



Bristol BIDs

Consumer Spend Analysis

Q1 2024

Visa Loyalty Insights (VLI)



- **Visa Loyalty Insights (VLI) – analyses spend behaviour in every postal sector across the UK by origin and destination of spend along with spend at store location**
- **NB – for reasons of confidentiality, category spend is not included where:**
 - **There are less than five stores in a category in the merchant location’s postal sector**
 - **A single retailer accounts for 50% or more of spend or transactions in a category within the postal sector**
- **VLI is collated on a quarterly basis up to March 2024**

NB – VLI data does not include cash transactions which in certain areas can be significant

Overview of spend behaviour in BS1, BS2 and BS8 postal sectors Q1 2023 to Q1 2024



| | Q1 2023 | Q2 2023 | Q3 2023 | Q4 2023 | Q1 2024 | Q1 2023 vs Q1 2024 |
|--|-----------|-----------|-----------|-----------|-----------|--------------------|
| No of cards identified | 1,146,442 | 1,376,627 | 1,206,427 | 1,303,986 | 1,199,189 | 5% |
| Average Transaction Value (ATV) | £15.88 | £16.20 | £16.17 | £15.40 | £13.83 | -13% |
| Total Transactions | 5,494,698 | 6,447,811 | 5,272,305 | 7,041,933 | 6,435,953 | +17% |
| No of postal sectors identified | 911 | 1159 | 960 | 932 | 905 | -1% |
| Total spend | £87.2m | £104.4m | £85m | £108.4m | £89m | 2% |

International Spend Q1 2023 and 2024 in BS1, BS2 and BS8



| | Q1 2023 | Q1 2024 | Q1 2023 vs Q1 2024 |
|--|-----------|-----------|--------------------|
| No of cards identified | 50,440 | 74,274 | +47% |
| Average Transaction Value (ATV) | £23.70 | £23.24 | -2% |
| Total Transactions | 209,670 | 306,669 | +46% |
| No of countries identified | 55 | 57 | +4% |
| Total spend | 4,969,213 | 7,128,515 | +43% |

| Top 5 countries by spend Q1 2024 |
|----------------------------------|
| United States of America |
| China Mainland |
| Republic of Ireland |
| France |
| Spain |

Categories with highest spend among top 10 highest spending postal districts

Face to face spend vs online Q1 2024



| Category | Face to face (£) | Online (£) | % of Spend Face to Face | % of Spend Online | Total Spend (£) |
|-------------------------------|------------------|------------|-------------------------|-------------------|-----------------|
| AUTO SERVICE SHOPS/NON DEALER | 7,282,707 | 1,321,544 | 85% | 15% | 8,604,251 |
| BAKERIES | 2,001,970 | 29,344 | 99% | 1% | 2,031,314 |
| BEAUTY/BARBER SHOPS | 5,907,670 | 735,402 | 89% | 11% | 6,643,072 |
| CATERERS | 1,884,727 | 35,494 | 98% | 2% | 1,920,221 |
| ELECTRONICS STORES | 587,349 | 3,622,209 | 14% | 86% | 4,209,558 |
| FAST FOOD RESTAURANTS | 17,459,025 | 5,125,194 | 77% | 23% | 22,584,218 |
| GROCERY STORES/SUPERMARKETS | 175,731,537 | 19,516,046 | 90% | 10% | 195,247,583 |
| HOTELS & ACCOMMODATION | 4,560,234 | 10,321,437 | 31% | 69% | 14,881,671 |
| JEWELRY STORES | 1,867,558 | 1,133,727 | 62% | 38% | 3,001,285 |
| LUMBER/BUILD. SUPPLY STORES | 3,867,382 | | 100% | 0% | 3,867,382 |
| MENS/WOMENS CLOTHING STORES | 5,120,584 | | 100% | 0% | 5,120,584 |
| MISC FOOD STORES - DEFAULT | 13,497,755 | 4,511,076 | 75% | 25% | 18,008,831 |
| PARKING LOTS,METERS,GARAGES | 1,902,958 | 1,224,212 | 61% | 39% | 3,127,169 |
| RESTAURANTS | 46,933,501 | 18,285,972 | 72% | 28% | 65,219,473 |
| SHOE STORES | 1,313,678 | 1,268,224 | 51% | 49% | 2,581,902 |

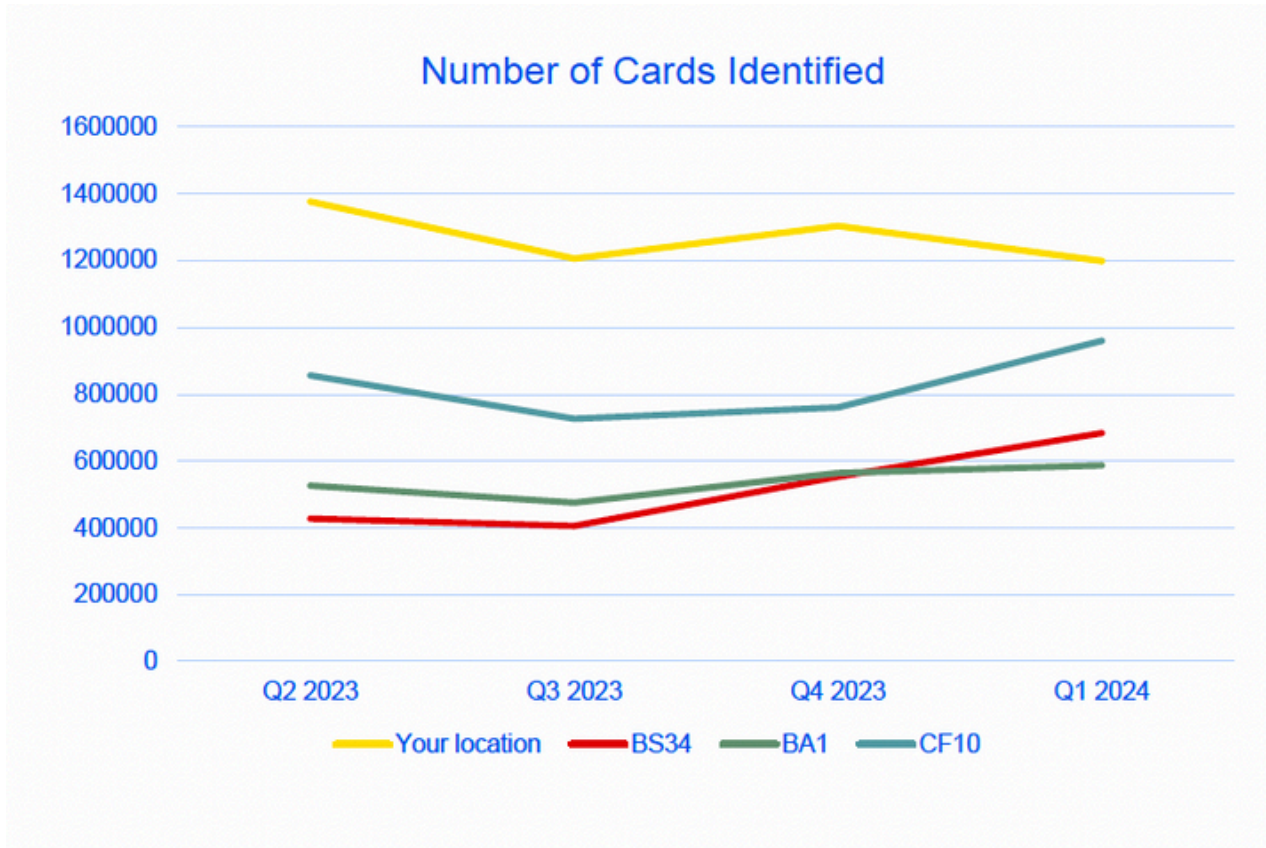
Postcodes included are those that spent the most in the area (BS1, BS2 and BS8 combined):
BS2, BS5, BS8, BS16, BS1, BS7, BS4, BS3 and BS15.

Summary of spend behaviour in postal sectors versus competitor locations

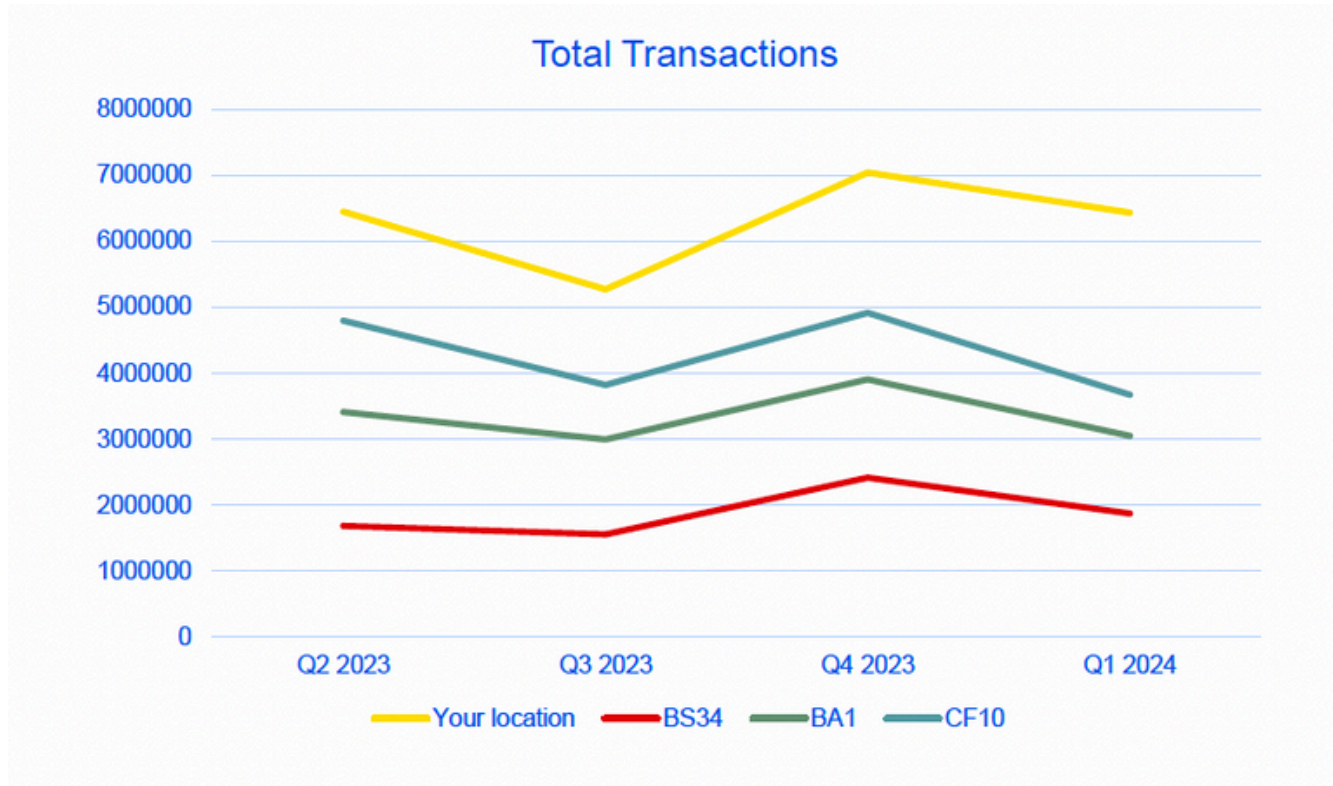


| | Q1 2024 | | | |
|--|---------------|-----------|-----------|-----------|
| | Your location | BS34 | BA1 | CF10 |
| No of cards identified | 1,199,189 | 684,011 | 587,323 | 959,321 |
| Average Transaction Value (ATV) | £13.83 | £25.21 | £17.70 | £16.12 |
| Total Transactions | 6,435,953 | 1,872,024 | 3,048,953 | 3,672,501 |
| No of postal sectors identified | 905 | 536 | 758 | 754 |
| Total spend | £89m | £47.2m | £53.9m | £59.2m |

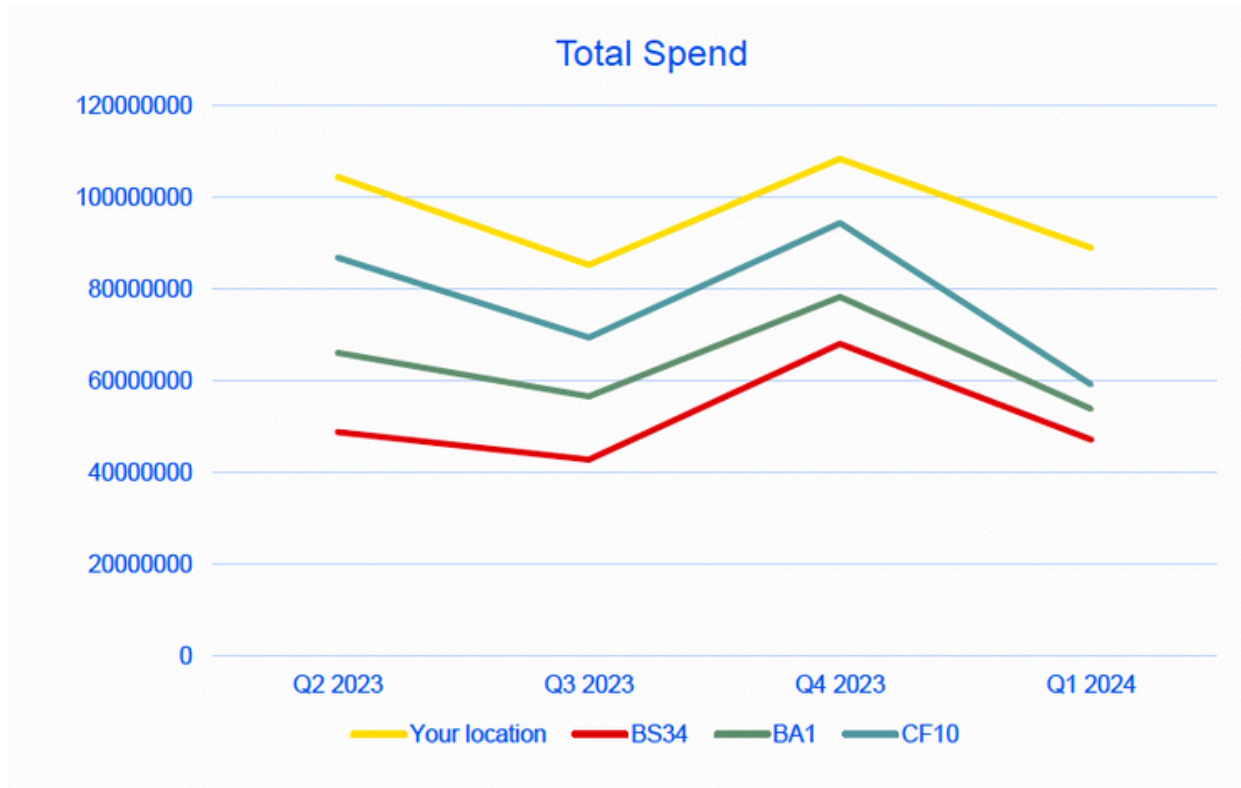
Summary of spend behaviour in postal sectors versus competitor locations



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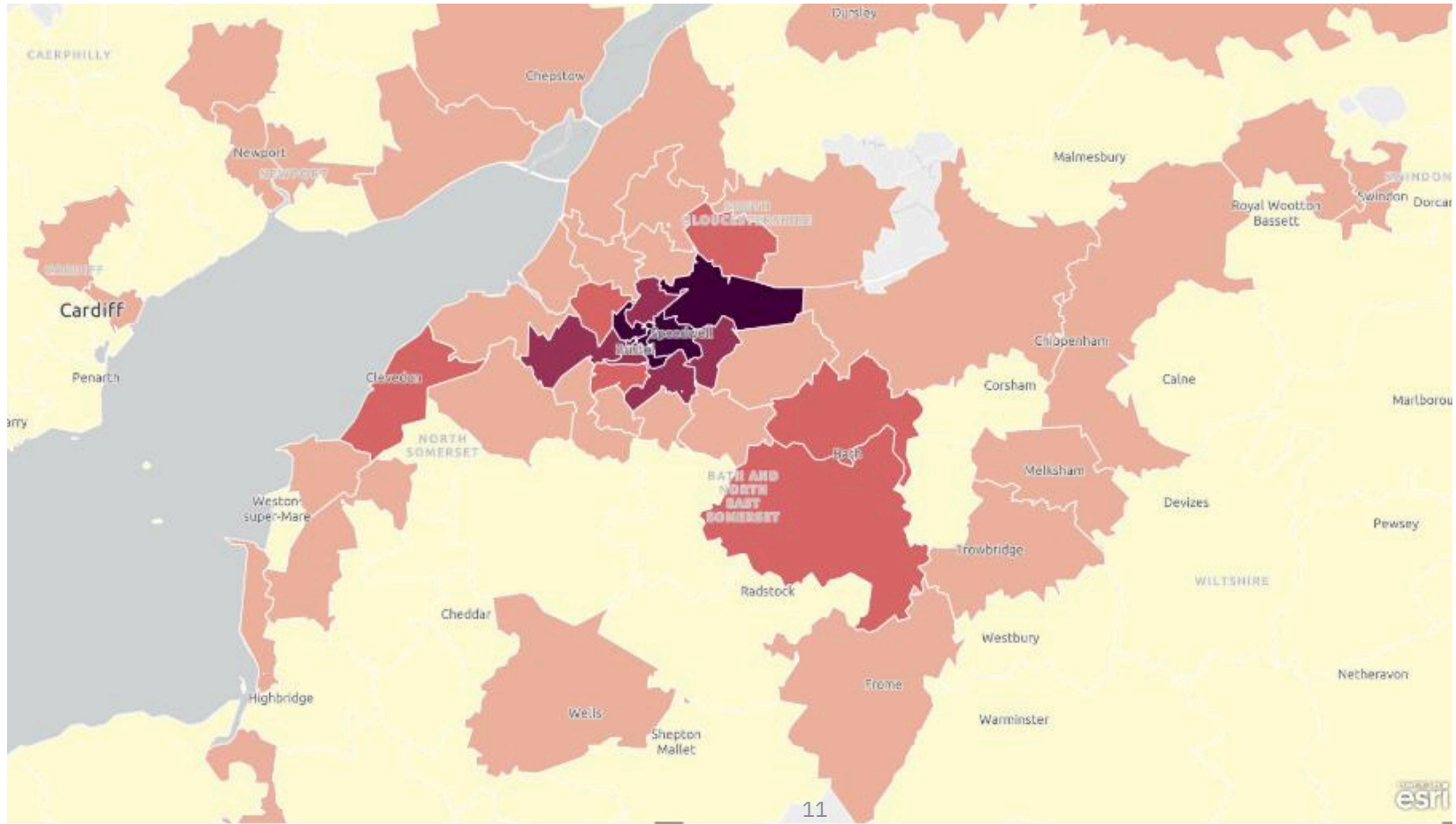
Consumer origins with highest spend in BS1, BS2 and BS8 postal sectors Q1 2024



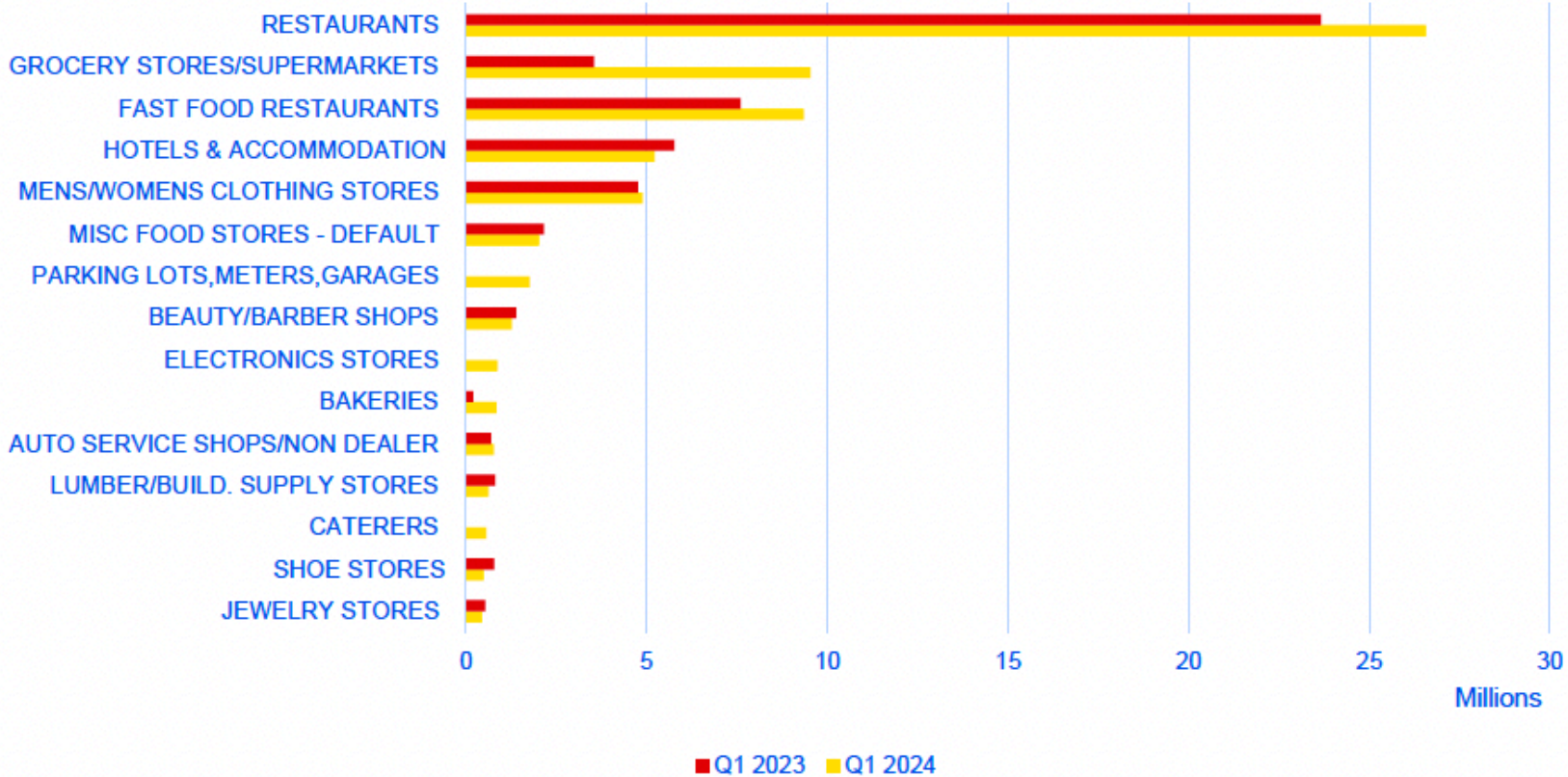
| Town / Area | Postcode | Number of Cards | Total Number of Transactions | Total Amount Spent (£) |
|--|----------|-----------------|------------------------------|------------------------|
| Cotham, Redland, Montpelier, Westbury Park, St. Andrew's | BS6 | 83,557 | 1,074,258 | 12,210,699 |
| Kingsdown, St Paul's, St Phillips, St Agnes Easton, St George, Redfield, Whitehall, Eastville, Speedwell, Greenbank, Barton Hill | BS2 | 69,331 | 853,328 | 9,403,951 |
| Clifton, Failand, Hotwells, Leigh Woods | BS8 | 32,457 | 45,557 | 3 |
| Downend, Emersons Green, Fishponds, Frenchay, Pucklechurch, Mangotsfield, Staple Hill | BS16 | 75,932 | 312,599 | 5,241,433 5,098,57 |
| Bristol city centre, Redcliffe | BS1 | 36,783 | 440,717 | 3 |
| Bishopston, Horfield, part of Filton, Lockleaze, Ashley Down | BS7 | 49,769 | 256,371 | 4,952,70 9,911,358 |
| Brislington, Knowle, Knowle West, St Anne's, part of Totterdown | BS4 | 42,295 | 203,193 | 3,262,678 |
| Bedminster, Southville, Bower Ashton, part of Totterdown, Windmill Hill | BS3 | 26,378 | 177,828 | 2,380,101 |
| Hanham, Kingswood | BS15 | 34,533 | 127,995 | 2,307,374 |

Cardholder Locations – Q1 2024

Darker colour = more cardholders

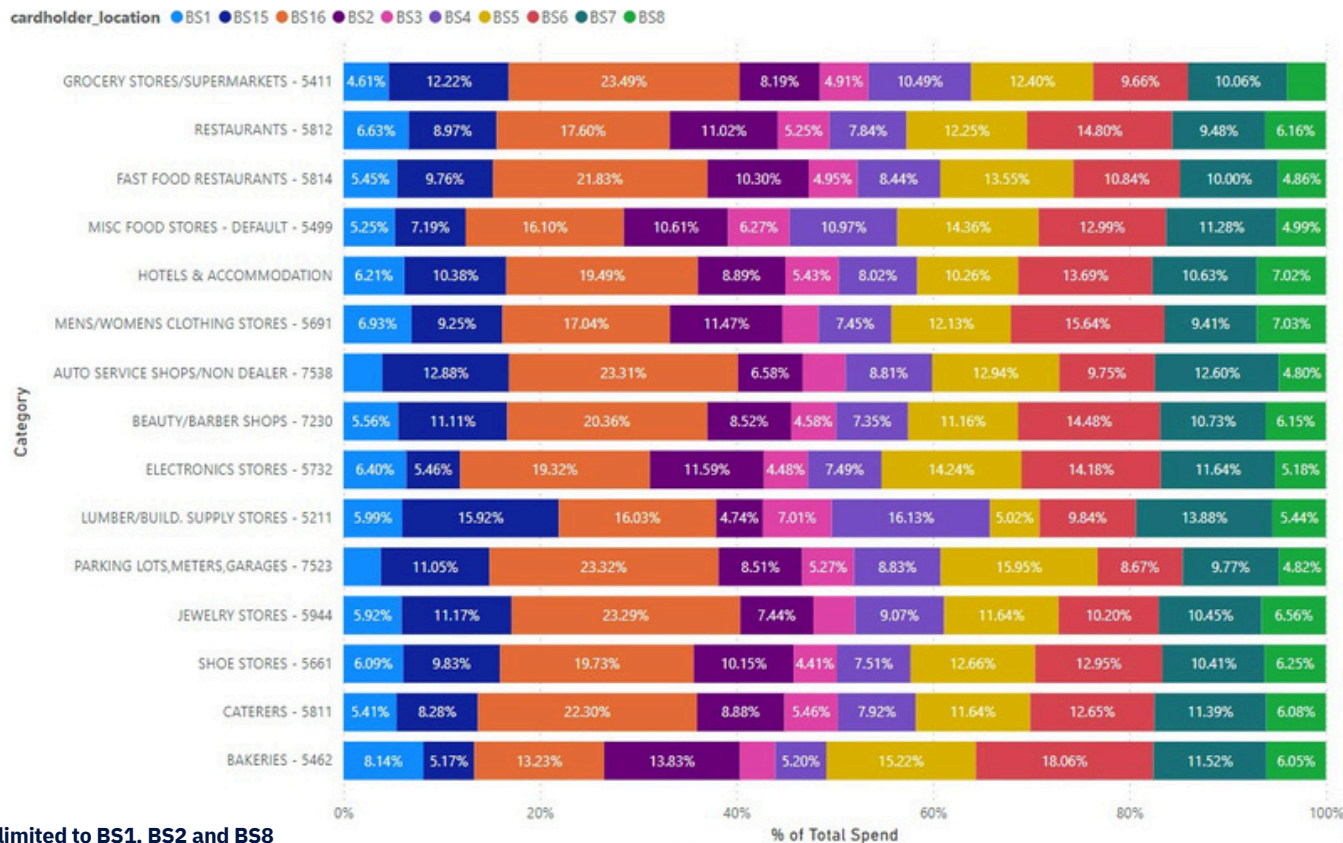


Category Spend in BS1, BS2 and BS8 Q1 2024 and Q1 2023

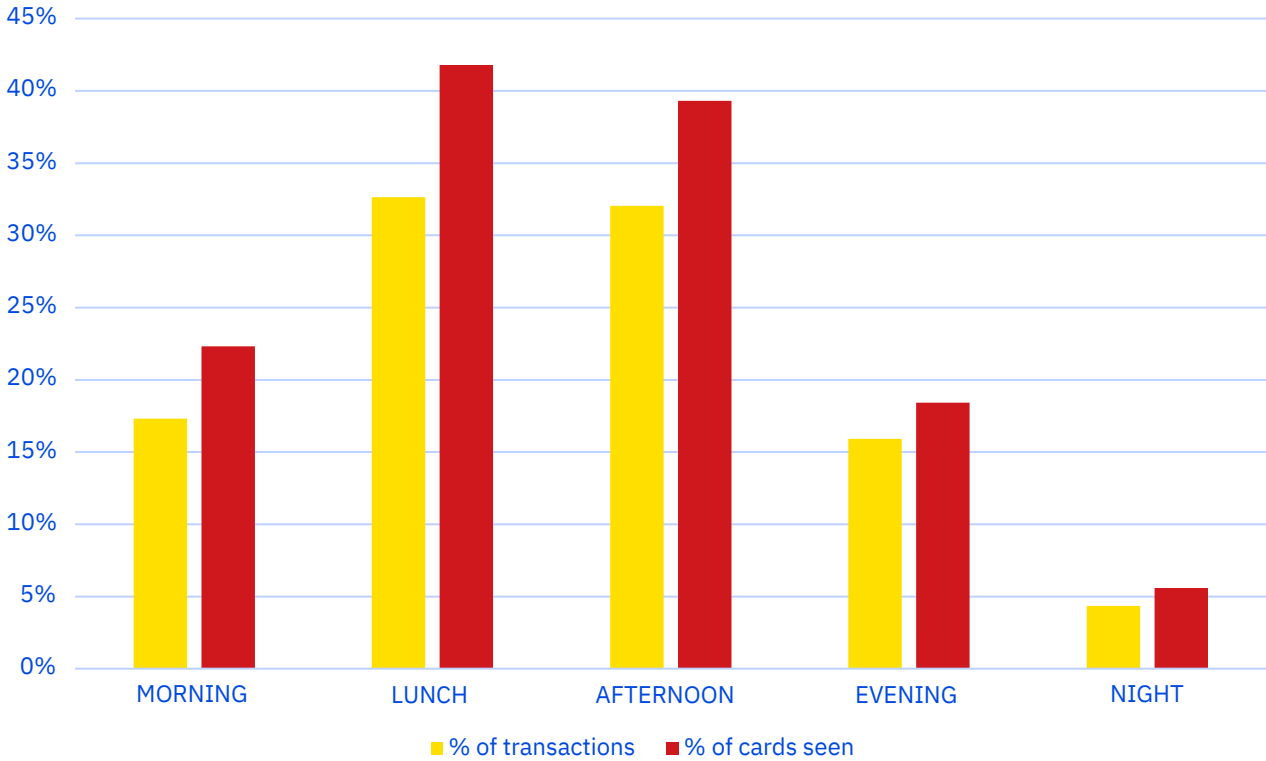


Total category spend* (online and face-to-face) among Top 10 highest spending postal districts in BS1, BS2 and BS8


Q1 2024



% of Transactions and Cards Seen* in BS1, BS2 and BS8 by Time of Day Q1 2024



* % of cards seen adds up to more than 100% as transactions can occur on the same card across multiple time periods in a day



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