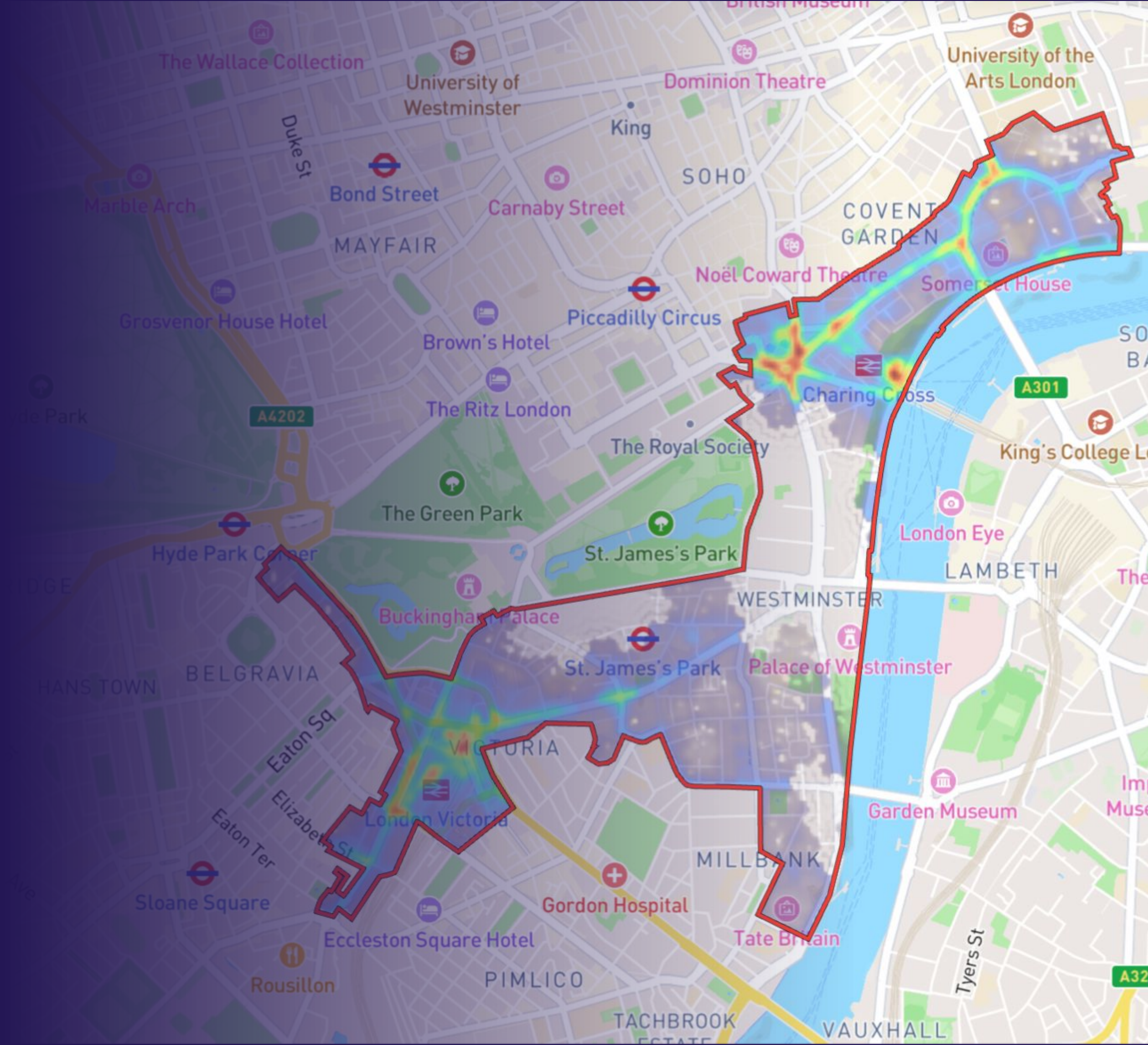
LONDON HERITAGE QUARTER

October 2025 report



huq | Introduction

What is London Heritage Quarter?

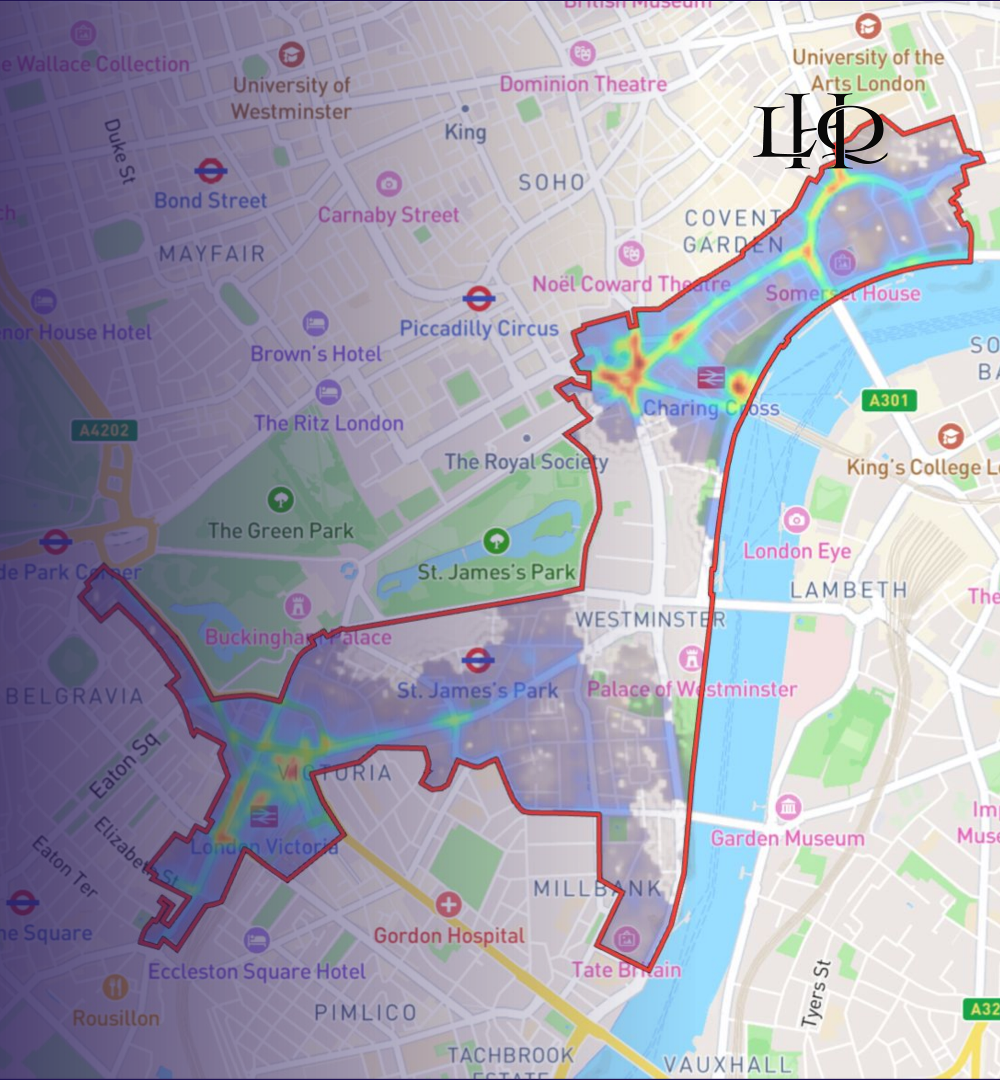
Stretching from Belgravia through to Parliament Square and along the Strand to the Royal Courts of Justice, London Heritage Quarter is a collective of four Business Improvement Districts representing over one thousand organisations.

The **Northbank Business Improvement District (BID)** covers one of London's most iconic areas and includes Trafalgar Square, Strand and Aldwych.

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.

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.

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.



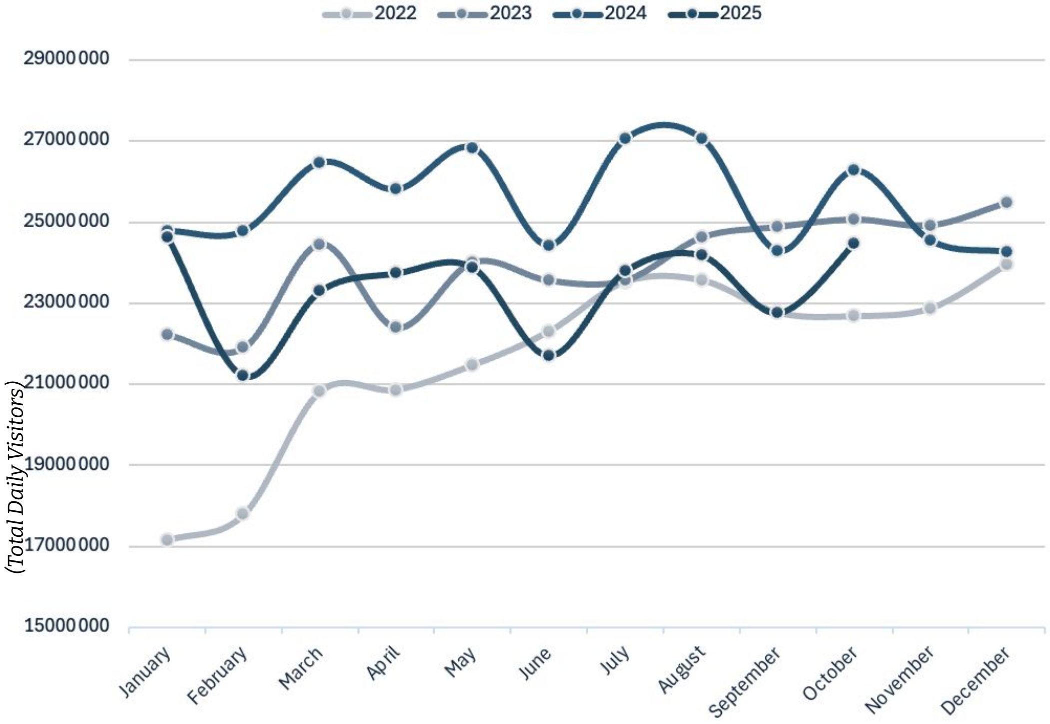
huq | Visit performance | October 2025

Month-on-month trend

24.5m total daily visitors in October 2025

- **+7.5%** compared with previous month
- **-6.88%** compared with October 2024

Year to date comparison against same period in 2024 shows a **9.37% decrease** in visit performance.



huq | Visit performance | October 2025

Total Daily Visitors

Northbank BID

9.4 million

Victoria BID

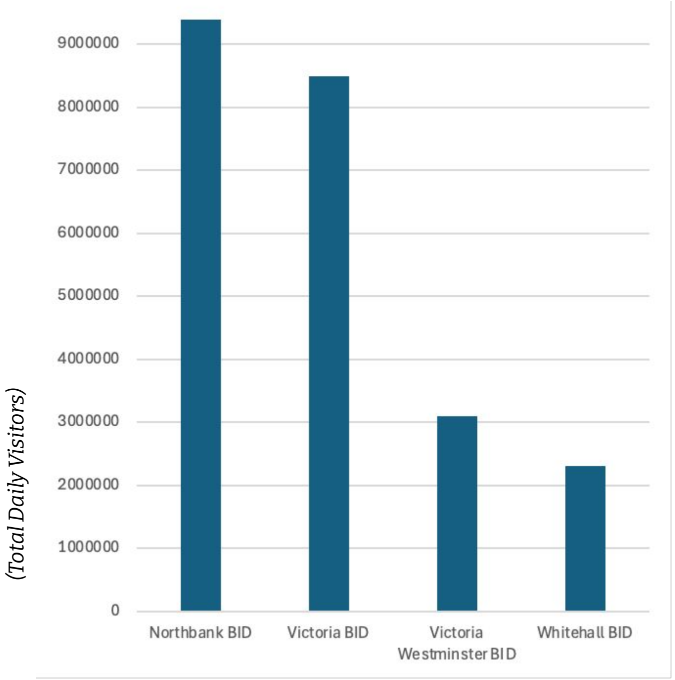
8.5 million

Victoria Westminster BID

3.1 million

Whitehall BID

2.3 million



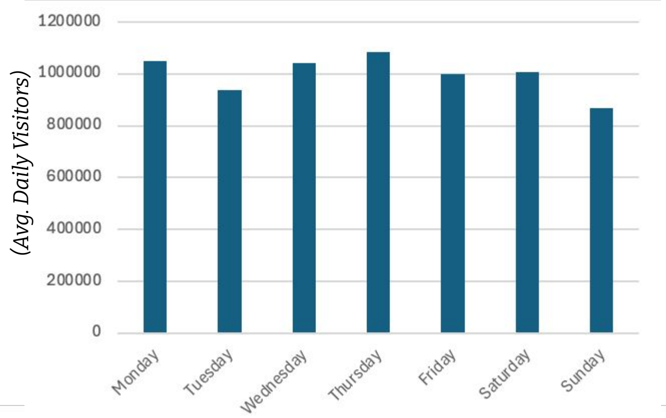
huq | Visit performance | October 2025

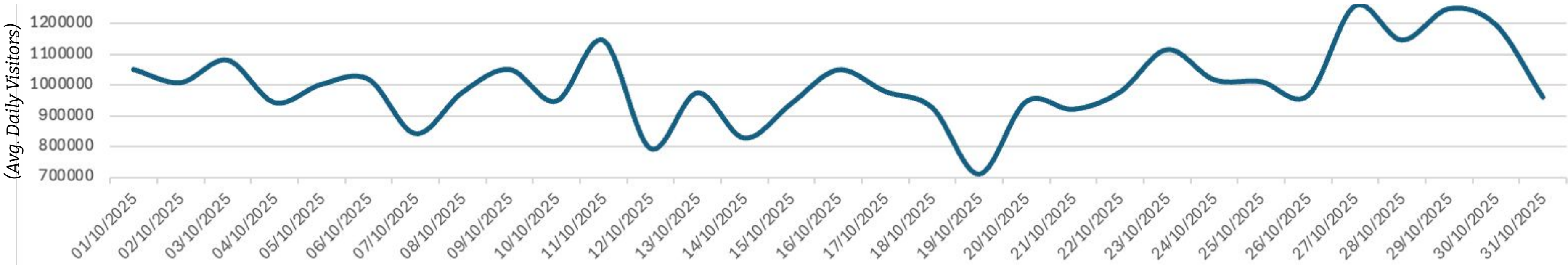
Unique daily visitors

Monday, Wednesday and Thursday are highlighted as the strongest day of the week in October 2025, as average number of visitors on these days increase in comparison to performance in the previous month. **Weekend behaviour continues to boost visitation**.

Sunday is highlighted as the lowest day of the week in October 2025, despite being relatively in line with September 2025 performance.

Mid-week remains consistently strong, indicating strong engagement and predictable daily usage patterns.The pattern indicates a **hybrid platform**.





huq | Visitor behaviour | October 2025

Time of day

Visitor activity in October 2025 shows a consistent daily rhythm, with footfall building steadily from early morning and peaking between **15:00–18:00**, where October 2025 closely aligns with or slightly exceeds both October 2024 and year-to-date levels. The morning period from **06:00–12:00 demonstrates solid growth**, with October 2025 tracking ahead of 2024 averages and indicating stronger early-day engagement.

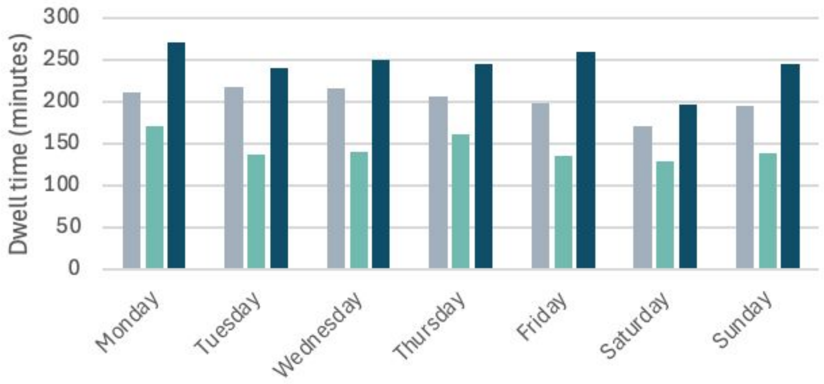
After the afternoon peak, visitor numbers gradually decline through the evening, with the most pronounced drop occurring after **21:00**. Overall, October 2025 data highlights a **robust mid-afternoon peak and improved morning activity**, suggesting rising demand and a stronger all-day presence compared with previous periods.

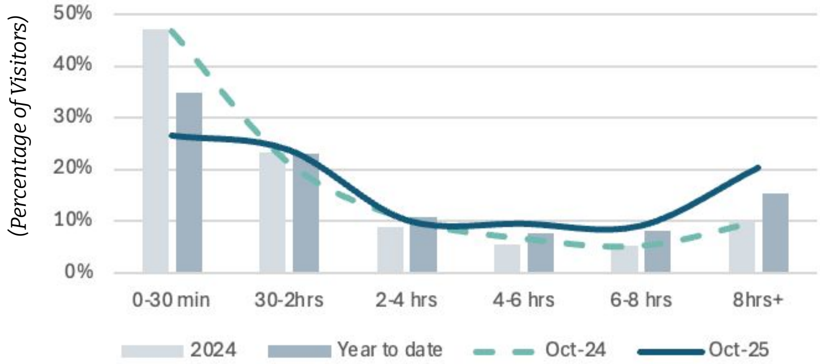
Dwell time

Dwell-time analysis shows a clear shift toward **longer, more engaged visits** in October 2025 compared with both October 2024 and year-to-date benchmarks. Shorter visits still account for the largest share of activity, but October 2025 records **fewer very short stays** and a more even spread across all dwell-time categories. Notably, there is a **meaningful increase in the 8 hour +** group, indicating deeper engagement and more full-day visits across the destination.

October 2025 outperforms previous years across **every day**, with the strongest increases mid-week. Weekend dwell, while lowest overall, still shows improvement over previous periods..

Combined, these insights indicate that **visitors in October 2025 are staying longer and engaging more fully**. This points to an enhanced visitor experience, stronger activity programming, or improved conditions that support extended dwell across the week.





huq | Visitor behaviour | October 2025

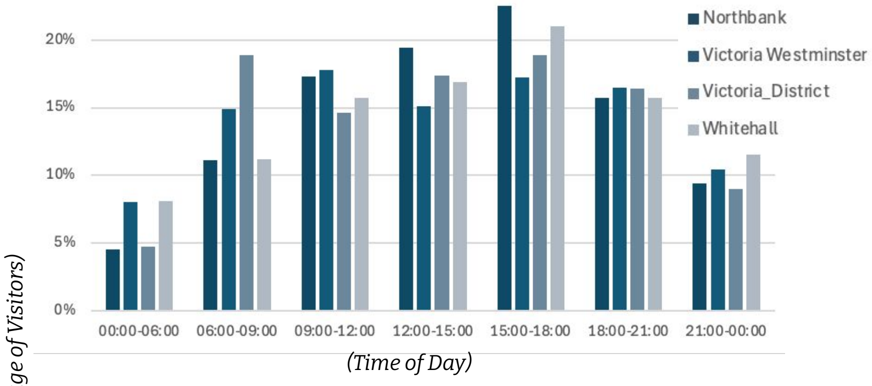
Time of day & Dwell time by area

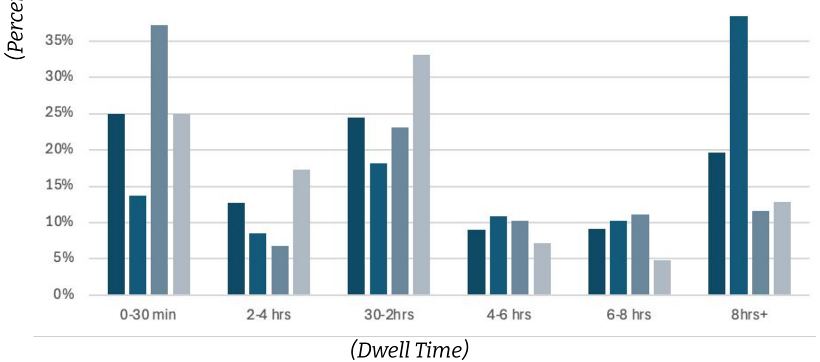
All areas show a clear daytime concentration, with visitor levels rising from **06:00-09:00**, peaking between **12:00–18:00**, and tapering off into the evening.

Distinct differences emerge in how long visitors stay.

- **Northbank** stands out with significant proportions at both **0–30 min** and **8hrs+**, indicating a mix of quick trips and very long stays.
- **Victoria Westminster** has the highest share of **0–30 min** visits, reflecting highly transient footfall.
  Victoria District sees its strongest share in **30 min–2 hrs**, pointing to medium-length, purpose-driven stays.
- **Whitehall** is more varied, with notable volumes in **0–30 min**, **2–4 hrs**, and **30 min–2 hrs**, but relatively fewer extended stays.

While daytime peaks are broadly aligned across areas, dwell-time patterns highlight different visitor behaviours: **fast-moving traffic in Westminster**, **medium-stay engagement in the Victoria District**, **mixed short/long visits in Northbank**, and **balanced but shorter visits in Whitehall**.

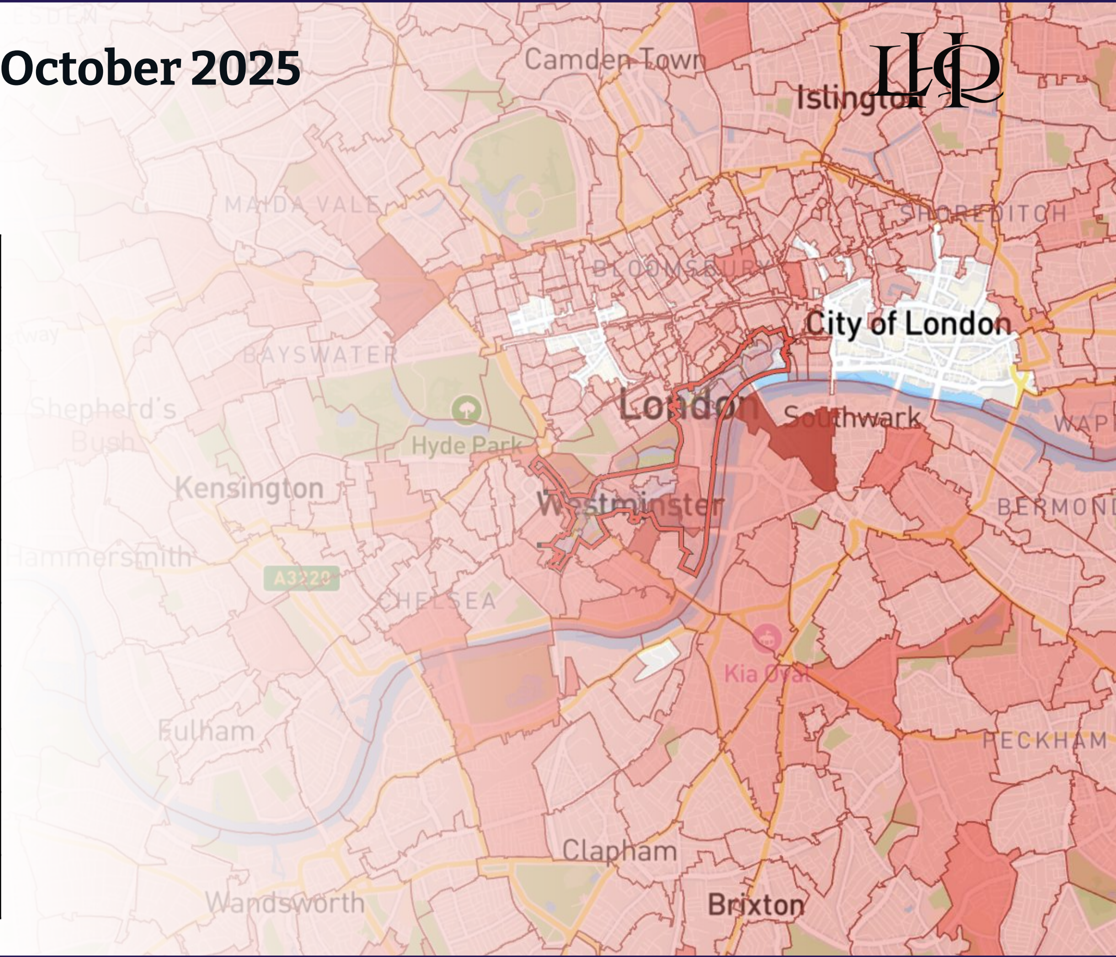




huq | Visitor segmentation | October 2025

Top visiting postcodes

Rank	Postcode	Percentage (%)	Distance (km)
1	SE1 8	1.28	2.86
2	SW1P 2	1.22	0.67
3	W2 1	1.14	4.85
4	SW16 2	0.75	7.89
5	SW17 8	0.73	8.00
6	NW1 5	0.69	3.59
7	NW1 5	0.68	1.54
8	NW1 5	0.64	2.12
9	SW16 5	0.64	9.70
10	N7 9	0.62	5.58



huq | Visitor segmentation | October 2025

Demographics

Visitors in October 2025 show a well-balanced age profile, with the **30-44 age group forming the largest share (30%)**, followed by **15–29 (25%)**, **45–59 (23%)**, and **60+ (22%)**. This distribution highlights broad appeal across both younger and older audiences, with a particularly strong presence of working-age adults.

Income data indicates that October visitors are predominantly **mid-income earners**, with the highest concentrations in the **€21,000–€31,000 disposable income range**, where individual bands peak at around **14–15%**. Additional clusters appear around **€35,000–€45,000**, suggesting a mix of moderately and comfortably resourced visitors. Higher-disposable income groups (above €55,000) make up a smaller but noticeable proportion, adding depth to the spending potential of the audience.

Overall, October 2025 visitors represent a **diverse but economically stable demographic**, skewed toward younger and mid-aged groups with solid disposable incomes - an audience well-positioned for both leisure spend and sustained engagement within the destination.