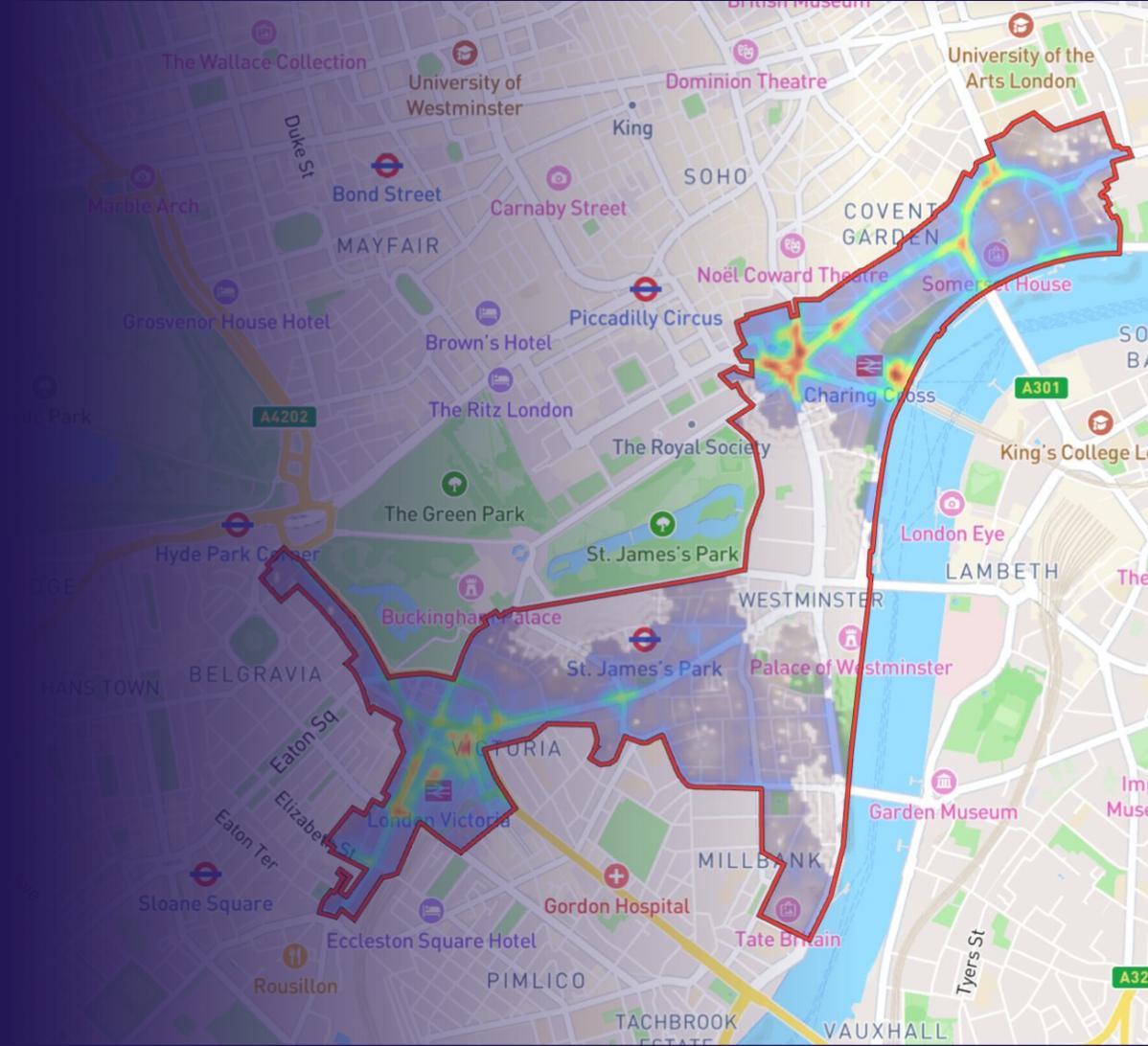




LONDON HERITAGE QUARTER

December 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.



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Month-on-month trend

23.6m total daily visitors in December 2025

- **+2.56%** compared with previous month
- **-2.59%** compared with December 2024

Year to date comparison against same period in 2024 shows a **8.58% decrease** in visit performance.



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Total Daily Visitors

Northbank BID

14.1 million

Victoria BID

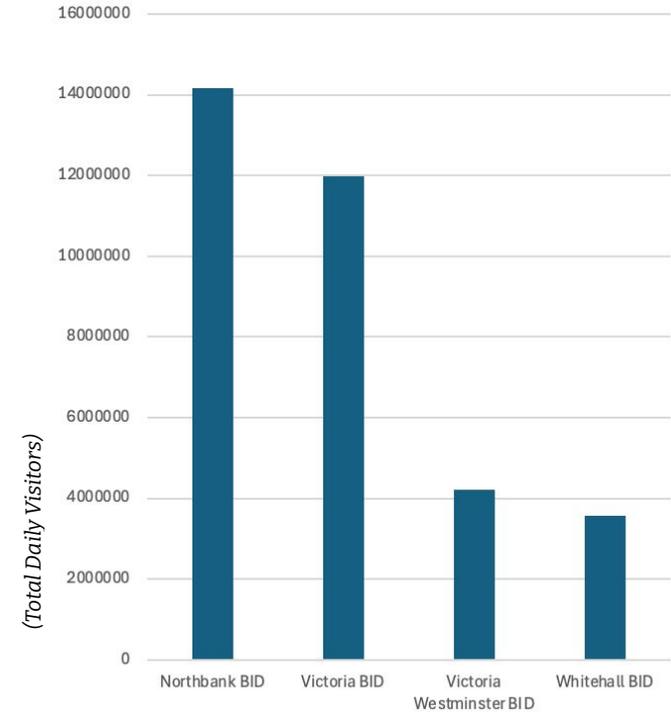
12.0 million

Victoria Westminster BID

4.2 million

Whitehall BID

3.6 million



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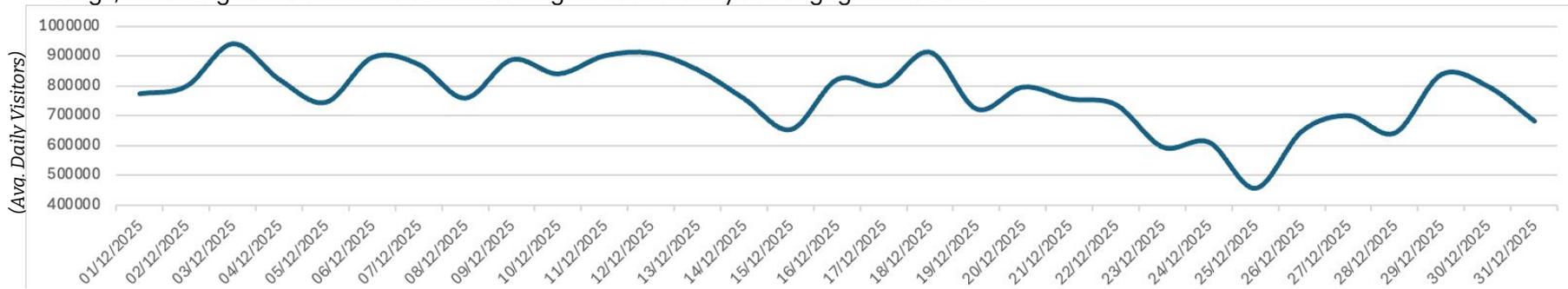
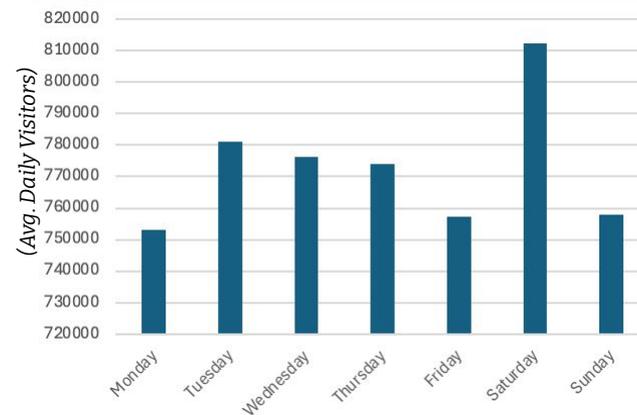


Unique daily visitors

Tuesday, Wednesday and Thursday were the strongest weekdays in December 2025, with Tuesday leading overall weekday performance. However, **Saturday recorded the highest average daily visitors**, marking a notable shift toward stronger weekend engagement.

Friday and Monday were comparatively softer, while Sunday remained broadly in line with weekday performance. Daily traffic showed greater volatility across the month, including a **pronounced dip around the Christmas period followed by a recovery toward month-end**.

Overall, December reflects a more weekend-led pattern alongside steady mid-week usage, indicating seasonal behaviour influencing an otherwise hybrid engagement trend.



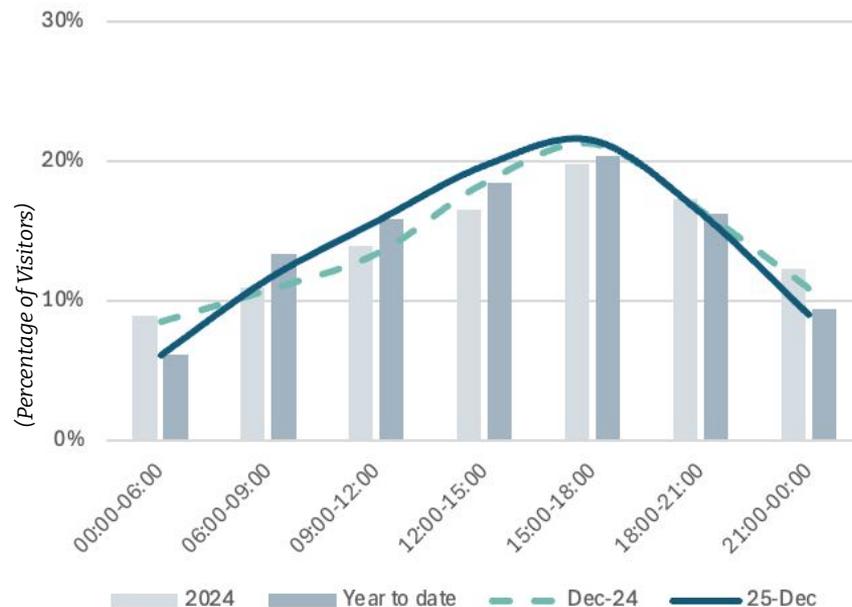
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Time of day

Visitor activity in December 2025 demonstrates a steady build across the day, with footfall rising consistently from early morning and peaking between 15:00–18:00. At this peak, December 2025 slightly exceeds both December 2024 and year-to-date levels, representing the **strongest performance window**. The morning period from 06:00–12:00 shows healthy momentum, tracking closely with historical benchmarks and indicating stable early-day engagement.

Following the afternoon high point, visitor numbers gradually decline into the evening, with 18:00–21:00 broadly aligned with comparative periods before a more pronounced drop after 21:00. The late-evening slowdown reflects typical daily patterns rather than a significant deviation from trend. Overall, December 2025 highlights a **well-defined mid-afternoon peak, supported by consistent morning demand and performance that remains competitive with previous periods throughout most of the day.**



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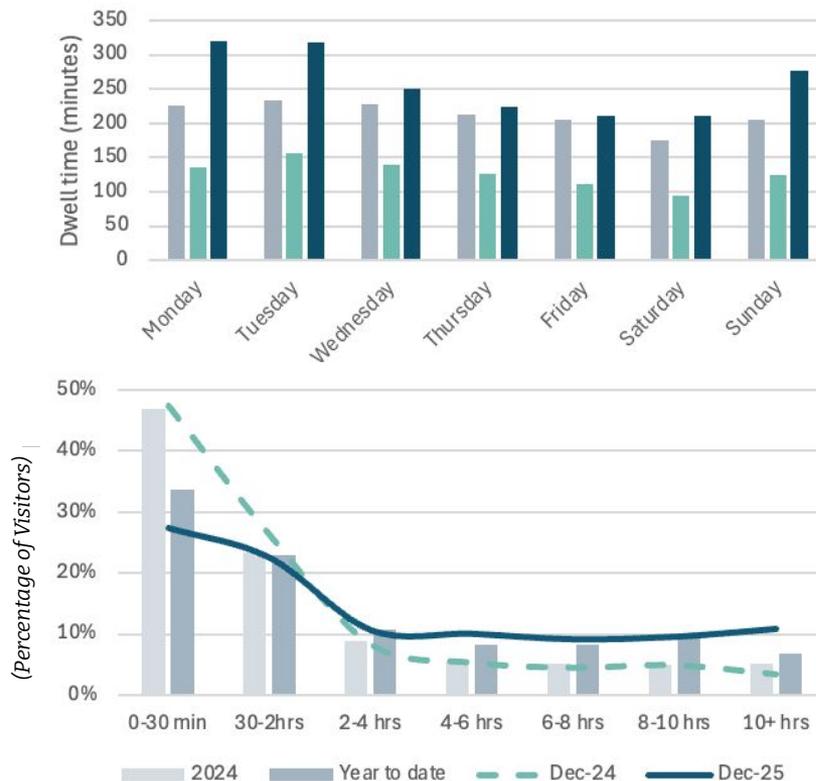


Dwell time

Dwell-time analysis for December 2025 shows a **pronounced shift toward longer, more engaged visits compared with December 2024** and year-to-date benchmarks. While short visits (0–30 minutes) remain the largest share, their proportion has declined significantly year-over-year, with substantial gains across the 2–4 hour and 8+ hour categories. The 10+ hour segment in particular shows strong growth, indicating a **meaningful rise in full-day and highly engaged visits**.

December 2025 outperforms both last year and year-to-date averages across every day of the week. The strongest dwell times occur on Monday and Tuesday, with particularly notable lifts on Sunday as well. Even Saturday, typically the lowest-performing day, records a clear year-over-year improvement.

Overall, December 2025 reflects a **marked increase in visitor dwell and depth of engagement across the entire week**, signaling strong seasonal momentum and conditions that are driving longer, more immersive on-site experiences.



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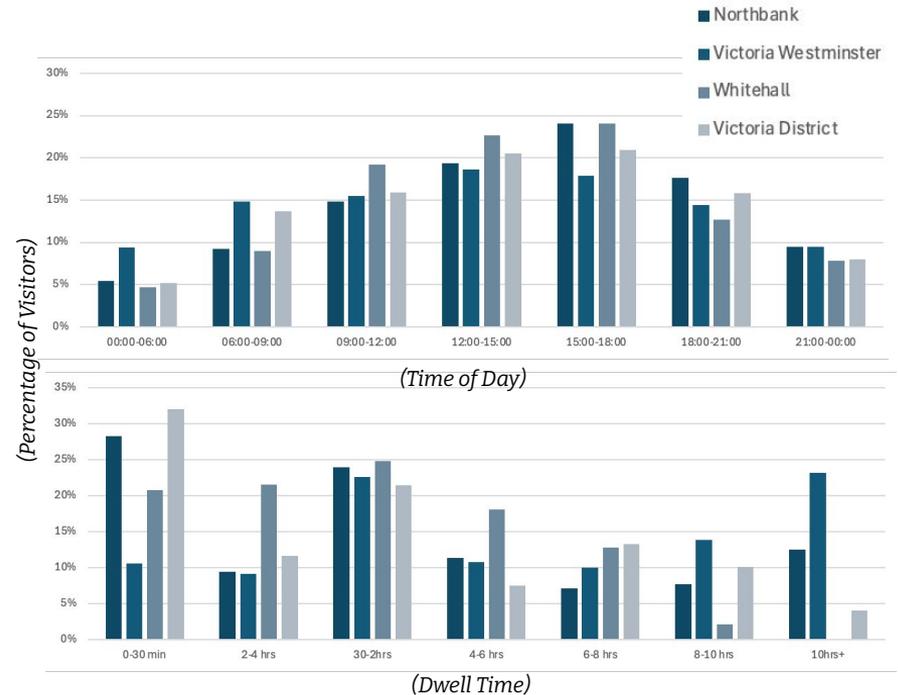


Time of day & Dwell time by area

All locations show the same strong daytime pattern in December, with footfall rising from 06:00–09:00, peaking between 12:00–18:00 (especially 15:00–18:00), and tapering into the evening. Overnight activity remains low, though Northbank has a slightly stronger early-morning presence.

Dwell profiles remain distinct. **Victoria Westminster** is dominated by 10 hrs+ stays, reinforcing its full working-day character. **Northbank** shows a mixed profile, with high shares of both short (0–30 min, 30 min–2 hrs) and very long visits. **Whitehall** is centred on medium-length stays (30 min–4 hrs), with fewer ultra-long visits. **Victoria District** skews shorter overall, with stronger 0–30 min and 30 min–2 hr shares and limited all-day presence.

In summary, while time-of-day trends align, December highlights Westminster's full-day focus, Northbank's short/long mix, Whitehall's medium-duration strength, and Victoria District's shorter, purpose-driven visits.

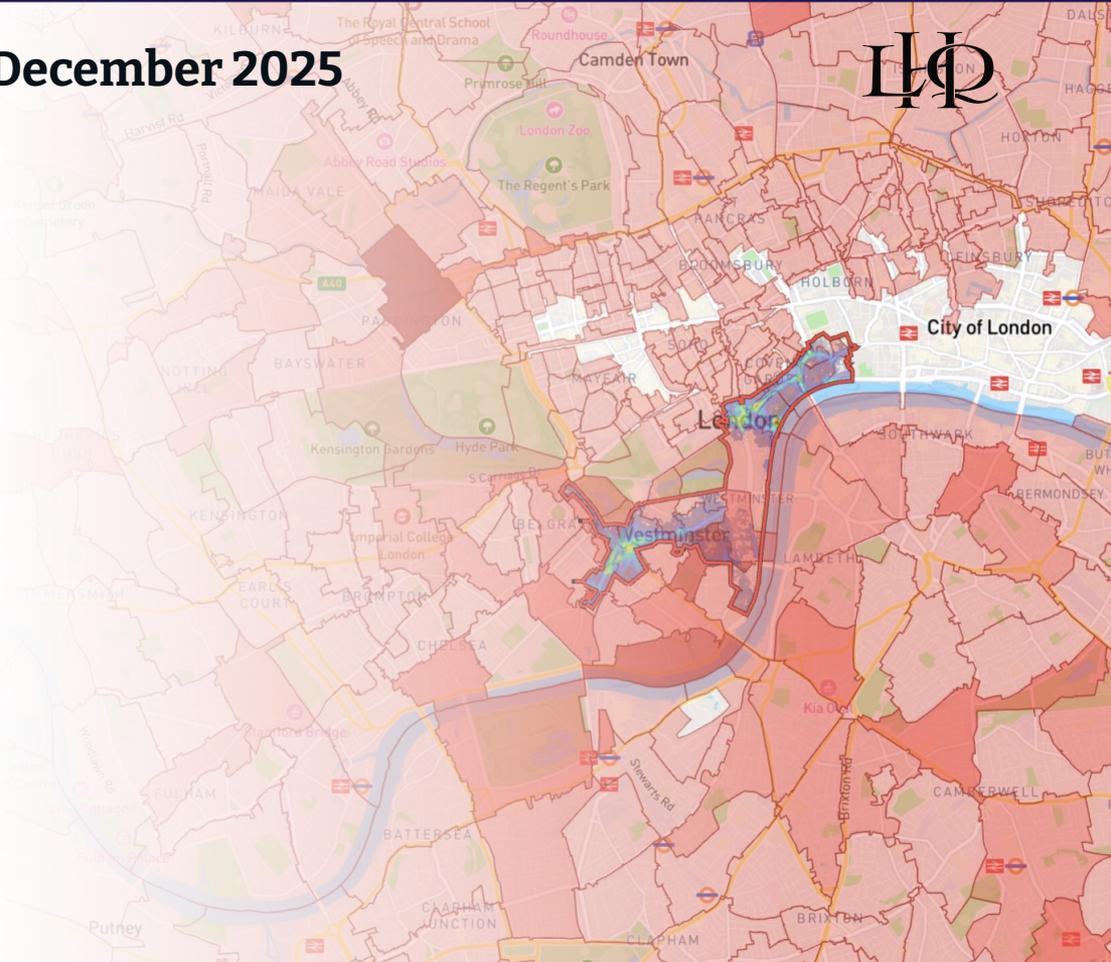


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Top visiting postcodes

Rank	Postcode	Percentage (%)	Distance (km)
1	W2 1	1.72	4.85
2	SW1P 2	1.52	0.67
3	SW1V 3	0.99	1.54
4	SW17 8	0.96	8.00
5	SW16 2	0.95	7.89
6	SW16 5	0.84	9.70
7	NW10 7	0.79	16.17
8	SW1X 7	0.76	2.12
9	E13 9	0.75	18.98
10	SE5 0	0.75	5.20



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Demographics

December 2025 visitors maintain a **similar age profile to November**, led by the 30–44 group (25%), followed by 15–29 (22.7%) and 45–59 (21.3%). Visitors aged 60+ represent 18.1%, while 0–14 remains the smallest segment at 12.8%. **The audience continues to centre on working-age adults, with consistent cross-generational representation.**

Income distribution is **concentrated between €21,000 and €31,500, peaking around €24,500 (15%) and remaining strong at €21,000 and €28,000 (14% each)**. A moderate spread extends through €35,000–€49,000, though higher income bands above €52,500 account for smaller shares, with only limited representation beyond €70,000.

Overall, December visitors reflect a **predominantly mid-income, economically active demographic, reinforcing a stable audience base with solid discretionary spending capacity** heading into the year-end period.

