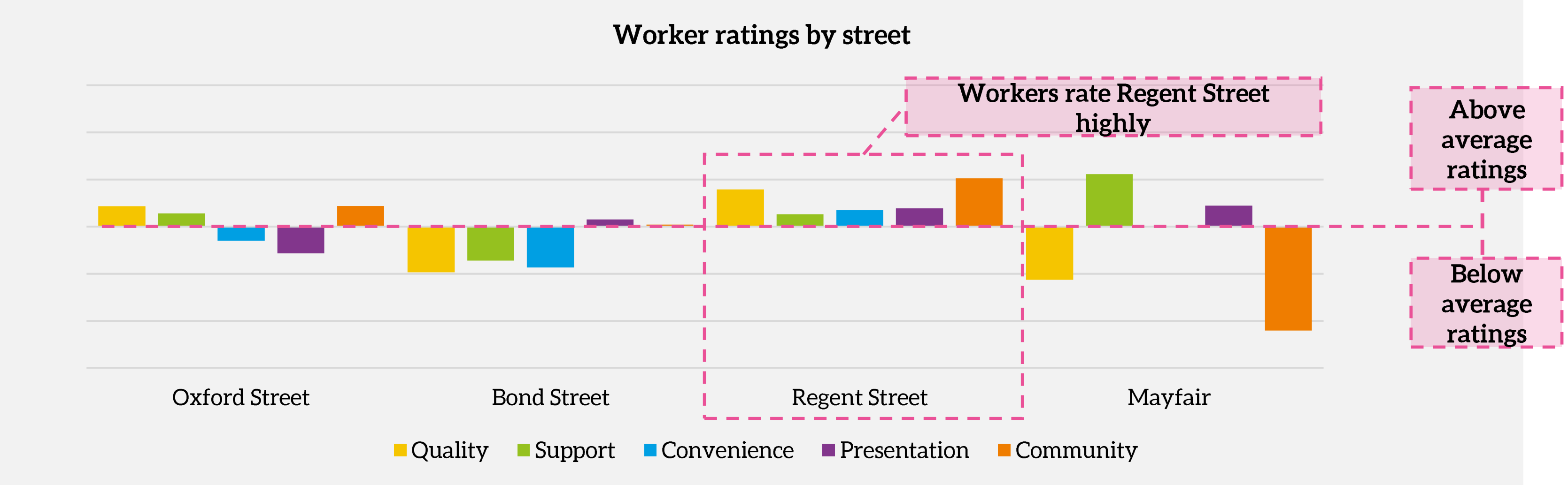
- **International visitor ratings outperform overall West End ratings. Satisfaction is up marginally (+1) versus Dec '23 but down -2 versus June '23**
- **Focus areas for domestic visitors where ratings are typically low are::**
  - **Quality:** Wellbeing activities and lifestyle services
  - **Convenience:** Availability of water bottle refilling stations and public toilet facilities
  - **Support:** Availability of cycle parking and access to general visitor support
- **International visitors have concerns in relation to amount of rough sleeping, the number of people begging and personal safety on the street**

SOURCE: NWEC Consumer Survey – June 2024

Workers have concerns in relation to personal safety on the street, air quality and amount of rough sleeping

How do you rate the area....?





- **Worker ratings slightly outperform overall West End ratings**
- **Focus areas for worker where ratings are typically low are::**
  - **Presentation:** Amount of traffic on the street, air quality and the green space available around the street
  - **Convenience:** Availability of water bottle refilling stations, availability of seating and public toilet facilities
  - **Support:** Availability of cycle parking

- **Workers have concerns in relation to personal safety on the street, air quality and amount of rough sleeping**

SOURCE: NWEC Consumer Survey – June 2024

Core visitor groups highlight 'public toilet facilities' 'water refill stations' & 'seating' as common weaknesses

Drivers of visitor satisfaction by visit reason- Top 3 / Bottom 3

	Shopping	Work, Business & study	Culture & Leisure	Social
Strengths	Opening hours	Opening hours	Ease of being able to get to the street via public transport	Opening hours
	Ease of being able to get to the street via public transport	Access to maps and signage to navigate the area	Ability to get around the street easily e.g. navigating crowds, using pushchairs or wheelchairs	Ease of being able to get to the street via public transport
	General atmosphere of the street	Access to information on things to do in the area, e.g. tourist information	Opening hours	General atmosphere of the street
Weaknesses	Availability of recycling bins	Availability of water bottle refilling stations	Access to maps and signage to navigate the area	Availability of seating
	Availability of seating	Availability of seating	Availability of water bottle refilling stations	Public toilet facilities
	Public toilet facilities	Public toilet facilities	Public toilet facilities	Availability of water bottle refilling stations

Most highly ranked across West End

Lowest ranked across West End

2nd most highly ranked across West End

2nd lowest ranked across West End

SOURCE: NWEC Consumer Survey – June 2024

‘More spaces to relax’ and ‘more green spaces’ most commonly ranked as areas for improvement

Which of the following ideas might encourage you to visit the West End more often…?

- **More places to relax is the most highly requested improvement to be made to the West End, followed by visitors wanting more green space available and more places to eat and drink**
  - Size of box denotes a weighted percentage of visitors who ranked the idea in their top 5 ways to make them visit the West End more.
  - Bigger box = more highly ranked

SOURCE: NWEC Consumer Survey – June 2024

'More places to relax' wanted by all visit segments, whilst workers want 'less expensive shops'

What might encourage more visits (by visit reason)....?

Shoppers		Work, Business & study		Culture & Leisure		Social	
Domestic	International	Domestic	International	Domestic	International	Domestic	International
More green space available	More green space available	Less expensive shops	More places to relax	More places to eat and drink	More places to relax	More places to relax	More places to relax
More places to relax	More places to relax	More places to relax	More green space available	More green space available	More green space available	Less expensive shops	Having shops which are easily accessible by walking, cycling and public transport
Support the local economy and strive for a more balanced society	Reduce waste and offering products which are reusable, second hand or rented	More green space available		Support the local economy and strive for a more balanced society	More places to eat and drink	Less vehicle traffic	More places to eat and drink
Encourage active lifestyles and promote the importance of physical and mental well-being	Support the local economy and strive for a more balanced society	Less vehicle traffic		Encourage active lifestyles and promote the importance of physical and mental well-being	Encourage active lifestyles and promote the importance of physical and mental well-being	More green space available	Pedestrian-only streets
Having shops which are easily accessible by walking, cycling and public transport	More places to eat and drink	Less crowded		More places to relax	Having shops which are easily accessible by walking, cycling and public transport	Support the local economy and strive for a more balanced society	Less expensive shops

Highest ranking across West End

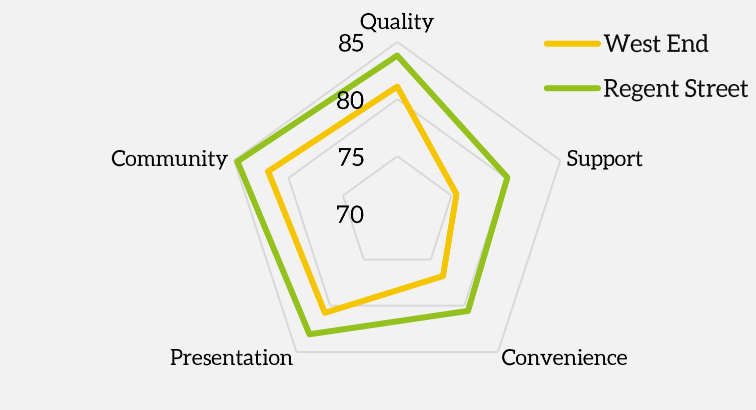
2nd highest ranking across West End

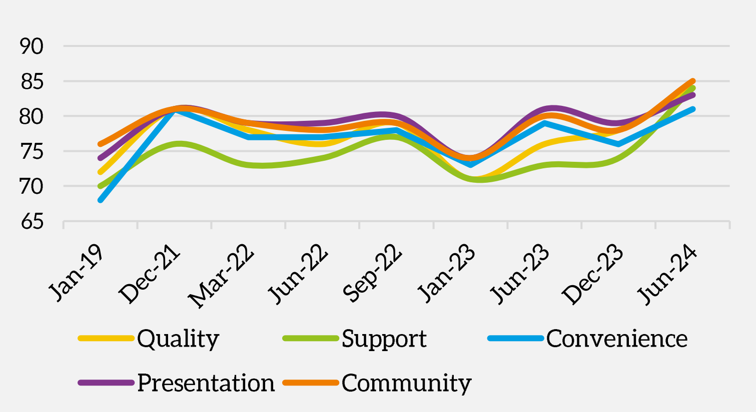
3rd highest ranking across West End

SOURCE: NWEC Consumer Survey – June 2024

Regent Street outperforms wider West End in all metrics… visitors would like 'more places to relax' and 'more greenery'

Regent Street ratings





Strengths
(things they like)

- Opening hours
- Ease of being able to get to the street via public transport
- Cultural facilities e.g. cinemas, theatres, art galleries, creative classes

Opportunities
(things that would encourage more visits)

- More places to relax
- More green space available
- Support the local economy and strive for a more balanced society
- Reduce waste and offering products which are reusable, second hand or rented
- Having shops which are easily accessible by walking, cycling and public transport

Weaknesses
(things they don't like)

- Public toilet facilities
- Availability of seating
- Availability of recycling bins

Threats
(things that concern them)

- Air quality
- Safety on the street due to crowds
- Personal safety on the street

Common strength across all visitor groups & locations

Common opportunity across all visitor groups & locations

Common weakness across all visitor groups & locations

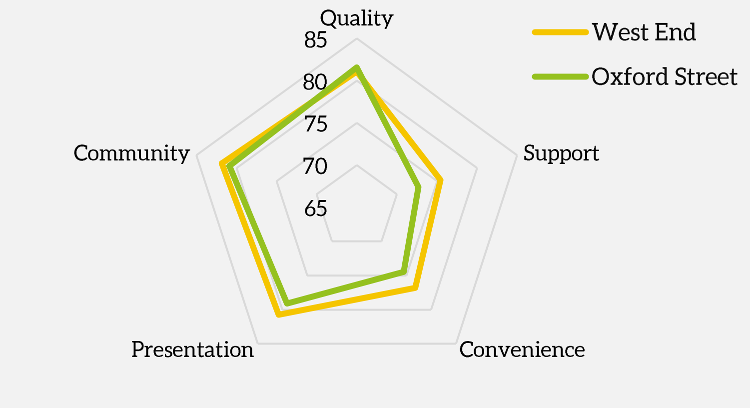
Common concern across all visitor groups & locations

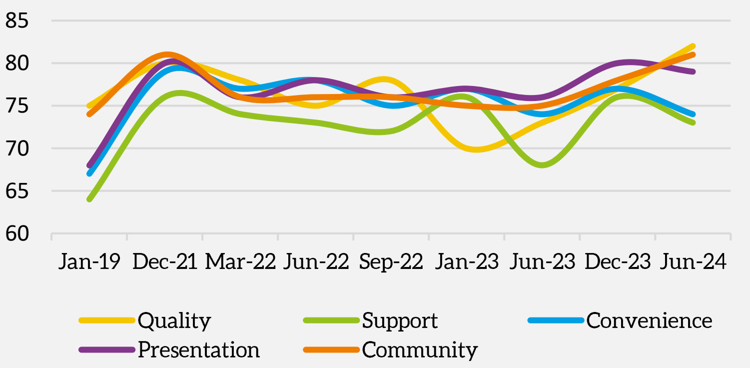
- **Regent Street outperforms wider West End in all metrics**
- **Key areas for improvement are**
  - Public toilet facilities
  - Availability of seating
  - Availability of recycling bins

SOURCE: NWEC Consumer Survey – June 2024

Oxford Street ratings continue to improve.. visitors would like to see 'more places to relax' and 'more greening'

Oxford Street ratings





Strengths
(things they like)

- Opening hours
- Ease of being able to get to the street via public transport
- Retail shops

Opportunities
(things that would encourage more visits)

- More places to relax
- More green space available
- More places to eat and drink
- Promote healthy, seasonal, locally sourced food and plant-based options
- Support the local economy and strive for a more balanced society

Weaknesses
(things they don't like)

- Availability of seating
- Availability of water bottle refilling stations
- Public toilet facilities

Threats
(things that concern them)

- Number of people begging
- Amount of rough sleeping
- Personal safety on the street

Common strength across all visitor groups & locations

Common opportunity across all visitor groups & locations

Common weakness across all visitor groups & locations

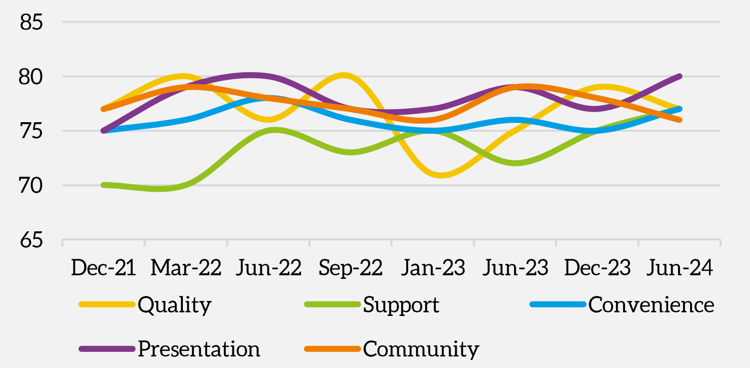
Common concern across all visitor groups & locations

- **Oxford Street ratings continue to improve however it does rate lower on support, convenience and presentation metrics**
  - Support ratings pulled down by 'availability of quality wi-fi'
  - Convenience ratings pulled down by 'public toilet facilities' and 'availability of water bottle refilling stations'
  - Presentation ratings pulled down by the amount of traffic in the street and lack of green space

SOURCE: NWEC Consumer Survey – June 2024

Mayfair has oldest visitors and is most biassed towards international visits, but is rated lowest

Mayfair ratings



Strengths
(things they like)

- Opening hours
- Ease of being able to get to the street via public transport
- The amount of pedestrian space available

Opportunities
(things that would encourage more visits)

- Promote healthy, seasonal, locally sourced food
- More green space available
- Support the local economy and strive for a more balanced society
- Having shops which are easily accessible by walking, cycling and public transport
- Reduce waste and offering products which are reusable, second hand or rented

Weaknesses
(things they don't like)

- Access to maps and signage to navigate the area
- Availability of water bottle refilling stations
- Public toilet facilities

Threats
(things that concern them)

- Amount of rough sleeping
- Safety on the street due to crowds
- Personal safety on the street

- **Mayfair ratings are typically lower than overall West End, particularly for quality, support and community**
  - Support scores lower for 'access to maps and signage to navigate the area' and 'availability of parking'
  - Community scores lower for 'quality of street entertainment' and 'street events'
  - Quality scores lower for 'cultural facilities' and 'retail shops'

Common strength across all visitor groups & locations

Common opportunity across all visitor groups & locations

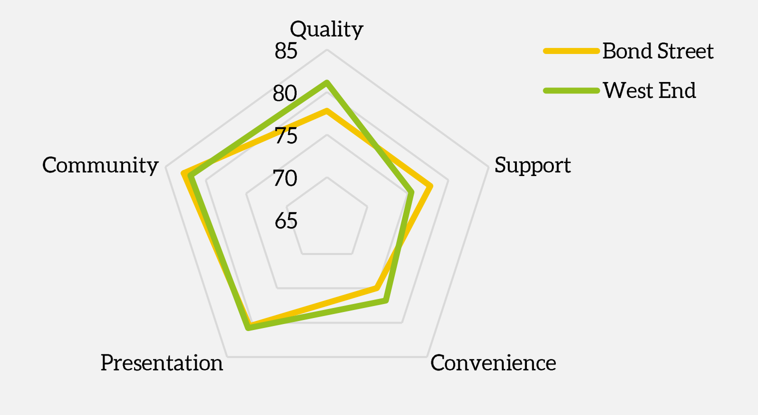
Common weakness across all visitor groups & locations

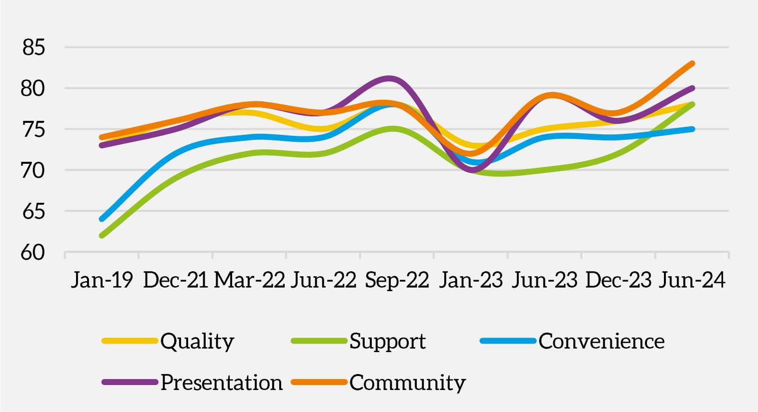
Common concern across all visitor groups & locations

SOURCE: NWEC Consumer Survey – June 2024

Bond Street rated in line with Wider West End, but would be improved by additional 'greening' and 'places to relax'

Bond Street ratings





Strengths
(things they like)

- Opening hours
- Ease of being able to get to the street via public transport
- General atmosphere of the street

Opportunities
(things that would encourage more visits)

- More green space available
- More places to relax
- Having shops which are easily accessible by walking, cycling and public transport
- Support the local economy and strive for a more balanced society
- Promote healthy, seasonal, locally sourced food and plant-based options

Weaknesses
(things they don't like)

- Availability of seating
- Availability of recycling bins
- Public toilet facilities

Threats
(things that concern them)

- Personal safety on the street
- Number of people begging
- Amount of rough sleeping

Common strength across all visitor groups & locations

Common opportunity across all visitor groups & locations

Common weakness across all visitor groups & locations

Common concern across all visitor groups & locations

- **Whilst Bond street is rated broadly in line with overall West End it rates lower on 'quality' and 'convenience'**
- **Quality ratings pulled down in relation to:**
  - Ratings related to F&B and outdoor dining
  - Hotels
- **Convenience ratings pulled down in relation to:**
  - Availability of seating, recycling bins and public toilet facilities

SOURCE: NWEC Consumer Survey – June 2024

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