



JUNE 2025

# 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.

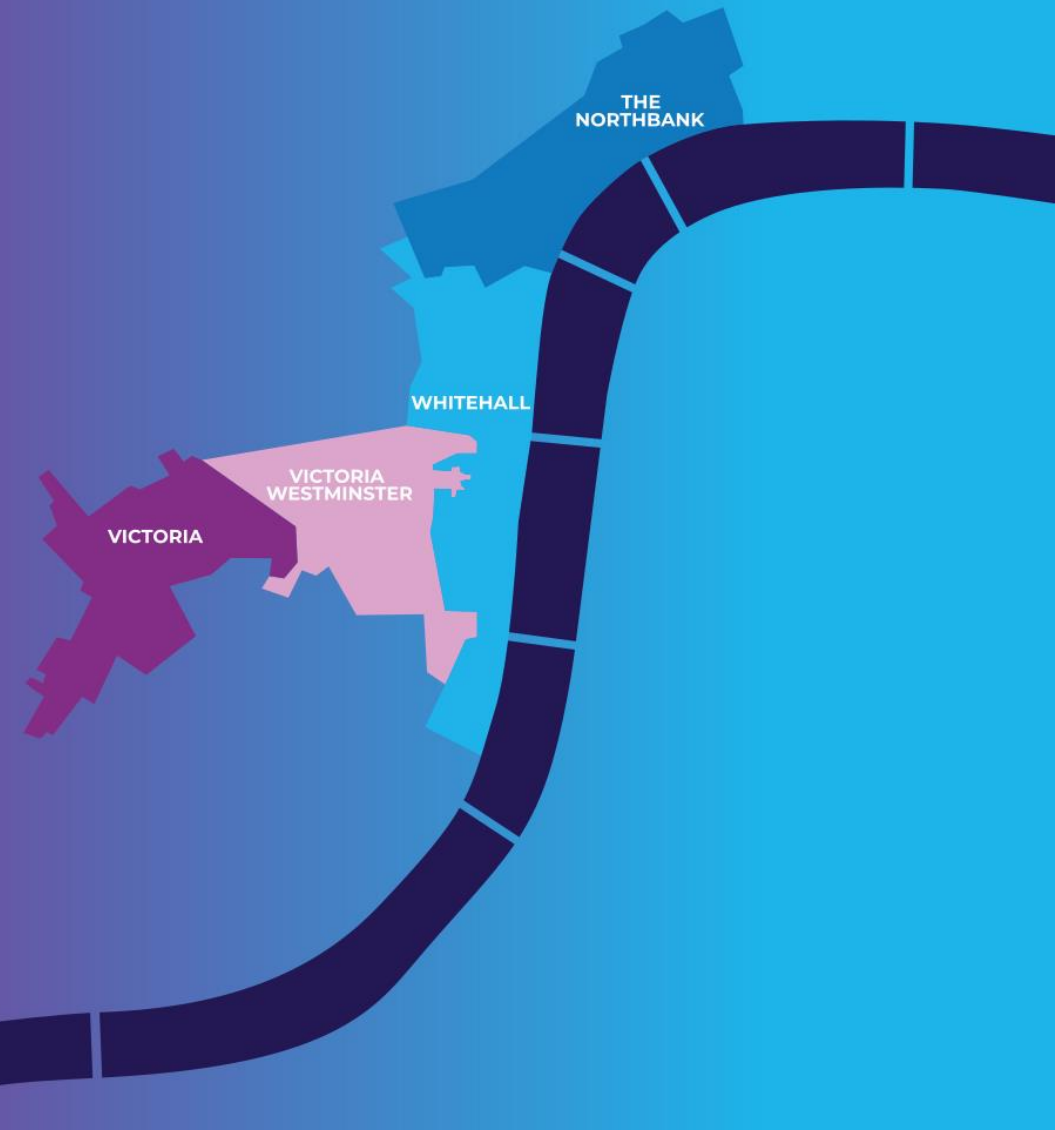
**VICTORIA:** The Victoria Business Improvement District (BID) is a business-led and business-funded body formed to support economic growth in Victoria and to create a vibrant destination for those who work, visit or live in the area.

**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:

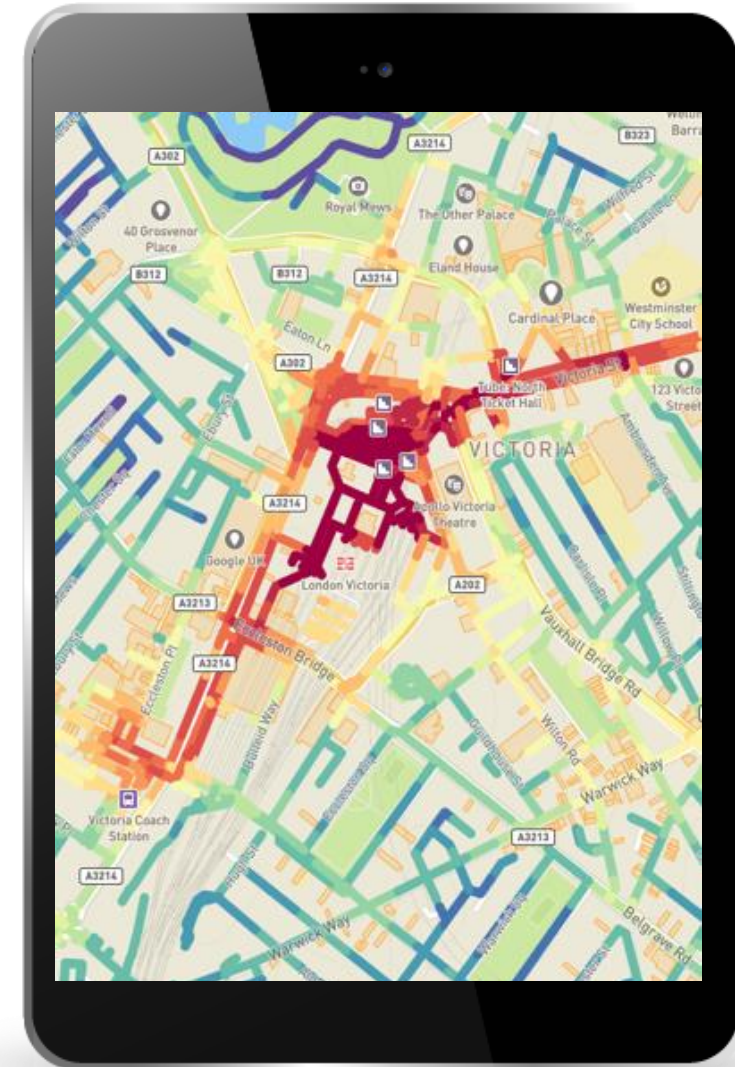
- ❑ Visitor footfall
- ❑ Visitor profile
- ❑ Visitor behaviour

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*







# CONTENTS

01

Visit Performance

02

Visitor Behaviour

03

Visitor Segmentation

04

Appendix



01

# VISIT PERFORMANCE





VISIT PERFORMANCE | VICTORIA BID

# VISITS TO VICTORIA BID UP +10.1% YEAR- ON-YEAR

Strong growth in visit performance across Victoria BID year-on-year (+10.1%), with consistent month-on-month performance

Slight decline month-on-month (-0.1%) following May half-term & bank holidays influencing visitor profile across Victoria BID.

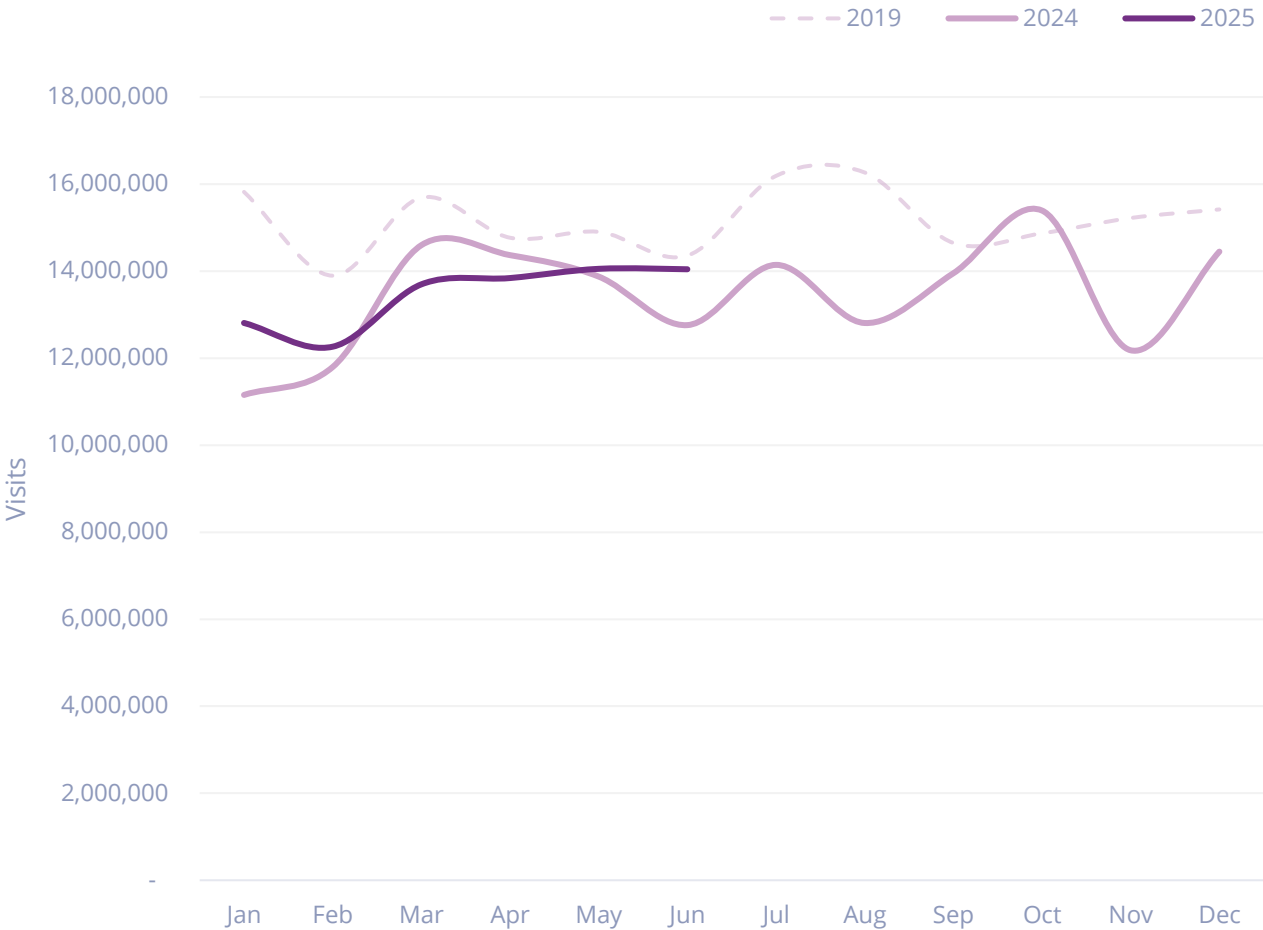
Year-to-date performance across Victoria BID up +3.2% vs. same period in 2024.

June 2025

Area	Footfall (millions)	Month-on-Month	Year-on-Year	vs. 2019
Victoria BID	14.0	-0.1%	+10.1%	-2.2%
West End (Benchmark)	20.2	-1.7%	-4.1%	-45.8%

Source: Colliers LocateFootfall  
See Appendix for defined BID boundaries

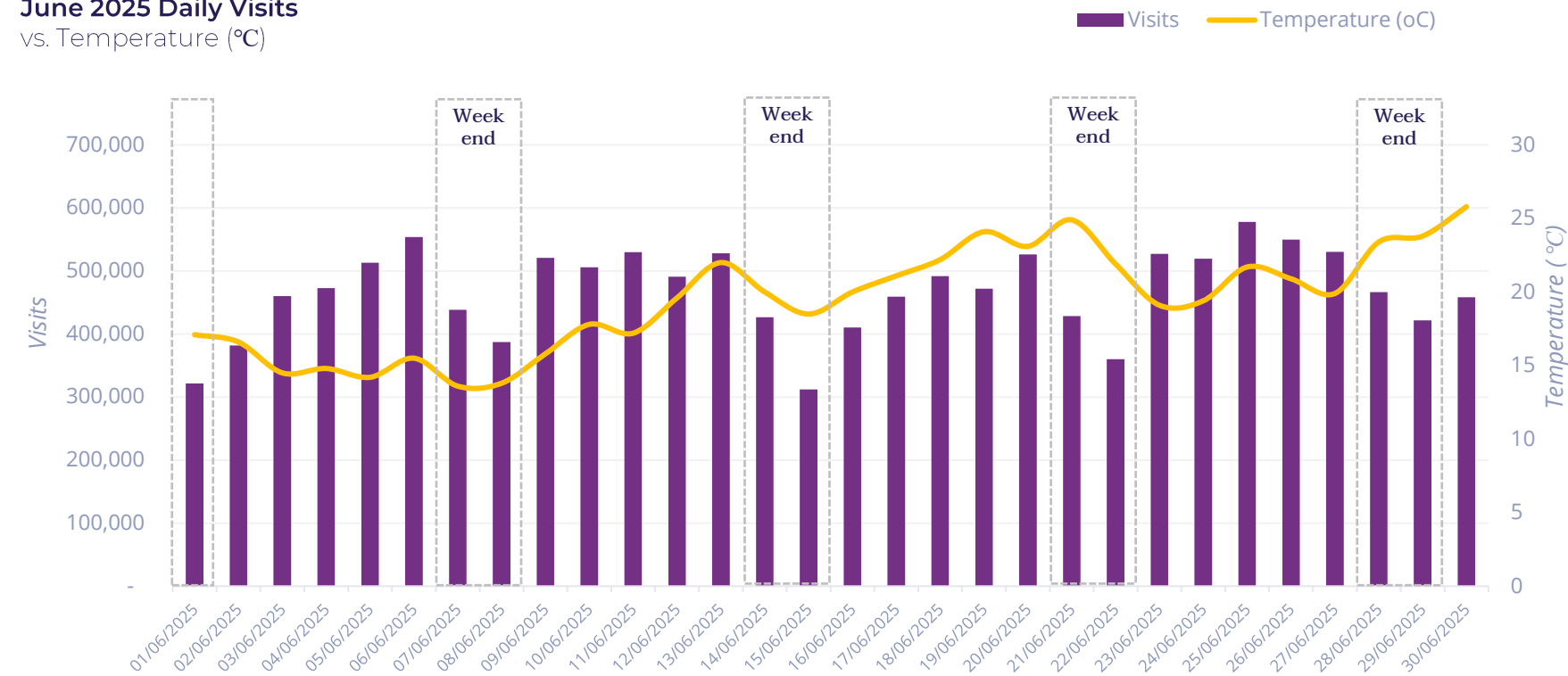
Monthly Overview



VISIT PERFORMANCE | VICTORIA BID

# CONSISTENT VISIT PERFORMANCE THROUGHOUT JUNE WITH STABLE, WARM WEATHER DURING THE MONTH

June 2025 Daily Visits  
vs. Temperature (°C)



**Slight uplift in visits to Victoria BID during Week 25 (w/c 23<sup>rd</sup> June), up +9.1% on average**

Peak visitation across Victoria BID occurred on Wednesday 25<sup>th</sup> June (578k visits), up +11.5% vs. average Wednesday in June.

Visit distribution throughout June remained relatively consistent, with the return of normal worker-behaviour following half-term & bank holidays in May.

Source: Colliers LocateFootfall  
See Appendix for defined BID boundaries

Strong year-on-year performance across most clusters leading to overall growth of +10.1% across Victoria BID

June 2025

Area	Footfall	Month-on-Month	Year-on-Year	vs. 2019
Victoria BID (All)	14,041,924	-0.1%	+10.1%	-2.2%
Buckingham Palace Road	2,234,107	-7.3%	+6.6%	-1.7%
Parliament Square	2,784,361	-4.5%	+12.8%	-6.7%
Terminus Place	1,728,588	+16.9%	+32.2%	-2.3%
Victoria Street - West	1,188,538	-18.4%	-12.0%	-49.8%
St. James's Park Station	152,876	-9.7%	+6.1%	-79.5%
Victoria Street - East	1,023,466	-9.1%	+5.1%	-1.5%
Whitehall	4,929,988	+9.6%	+11.6%	+55.3%
West End (Benchmark)	20,180,956	-1.7%	-4.1%	-45.8%

Source: Colliers LocateFootfall  
See Appendix for defined BID boundaries

## VISIT PERFORMANCE | VICTORIA BID

# VARIED MONTH-ON-MONTH PERFORMANCE ACROSS CLUSTERS IN JUNE 2025

Increased month-on-month performance along **Terminus Place (+16.9%)** and **Whitehall (+9.6%)**, despite overall consistent performance (-0.1%) across Victoria BID vs. May 2025.

Despite slight decline month-on-month following comparisons to May half-term & bank holidays, Victoria BID experienced strong growth year-on-year (+10.1%), driven by increased visitation across all clusters, except Victoria Street – West. Strongest uplift in visitation was seen in **Terminus Place**, up by a third.

Victoria BID experienced improved growth rates vs. wider West End benchmark in June 2025; Victoria BID saw slightly less decline month-on-month, while wider West End benchmark also experienced decline year-on-year.



VISIT PERFORMANCE | NORTHBANK BID

# +5.3% YEAR-ON-YEAR GROWTH IN VISITS ACROSS THE NORTHBANK BID

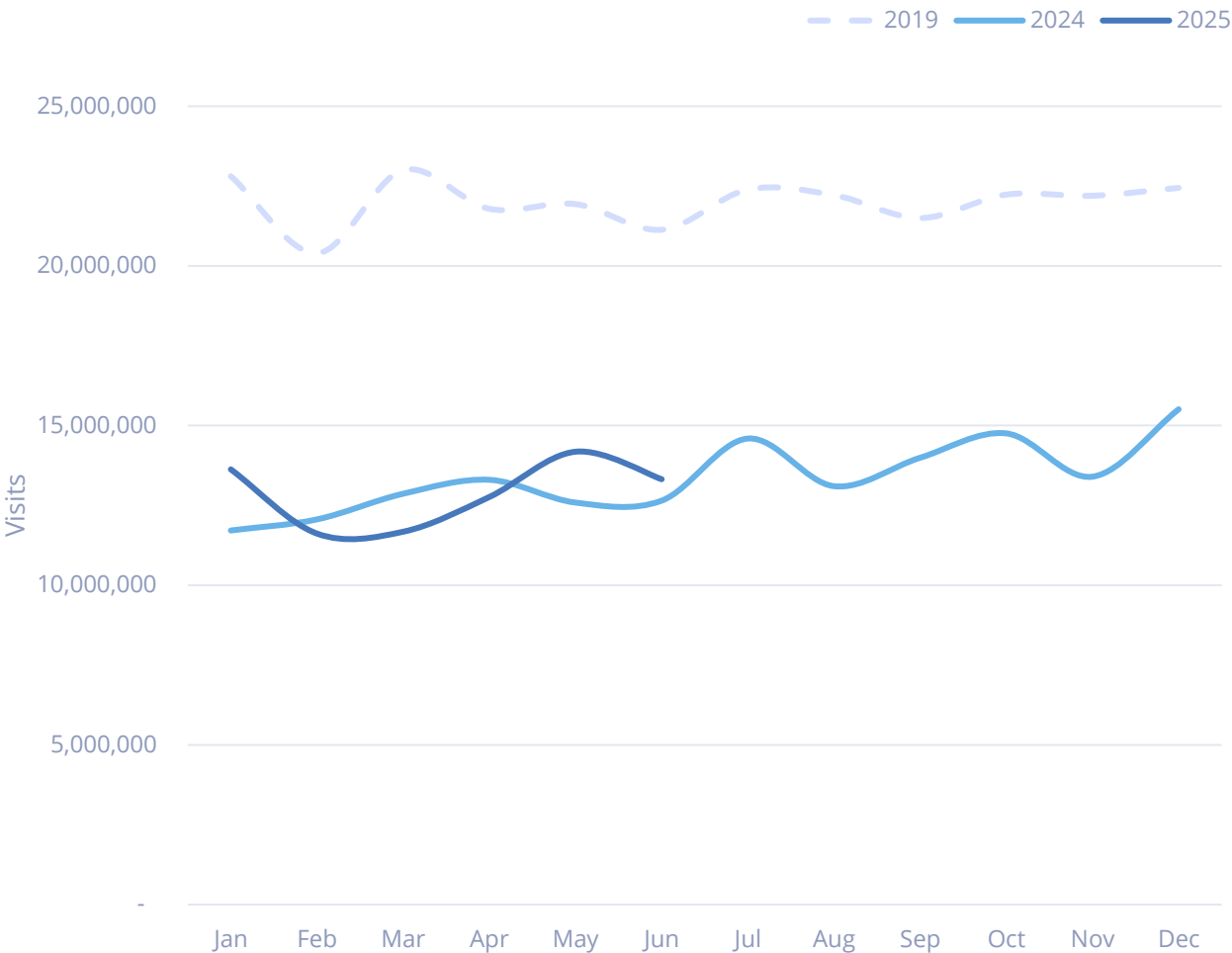
Similar to other London HQ areas, Northbank BID saw growth year-on-year (+5.3%), despite decline month-on-month (-6.1%)

13.3 million visits across Northbank BID in June 2025, experiencing month-on-month decline following a period of considerable growth from March.

## June 2025

Area	Footfall (millions)	Month-on-Month	Year-on-Year	vs. 2019
Northbank BID	13.3	-6.1%	+5.3%	-37.0%
West End (Benchmark)	20.2	-1.7%	-4.1%	-45.8%

Monthly Overview

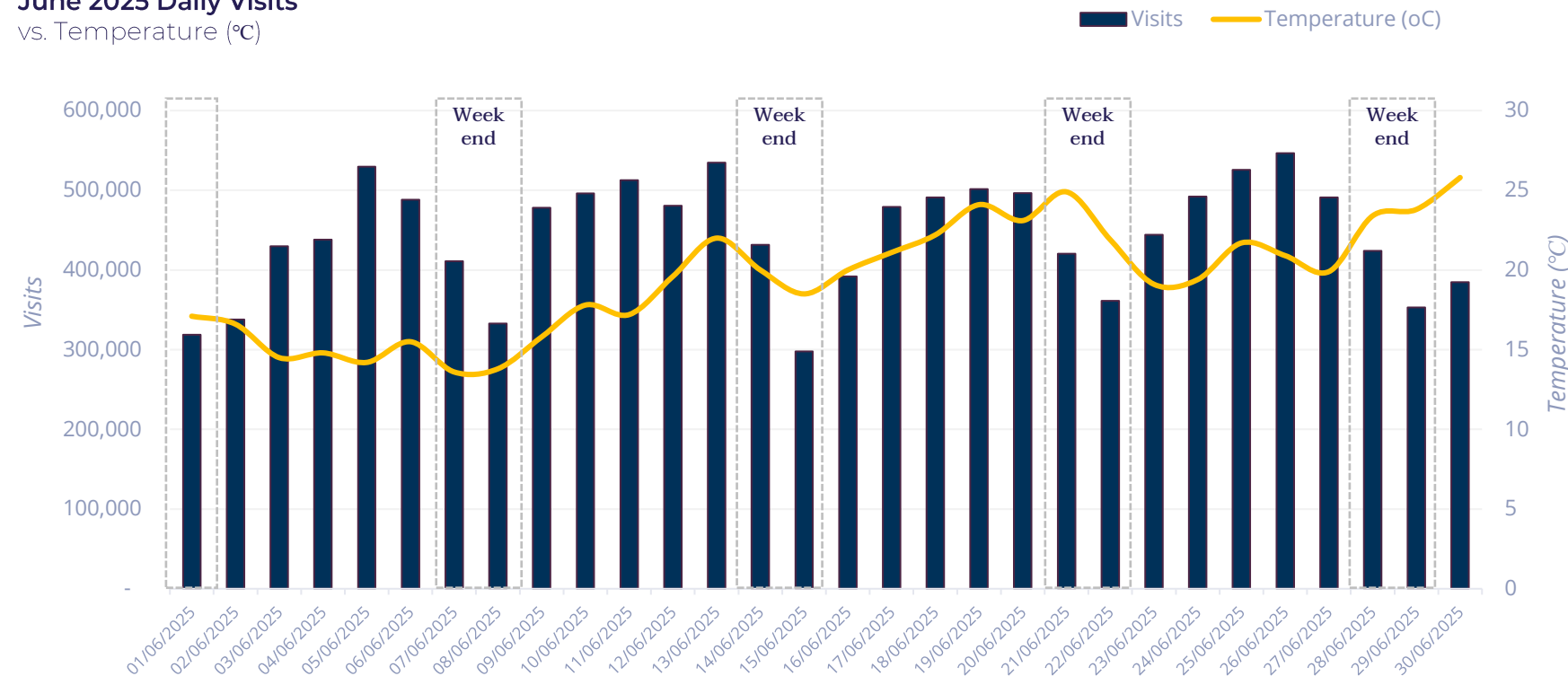


Source: Colliers LocateFootfall  
See Appendix for defined BID boundaries

VISIT PERFORMANCE | NORTHBANK BID

# RELATIVELY STABLE VISIT PERFORMANCE THROUGHOUT JUNE, WITH SLIGHT UPLIFT DURING W/C 23<sup>RD</sup> JUNE

June 2025 Daily Visits  
vs. Temperature (°C)



**Visit distribution throughout June returned to ‘normal’ following bank holidays & half-term in May**

Stable, warm weather throughout June contributed to consistent visit performance throughout the month; all days in the second half of the month saw average temps. above 19°C.

Despite consistent visit distribution throughout June, there was slight uplift in visits during w/c 23<sup>rd</sup> June (+4.3% ahead of average week); in-line with wider London HQ trends.

Source: Colliers LocateFootfall  
See Appendix for defined BID boundaries



All clusters experienced expected decline month-on-month in June, leading to overall visits down -6.1% across Northbank BID

## VISIT PERFORMANCE | NORTHBANK BID

# VARIED PERFORMANCE YEAR-ON-YEAR BETWEEN CLUSTERS DESPITE ALL SEEING MONTH-ON-MONTH DECLINE

Northbank BID saw **+5.3%** growth year-on-year, with strongest performance across **Victoria Embankment Gardens (+19.5%)** and **Trafalgar Square (+15.1%)**.

Northbank BID also experienced decline month-on-month (-6.1%), with all clusters seeing a reduction in visits vs. May 2025; comparison to May half-term & bank holidays influenced the volume of social visitors across the BID leading to decline in total visitors. Greatest decline experienced across **Strand Aldwych & Maiden Lane & Tavistock**.

Overall Northbank experienced less decline than most individual clusters in June, representing **less cross-visitation between clusters**, further reflecting the return of workers on focussed-trips & a decline in social visitors vs. May.

Area	Footfall	Month-on-Month	Year-on-Year	vs. 2019
The Northbank - Total Area	13,319,736	-6.1%	+5.3%	-37.0%
Strand - Central	2,095,366	-15.9%	+2.2%	-13.9%
Strand - West	2,328,777	-6.0%	+10.7%	-47.3%
Maiden Lane + Tavistock	470,212	-25.8%	-19.2%	-42.1%
Aldwych D	4,843,094	-5.0%	+10.2%	+44.8%
Strand Aldwych	407,747	-30.0%	-6.8%	-77.0%
Somerset / Arundel	1,810,461	-14.9%	+7.3%	-7.5%
Riverfront	3,071,624	-13.4%	+12.0%	+4.9%
Adelphi	301,907	-15.9%	-3.4%	-68.4%
Victoria Embankment Gardens	467,554	-12.6%	+19.5%	-43.1%
Villiers Street	1,195,831	-18.0%	+8.0%	-46.2%
Northumberland Avenue	2,297,556	-11.6%	+7.9%	-24.1%
Trafalgar Square	4,725,964	-6.9%	+15.1%	+1.5%
West End (Benchmark)	20,180,956	-1.7%	-4.1%	-45.8%

Source: Colliers LocateFootfall  
See Appendix for defined BID boundaries



02

# VISITOR BEHAVIOUR



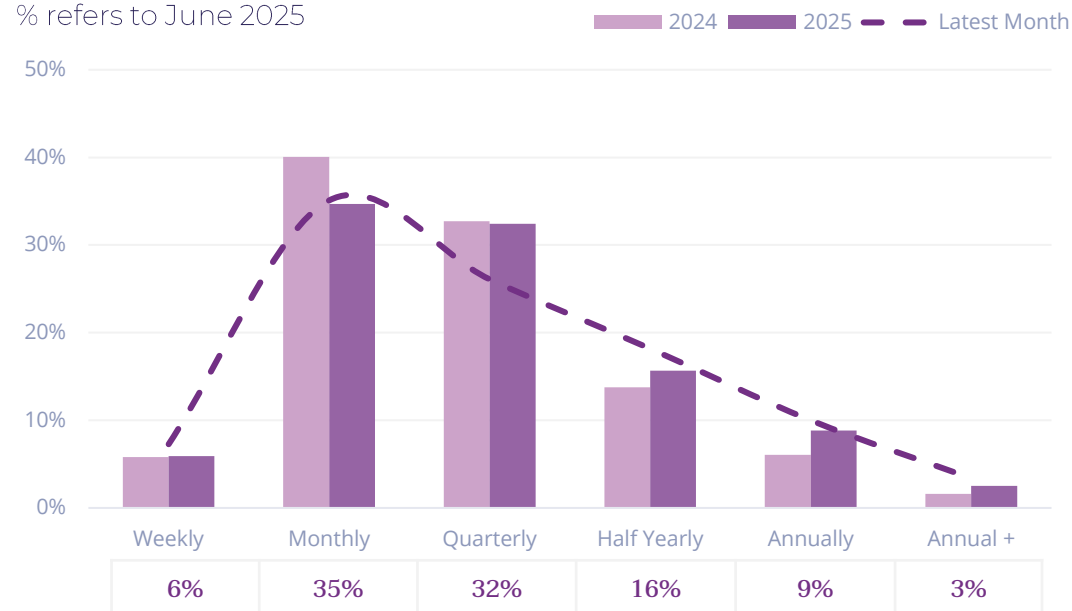


VISIT BEHAVIOUR | VICTORIA BID

# VISITORS RETURNED TO VICTORIA BID MORE OFTEN IN JUNE, REFLECTING INCREASED WORKER PRESENCE

## Visit Frequency

% refers to June 2025

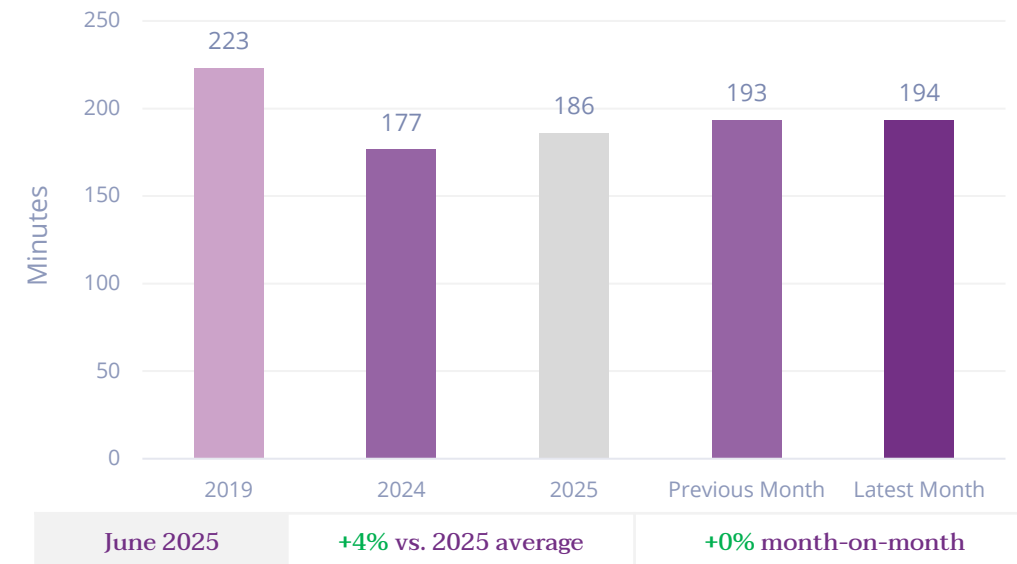


Slight increase in visit frequency in June 2025 vs, YTD average, reflecting **return of workers** in June.

**41%** of visitors visited Victoria BID at least **monthly** in June 2025 vs. 36% in May 2025.

## Average Dwell

June 2025



Relatively consistent average visitor dwell month-on-month, with continued warm & dry weather capturing longer dwell vs. year-to-date average.

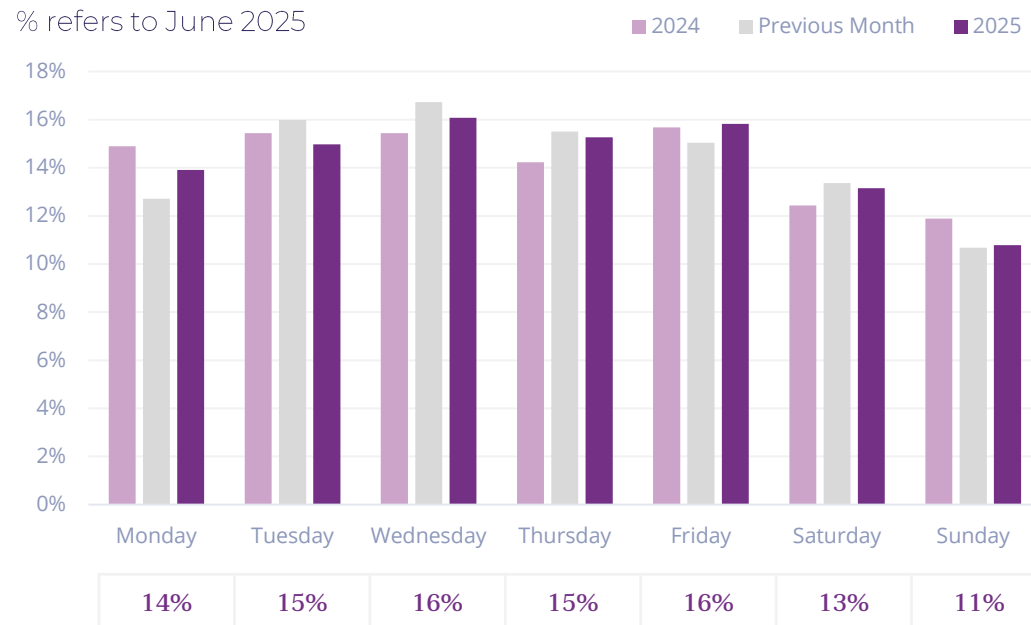
Visitor dwell **+1 min** vs. May 2025, and **+8 mins** vs. 2025 average.

VISIT BEHAVIOUR | VICTORIA BID

# CONSISTENT VISIT DISTRIBUTION THROUGHOUT THE WEEK IN JUNE 2025, WITH 24% WEEKEND SHARE OF VISITS

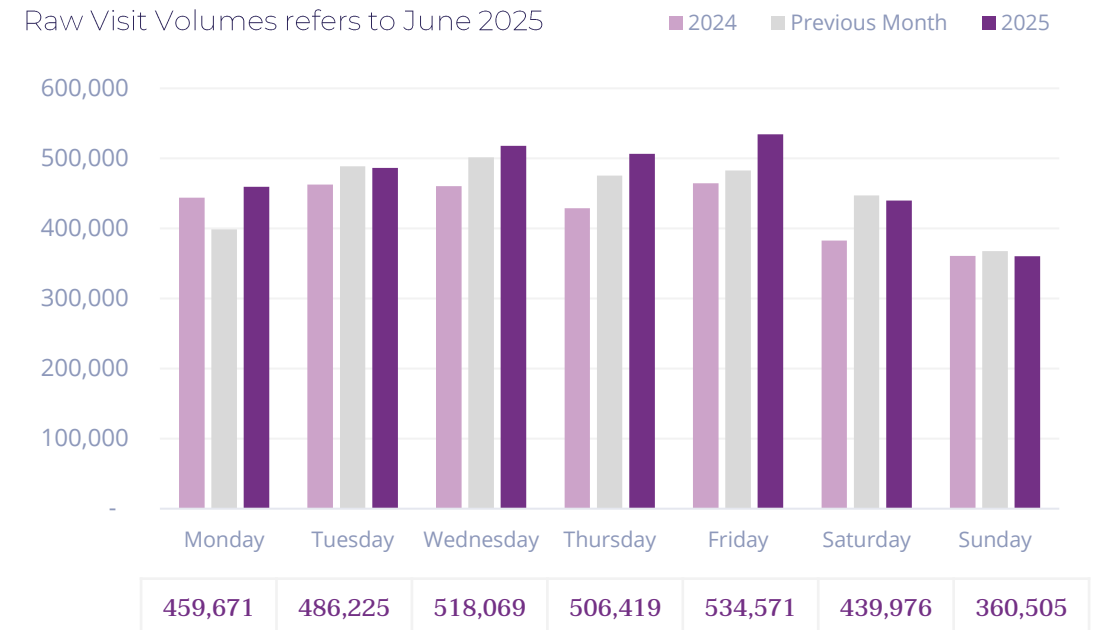
## Visit Share by Day

% refers to June 2025



## Average Visits by Day

Raw Visit Volumes refers to June 2025



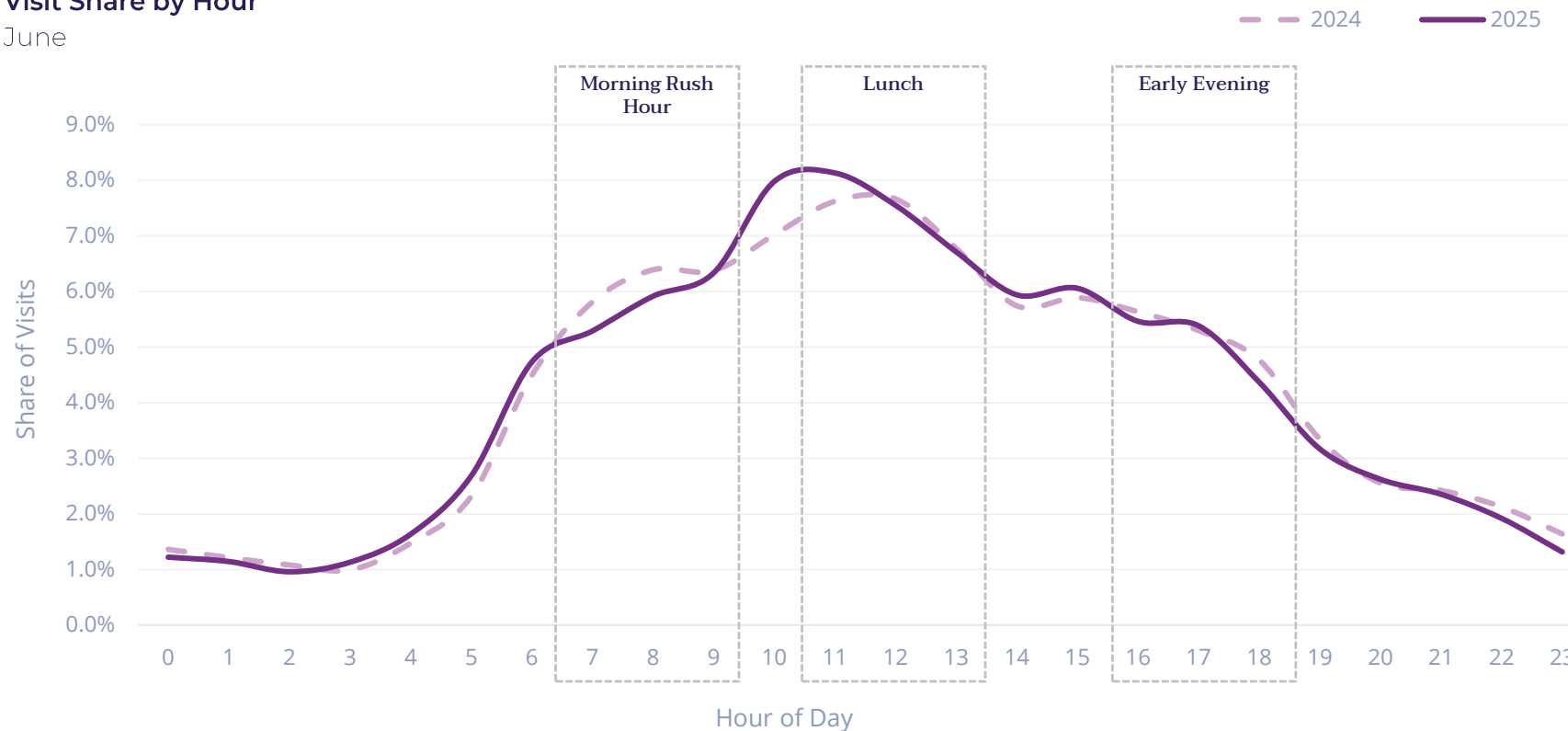
Visit distribution across Victoria BID slightly more consistent vs. May 2025, with increased share on Mondays following bank holidays in May, while weekend share of visits (24%) remained consistent with previous month.



VISIT BEHAVIOUR | VICTORIA BID

# HIGHER SHARE OF VISITS DURING LATE MORNING IN JUNE 2025, WITH SLIGHT REDUCTION IN EARLY MORNING

Visit Share by Hour  
June



**Slight shift in hourly distribution of visits focussed around late-morning/lunch visitation, further reflecting increased worker presence**

Visit distribution follows similar trend year-on-year throughout June showing three clear phases: morning rush hour (7-9am), lunchtime peak (11am – 1pm), before a gradual decline from mid-afternoon.

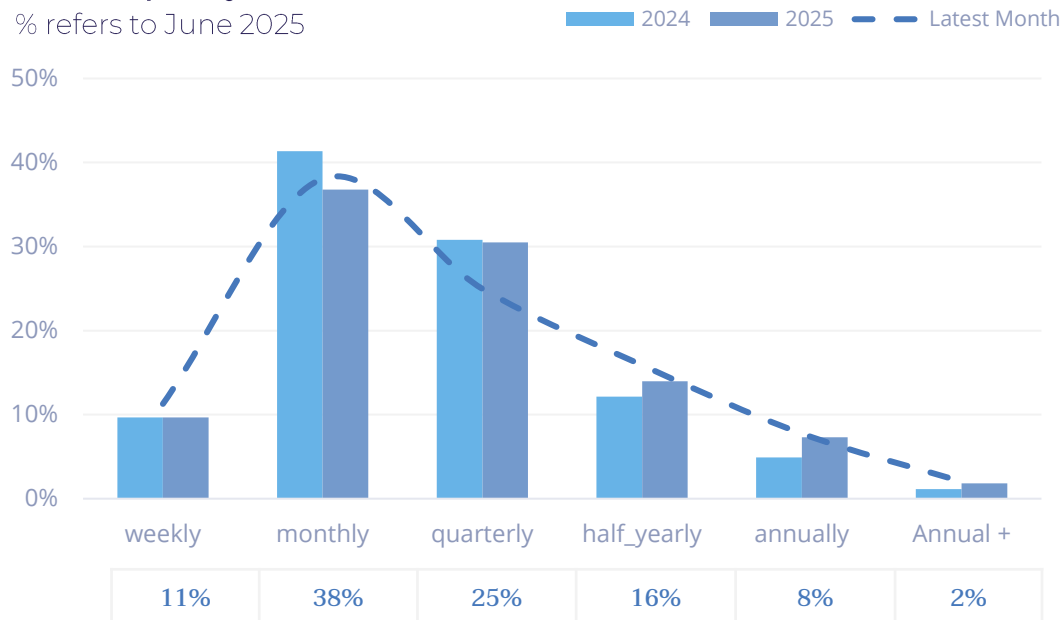
Proportion of visits **after 6pm** remained consistent year-on-year, with **16%** of visits after 6pm.

VISIT BEHAVIOUR | NORTHBANK BID

# INCREASED VISIT FREQUENCY IN JUNE, WITH HALF OF VISITORS VISITING AT LEAST MONTHLY

## Visit Frequency

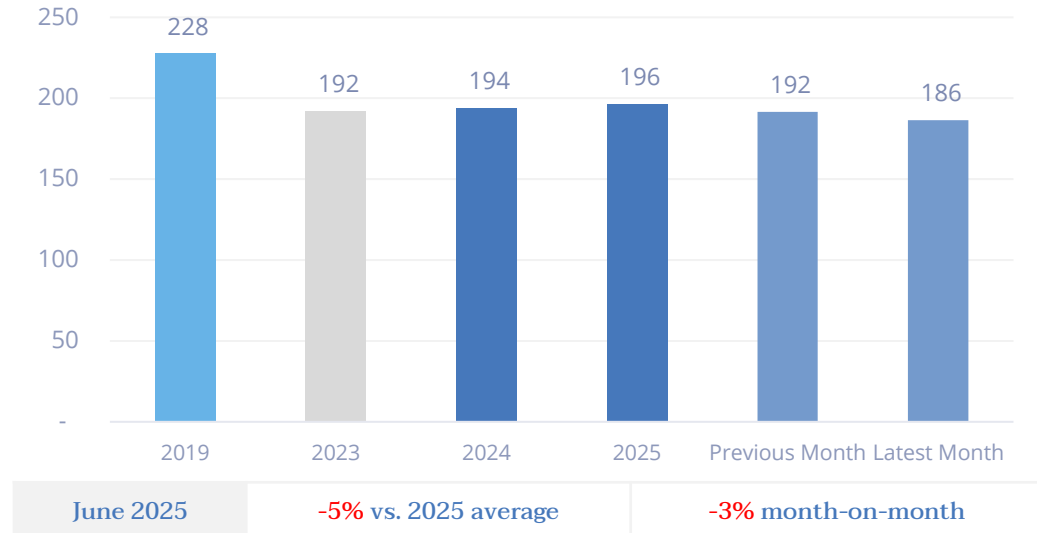
% refers to June 2025



Similar to wider London HQ trends, Northbank BID experienced increased visit frequency throughout June reflecting return of workers; **49%** of visitors visiting at least monthly in June vs. 42% in May 2025.

## Average Dwell

June 2025



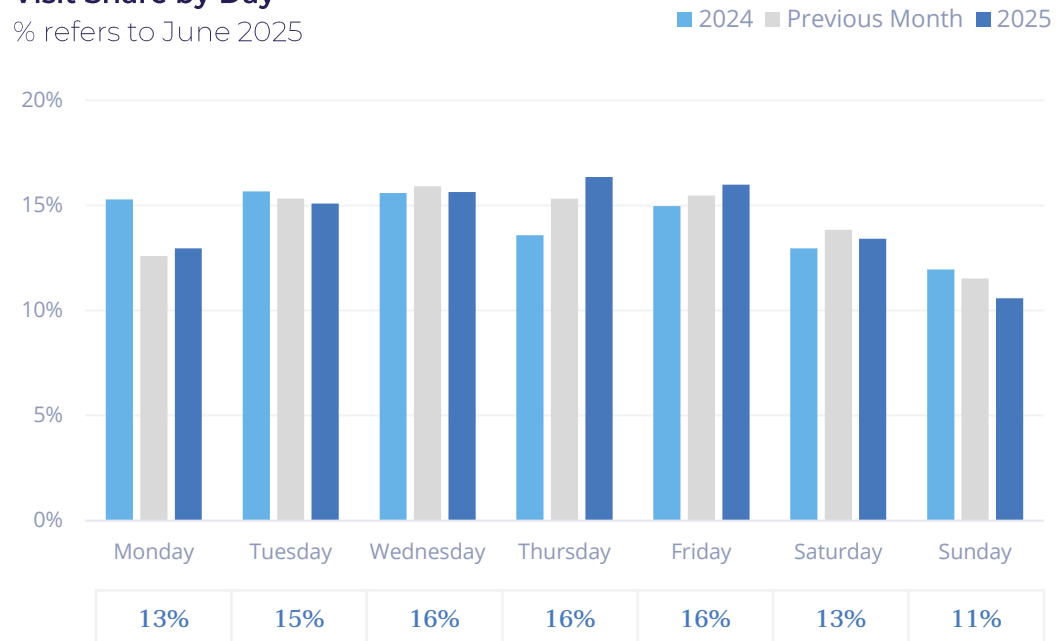
Dwell time around Northbank BID saw month-on-month decline (-6 mins) and a reduction vs. year-to-date average (+10 mins) in June.

VISIT BEHAVIOUR | NORTHBANK BID

# INCREASED SHARE OF VISITS TOWARDS THE END OF THE WORKING WEEK IN JUNE, REPLACING WEEKEND VISITS

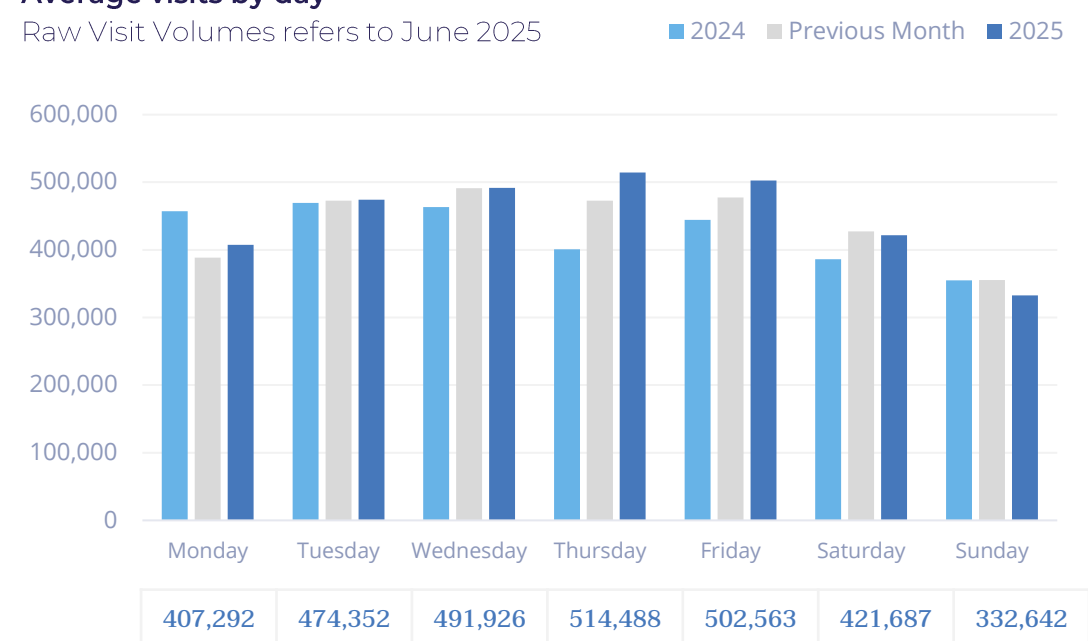
## Visit Share by Day

% refers to June 2025



## Average visits by day

Raw Visit Volumes refers to June 2025

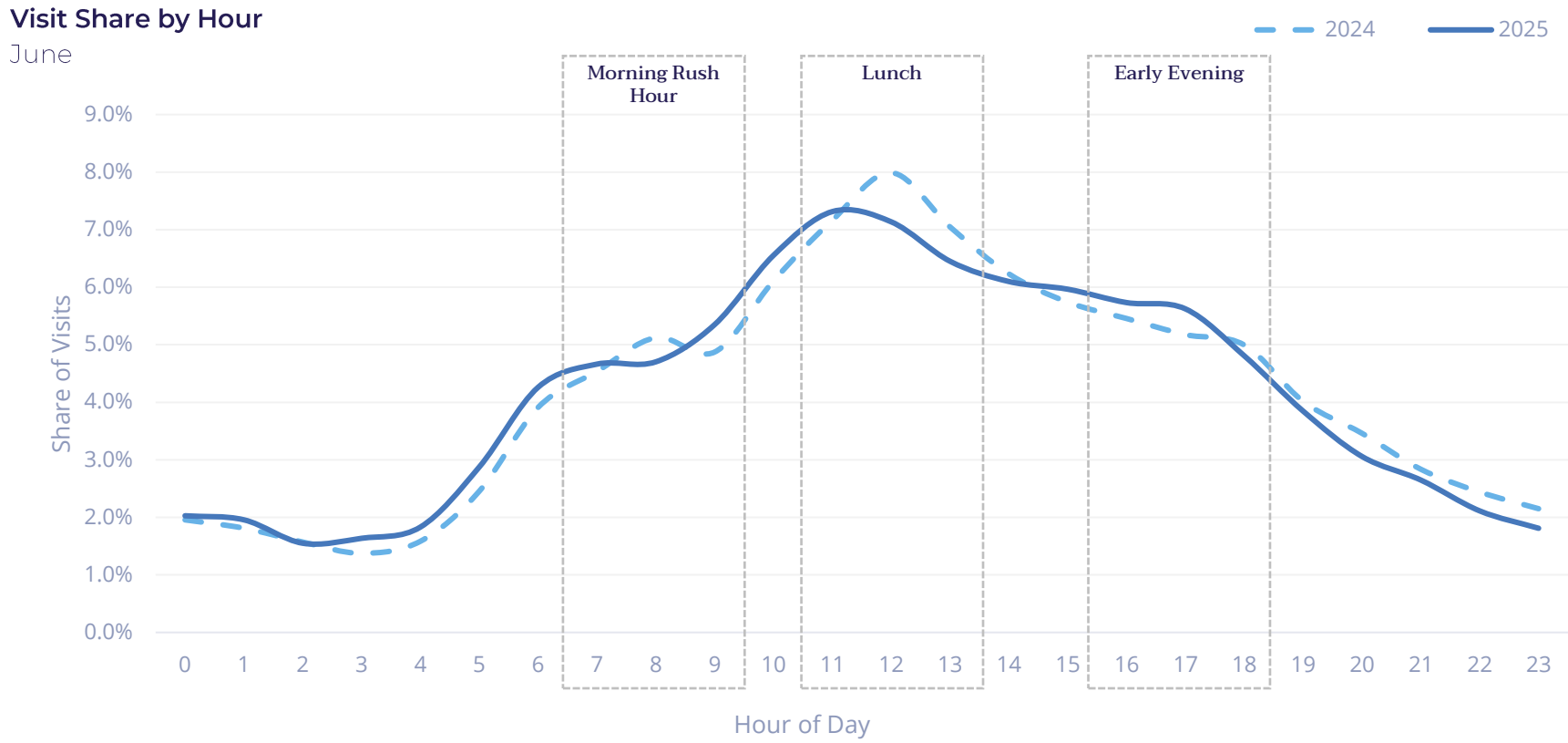


Slight increase in share of visits towards end of the working week (**Thursday & Friday**) in June vs. May, with a **reduction in share of weekend** visits month-on-month; average visits on weekends throughout June down ~ 30k on average vs. May.



VISIT BEHAVIOUR | NORTHBANK BID

# RELATIVELY CONSISTENT HOURLY DISTRIBUTION IN JUNE 2025 VS. SAME MONTH LAST YEAR



**Visit distribution throughout June 2025 saw a relatively consistent profile to June 2024**

Slight increase in share of visits throughout mid-to-late morning, despite a lower lunchtime peak vs. 2024.

Northbank’s distribution of visits throughout the day in-line with wider trend seen across wider London HQ BIDs throughout June 2025.

Source: Colliers LocateFootfall  
See Appendix for defined BID boundaries

03

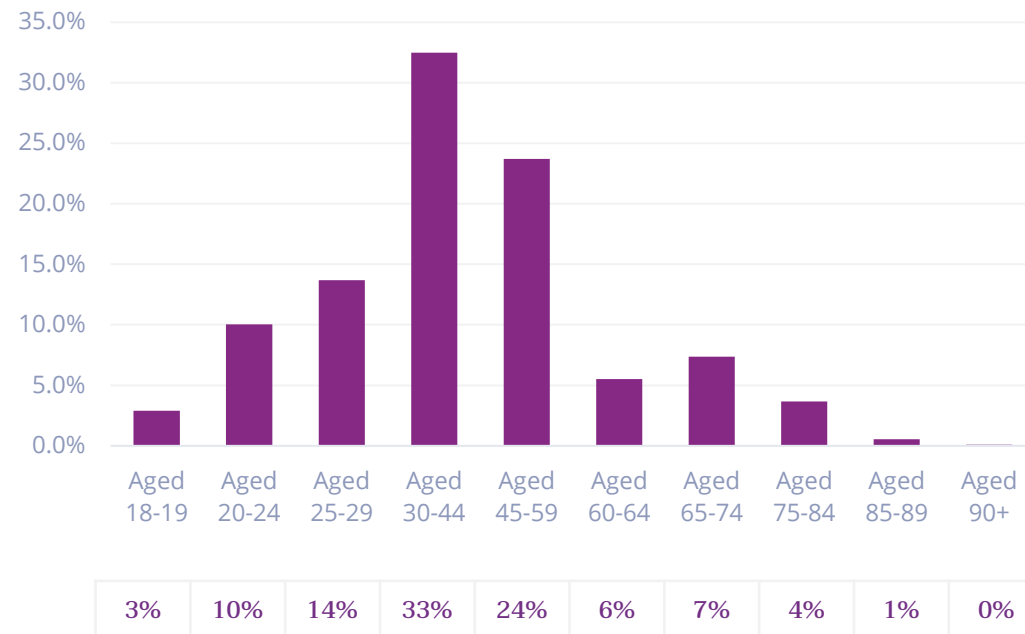
# VISITOR SEGMENTATION



VISIT SEGMENTATION | VICTORIA BID

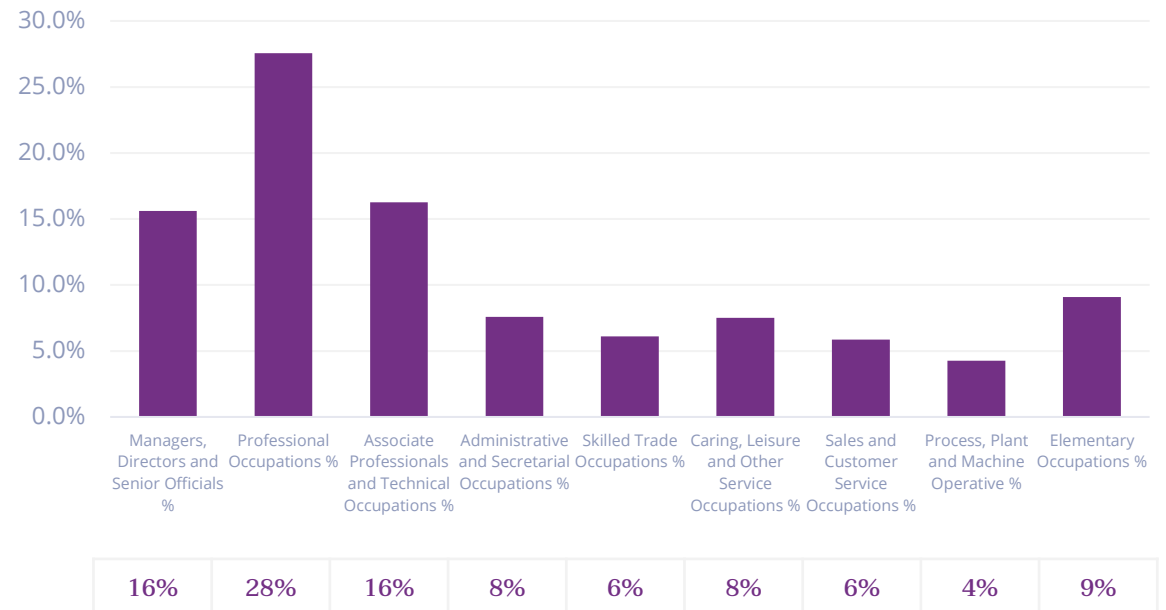
# VICTORIA BID CATCHMENT PROFILE SKEWED TOWARDS HIGH-INCOME, MIDDLE-AGED VISITORS

Age Profile



Victoria BID has a bias towards mid-ranged age groups, particularly aged 30-44 years old (32.5%) and 45-59 years old (23.7%)

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 27.6% of visitor profile; up slightly (+0.1%) vs. previous month.



VISIT SEGMENTATION | VICTORIA BID

# VISITOR PROFILE OVER-INDEXES ON CITY PROSPERITY & MUNICIPAL TENANTS

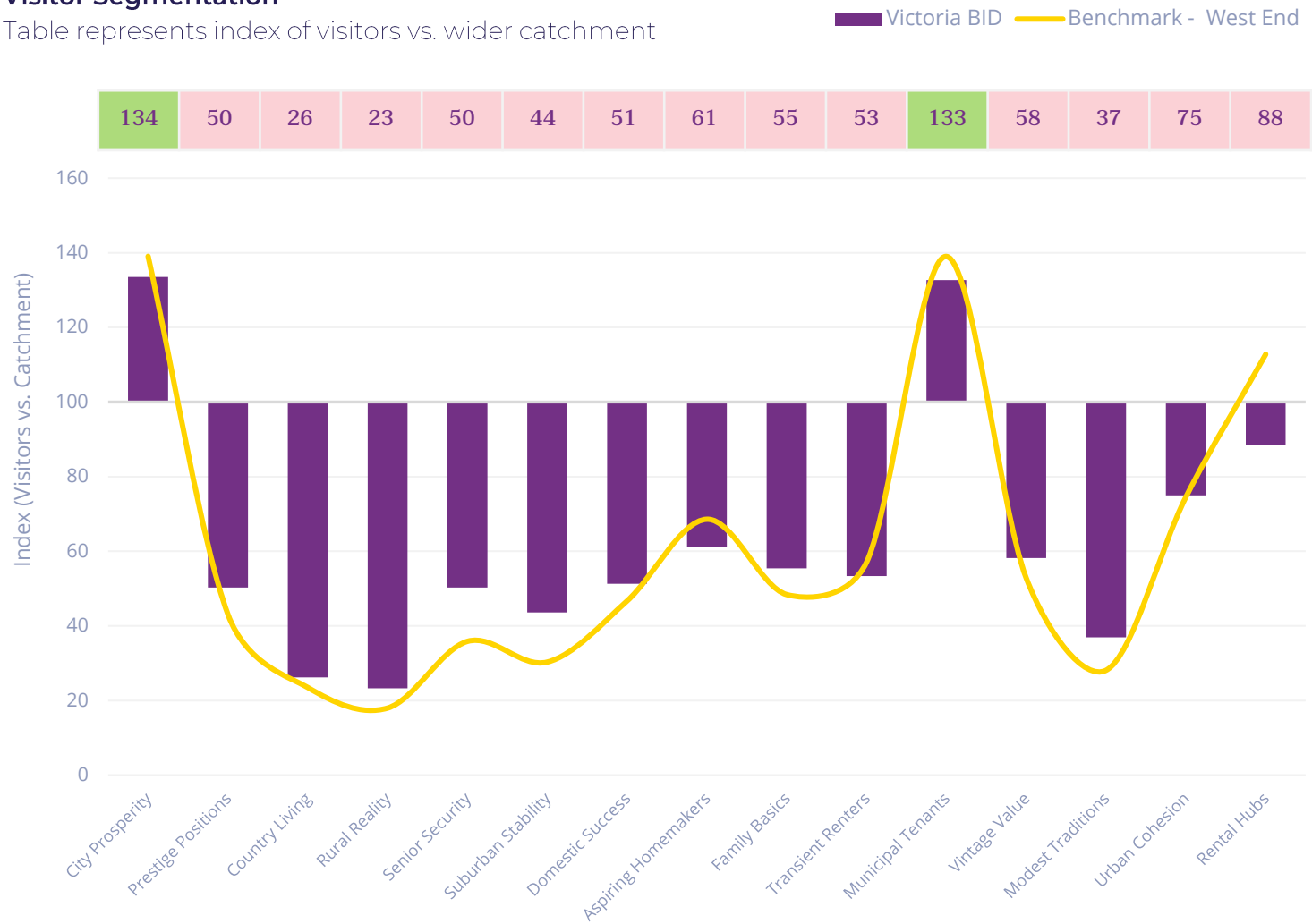
Visitor profile remains in line with West End, with a bias towards 2 Mosaic groups ‘City Prosperity’ and ‘Municipal Tenants’

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

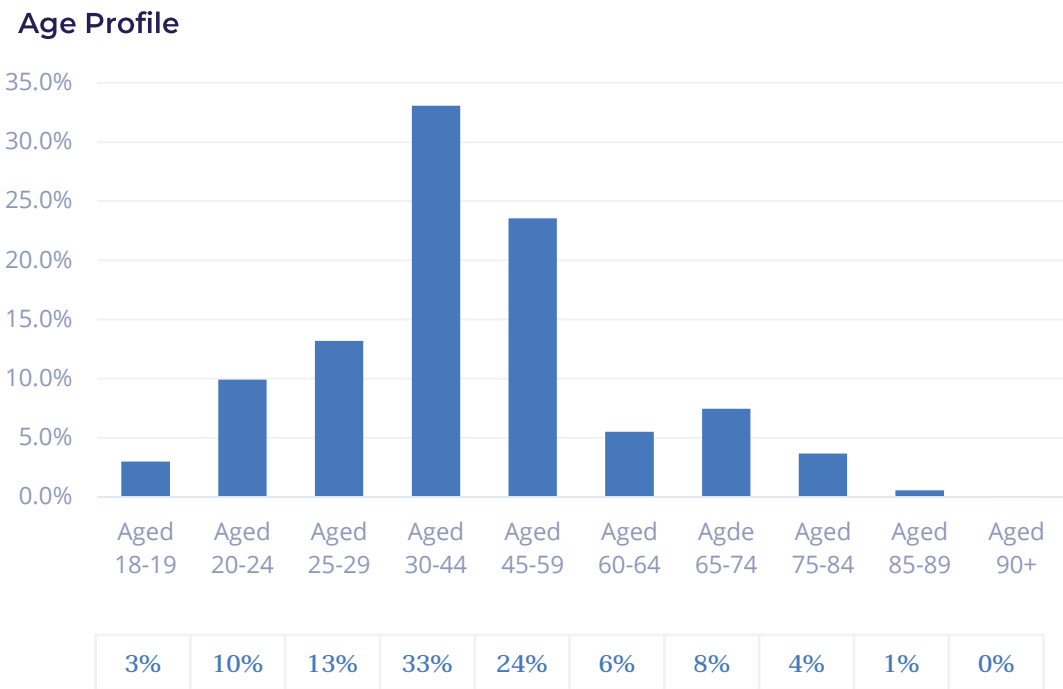
Table represents index of visitors vs. wider catchment



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

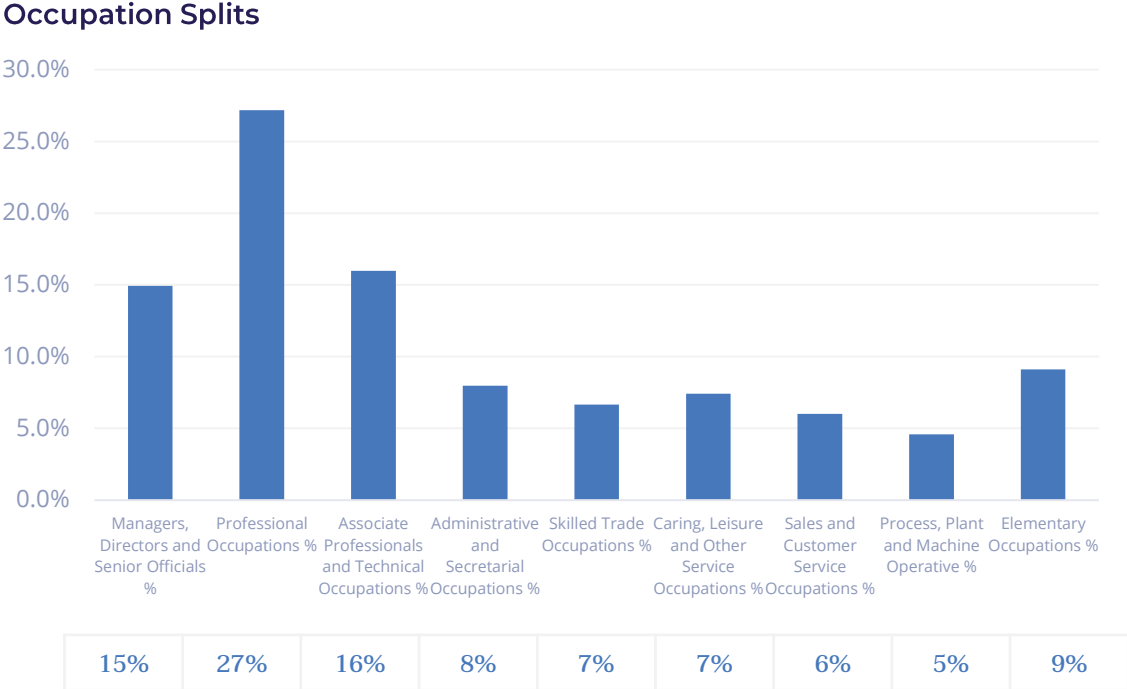
VISIT SEGMENTATION | NORTHBANK BID

# 42% OF NORTHBANK BID VISITORS WITHIN MANAGERIAL OR PROFESSIONAL OCCUPATIONS CATEGORIES



Northbank BID has a bias towards mid-ranged age groups, particularly aged **30-44 years old (33.1%)** and **45-59 years old (23.5%)**

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



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

**27.2%** of visitors in **Professional Occupations**, up slightly (+0.1%) vs. previous month.

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’

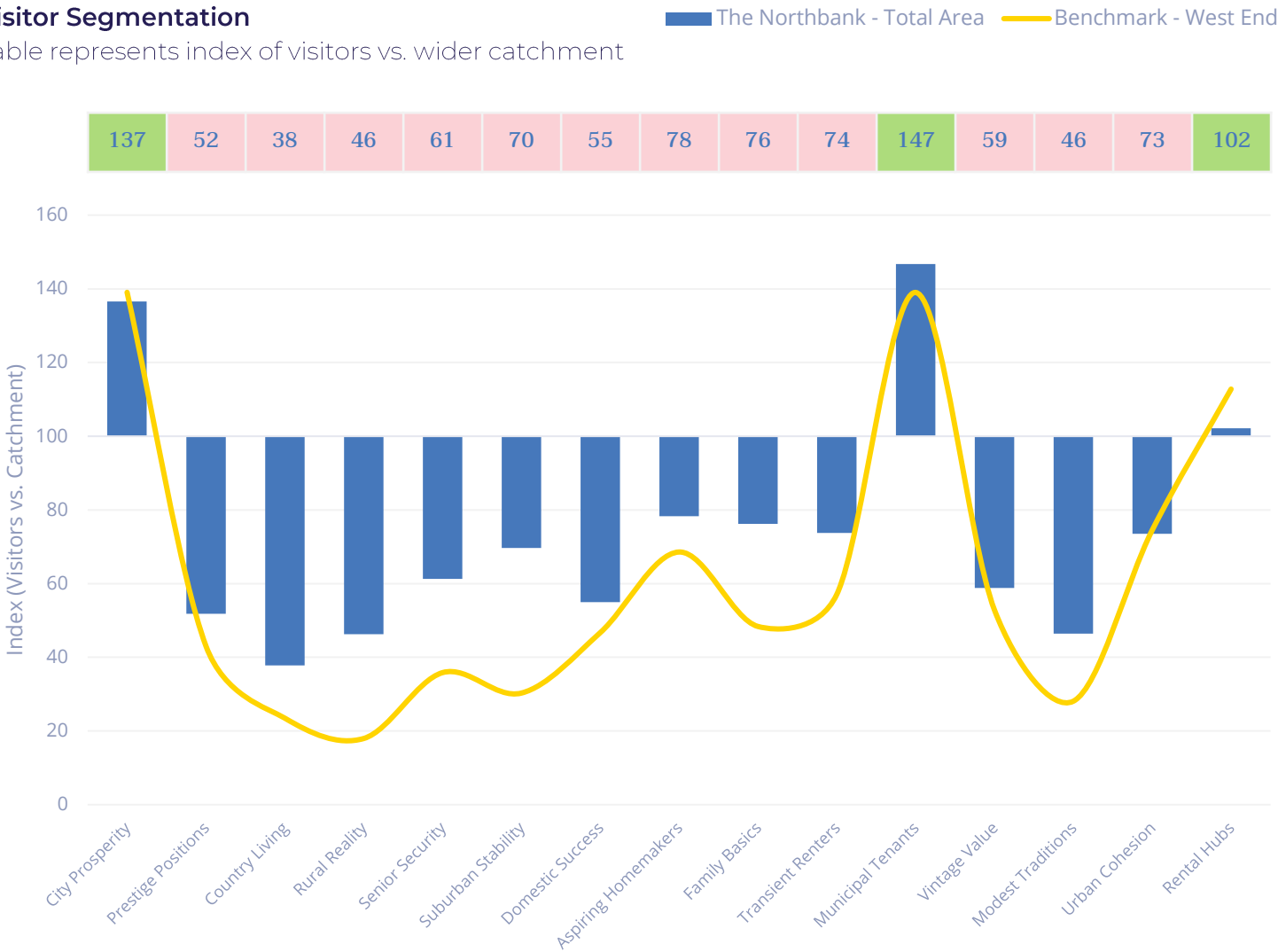
City Prosperity are high-income residents who have expensive homes in desirable metropolitan locations (Age: 26-35 | Income: £100k-£150k)

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

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

## Visitor Segmentation

Table represents index of visitors vs. wider catchment





04

# APPENDIX





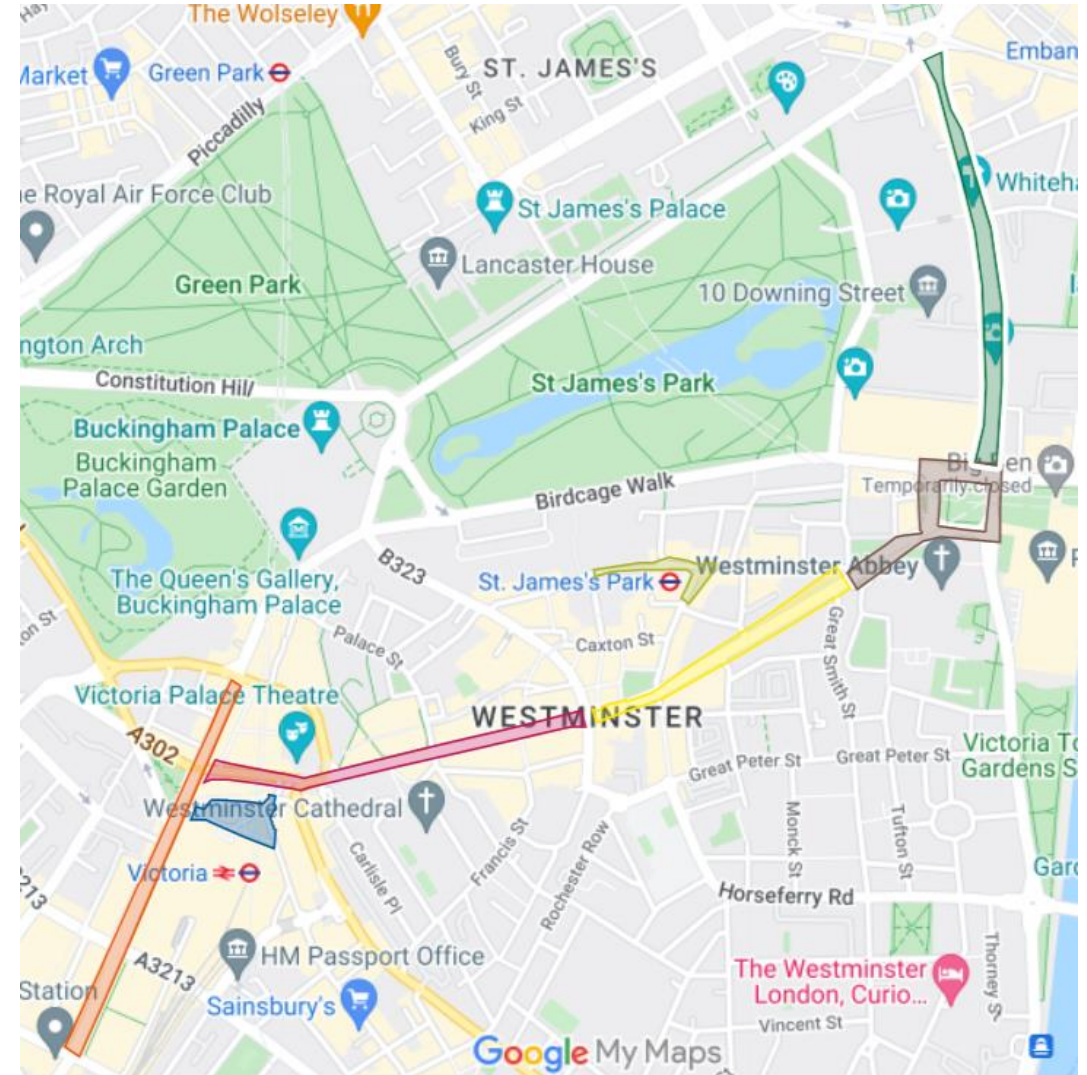
# APPENDIX | VICTORIA BID

## 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

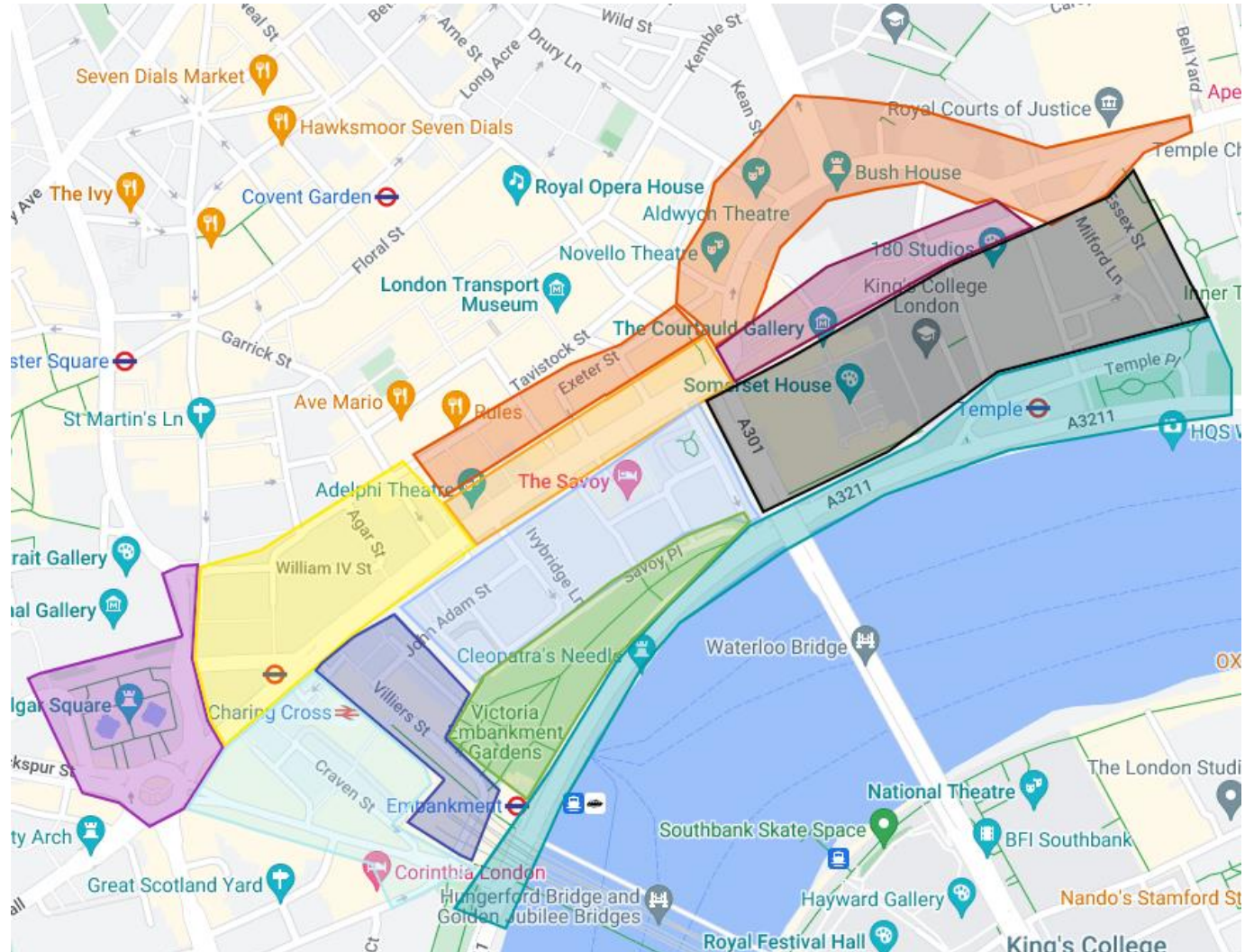


## APPENDIX | NORTHBANK BID

# 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

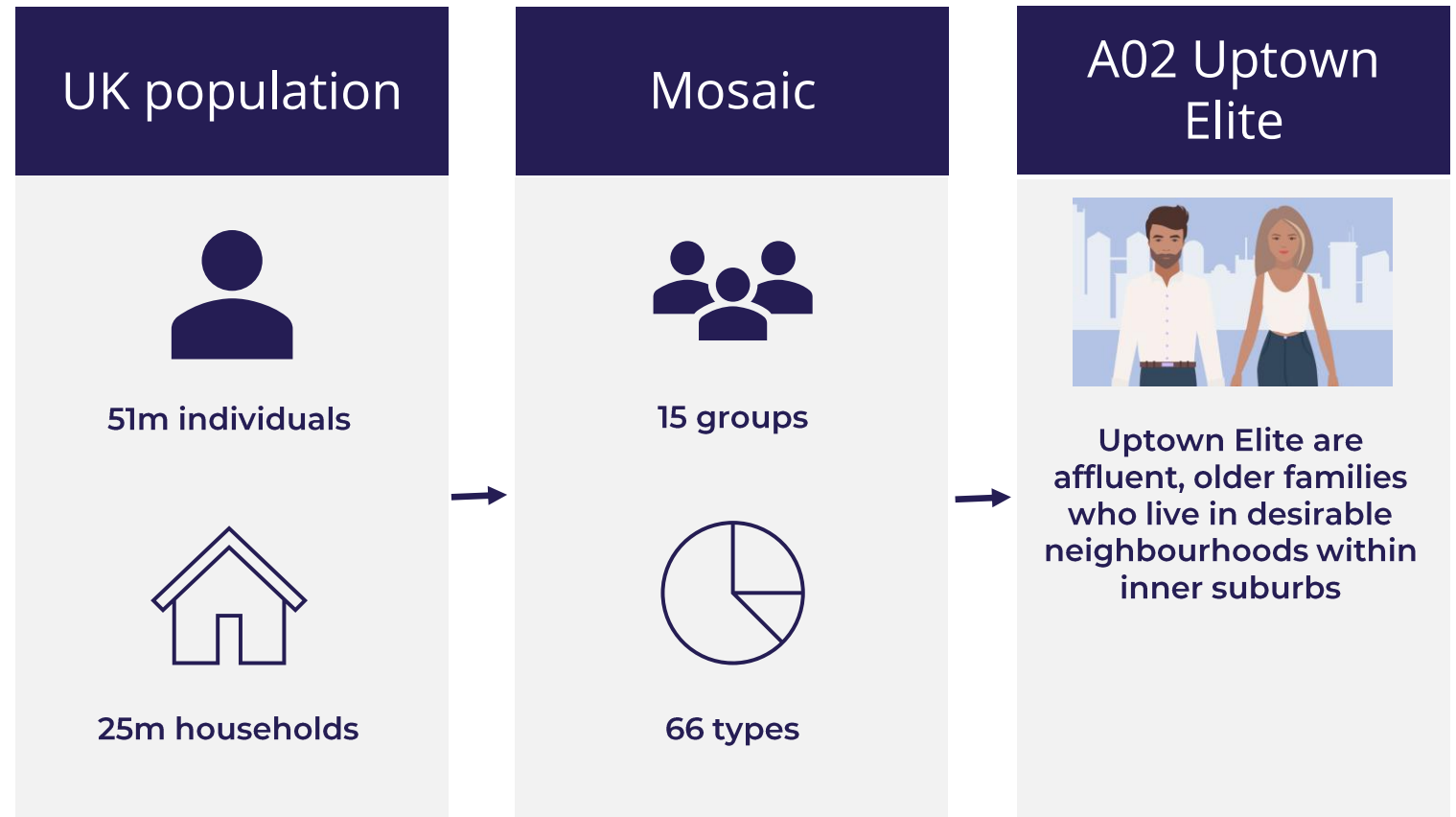
# EXPERIAN'S MOSAIC SEGMENTATION

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...



Colliers LocateFootfall

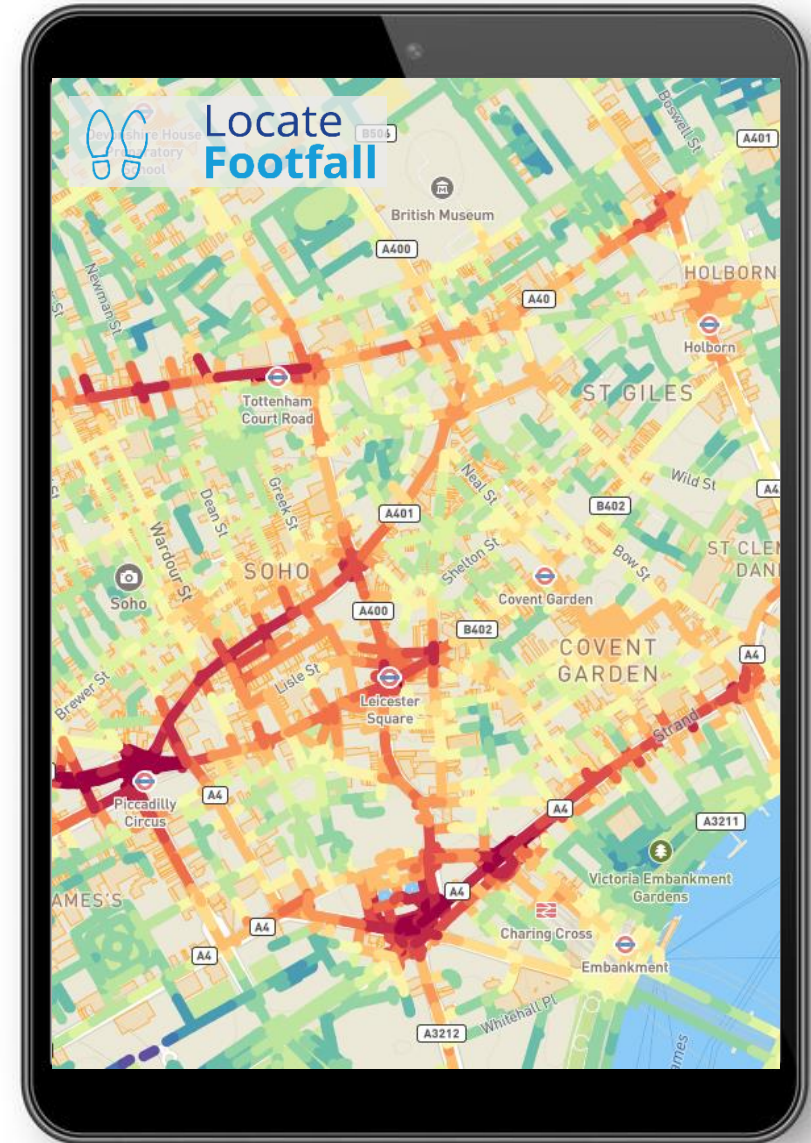
# Footfall Intelligence

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



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

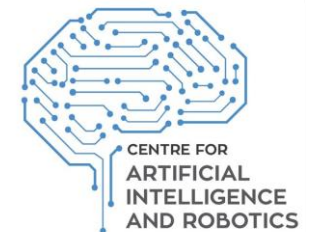


# GDPR

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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