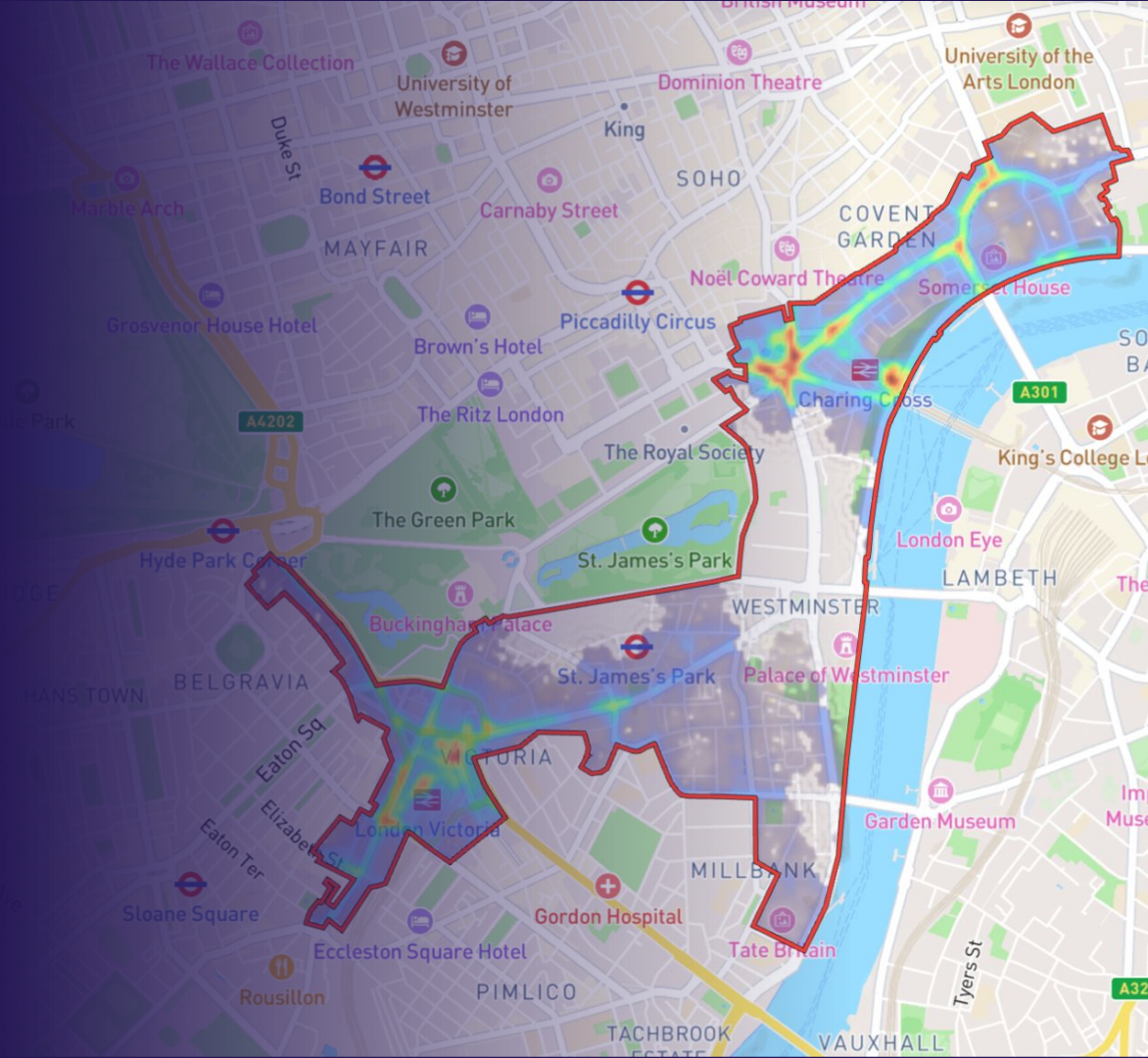




LONDON HERITAGE QUARTER

March 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.



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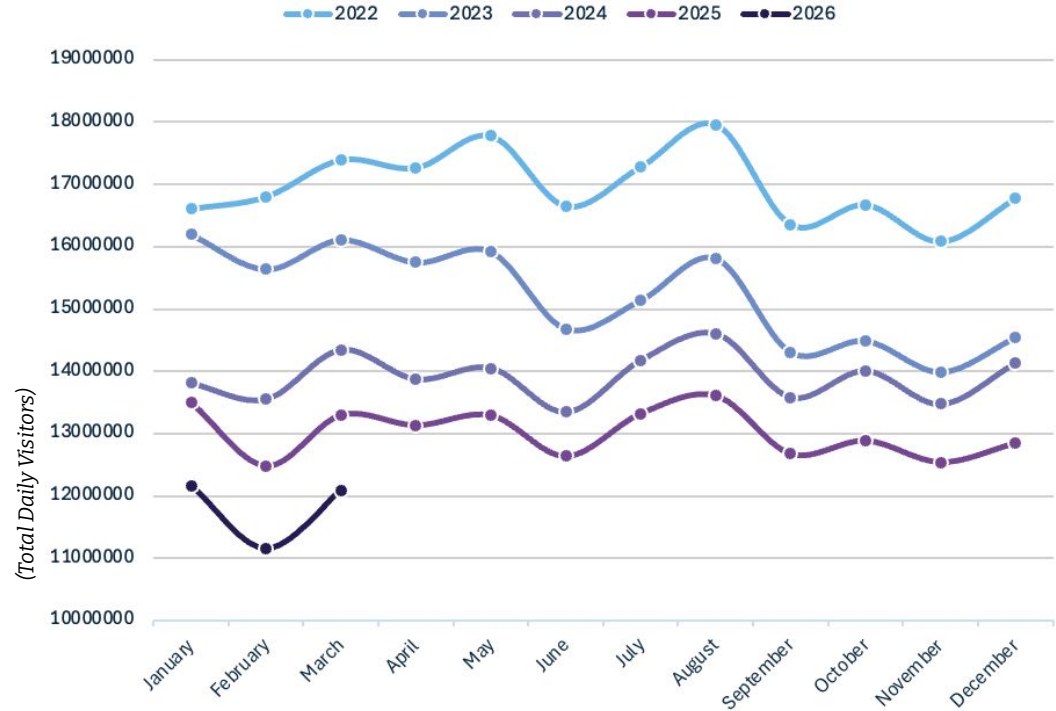


Month-on-month trend

12m total daily visitors in March 2026

- **+8.3%** compared with previous month
- **-9.1%** compared with March 2025

Year to date comparison against same period in 2025 shows a **9.85% decrease** in visit performance.



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Total Daily Visitors

Northbank BID

5.9 million

Victoria BID

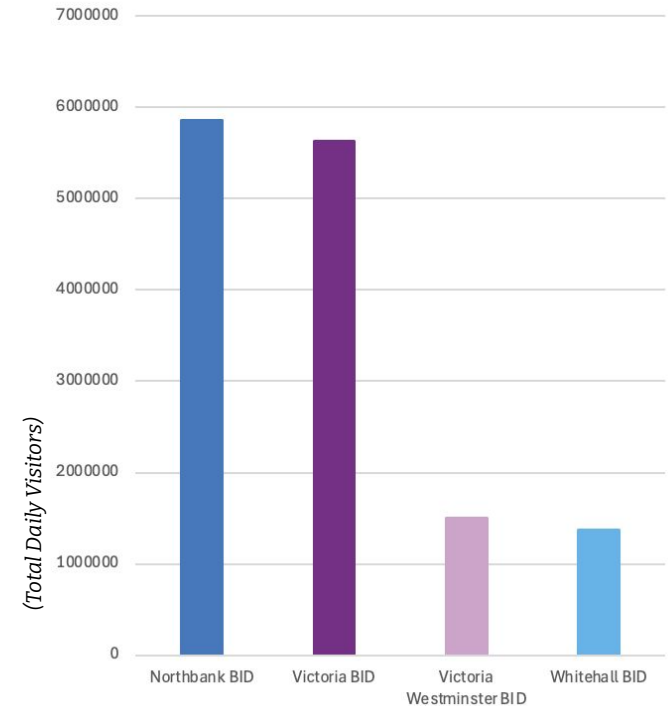
5.6 million

Victoria Westminster BID

1.5 million

Whitehall BID

1.4 million



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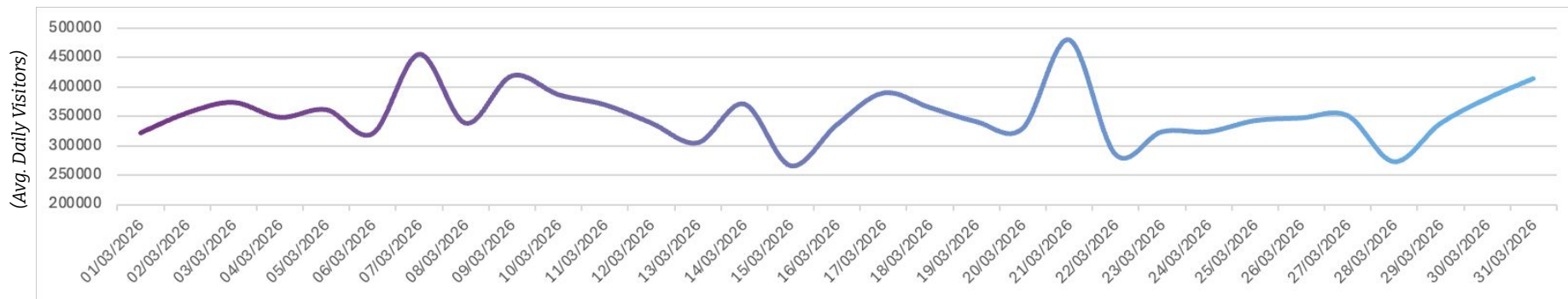
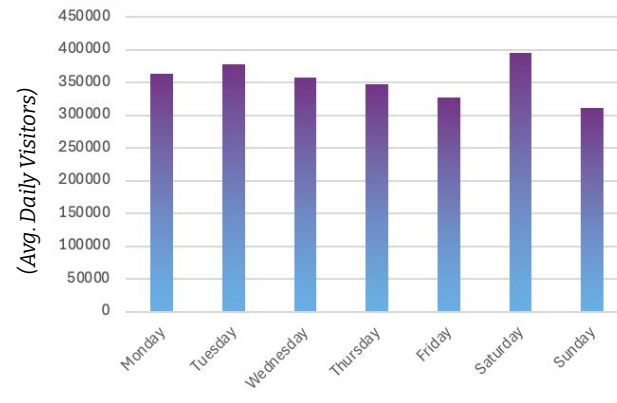


Unique daily visitors

Tuesday and Saturday were the standout days in March 2026, with Saturday recording the highest average daily visitors - indicating a **shift toward stronger weekend engagement**. Weekday performance remained relatively balanced, though Friday trailed slightly behind.

Daily traffic showed moderate volatility, with a few sharp mid-month dips and spikes, followed by a steady uplift toward the end of the month.

Overall, March reflects a more **blended usage pattern**, with **weekend strength becoming more prominent** alongside consistent weekday activity.



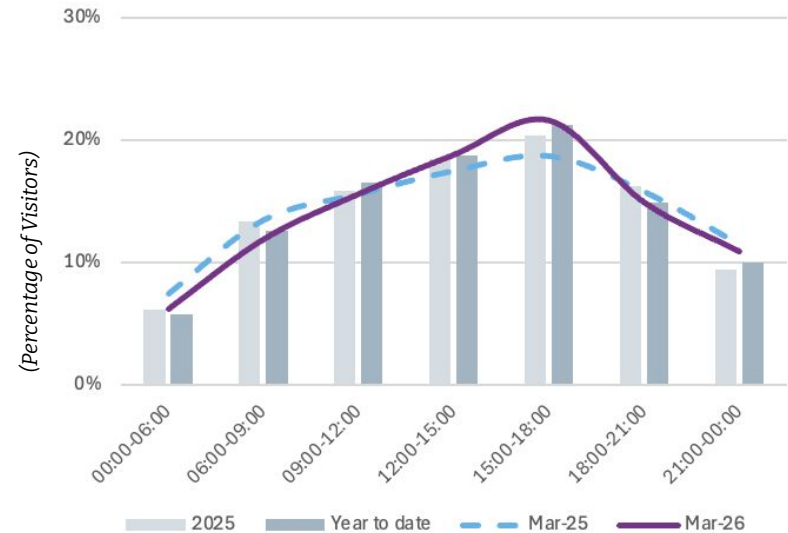
huq | Visitor behaviour | March 2026



Time of day

Visitor activity in March 2026 exhibits a **strong and progressive build throughout the day**, with footfall increasing from the early morning and peaking between 15:00–18:00. At this peak, **March 2026 outperforms both March 2025 and year-to-date levels, marking the highest concentration of visitors across all dayparts**. The morning period from 06:00–12:00 shows steady growth, with early hours slightly below last year but quickly catching up by mid-morning and aligning closely with benchmark levels.

Following the afternoon peak, visitor numbers decline into the evening, with 18:00–21:00 softening more noticeably compared to March 2025. Activity continues to taper after 21:00, representing the sharpest drop-off of the day. Overall, March 2026 highlights a pronounced and market-leading mid-afternoon peak, supported by a **solid daytime build, though with a slightly steeper evening decline relative to previous periods**.



huq | Visitor behaviour | March 2026

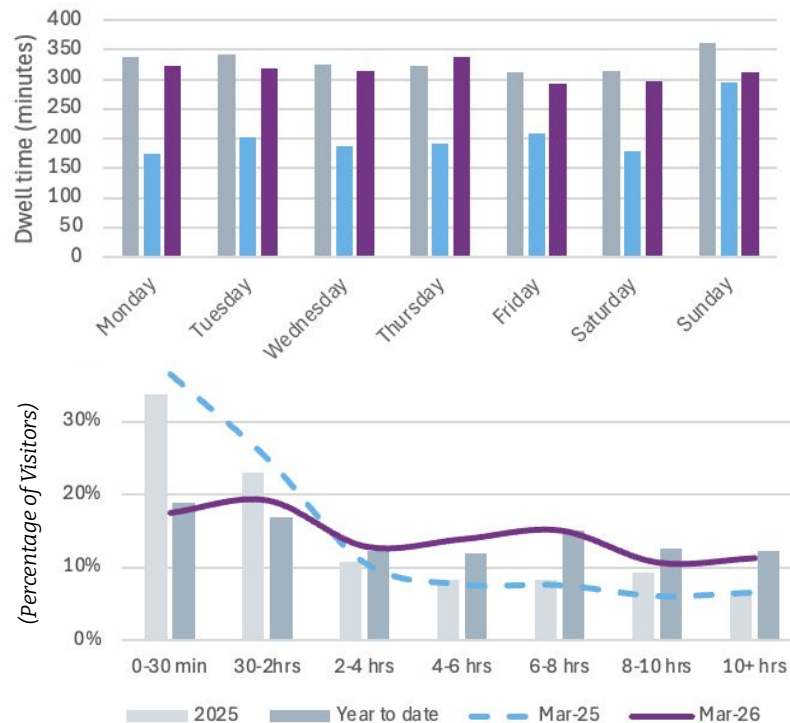


Dwell time

Dwell-time analysis for March 2026 indicates a **more balanced distribution of visit lengths** compared with March 2025, with engagement holding steady against year-to-date benchmarks. While short visits (0-30 minutes) remain the largest share, they have declined notably year-over-year. This is offset by a **broader spread across mid-to-longer duration buckets**, particularly in the 4-6 hour and 6-8 hour ranges, alongside stable performance in the 8+ hour segments.

March 2026 **shows consistent dwell performance across the week**, generally aligning with year-to-date levels and improving on March 2025. **Thursday stands out as the strongest day for average dwell time**, while Monday and Tuesday remain solid. Weekend performance is steady, with Saturday and Sunday maintaining comparable engagement to weekday levels.

Overall, March 2026 reflects a stabilisation in visitor behaviour, with fewer short stays and a more even distribution across longer dwell periods. This suggests sustained engagement and a consistent on-site experience throughout the week.



huq | Visitor behaviour | March 2026



Time of day & Dwell time by area

March maintains a **clear daytime concentration across all locations**, with footfall building from 06:00-09:00, strengthening through late morning, and **peaking between 12:00-18:00 (especially 15:00-18:00)**, before tapering into the evening. Overnight activity remains low, though Victoria Westminster again shows relatively stronger early-morning and late-evening presence.

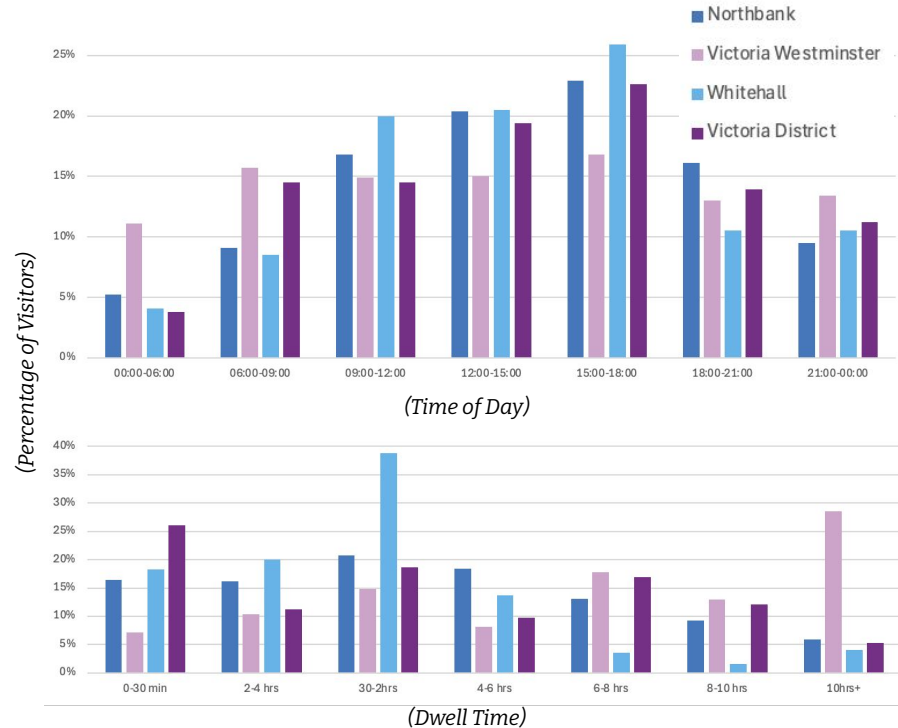
Dwell patterns remain distinct but slightly more balanced. **Whitehall** continues to be led by **short-to-mid stays**, with very high shares in **30 min-2 hrs** and **2-4 hrs**, and minimal long stays.

Victoria Westminster is still dominated by **10 hrs+ visits**, reinforcing its full-day profile, though with a more even spread across mid-length durations than in February.

Northbank shows a broad mix, with **steady distribution across short, mid-length, and longer stays**, but fewer all-day visits.

Victoria District remains **mixed but slightly shorter-leaning**, with strong **0-30 min**, **30 min-2 hrs**, and **6-8 hrs** segments, alongside a moderate 10 hrs+ share.

Overall, while time-of-day trends are consistent, March highlights **short-to-mid dominance in Whitehall**, **full-day presence in Victoria Westminster**, **balanced dwell in Northbank**, and **a mixed short-to-long profile in Victoria District**.

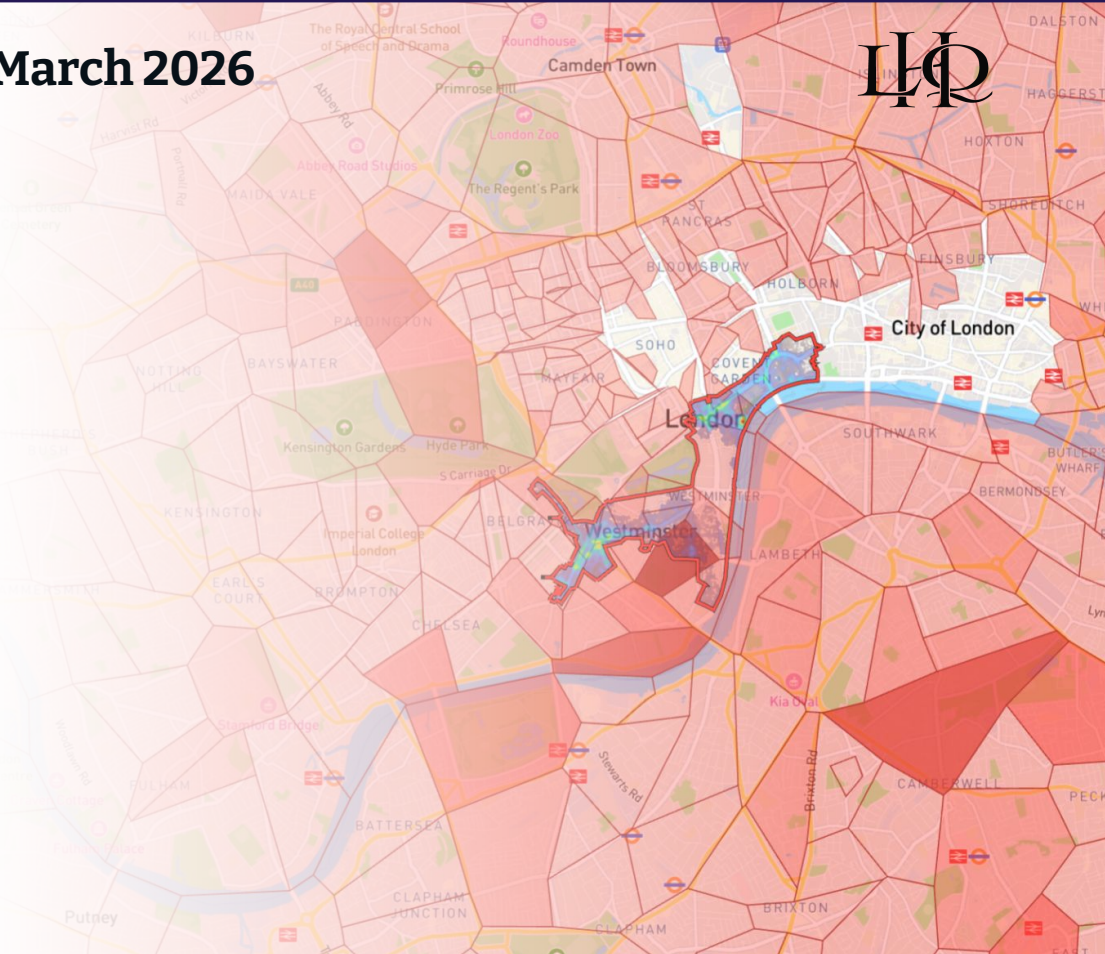


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Top visiting postcodes

Rank	Postcode	Percentage (%)	Distance (km)
1	SWIP 2	2.56	0.69
2	W2 1	1.74	4.94
3	SWIV 3	1.08	1.67
4	NW6 2	1.06	8.59
5	SE5 0	1.05	5.19
6	SW17 0	0.97	9.03
7	SW16 2	0.85	7.72
8	E4 8	0.79	18.22
9	KT3 5	0.79	18.80
10	E13 9	0.78	18.98



huq | Visitor segmentation | March 2026



Demographics

March 2026 visitors show a **slightly more concentrated age profile**, with 30-44 forming the largest segment (30.7%), followed by 15-29 (25.6%), 45-59 (22.5%), and 60+ (21.1%). The distribution **continues to emphasise a strong working-age core, with a modest skew toward mid-career adults.**

Income patterns remain anchored in the €21,000-€31,500 range, with a clear peak at €24,500 (14%) and solid representation across €28,000-€31,500 (10% each). **A notable secondary concentration appears at €49,000 (14%),** indicating a **stronger upper-mid income presence than in previous months.** Lower and higher income bands are more lightly represented but extend the overall spread.

Overall, March visitors reflect a **slightly more affluent and mid-career-skewed audience**, combining stable mid-income foundations with a growing share of higher earners, **supporting continued discretionary spend and engagement.**

