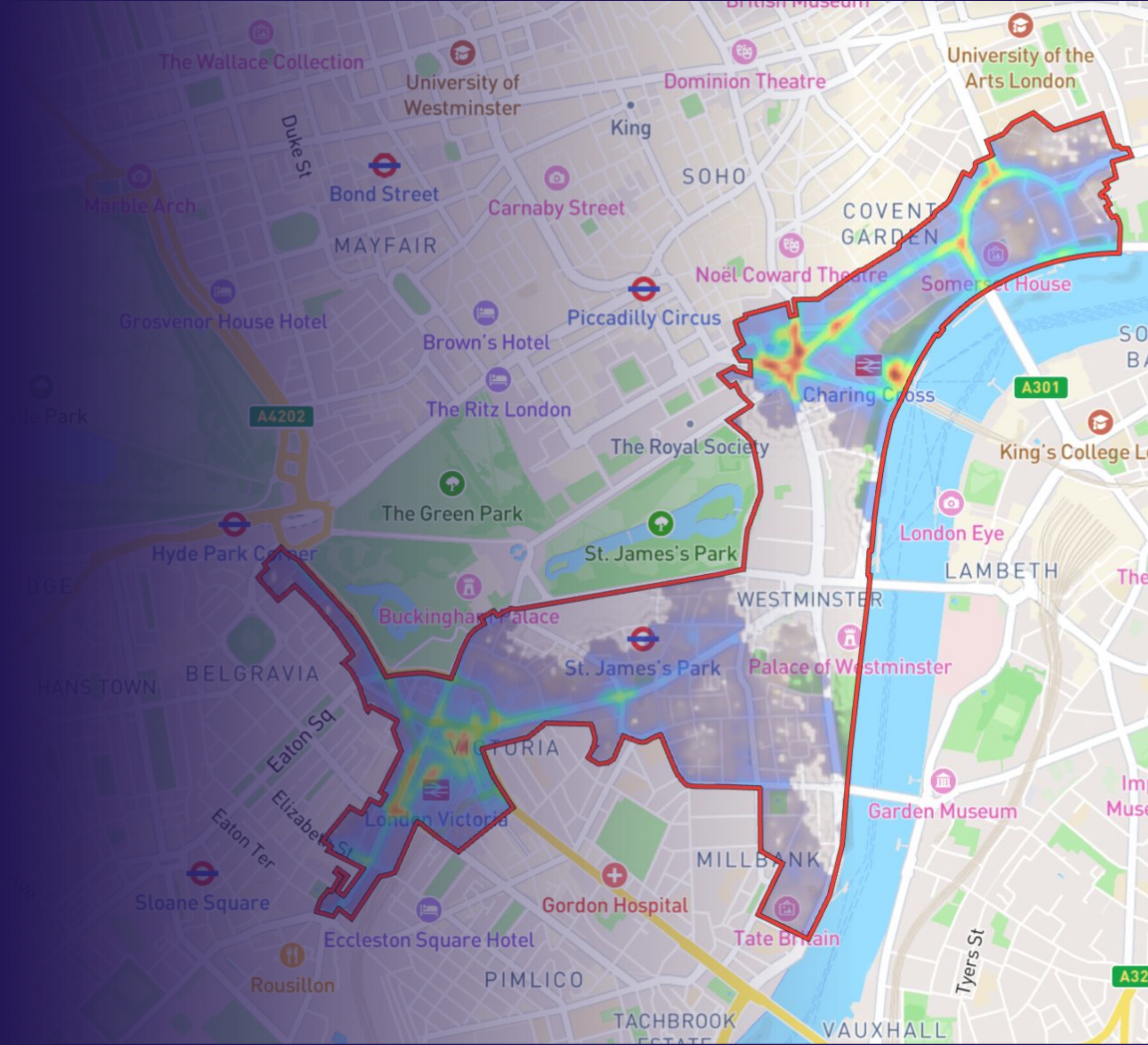
LONDON HERITAGE QUARTER

November 2025 report



huq | Introduction

What is London Heritage Quarter?

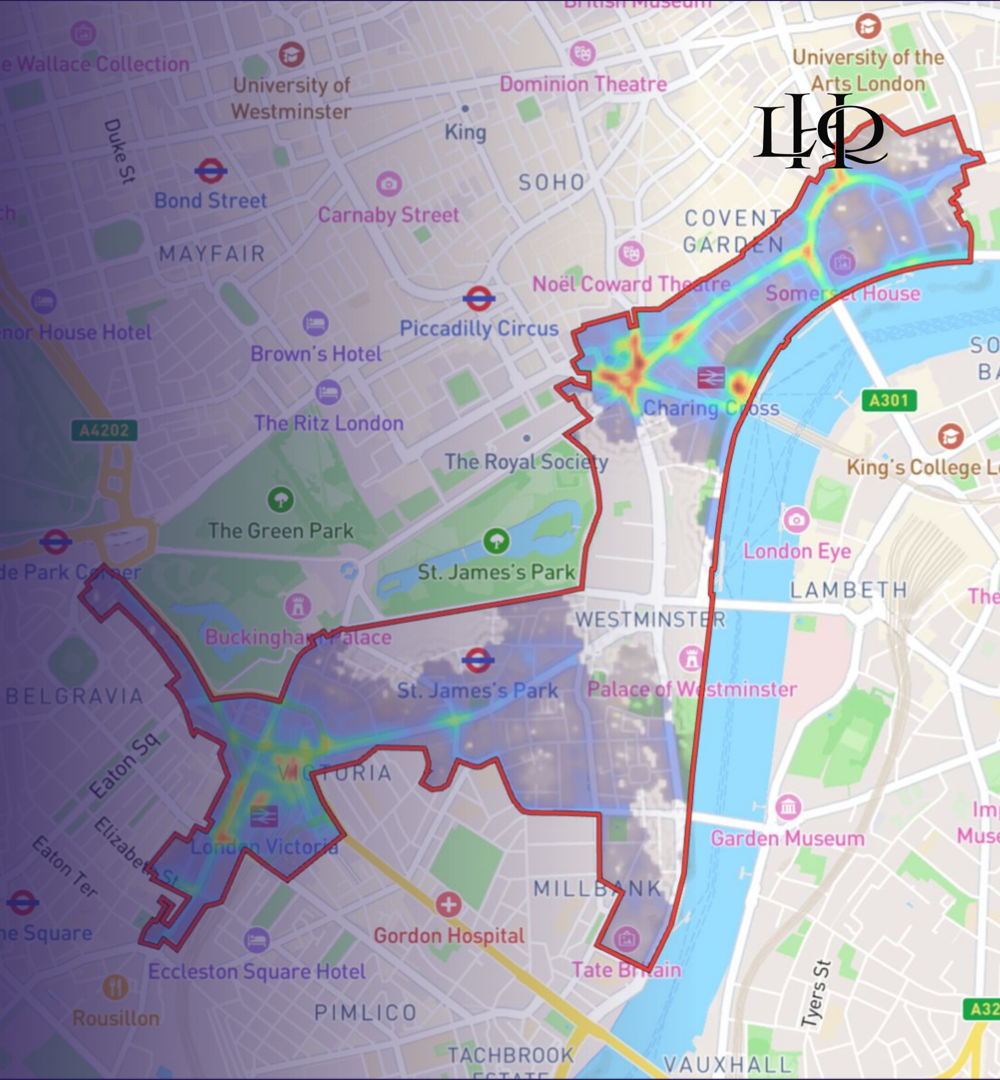
Stretching from Belgravia through to Parliament Square and along the Strand to the Royal Courts of Justice, London Heritage Quarter is a collective of four Business Improvement Districts representing over one thousand organisations.

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

23.5m total daily visitors in November 2025

- **-5.9%** compared with previous month
- **-6.17%** compared with November 2024

Year to date comparison against same period in 2024 shows a **9.09% decrease** in visit performance.

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Total Daily Visitors

Northbank BID

13.4 million

Victoria BID

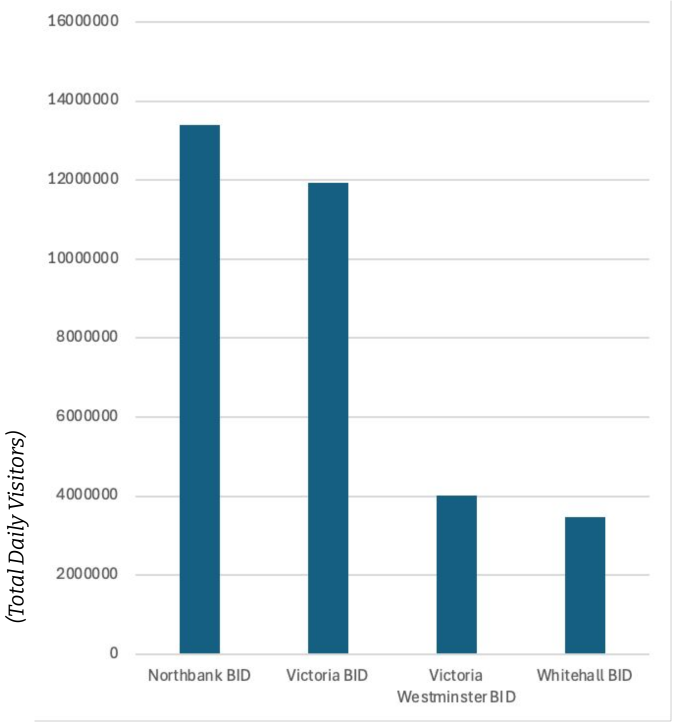
11.9 million

Victoria Westminster BID

4.0 million

Whitehall BID

3.5 million



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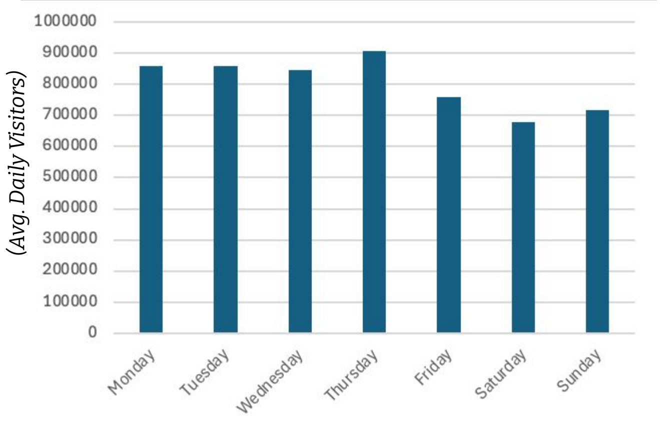
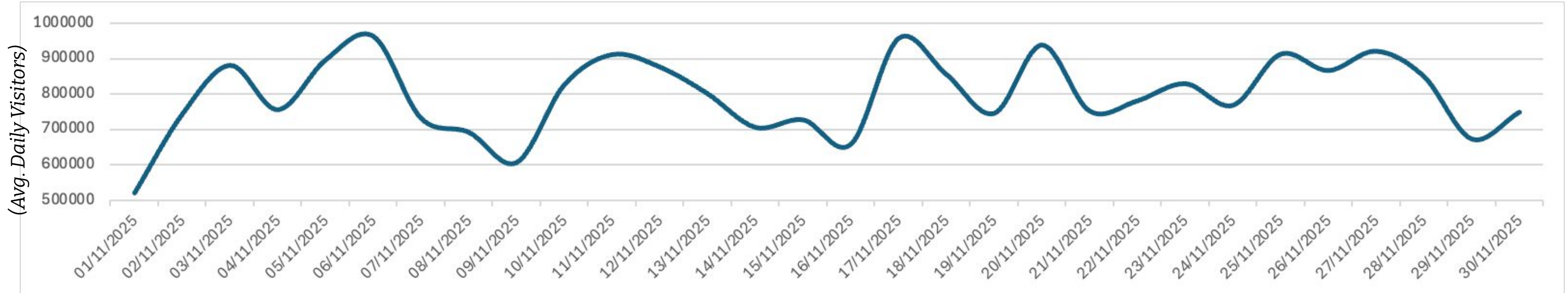
Unique daily visitors

Monday to Thursday were the strongest days in November 2025, with Thursday recording the highest average daily visitors. Mid-week performance remained consistently strong, with several of the month's traffic peaks occurring between Tuesday and Thursday.

Friday saw a slight softening, while **Saturday was the lowest-performing day**. However, **Sunday showed a clear rebound, highlighting continued weekend engagement**.

Overall, the pattern reflects predictable mid-week strength alongside sustained weekend activity, **reinforcing a hybrid usage trend**.





Time of day

Visitor activity in November 2025 follows a **clear upward trajectory through the day**, with footfall building steadily from early morning and reaching a peak between 15:00–18:00. During this peak period, **November 2025 performs slightly above both November 2024 and year-to-date levels**, marking the strongest point of the daily profile. The morning window from 06:00–12:00 shows solid growth, tracking ahead of the prior year and broadly in line with year-to-date performance, **indicating strengthened early-day engagement**.

After the mid-afternoon high, visitor numbers soften into the early evening, with 18:00–21:00 easing back toward benchmark levels. **Activity then declines more noticeably after 21:00**, representing the sharpest drop-off of the day. Overall, November 2025 **highlights a robust afternoon peak and improved morning momentum**, supported by competitive performance against historical trends despite a typical late-evening slowdown.

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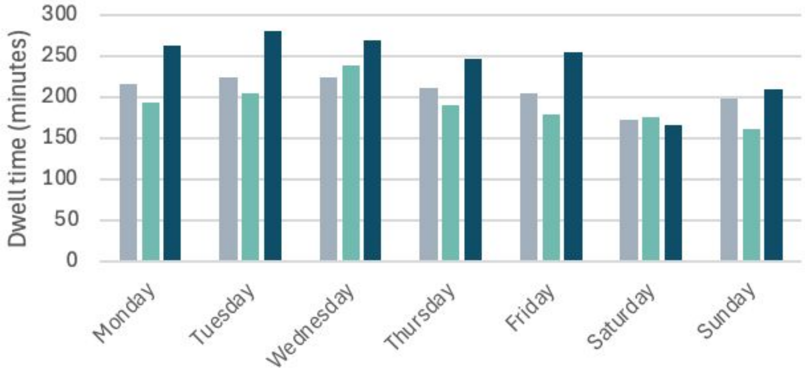
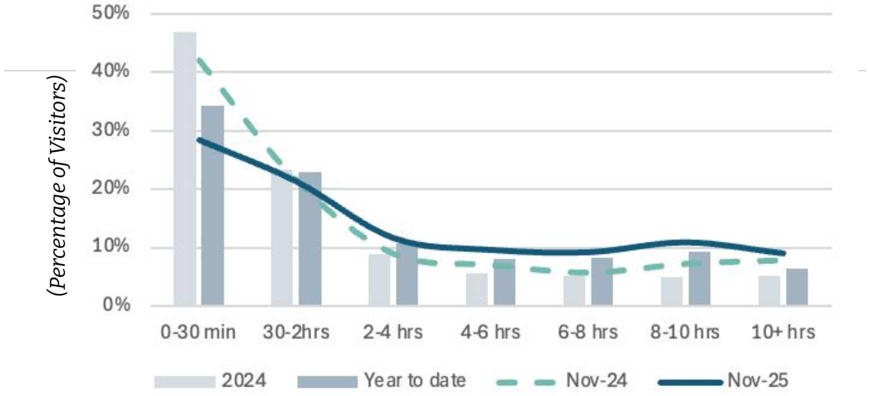
Dwell time

Dwell-time analysis for November 2025 shows a **continued shift toward longer, more engaged visits** compared with November 2024, while tracking at or slightly above year-to-date benchmarks. Although short visits (0–30 minutes) still account for the largest share, their proportion has declined year-over-year, with a more balanced spread across the 2–4 hour and 8+ hour categories. **Gains in the longer dwell buckets point to steady growth in extended, more immersive visits**.

November 2025 outperforms last year across most weekdays, with the strongest dwell times occurring mid-week from Tuesday through Friday. Monday also shows improvement, while weekend results are mixed - Sunday is up year-over-year, and Saturday trends slightly softer.

Overall, the data indicates that visitors in November 2025 are **staying longer and engaging more deeply**, particularly during the mid-week period, reinforcing **positive momentum in sustained on-site engagement**.





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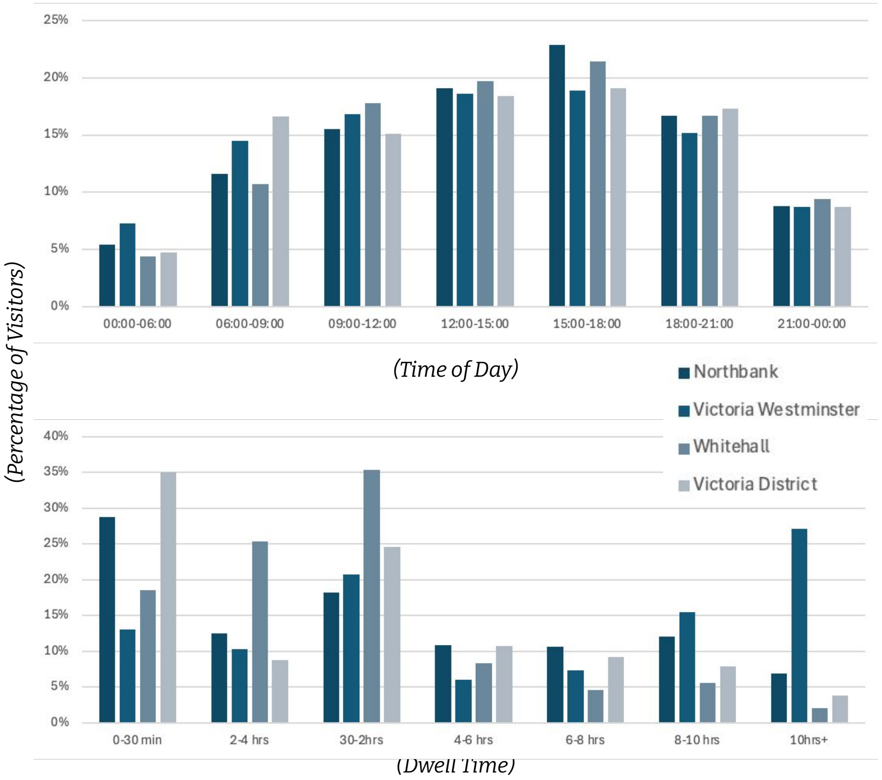
Time of day & Dwell time by area

All locations show a strong daytime pattern in November, with footfall building from 06:00–09:00, peaking between 12:00–18:00 (especially 15:00–18:00), and tapering off into the evening. Overnight activity remains minimal.

Dwell patterns differ more clearly. **Northbank** shows a polarised mix, with high shares of both very short (0–30 min) and long (8 hrs+) stays. **Victoria Westminster** is dominated by full-day visits, recording the highest proportion of 10 hrs+ stays. **Whitehall** is strongest in the 30 min–4 hr range, indicating structured medium-length visits with fewer very long stays. **Victoria District** skews shorter, with higher shares of 0–30 min and 30 min–2 hr visits and limited all-day presence.

Overall, while time-of-day trends align across areas, dwell profiles distinguish Westminster as full-day focused, Northbank as mixed short/long, Whitehall as medium-duration led, and Victoria District as more short, purpose-driven.



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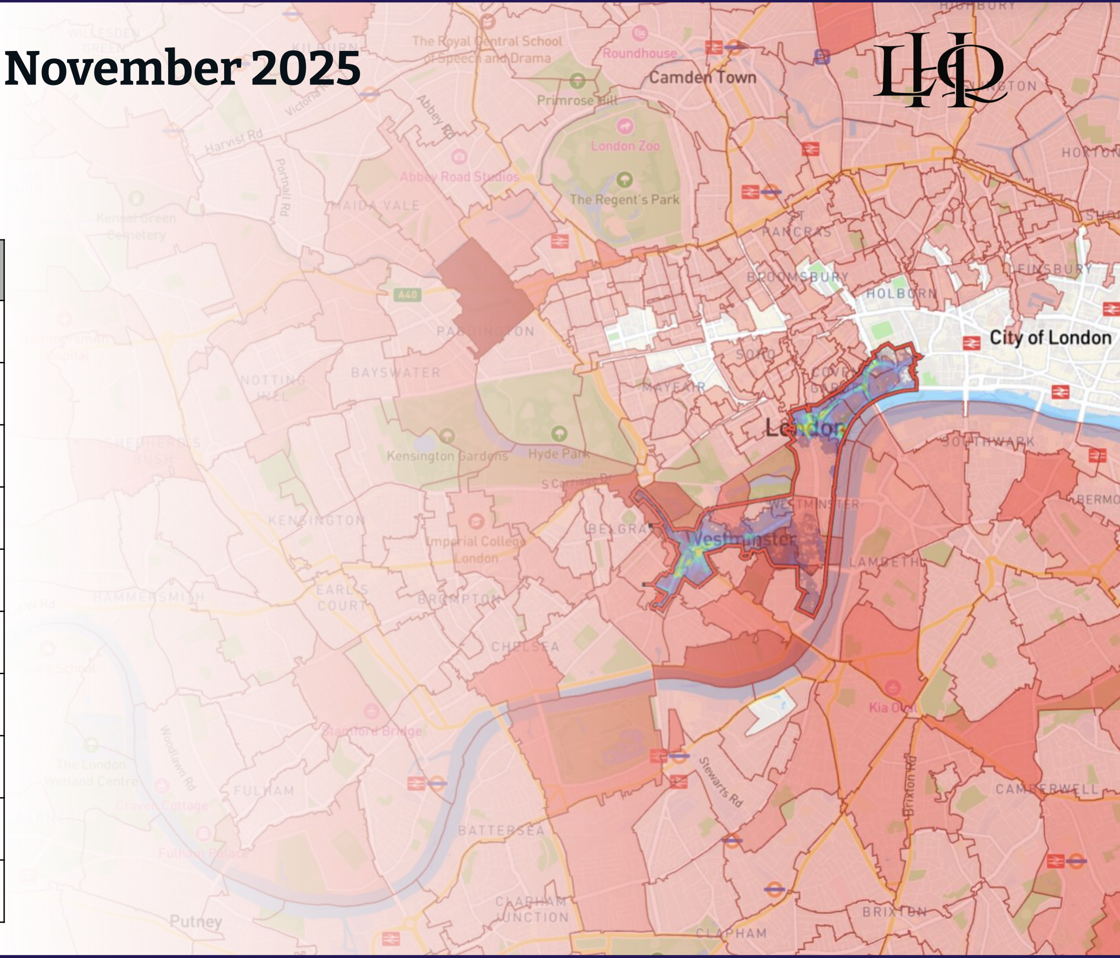
Top visiting postcodes

Rank	Postcode	Percentage (%)	Distance (km)
1	W2 1	1.61	4.85
2	SW1P 2	1.50	0.67
3	SW1V 3	0.92	1.54
4	SW17 8	0.91	8.00
5	SW16 2	0.89	7.89
6	SW1X 7	0.79	2.12
7	SW16 5	0.77	9.70
8	NW10 7	0.75	16.17
9	E13 9	0.69	18.98
10	NW1 5	0.69	3.59



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Demographics

Visitors in November 2025 are led by the 30–44 age group (25%), followed by 15–29 (22.7%) and 45–59 (21.3%), with 60+ accounting for 18.1% and 0–14 the smallest share at 12.8%. The profile remains **firmly centred on working-age adults**, while **maintaining balanced cross-generational appeal**.

Income distribution is **concentrated in the €21,000–€31,500 range, peaking at €24,500 (16%) and €28,000 (14%)**, with continued strength at €31,500 (12%). A secondary cluster appears around €49,000 (9%), while higher income bands above €56,000 represent smaller but visible segments.

Overall, November visitors skew toward **economically active, mid-income adults, indicating a financially stable audience with solid discretionary spending potential**.