



JULY 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.

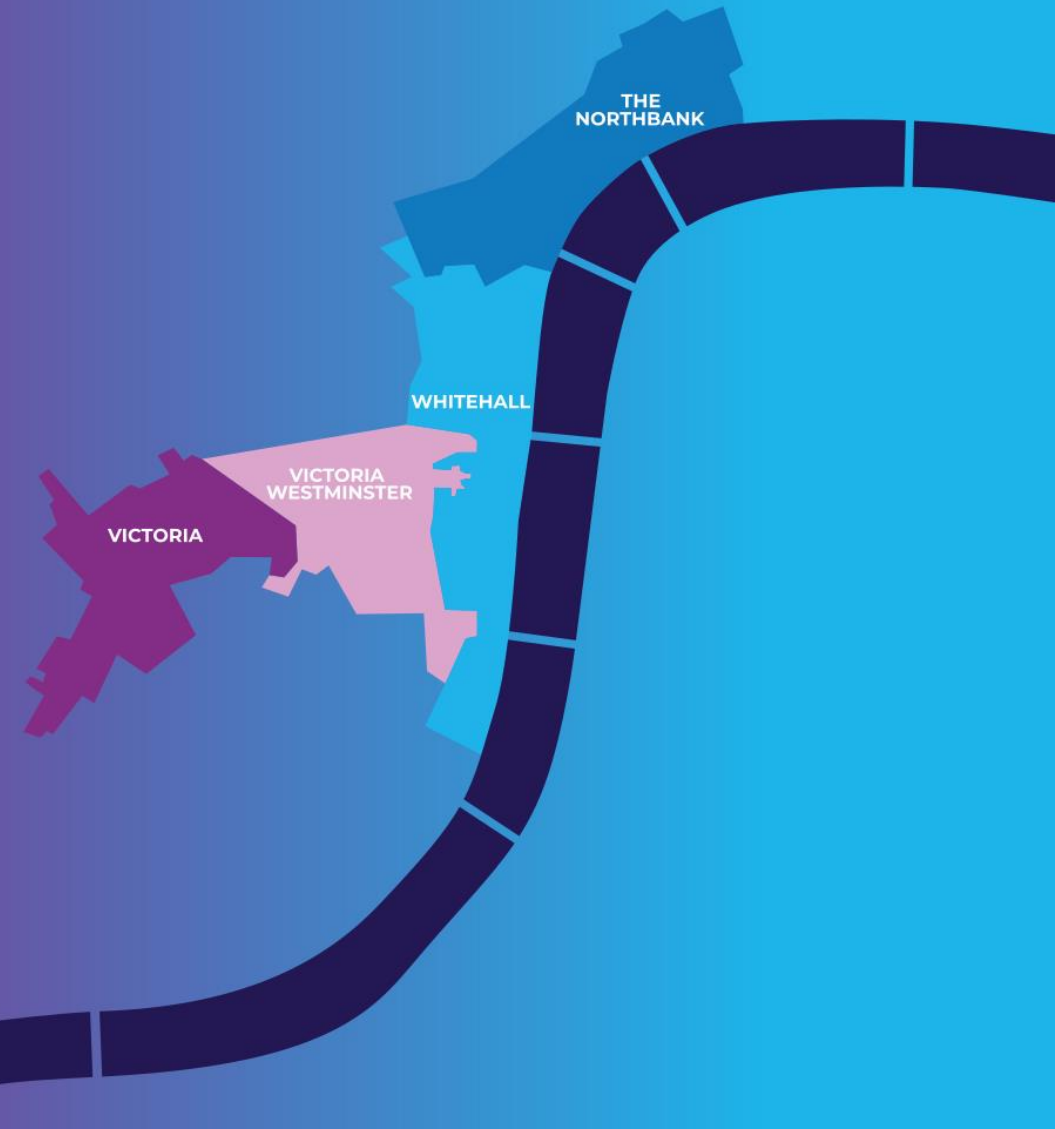
VICTORIA: The Victoria Business Improvement District (BID) is a business-led and business-funded body formed to support economic growth in Victoria and to create a vibrant destination for those who work, visit or live in the area.

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:

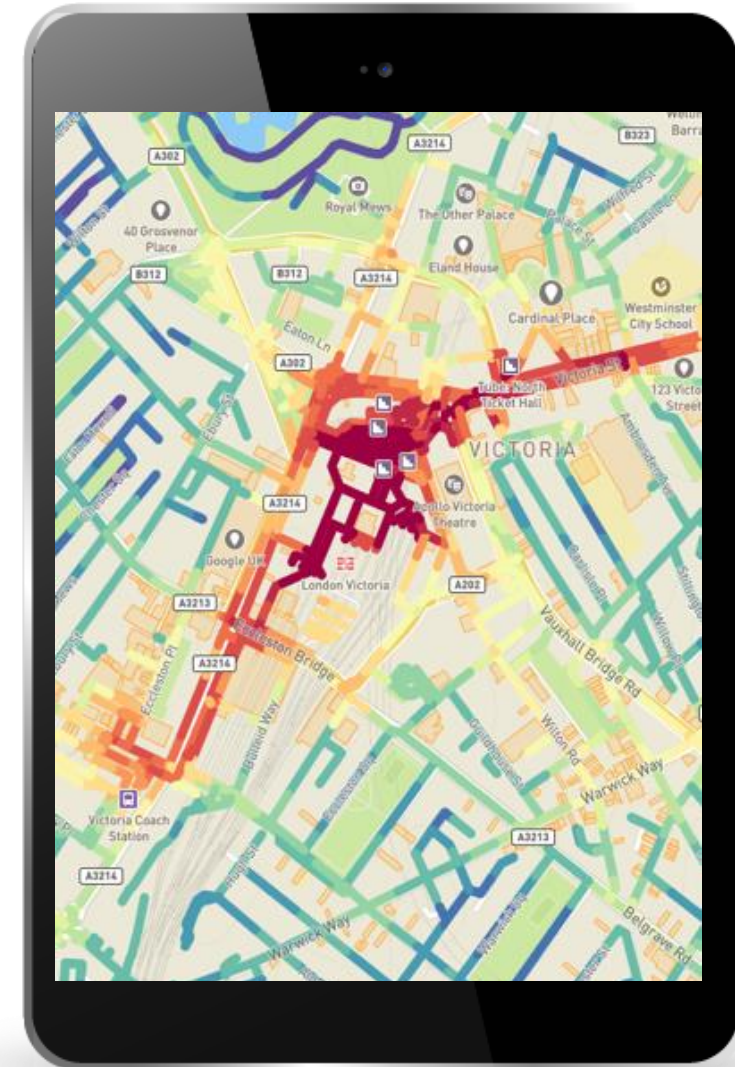
- ❑ Visitor footfall
- ❑ Visitor profile
- ❑ Visitor behaviour

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





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01

VISIT PERFORMANCE



VISIT PERFORMANCE | VICTORIA BID

STRONG GROWTH DURING JULY 2025 TO VICTORIA BID

Visit performance across Victoria BID up both month-on-month (+16.7%) and year-on-year (+15.9%)

Strong growth indicative of the start of the school summer holidays & various events across the district & wider London HQ area, including Lionesses' Euro 2025 Trophy Parade.

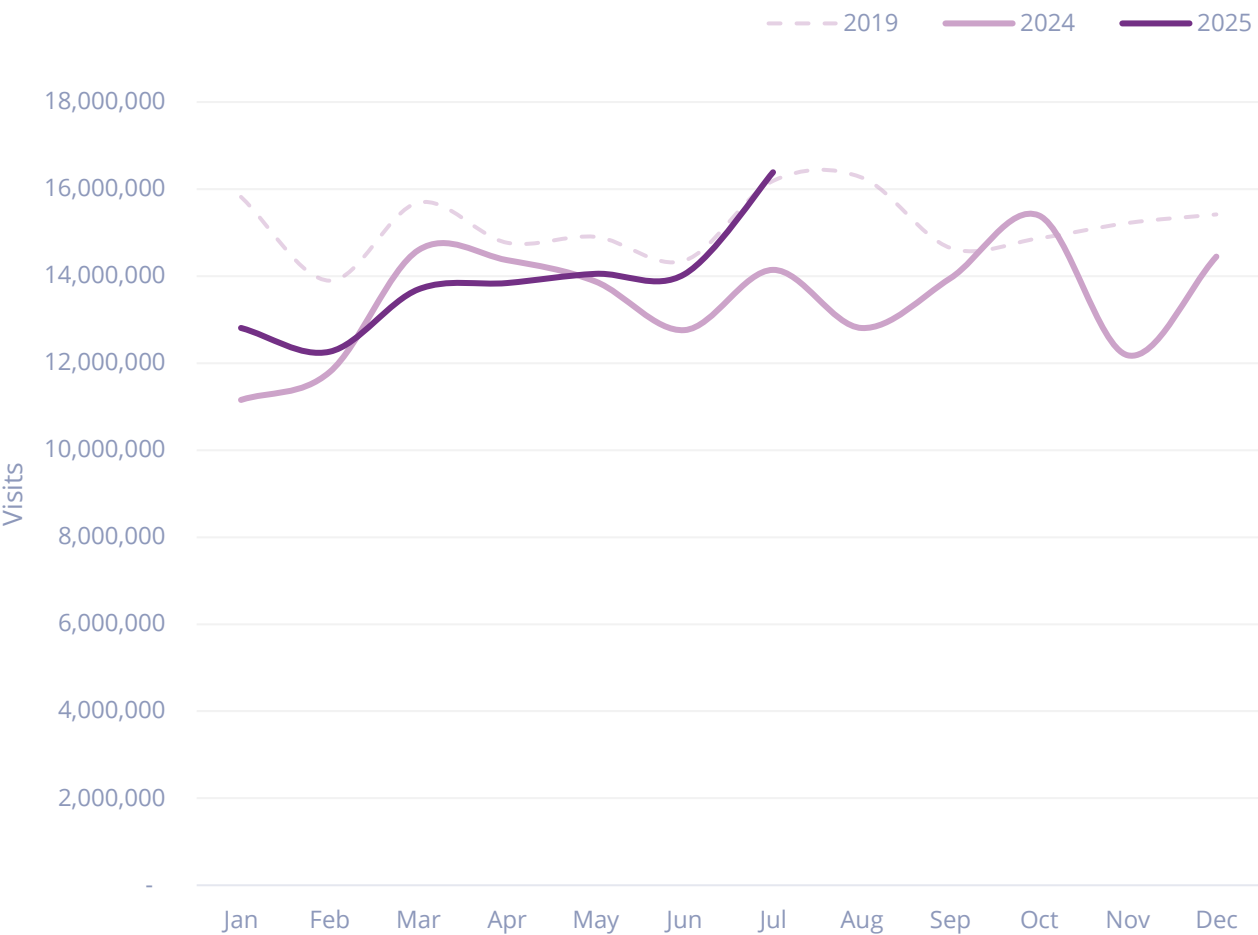
Year-to-date performance across Victoria BID up +4.5% vs. same period in 2024.

July 2025

Area	Footfall (millions)	Month-on-Month	Year-on-Year	vs. 2019
Victoria BID	16.4	+16.7%	+15.9%	+1.2%
West End (Benchmark)	22.4	+10.8%	+5.5%	-43.5%

Source: Colliers LocateFootfall
See Appendix for defined BID boundaries

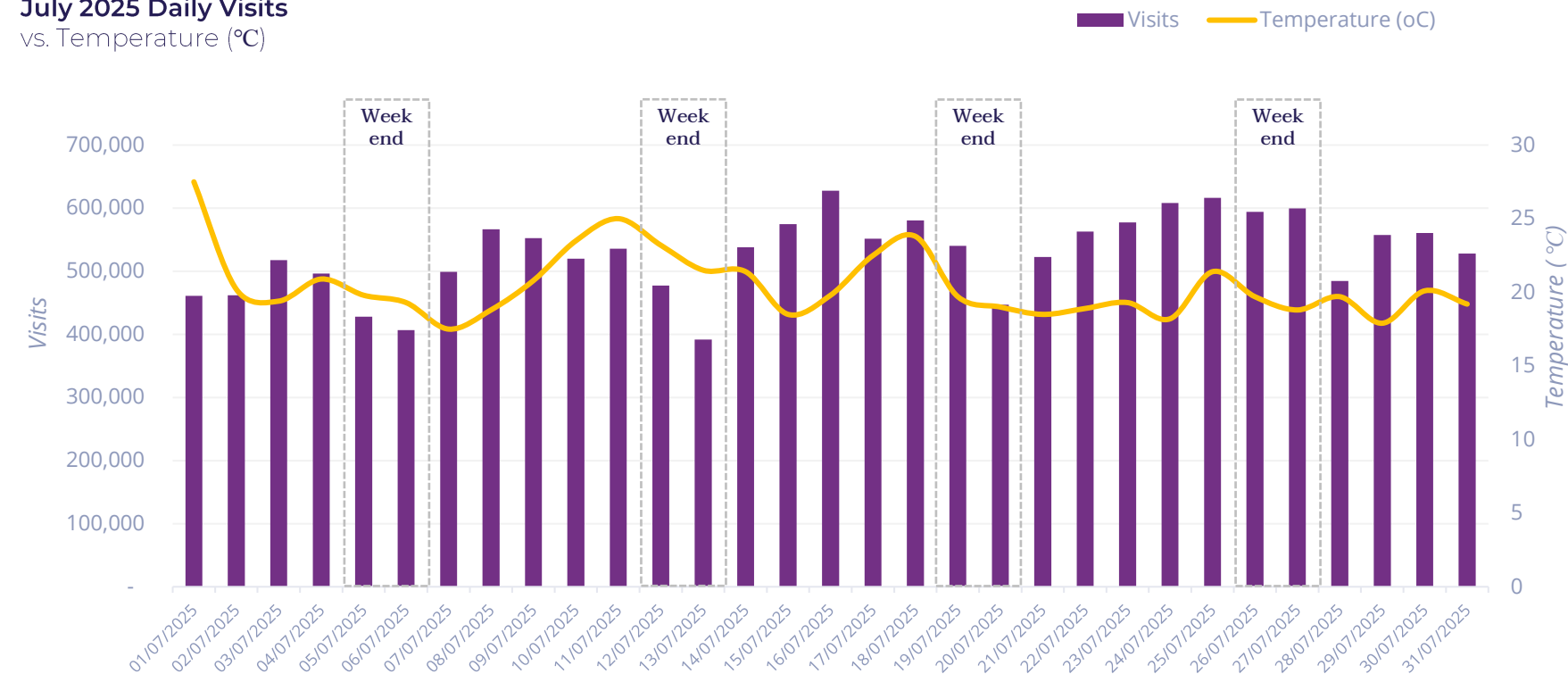
Monthly Overview



VISIT PERFORMANCE | VICTORIA BID

CONSISTENT VISIT PERFORMANCE THROUGHOUT JULY WITH SLIGHT UPLIFT TOWARDS THE END OF THE MONTH

July 2025 Daily Visits
vs. Temperature (°C)



Visits remained relatively consistent throughout July due to stable, warm weather

Slight uplift in visit performance across Victoria BID in w/c 21st July – coinciding with the start of school summer holidays, representing increased social visitors across the BID.

- Peak visitation occurred on Friday 25th July (616k visits), up +11% ahead of average Friday.
- W/c 21st July saw visits +11.2% ahead of an average July week.

Source: Colliers LocateFootfall
See Appendix for defined BID boundaries

Strong uplift both month-on-month (+16.7%) and year-on-year (+15.9%) across Victoria BID, driven by strong growth across Whitehall & Victoria Street - East

VISIT PERFORMANCE | VICTORIA BID

STRONG MONTH-ON-MONTH & YEAR-ON-YEAR PERFORMANCE ACROSS MOST CLUSTERS

July 2025

Area	Footfall	Month-on-Month	Year-on-Year	vs. 2019
Victoria BID (All)	16,386,453	+16.7%	+15.9%	+1.2%
Buckingham Palace Road	2,556,172	+14.4%	+8.7%	+1.1%
Parliament Square	3,200,920	+15.0%	+19.0%	-6.0%
Terminus Place	1,773,985	+2.6%	+26.8%	-9.6%
Victoria Street - West	1,297,221	+9.1%	-4.7%	-50.8%
St. James's Park Station	139,941	-8.5%	+11.6%	-82.5%
Victoria Street - East	1,386,395	+35.5%	+19.7%	+9.4%
Whitehall	6,031,819	+22.3%	+19.2%	+68.2%
West End (Benchmark)	22,358,059	+10.8%	+5.5%	-43.5%

All clusters, except St. James's Park Station, experienced growth month-on-month, with the start of the school summer holidays, alongside various events (Lionesses' Trophy Parade) contributing to increased social visitors across the BID.

Alongside strong month-on-month performance, Victoria BID also saw high year-on-year growth (+15.9%) throughout July, with greatest increase in performance along Terminus Place (+26.8%) and Victoria Street – East (+19.7%).

Victoria BID experienced stronger growth rates vs. wider West End benchmark in July. Despite both seeing growth MoM & YoY, Victoria BID saw greater performance relative to previous year/month.



VISIT PERFORMANCE | NORTHBANK BID

+4.9% YEAR-ON-YEAR GROWTH IN VISITS ACROSS THE NORTHBANK BID

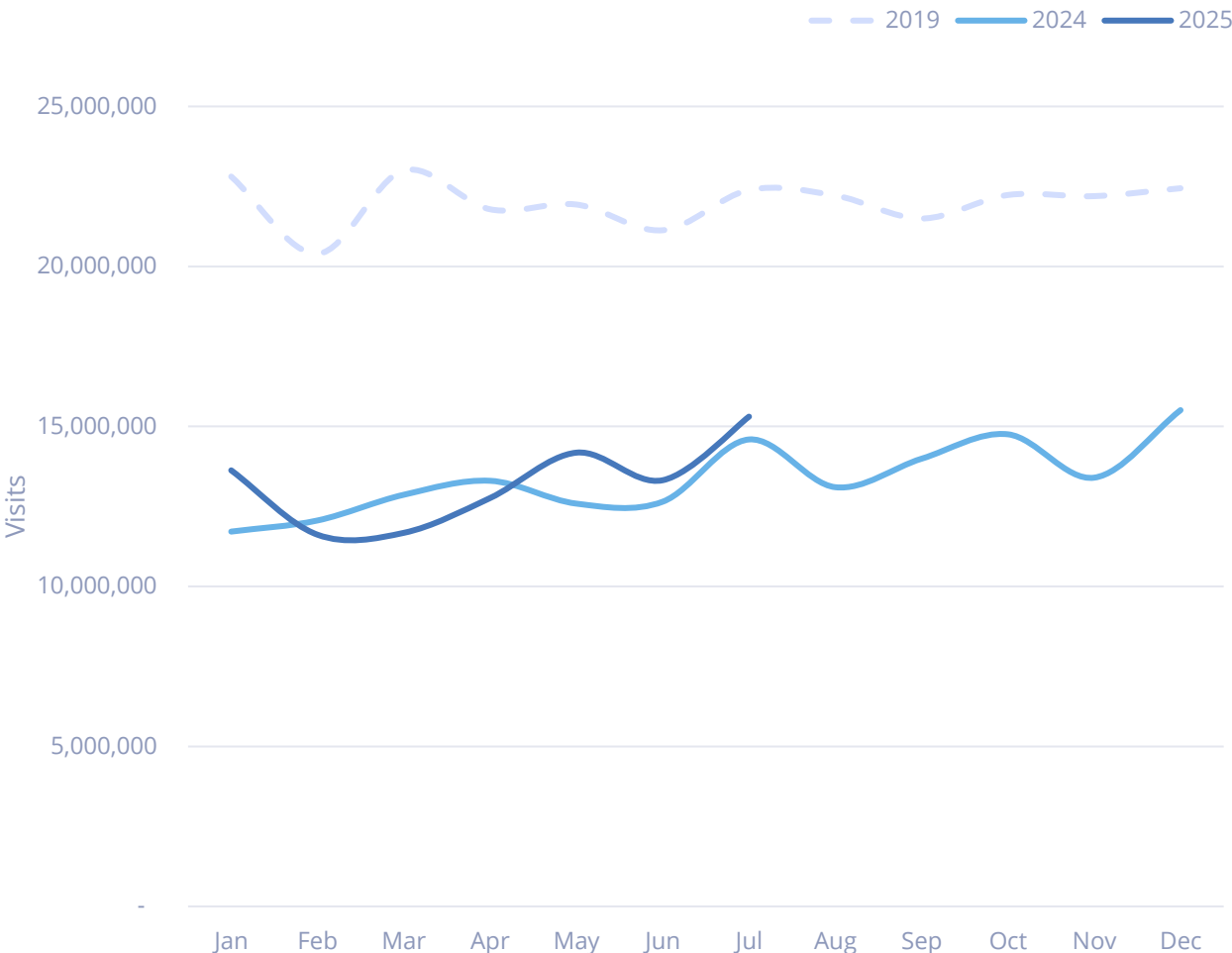
In line with other London HQ areas, Northbank BID saw strong growth both month-on-month (+14.9%) and year-on-year (+4.9%)

15.3 million visits across Northbank BID in July 2025, seeing considerable growth vs. June following a decline last month, and returning to trend of month-on-month growth experienced since March.

July 2025

Area	Footfall (millions)	Month-on-Month	Year-on-Year	vs. 2019
Northbank BID	15.3	+14.9%	+4.9%	-31.6%
West End (Benchmark)	22.4	+10.8%	+5.5%	-43.5%

Monthly Overview

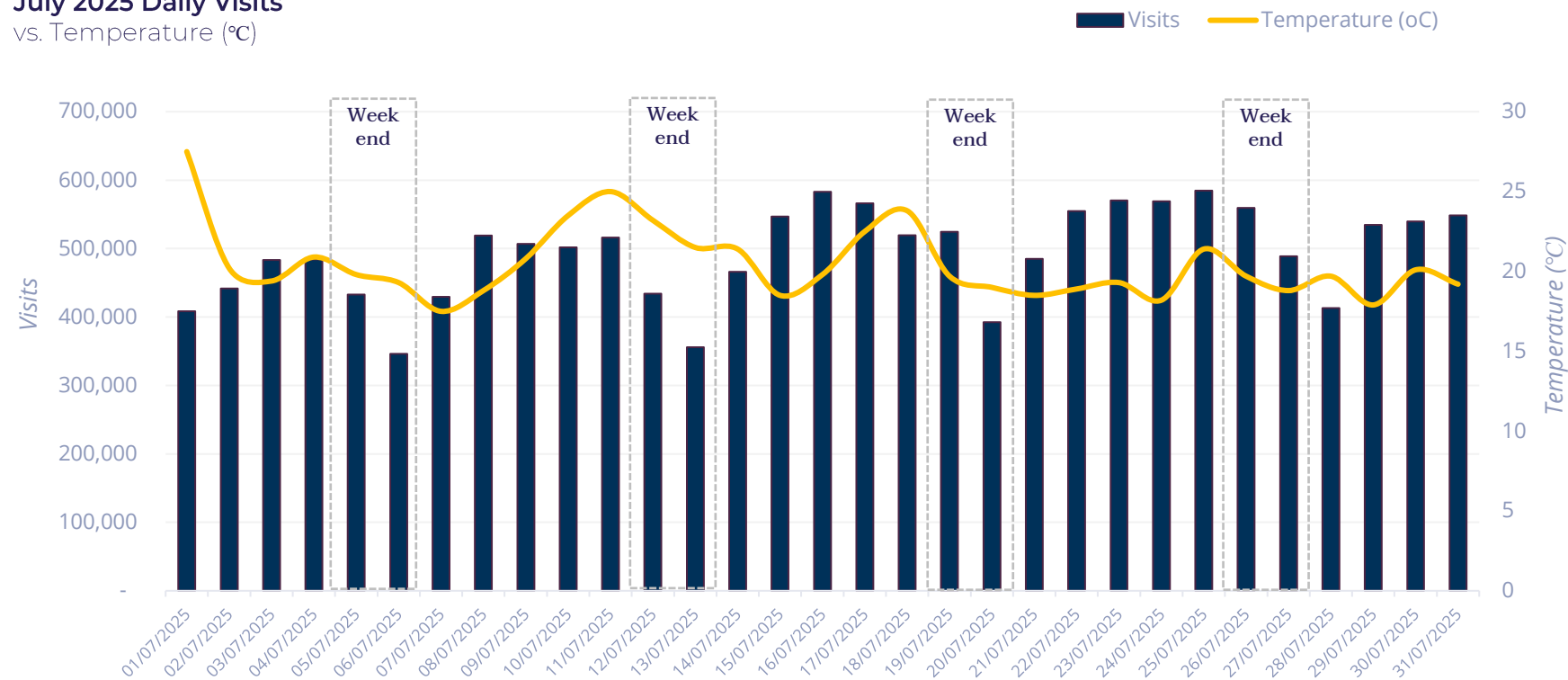


Source: Colliers LocateFootfall
See Appendix for defined BID boundaries

VISIT PERFORMANCE | NORTHBANK BID

START OF SCHOOL SUMMER HOLIDAYS CONTRIBUTED TO AN UPLIFT IN VISITATION ACROSS NORTHBANK BID

July 2025 Daily Visits
vs. Temperature (°C)



Uplift in visitation towards end of July, in-line with start of school summer holidays

Visits to Northbank BID saw growth towards the end of the month, consistent with trends seen in wider London HQ areas.

W/c 21st July saw all days out-perform average daily visits for each respective day in July, with the week +11.6% ahead of average week visit performance.

Following decline in June, all clusters across Northbank BID experienced strong month-on-month recovery

Area	Footfall	Month-on-Month	Year-on-Year	vs. 2019
The Northbank - Total Area	15,306,528	+14.9%	+4.9%	-31.6%
Strand - Central	2,536,949	+21.1%	+11.0%	-4.8%
Strand - West	2,703,167	+16.1%	+9.2%	-42.8%
Maiden Lane + Tavistock	607,826	+29.3%	-3.5%	-33.2%
Aldwych D	5,568,510	+15.0%	+8.6%	+50.4%
Strand Aldwych	413,159	+1.3%	-5.4%	-78.6%
Somerset / Arundel	2,049,833	+13.2%	+13.1%	-8.1%
Riverfront	3,417,302	+11.3%	+7.6%	+9.3%
Adelphi	327,316	+8.4%	+2.1%	-68.9%
Victoria Embankment Gardens	518,510	+10.9%	+19.1%	-43.5%
Villiers Street	1,367,929	+14.4%	+5.8%	-44.9%
Northumberland Avenue	2,820,824	+22.8%	+8.7%	-17.4%
Trafalgar Square	5,791,215	+22.5%	+15.4%	+12.1%
West End (Benchmark)	22,358,059	+10.8%	+5.5%	-43.3%

VISIT PERFORMANCE | NORTHBANK BID

SIGNIFICANT GROWTH MONTH-ON-MONTH & YEAR-ON-YEAR ACROSS NORTHBANK BID CLUSTERS

Northbank BID saw **+14.9%** growth month-on-month, following a drop in performance in June, alongside moderate growth year-on-year (**+4.9%**).

Trafalgar Square saw strong performance relative to previous month & year, and contributed the most visits compared to other clusters in July (5.8m). The cluster was host to stage performances at the start of the month for the Pride in London festival (Saturday 5th July).

Victoria Embankment Gardens experienced the greatest uplift year-on-year (+19.1%) with Somerset / Arundel also seeing strong growth (+13.1%) – indicative of the ‘Somerset House Summer Series’ between 10th – 20th July.

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VISITOR BEHAVIOUR

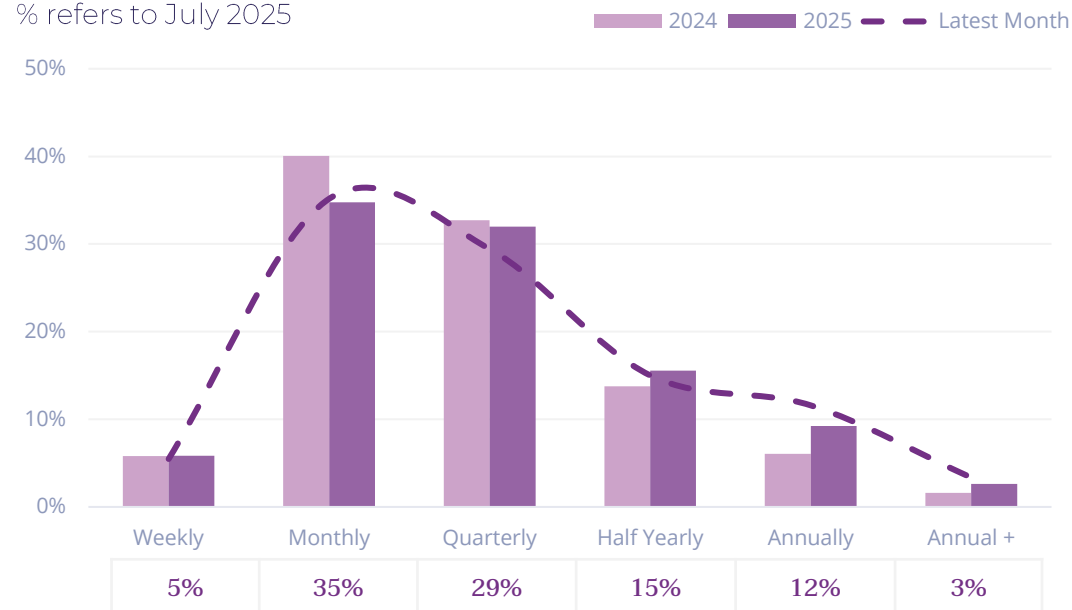


VISIT BEHAVIOUR | VICTORIA BID

SLIGHT DECLINE IN AVERAGE DWELL IN JULY REPRESENTING REDUCED WORKER PRESENCE

Visit Frequency

% refers to July 2025

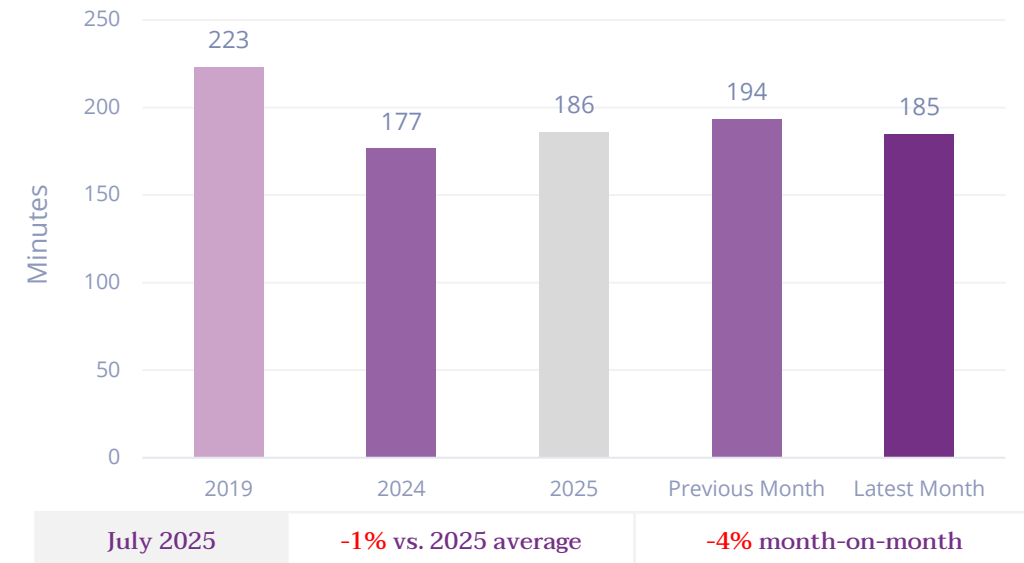


Visit Frequency in July 2025 consistent with year-to-date performance, with high share of visitors visiting Victoria BID either monthly or quarterly,

40% of visitors visited Victoria BID at least **monthly** in July 2025 vs. 41% in June 2025.

Average Dwell

July 2025



Slight decline in average dwell across July, representing impact of the start of the school summer holidays on worker presence across the BID.

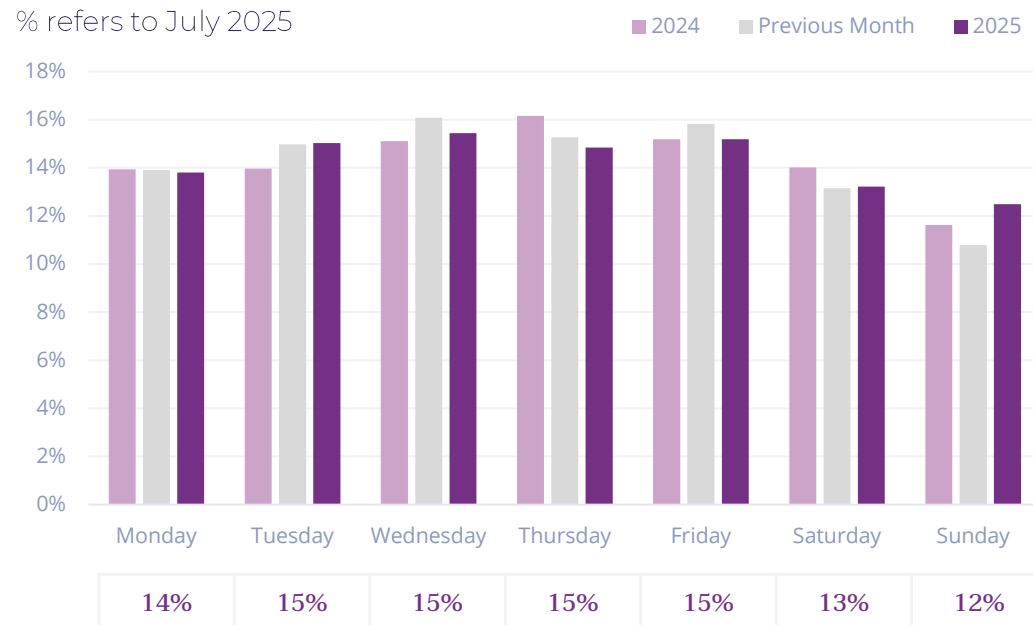
Visitor dwell **-9 mins** vs. June 2025, and **-1 min** vs. 2025 average.

VISIT BEHAVIOUR | VICTORIA BID

SLIGHTLY MORE DISTRIBUTED VISIT SHARE THROUGHOUT THE WEEK IN JULY, WITH GREATER WEEKEND SHARE

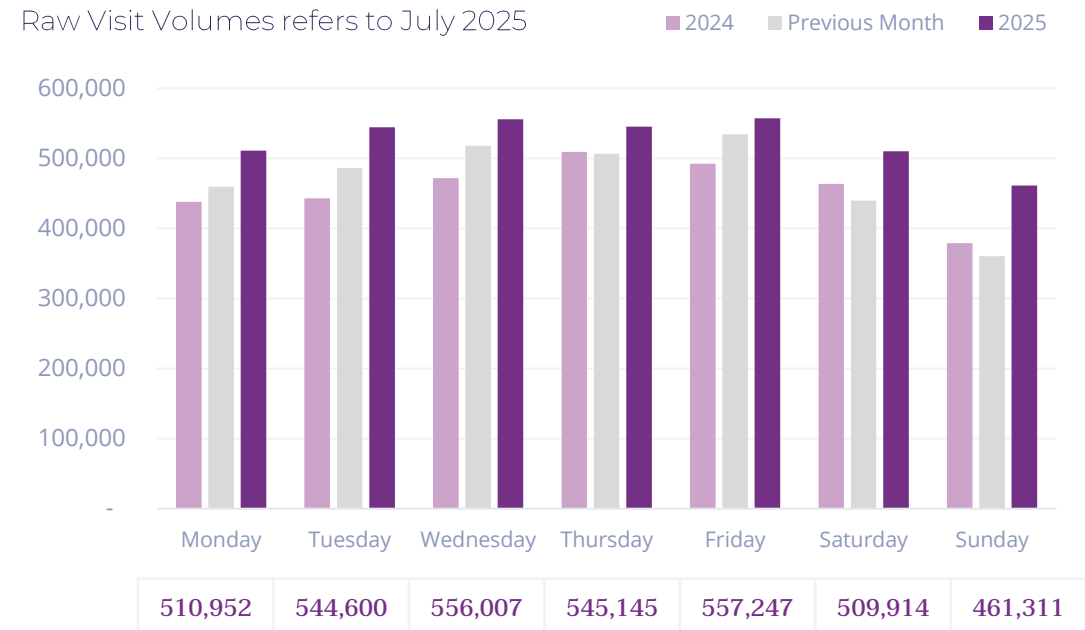
Visit Share by Day

% refers to July 2025



Average Visits by Day

Raw Visit Volumes refers to July 2025

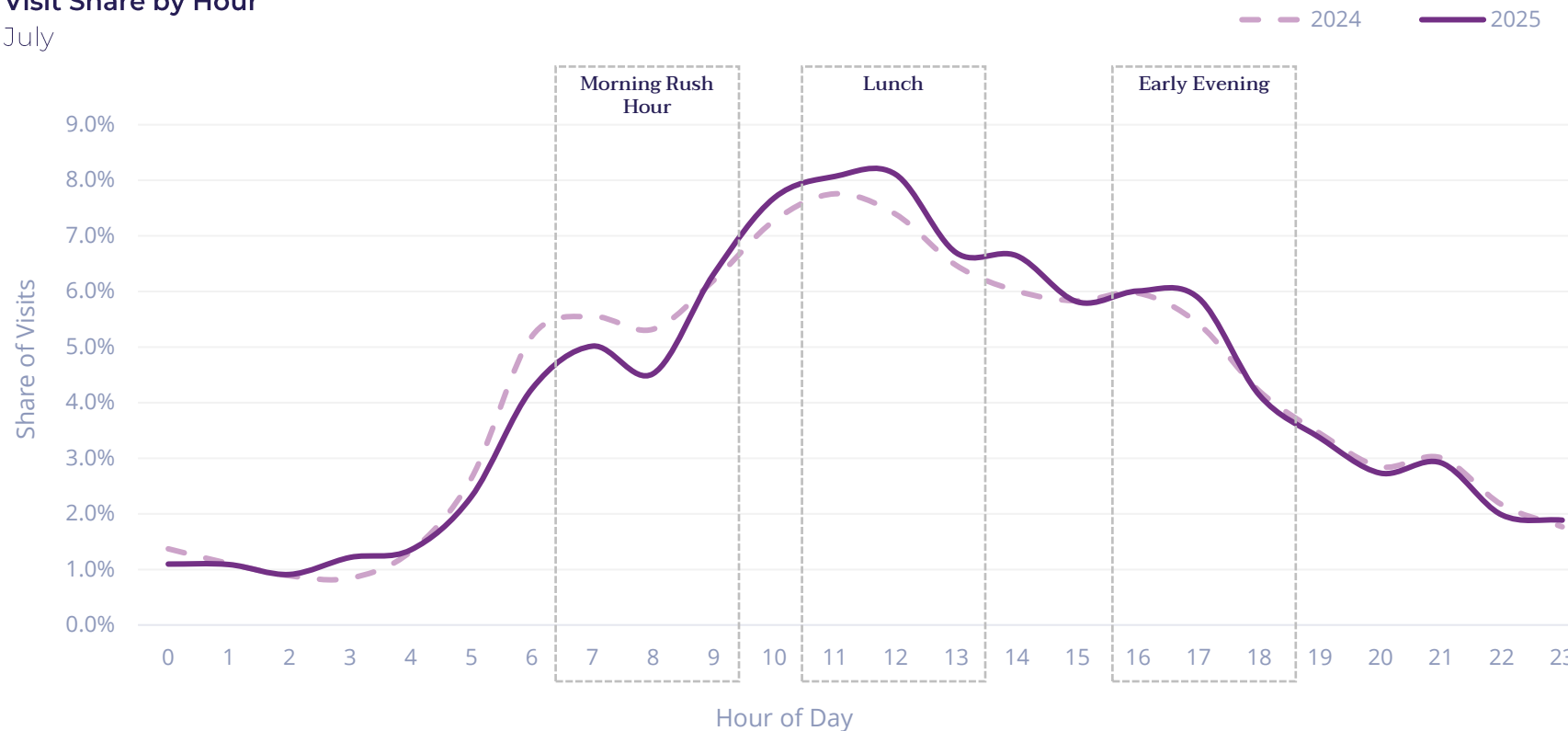


Visit distribution slightly more distributed across entire week in July, relative to previous month, with increased share of visits captured on Sundays representing increased social visitors & reduced worker presence during the working week. All days experienced growth in average visits year-on-year and month-on-month throughout July.

VISIT BEHAVIOUR | VICTORIA BID

REDUCED MORNING RUSH HOUR INDICATIVE OF LOWER WORKER PRESENCE DURING SCHOOL SUMMER HOLIDAYS

Visit Share by Hour
July



Slight shift in hourly distribution of visits in July, with lower morning rush hour share, with greater lunch/afternoon visit distribution

Visit distribution saw a slight shift, with -1.6% lower share of visits during the morning rush hour, being shifted to later in the day.

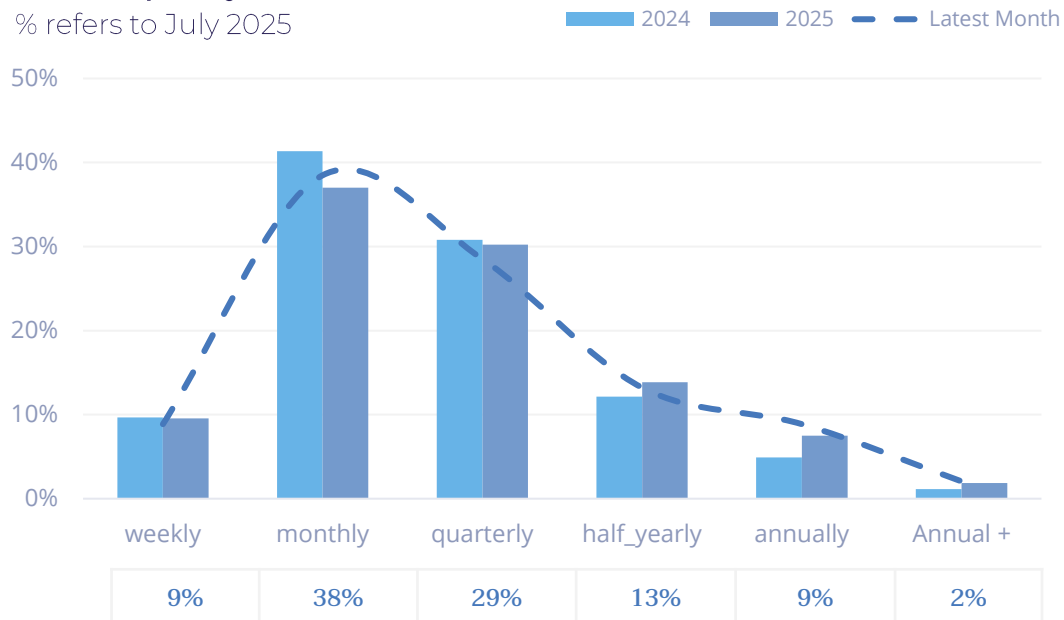
Proportion of visits **after 6pm** remained consistent year-on-year, with **17%** of visits after 6pm, with slight increase vs. last month.

VISIT BEHAVIOUR | NORTHBANK BID

VISIT FREQUENCY TO NORTHBANK BID CONSISTENT WITH YEAR-TO-DATE AVERAGE IN JULY

Visit Frequency

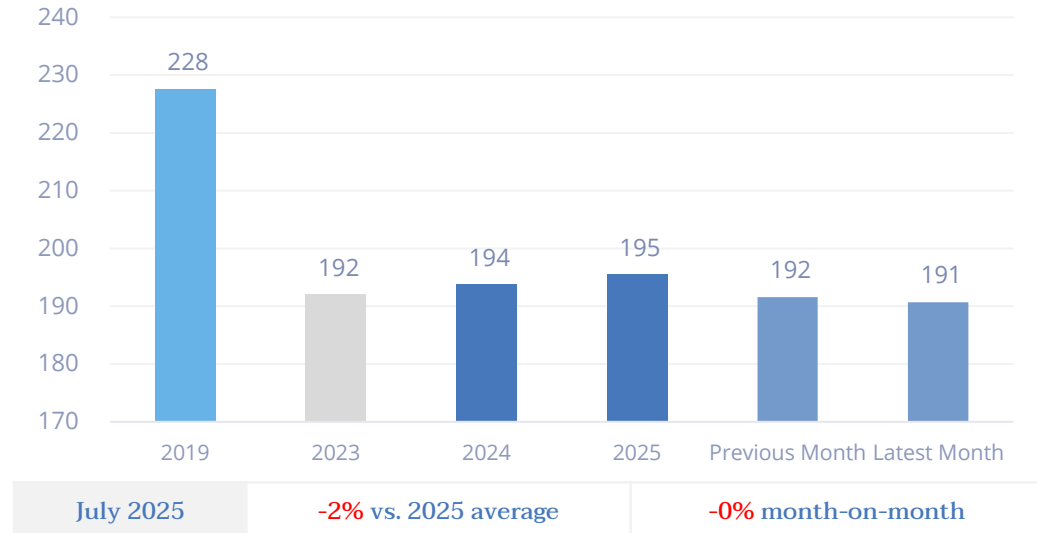
% refers to July 2025



Similar to wider London HQ trends, Northbank BID experienced consistent visitor frequency behaviours vs. year-to-date average; **47%** of visitors visiting Northbank BID at least monthly, consistent with YTD average.

Average Dwell

July 2025



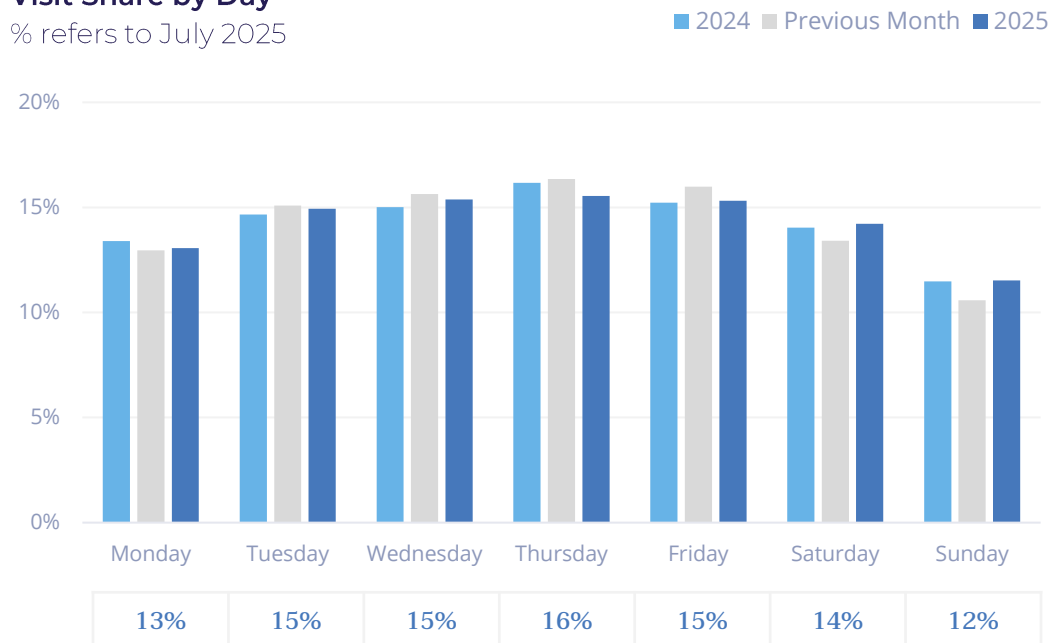
Dwell time around Northbank BID saw consistent month-on-month performance, despite -2% decline vs. year-to-date average.

VISIT BEHAVIOUR | NORTHBANK BID

INCREASED AVERAGE DAILY VISITS ACROSS ALL DAYS THROUGHOUT JULY MONTH-ON-MONTH

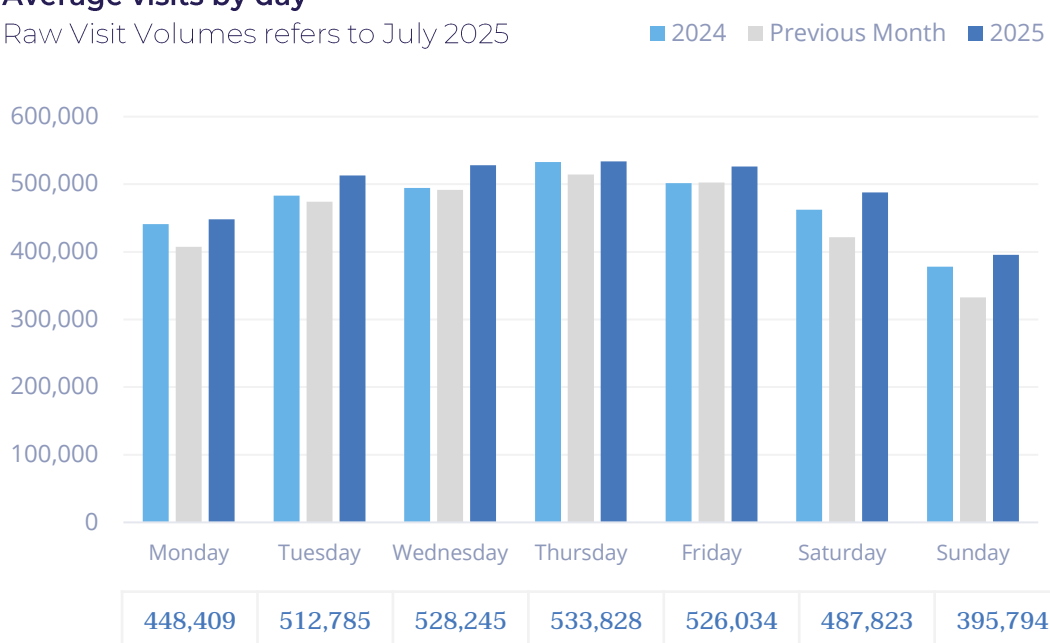
Visit Share by Day

% refers to July 2025



Average visits by day

Raw Visit Volumes refers to July 2025

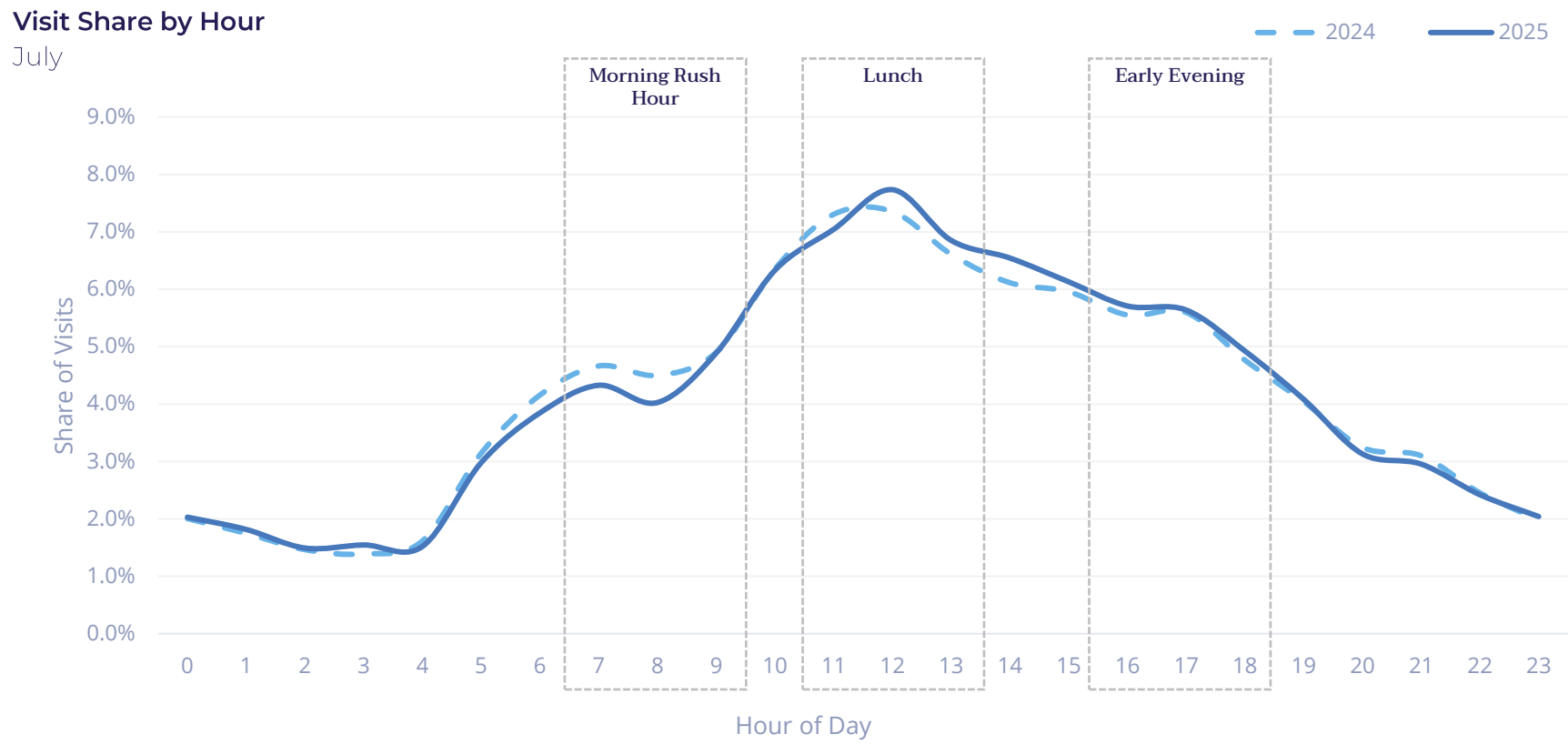


Despite share of weekly visits being relatively consistent at the start of the week vs. June, average daily visits between Monday – Wednesday saw strong uplift month-on-month; on average, Mon-Weds in July saw an additional ~35k daily visits on average.

Source: Colliers LocateFootfall
See Appendix for defined BID boundaries

VISIT BEHAVIOUR | NORTHBANK BID

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



Visit distribution throughout July 2025 saw a relatively consistent profile to July 2024

Similar to Victoria BID, visits across morning rush hour around Northbank BID saw slight decline year-on-year, being shifted to an increase in early afternoon visits.

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

Source: Colliers LocateFootfall
See Appendix for defined BID boundaries

03

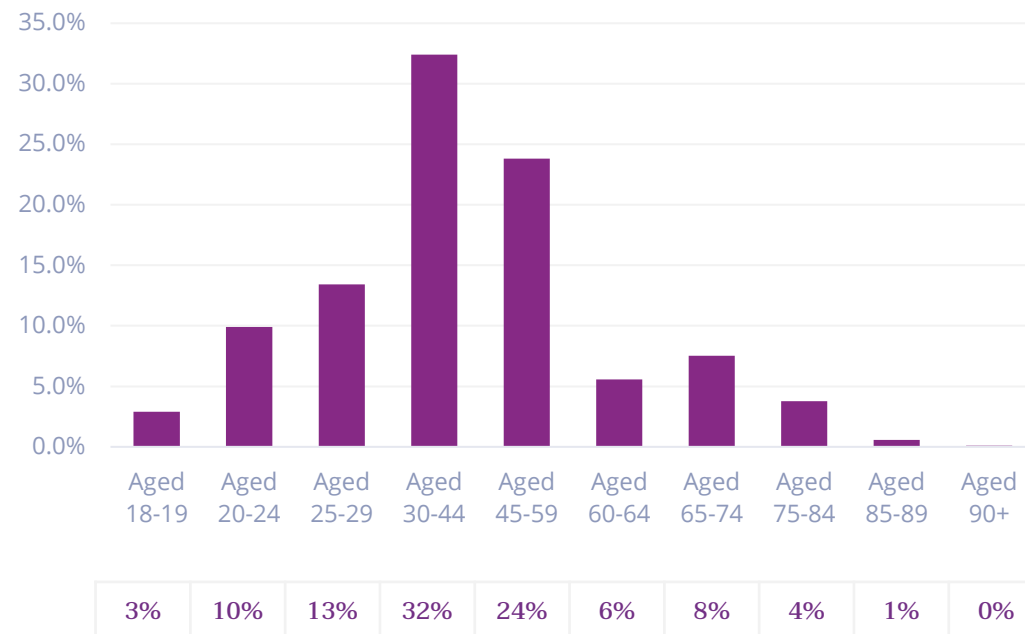
VISITOR SEGMENTATION



VISIT SEGMENTATION | VICTORIA BID

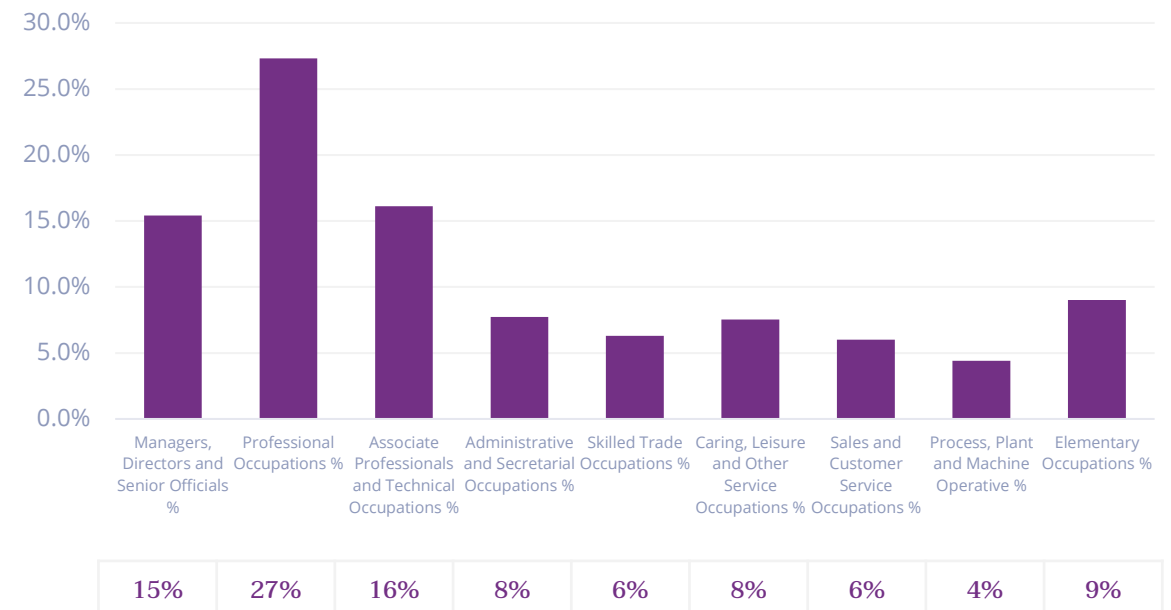
VICTORIA BID CATCHMENT PROFILE SKEWED TOWARDS HIGH-INCOME, MIDDLE-AGED VISITORS

Age Profile



Victoria BID has a bias towards mid-ranged age groups, particularly aged 30-44 years old (32.4%) and 45-59 years old (23.8%)

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 27.3% of visitor profile; down slightly (-0.3%) vs. previous month, representing start of school summer holidays.

VISIT SEGMENTATION | VICTORIA BID

VISITOR PROFILE OVER-INDEXES ON CITY PROSPERITY & MUNICIPAL TENANTS

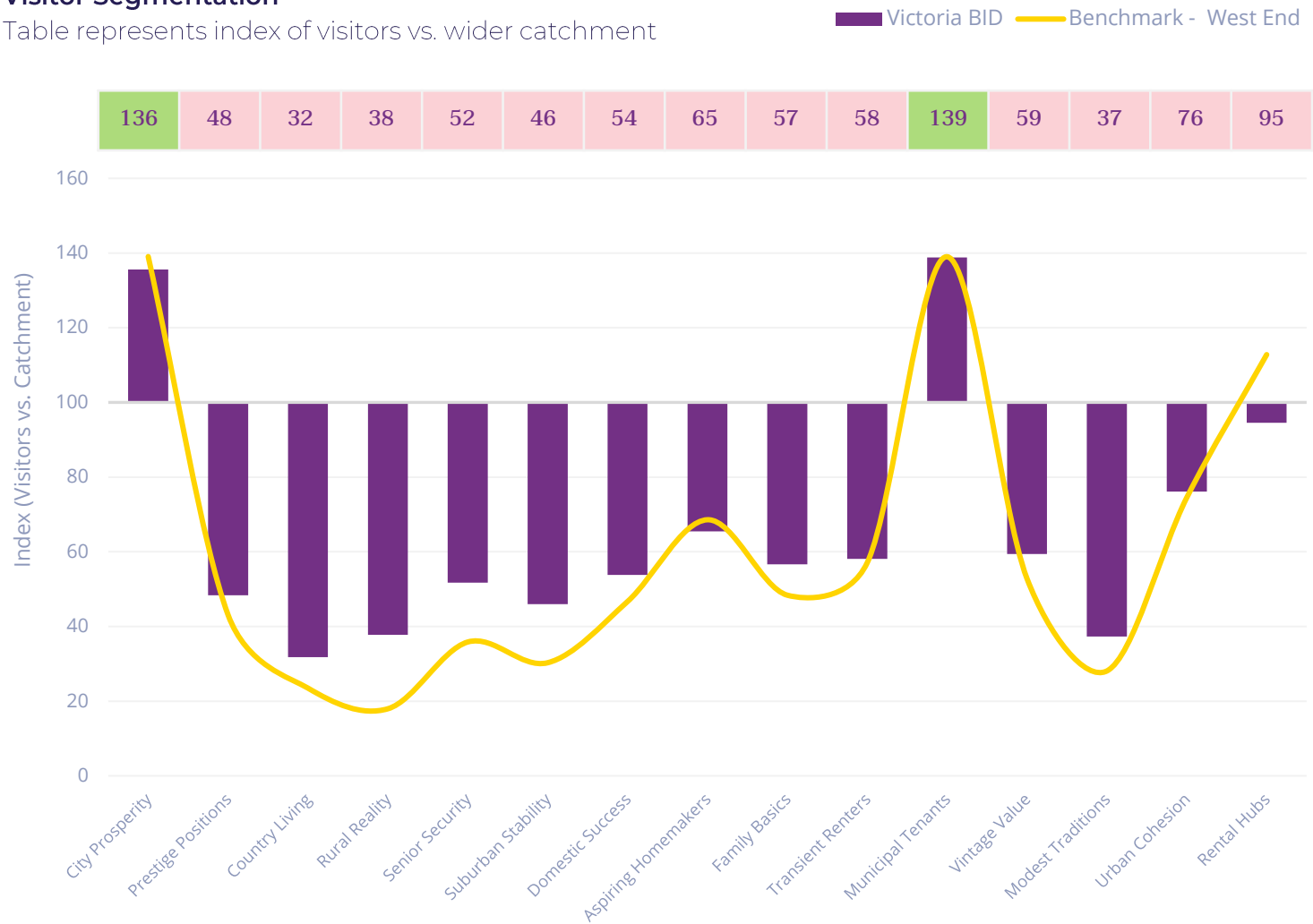
Visitor profile remains in line with West End, with a bias towards 2 Mosaic groups ‘City Prosperity’ and ‘Municipal Tenants’

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

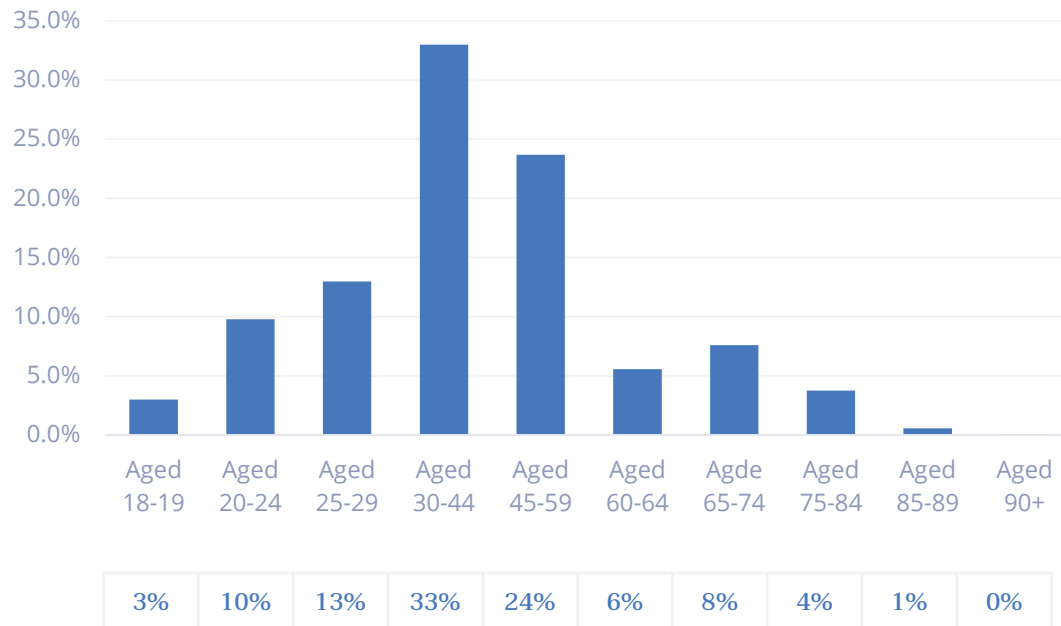


Source: Colliers LocateFootfall | Mosaic Experian
See Appendix for defined BID boundaries

VISIT SEGMENTATION | NORTHBANK BID

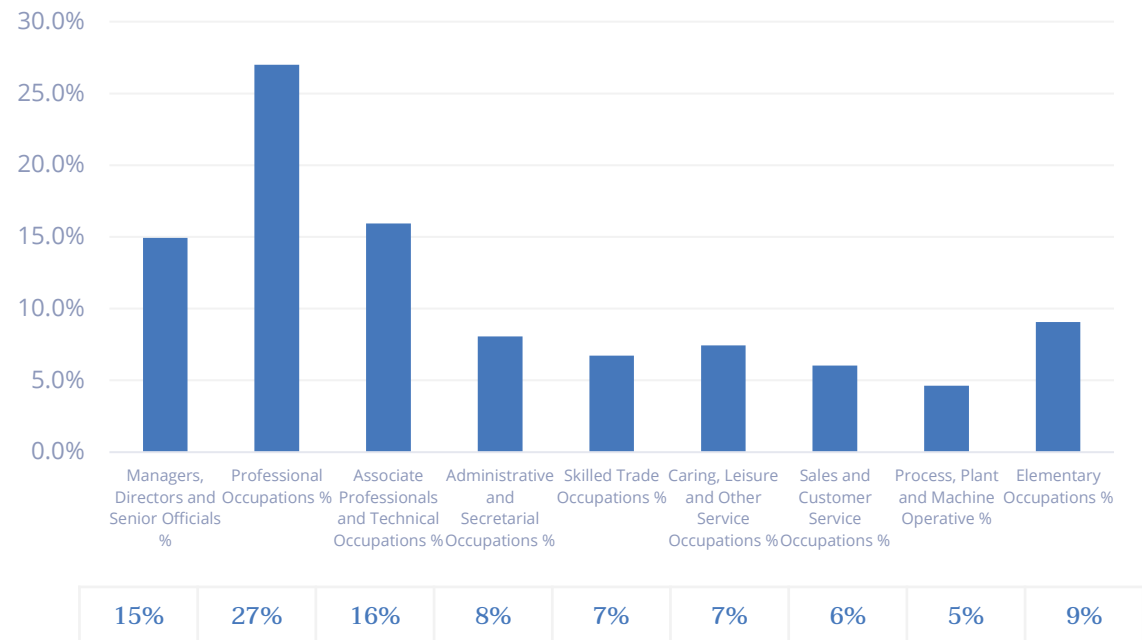
42% OF NORTHBANK BID VISITORS WITHIN MANAGERIAL OR PROFESSIONAL OCCUPATIONS CATEGORIES

Age Profile



Northbank BID has a bias towards mid-ranged age groups, particularly aged **30-44 years old (33.0%)** and **45-59 years old (23.7%)**

Occupation Splits



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

27.0% of visitors in **Professional Occupations**, down slightly (-0.2%) vs. previous month.

VISIT SEGMENTATION | NORTHBANK BID

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

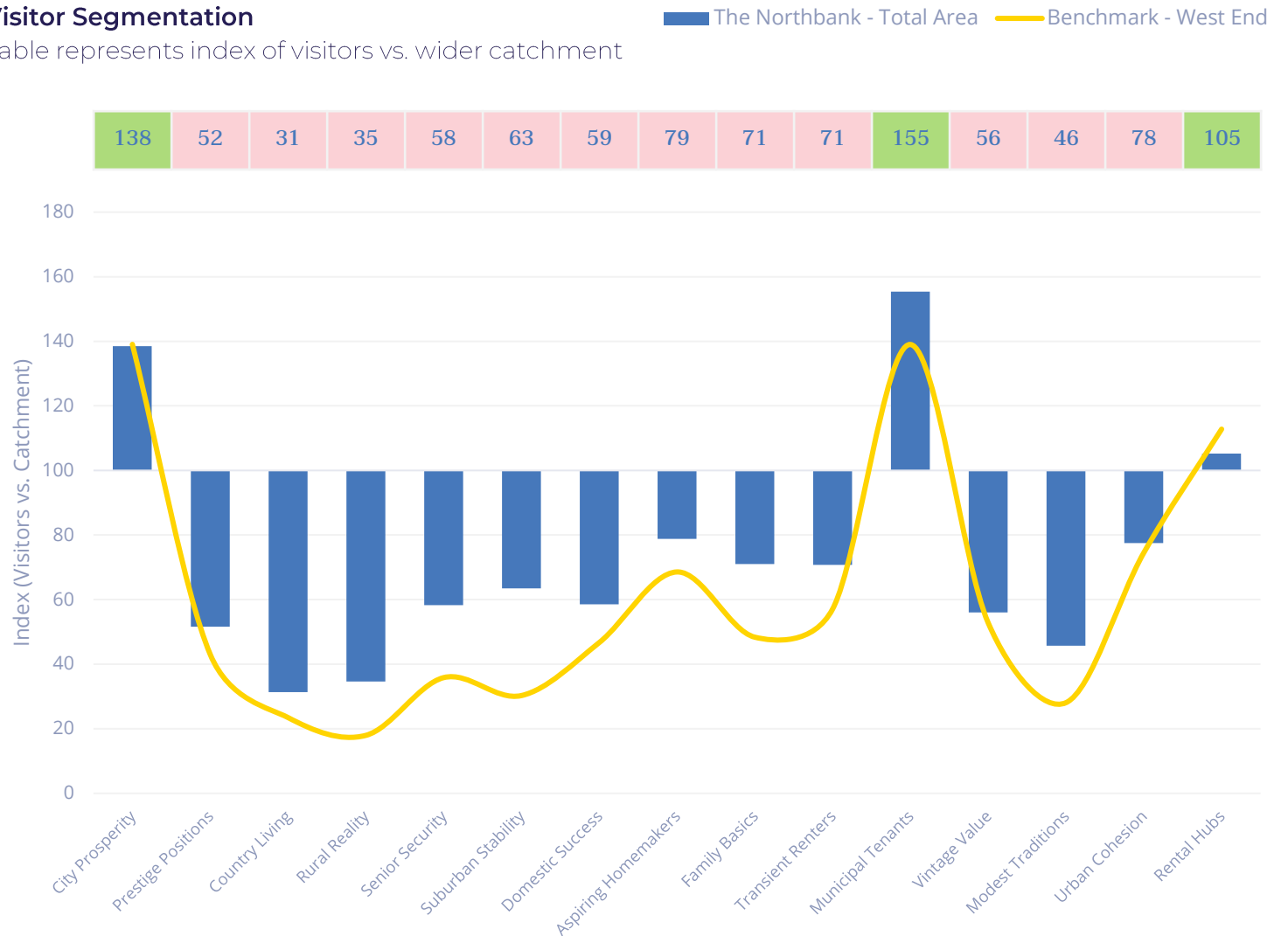
Visitor profile remains in line with West End, with a strong bias towards 2 Mosaic groups ‘City Prosperity’ and ‘Municipal Tenants’

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)

Visitor Segmentation

Table represents index of visitors vs. wider catchment



04

APPENDIX



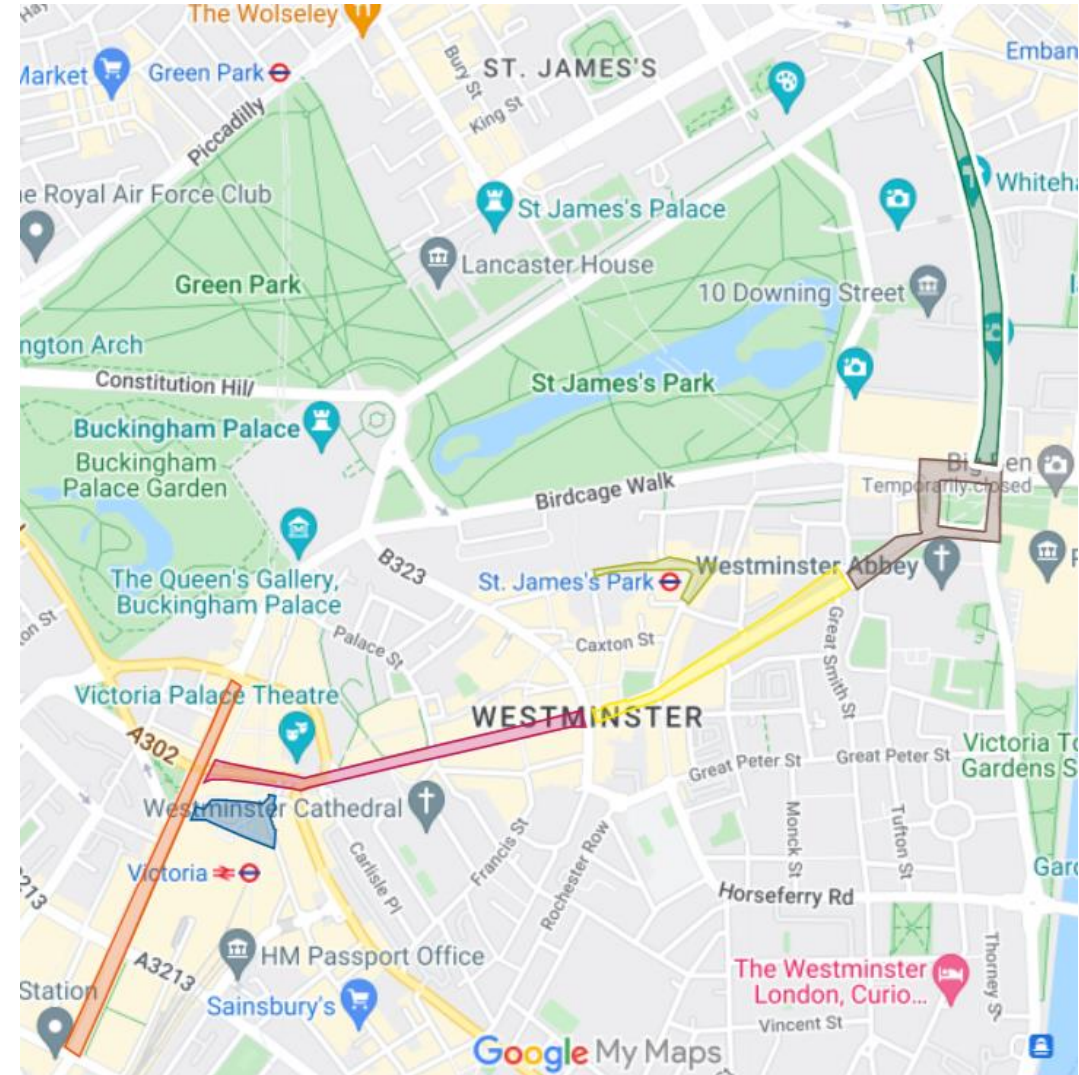
APPENDIX | VICTORIA BID

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

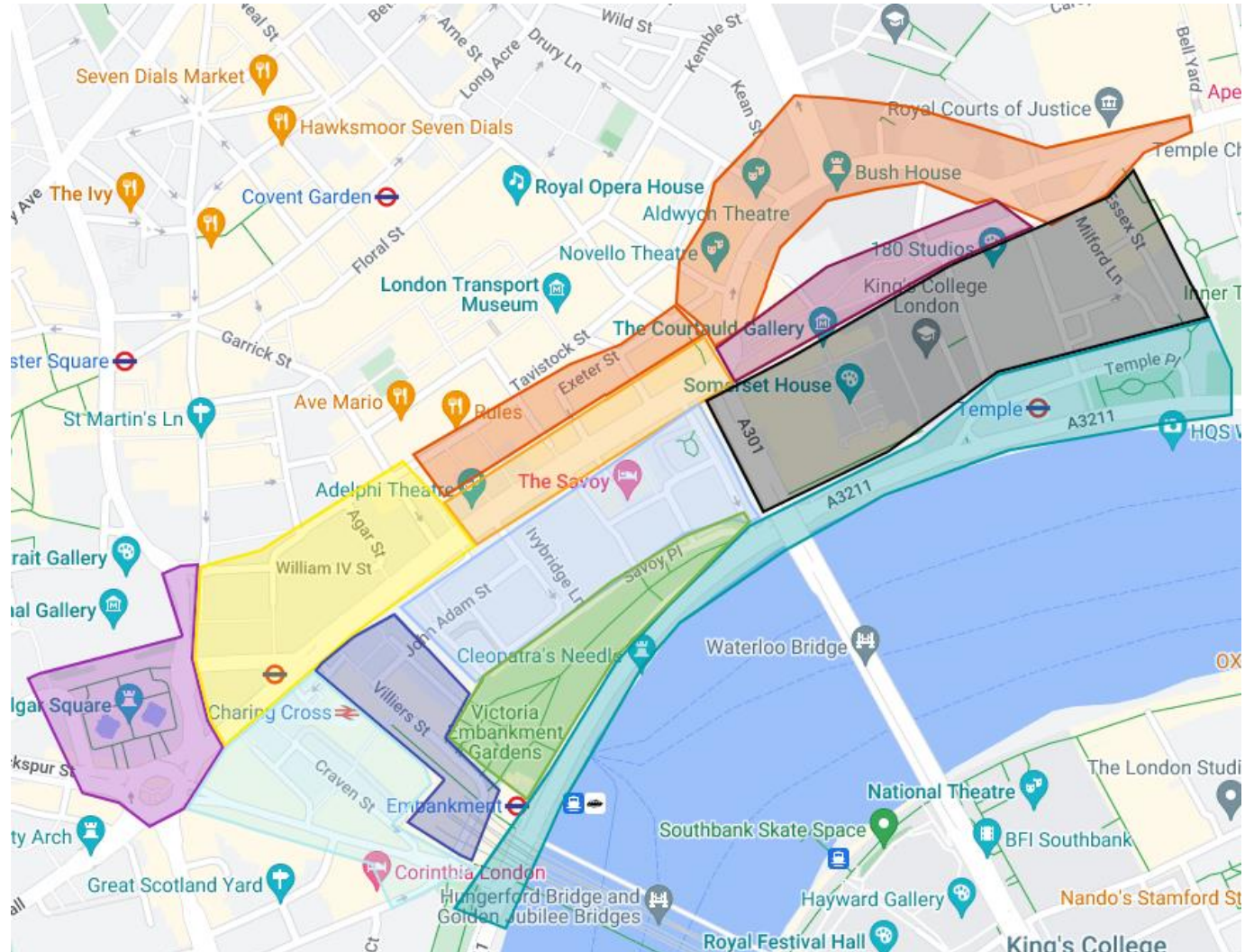


APPENDIX | NORTHBANK BID

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

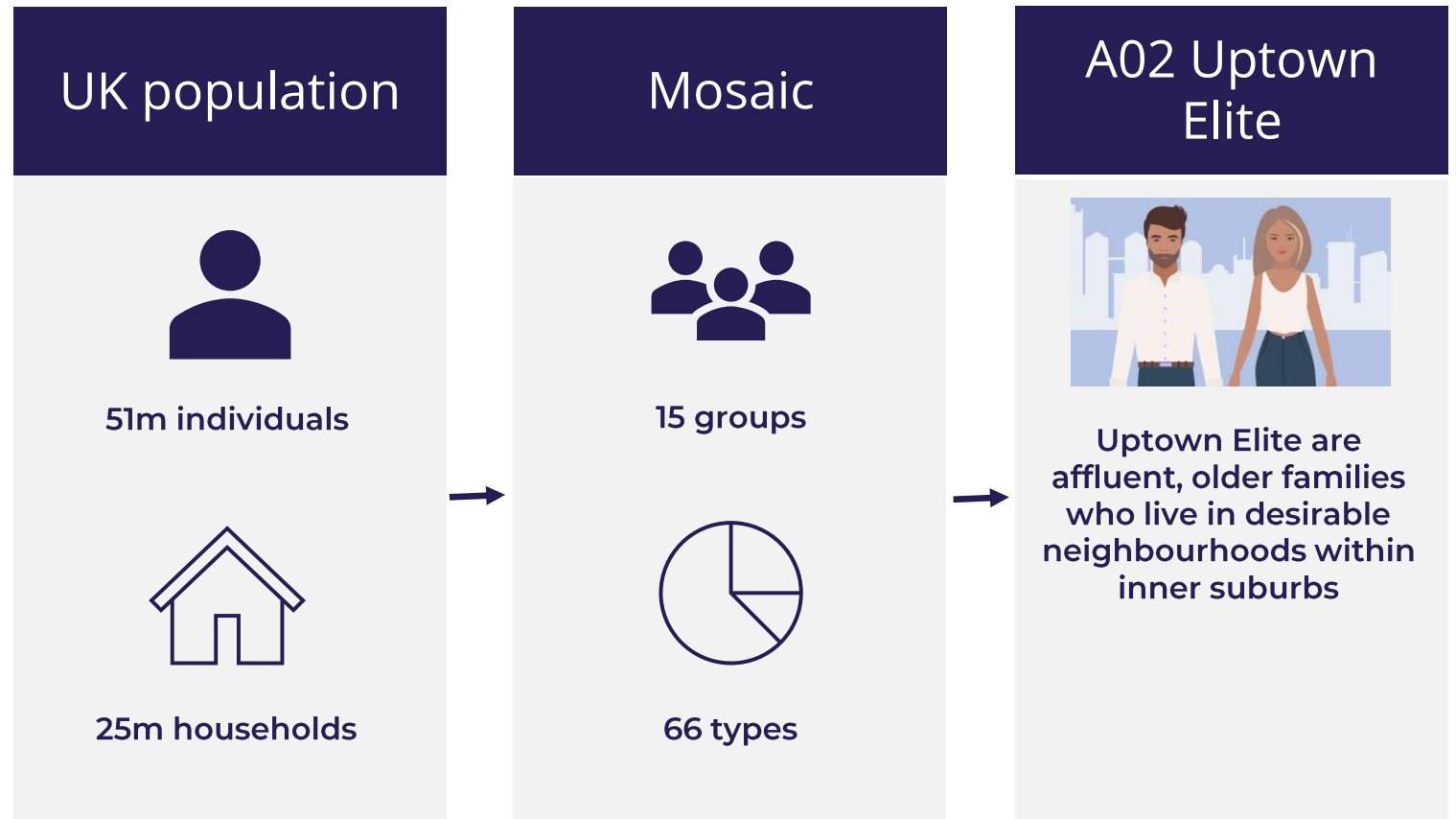
EXPERIAN'S MOSAIC SEGMENTATION

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...



For Occupiers

Roll-out
prioritisation



Network
optimisation

Cannibalisation
analytics



Predictive
performance
forecasting



For Landlords



Sustainable
rent modelling



Consumer
surveys



Development
appraisal

Geographic
marketing
recommendations



Tenant mix
strategy



For Public Sector

Venue
rankings



Visitor
profiling



Capacity
studies

For all

Customer
profiling +
segmentation



Channel 'halo'
analytics



Footfall
reporting



Turnover
forecasting



Catchment
definitions and
profiling



Colliers LocateFootfall

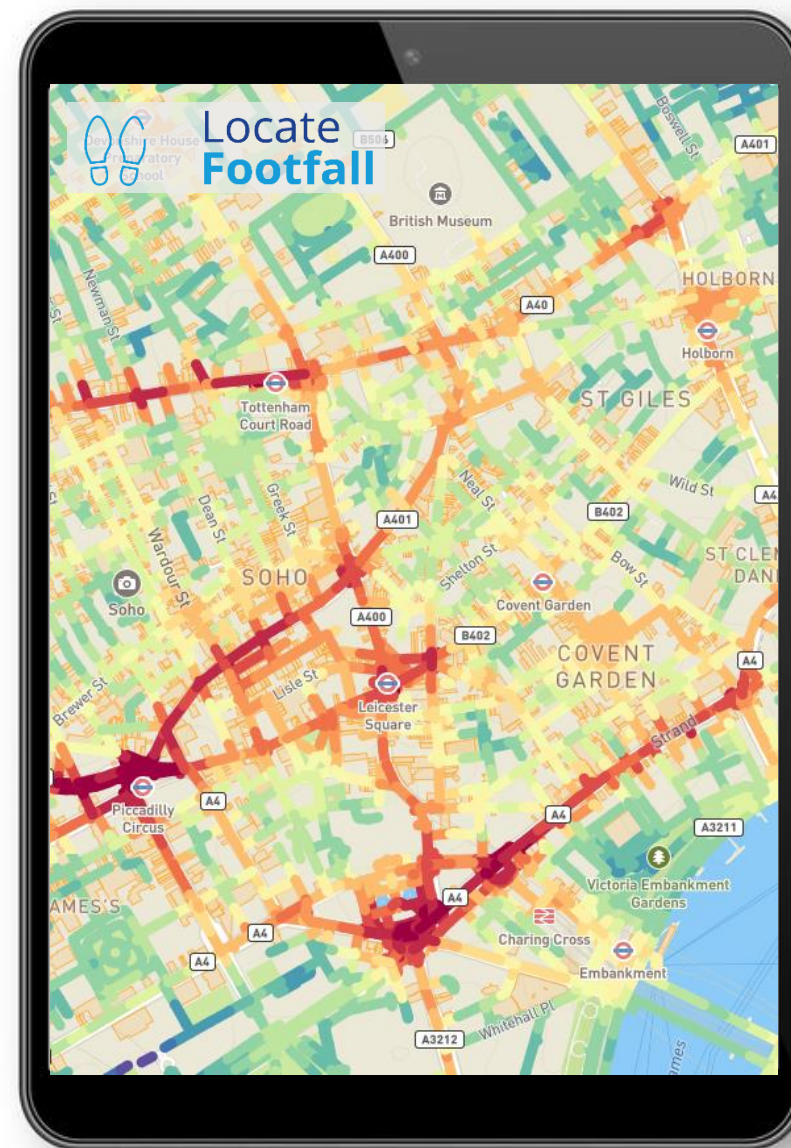
Footfall Intelligence

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

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

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

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



OVERVIEW



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.

15
million
mobile
customers

Anonymised

Personal data eliminated and hashed to keep an anonymised ID only

Aggregated

IDs grouped to crowd data, no individual is identifiable

Extrapolated

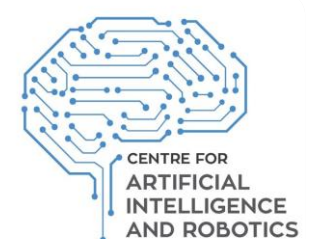
Algorithms applied so the insights represent the entire population

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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