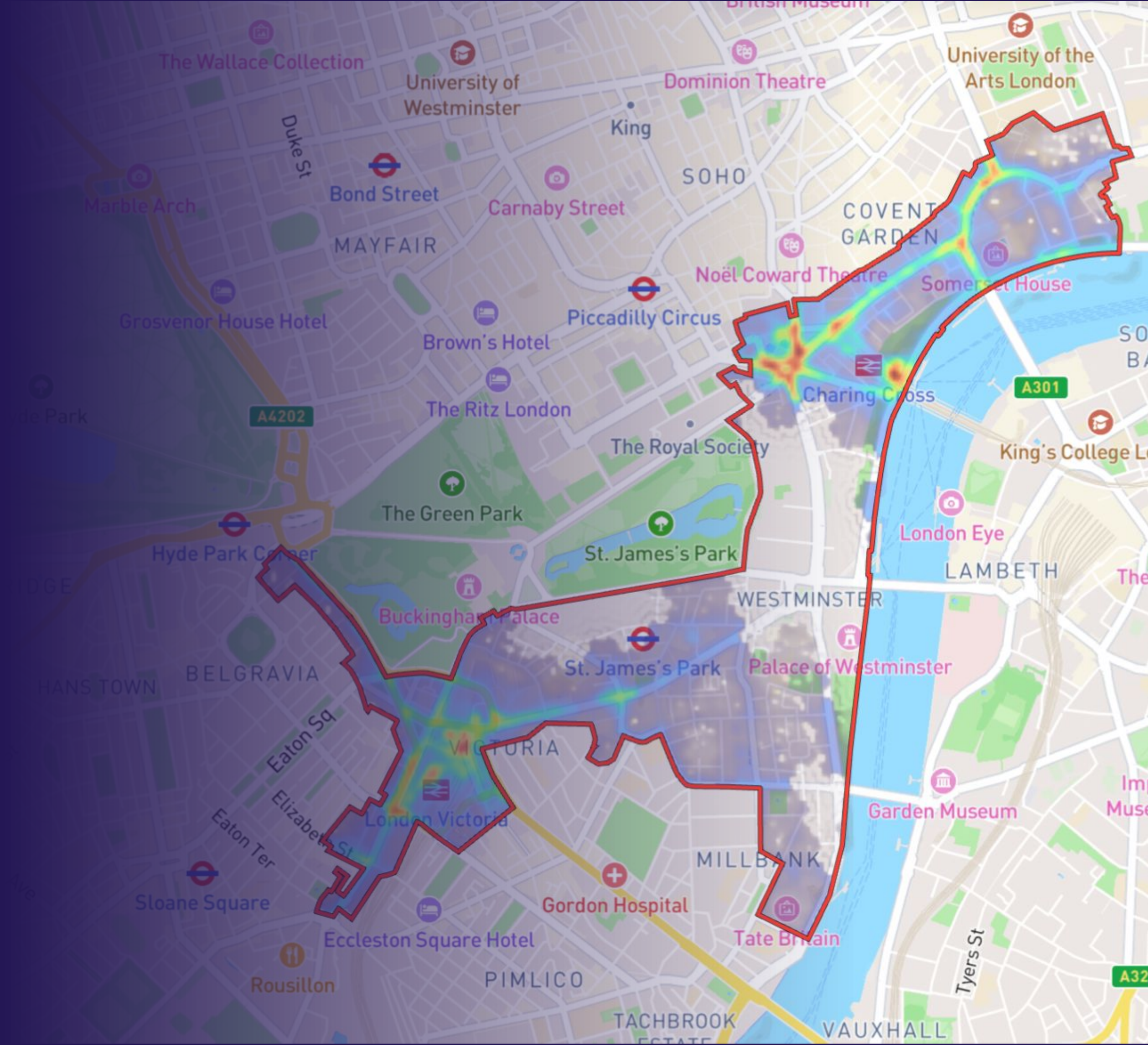
LONDON HERITAGE QUARTER

February 2026 report



huq | Introduction

What is London Heritage Quarter?

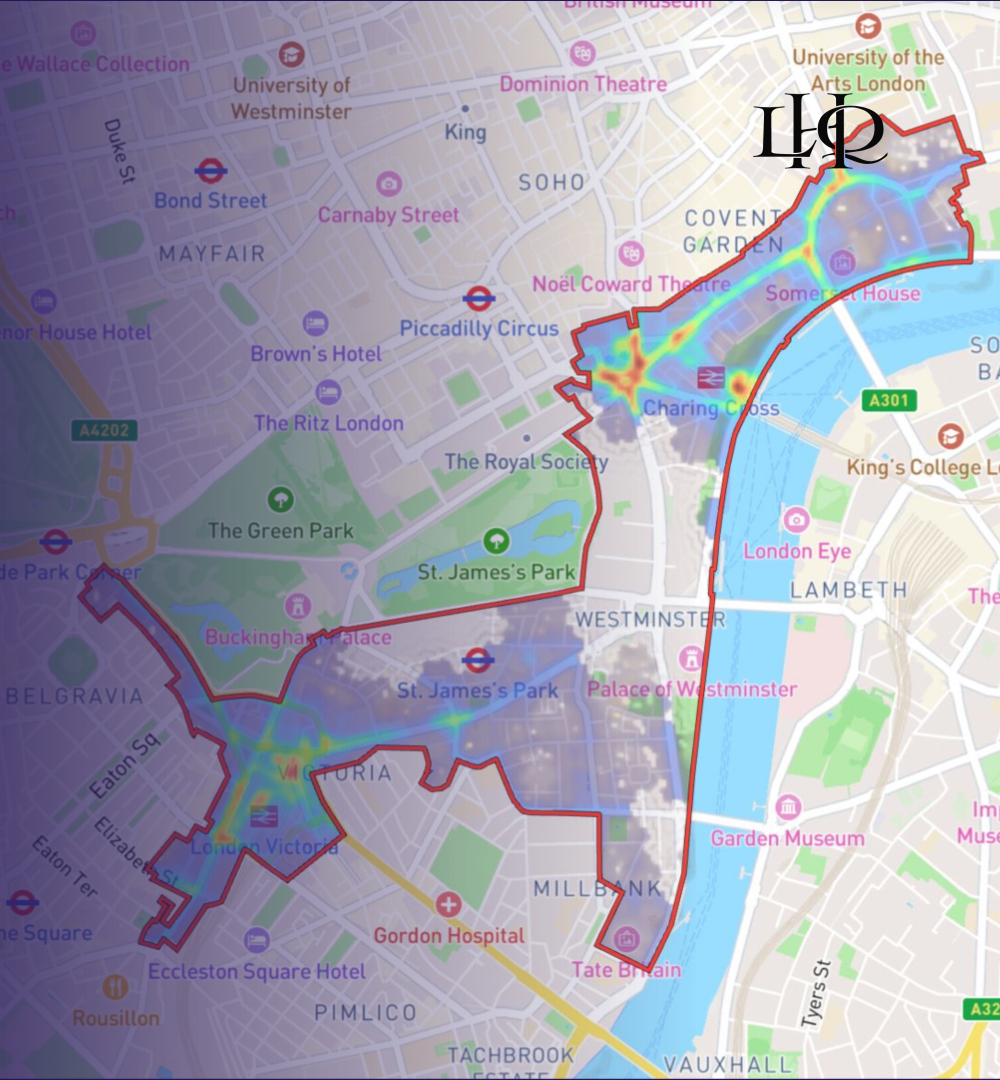
Stretching from Belgravia through to Parliament Square and along the Strand to the Royal Courts of Justice, London Heritage Quarter is a collective of four Business Improvement Districts representing over one thousand organisations.

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.



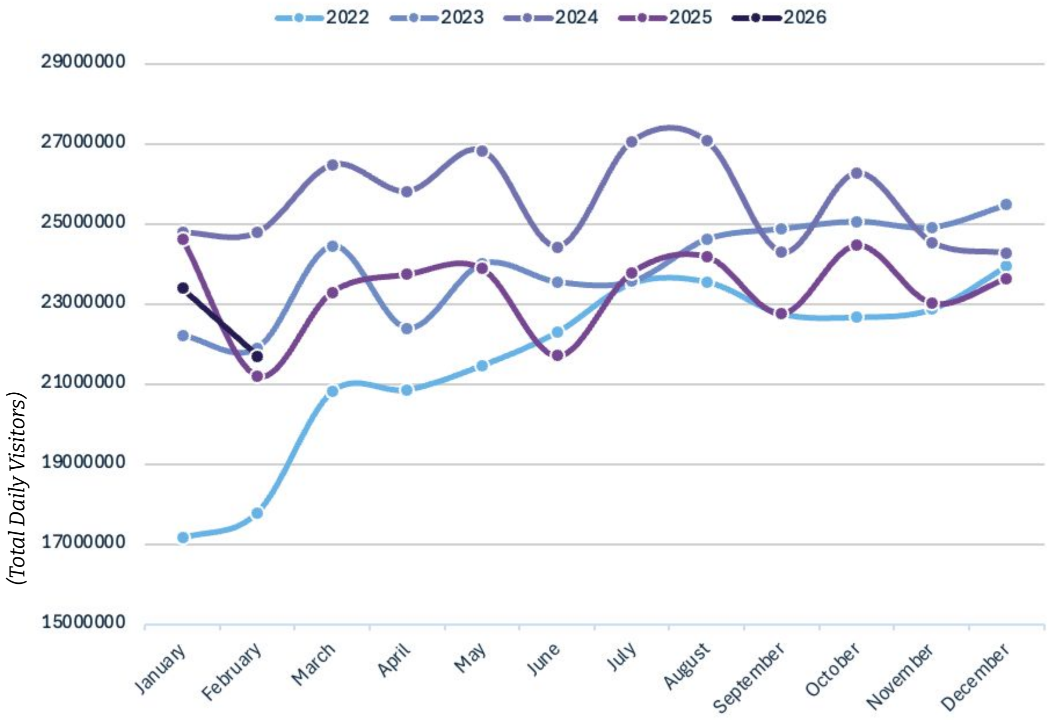
huq | Visit performance | February 2026

Month-on-month trend

21.7m total daily visitors in February 2026

- **-7.2%** compared with previous month
- **+2.3%** compared with February 2025

Year to date comparison against same period in 2025 shows a **1.63% decrease** in visit performance.



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Total Daily Visitors

Northbank BID

12.8 million

Victoria BID

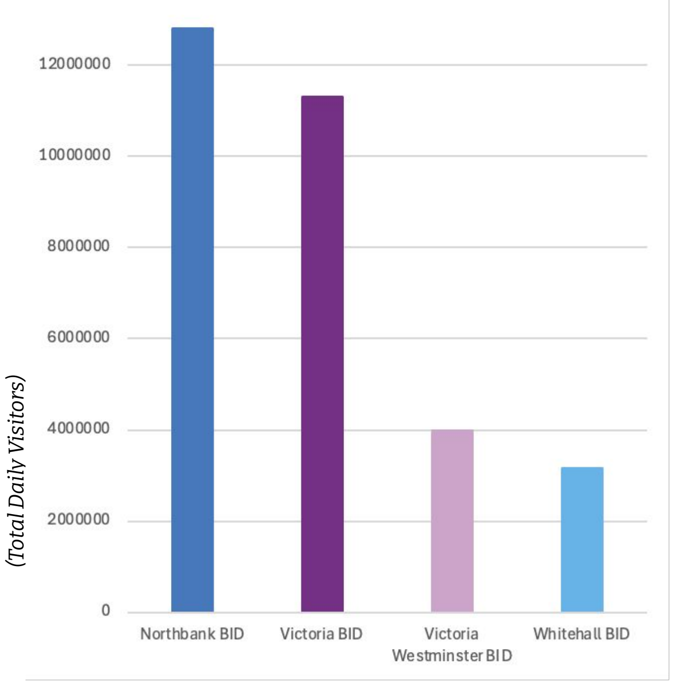
11.3 million

Victoria Westminster BID

4.0 million

Whitehall BID

3.2 million



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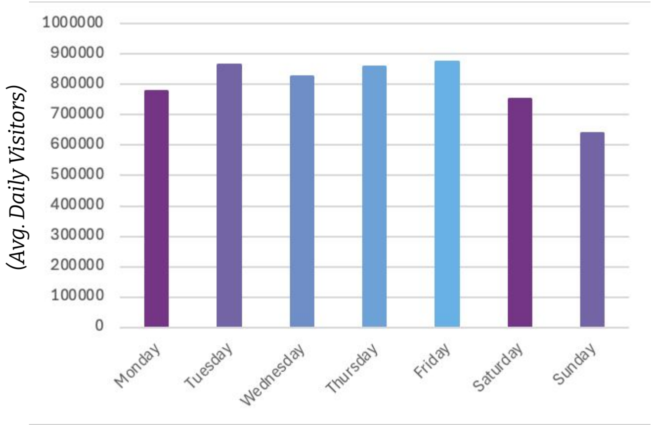
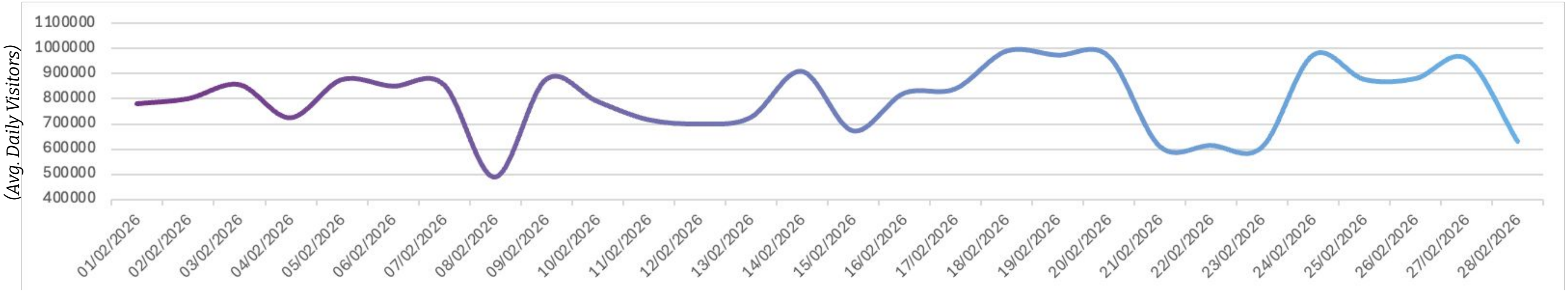
Unique daily visitors

Tuesday to Friday were the strongest days in February 2026, with Friday recording the highest average daily visitors. Mid-week performance remained consistently strong, reinforcing steady weekday engagement.

Weekend traffic softened slightly, with Sunday the lowest-performing day. Daily trends showed notable volatility, including **a sharp early-month dip** and another decline around the third week, followed by brief recoveries.

Overall, February maintained a **clear weekday-led usage pattern**, with **strong mid-week engagement** driving overall performance.

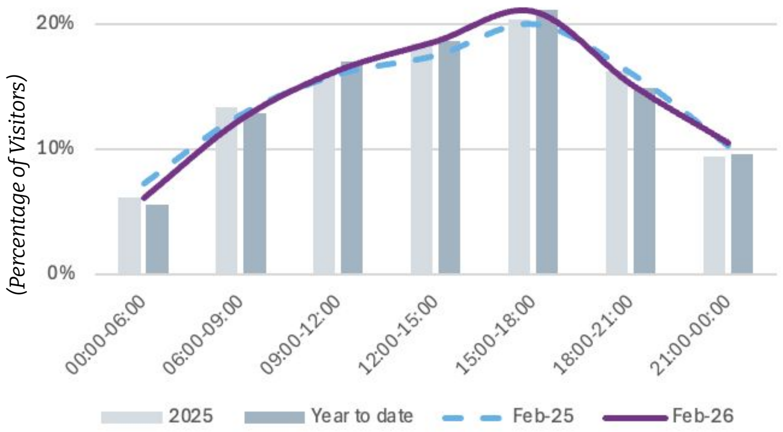




Time of day

Visitor activity in February 2026 shows a steady build across the day, with footfall rising consistently from the early morning period and reaching a **peak between 15:00-18:00**. During this peak window, **February 2026 performs slightly ahead of both February 2025 and year-to-date levels**, marking the strongest point in the daily distribution. The morning period from 06:00-12:00 demonstrates healthy momentum, broadly tracking alongside prior benchmarks while showing marginal improvement in the mid-morning and late-morning intervals.

Following the afternoon high point, visitor numbers gradually decline into the evening, with **18:00-21:00 easing slightly compared with February 2025 levels**. Activity continues to taper after 21:00, reflecting the sharpest drop-off across the dayparts. Overall, February 2026 highlights a **balanced daily pattern with a pronounced mid-afternoon peak**, supported by stable morning engagement and performance that remains closely aligned with recent historical trends.



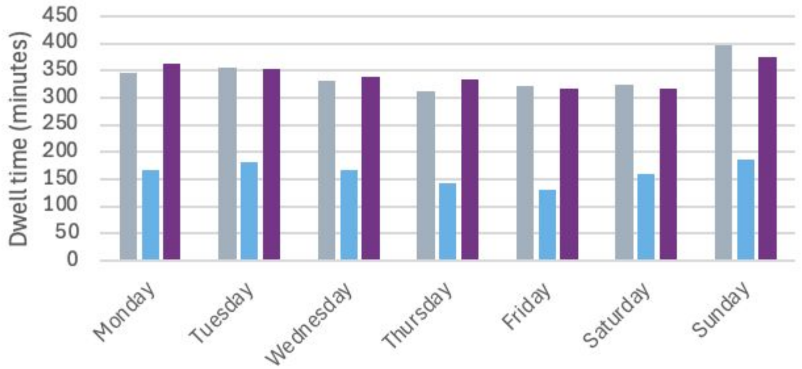
huq | Visitor behaviour | February 2026

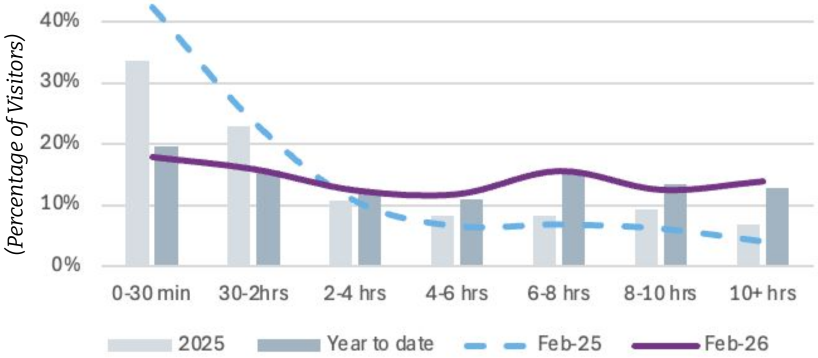
Dwell time

Dwell-time analysis for February 2026 shows a **clear shift toward longer, more engaged visits** compared with February 2025, while broadly aligning with year-to-date patterns. Short visits (0–30 minutes) still account for the largest share but have declined sharply year-over-year. At the same time, there is a strong uplift across the 6-8 hour, 8-10 hour, and 10+ hour categories, indicating a **growing share of extended and full-day visits**.

February 2026 records **substantially higher dwell times** than February 2025 across every day of the week. The strongest performance appears early in the week on Monday and Tuesday, while Thursday also stands out with a notable uplift. Weekend dwell remains strong, with Saturday and Sunday maintaining high engagement levels.

Overall, the data suggests February 2026 **visitors are spending significantly more time on-site, with fewer short visits and a stronger concentration of longer dwell periods**. This reflects deeper engagement and sustained momentum in attracting longer, more immersive visits throughout the week.





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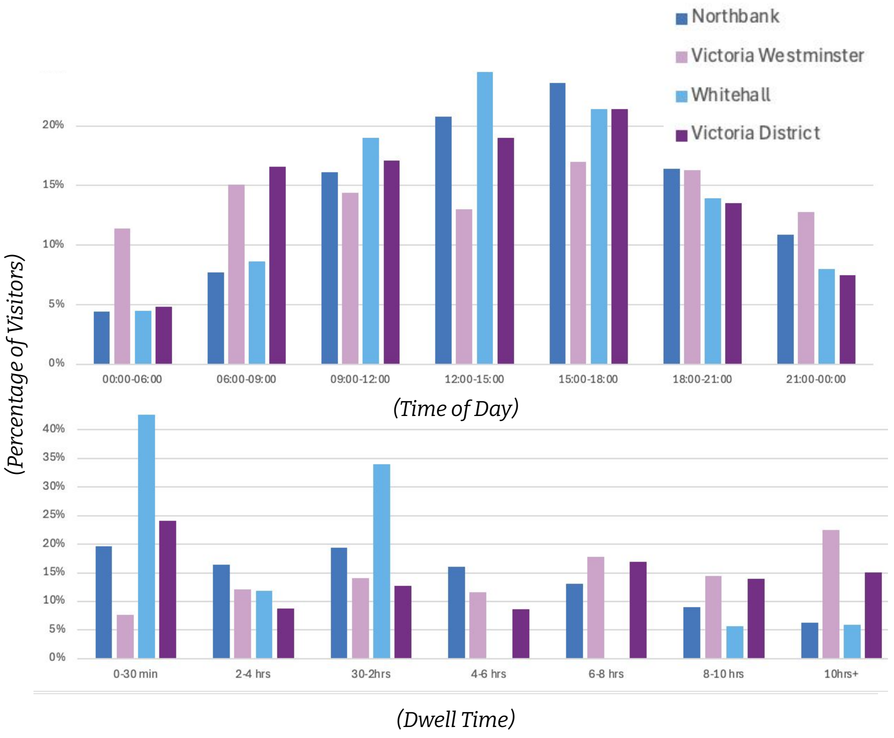
Time of day & Dwell time by area

February continues to show a **strong daytime concentration across all locations**, with footfall building from 06:00-09:00, remaining high through the afternoon, and peaking between 12:00-18:00 (particularly 15:00-18:00) before easing into the evening. Overnight activity is generally low, though Victoria Westminster and Victoria District show relatively stronger early-morning presence.

Dwell patterns show clearer contrasts. Whitehall is dominated by short visits, with very high shares in 0-30 min and 30 min-2 hrs, and minimal long stays. Victoria Westminster is heavily weighted toward longer dwell, recording the highest 10 hrs+ share and strong 6–10 hr activity, consistent with full-day presence. Northbank shows a balanced spread, with activity across short (0-30 min), mid-length (2-6 hrs) and longer (6-10 hrs) stays but fewer all-day visits. Victoria District skews toward short-to-mid stays, with high 0-30 min, 6-8 hr, and 10 hrs+ segments but a more varied distribution overall.

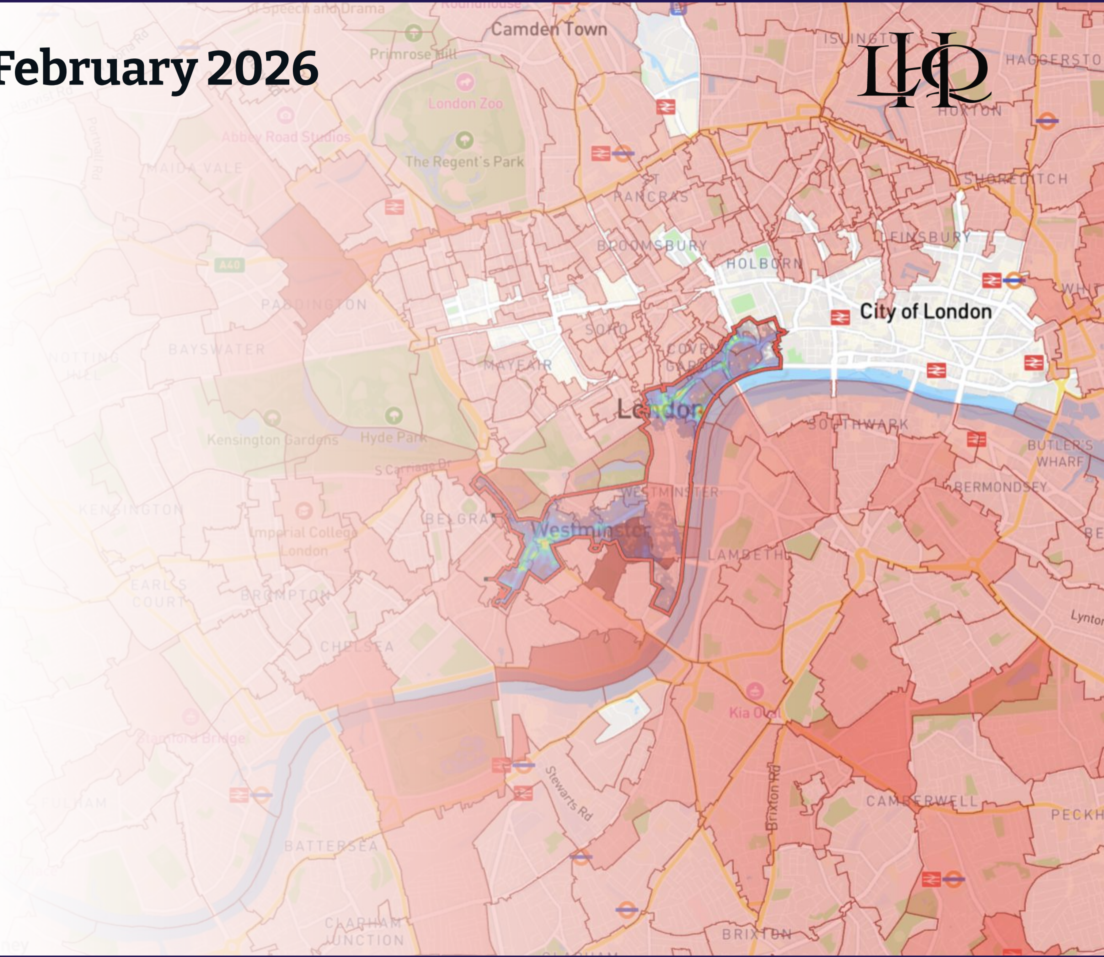
Overall, **while time-of-day behaviour is consistent, February highlights distinct dwell profiles**: short-stay dominance in Whitehall, full-day presence in Victoria Westminster, balanced durations in Northbank, and a mixed short-to-long pattern in Victoria District.



huq | Visitor segmentation | February 2026

Top visiting postcodes

Rank	Postcode	Percentage (%)	Distance (km)
1	SW1P 2	2.31	0.67
2	W2 1	1.75	4.85
3	SW1V 3	1.15	1.54
4	SE5 0	1.00	5.20
5	SW17 0	0.99	8.95
6	SW16 2	0.85	7.89
7	E13 9	0.83	18.98
8	SW16 5	0.82	9.70
9	SW17 8	0.82	8.00
10	E4 8	0.82	18.21



huq | Visitor segmentation | February 2026

Demographics

February 2026 visitors continue to show a **balanced age mix**, led by the 30-44 group (25%), followed by 15-29 (22.7%) and 45-59 (21.3%). Visitors aged 60+ account for 18.1%, while 0-14 remains the smallest segment at 12.8%, maintaining a **strong core of working-age adults with consistent cross-generational reach**.

Income distribution remains **centred on the lower-to-mid disposable income bands**, with the highest concentrations between €21,000 and €31,500. Peaks occur at €24,500 (14%) and €21,000 (14%), with solid representation at €28,000 and €31,500 (11% each). Additional presence extends through €38,500-€49,000, including a notable €49,000 cluster (10%), while higher income brackets above €56,000 appear in smaller, more scattered shares.

Overall, **February visitors represent a stable, mid-income audience anchored by economically active adults**, with a **slightly broader spread into upper-mid income bands that continues to support strong discretionary spending potential**.