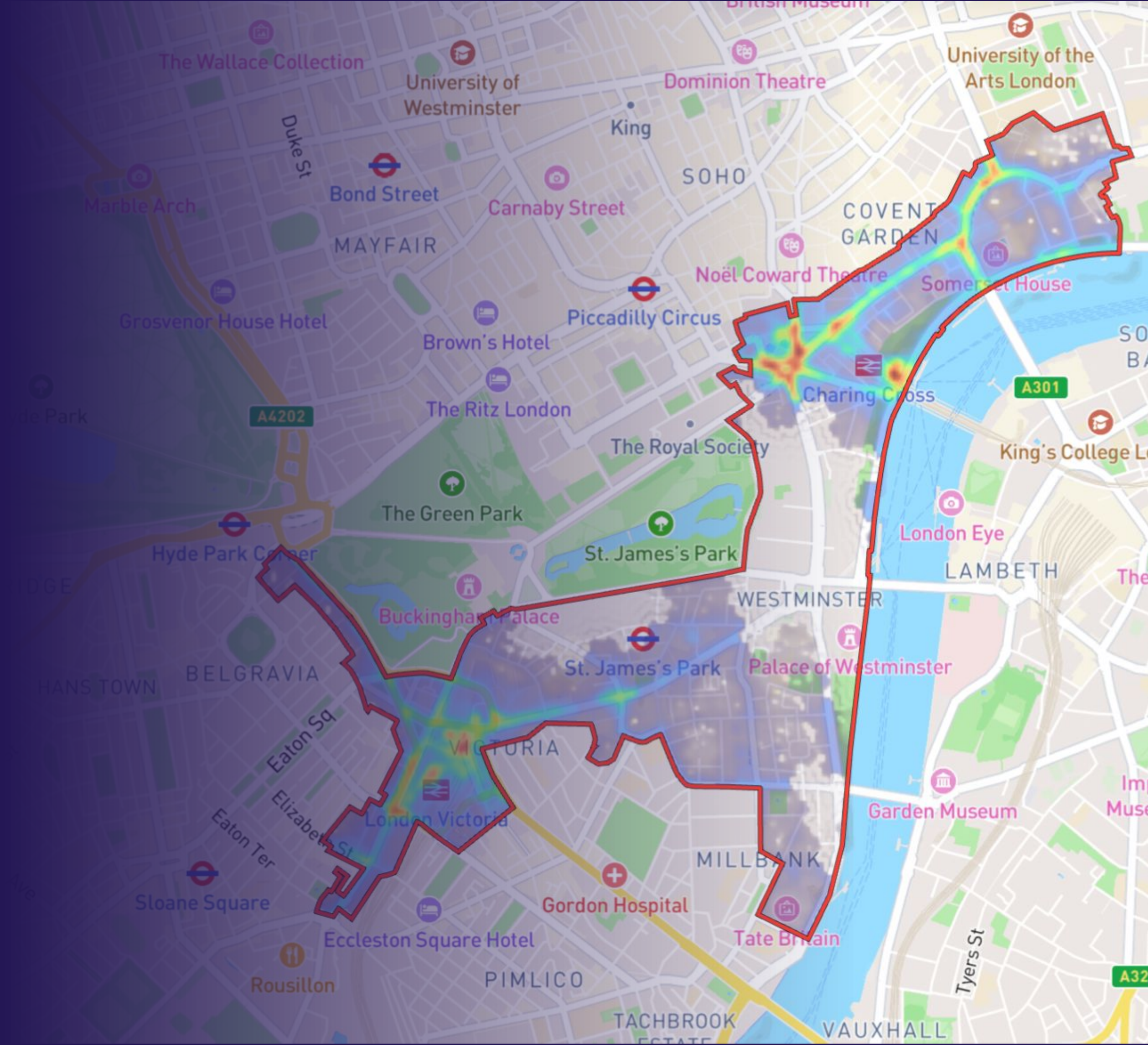
LONDON HERITAGE QUARTER

April 2026 report



huq | Introduction

What is London Heritage Quarter?

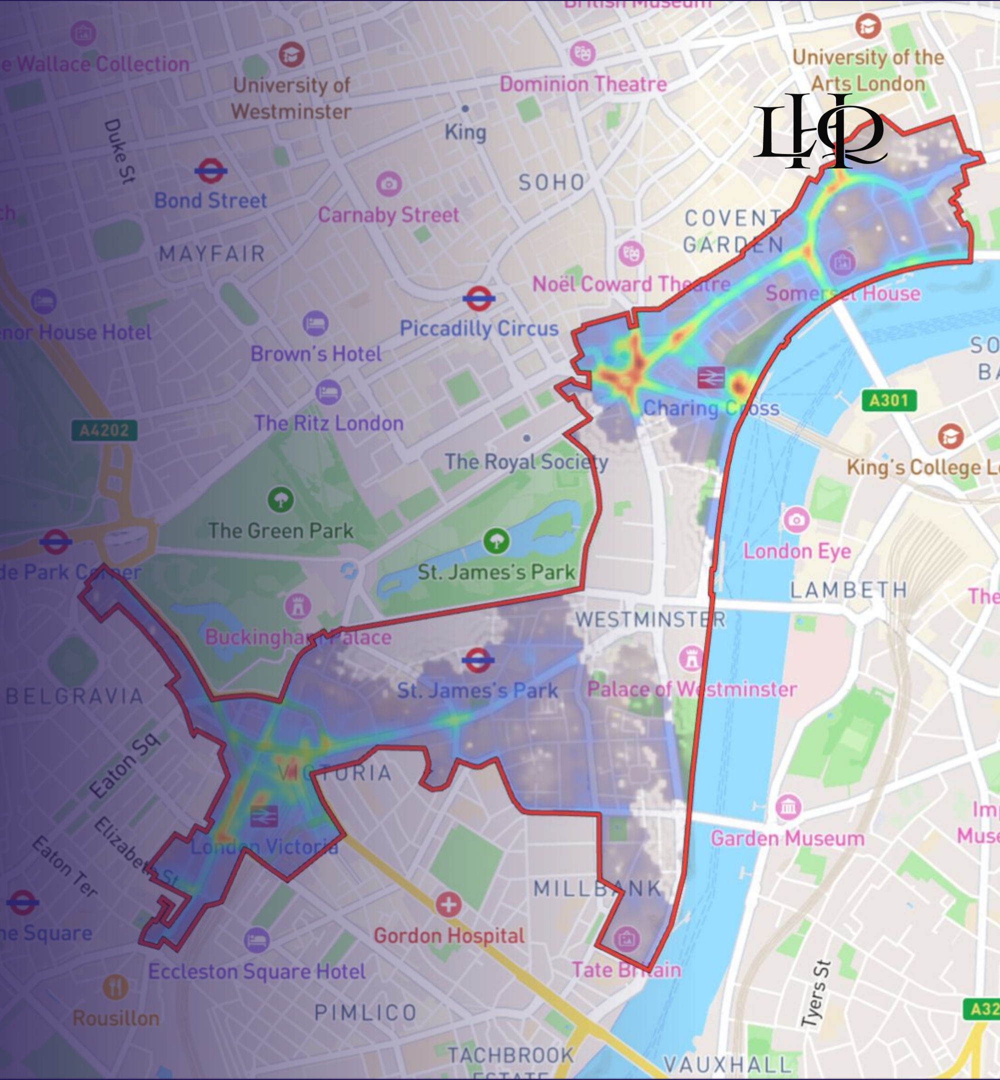
Stretching from Belgravia through to Parliament Square and along the Strand to the Royal Courts of Justice, London Heritage Quarter is a collective of four Business Improvement Districts representing over one thousand organisations.

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.



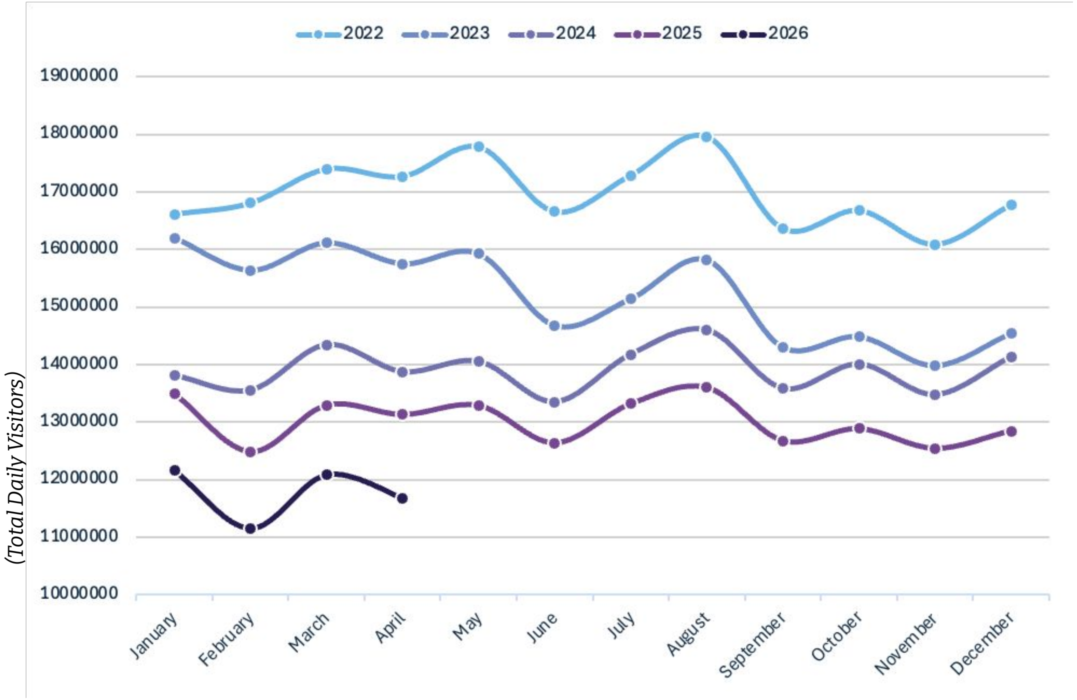
huq | Visit performance | April 2026

Month-on-month trend

11.7m total daily visitors in April 2026

- **-3.4%** compared with previous month
- **-11.1%** compared with April 2025

Year to date comparison against same period in 2025 shows a **10.16% decrease** in visit performance.



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Total Daily Visitors

Northbank BID

5.6 million

Victoria BID

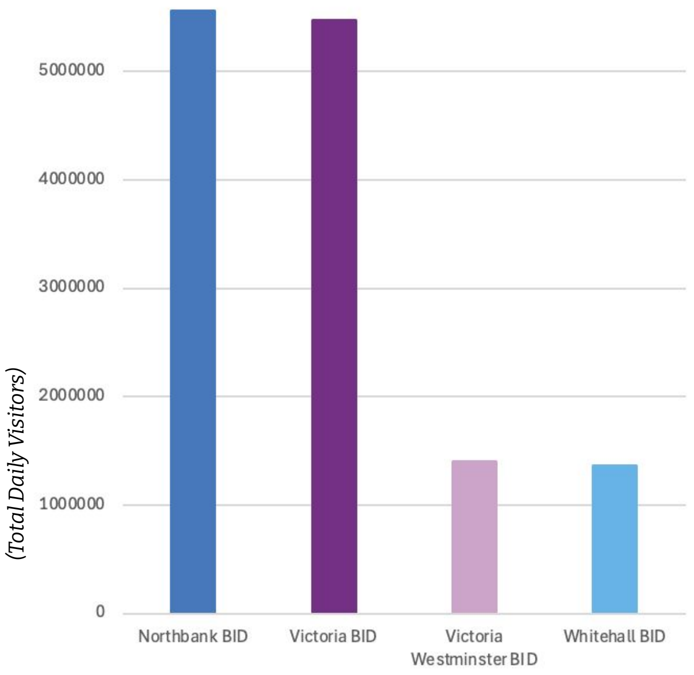
5.5 million

Victoria Westminster BID

1.4 million

Whitehall BID

1.4 million



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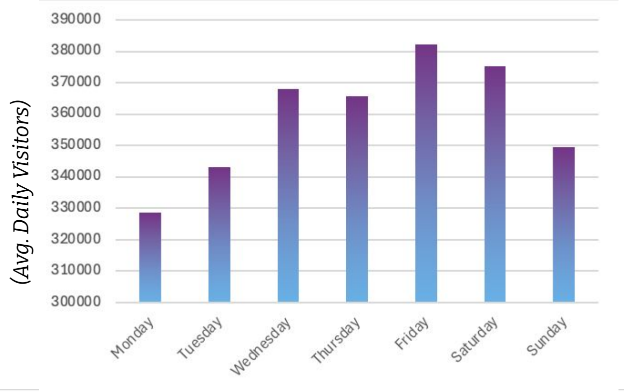
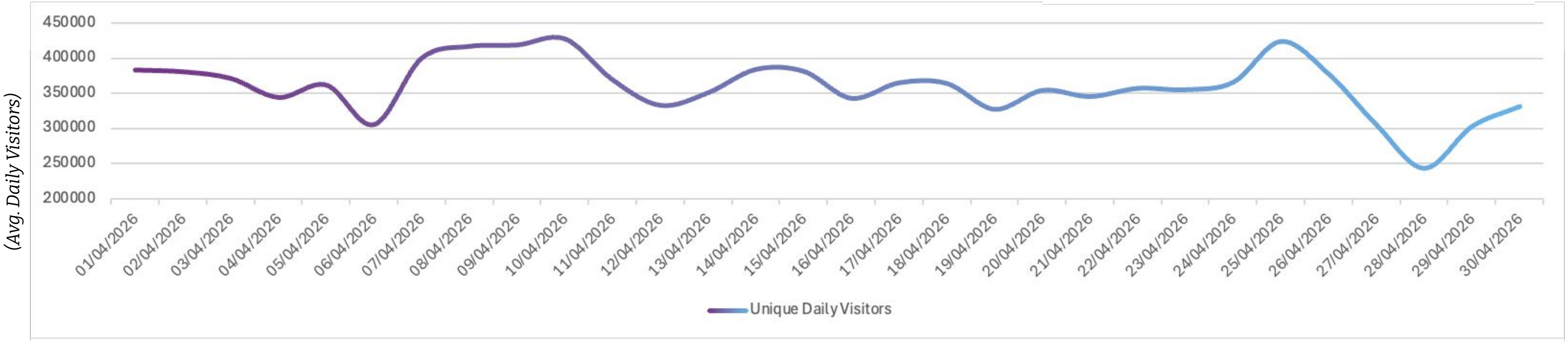
Unique daily visitors

Friday and Saturday were the strongest days in April 2026, with Friday recording the highest average daily visitors. Mid- to late-week engagement remained steady, while Monday continued to be the softest-performing day.

Daily traffic was relatively stable throughout the month, despite a brief early-April dip and a sharper decline toward month-end following a late-month peak.

Overall, **April reflects balanced weekday and weekend engagement, with stronger activity concentrated toward the end of the working week**.



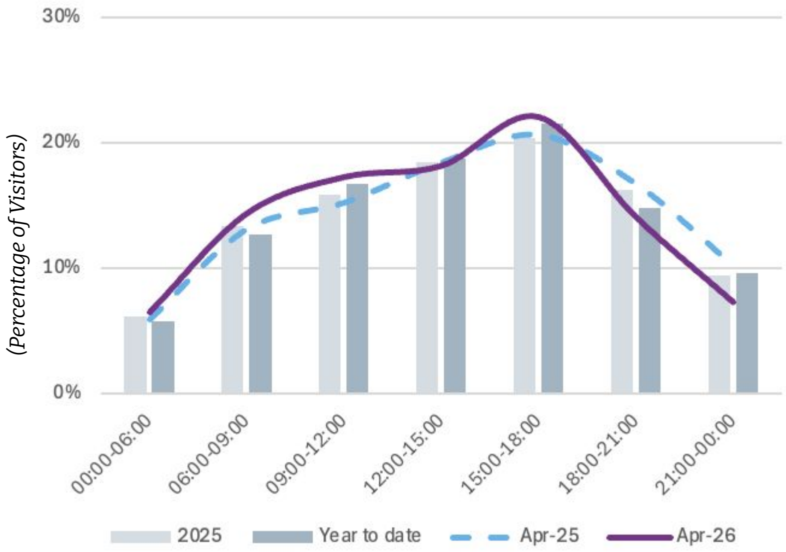


huq | Visitor behaviour | April 2026

Time of day

Visitor activity in April 2026 shows a **strong and sustained build throughout the day**, with footfall increasing steadily from early morning and reaching a **pronounced peak between 15:00-18:00**. During this peak window, April 2026 performs ahead of both April 2025 and year-to-date levels, recording the highest visitor concentration across the daily profile. The morning period from 06:00-12:00 demonstrates healthy momentum, with activity broadly aligned with benchmark trends before strengthening further into the afternoon.

Following the afternoon high point, visitor numbers decline more sharply into the evening, with 18:00-21:00 falling below April 2025 levels despite remaining broadly in line with year-to-date performance. Activity continues to taper after 21:00, marking the steepest slowdown across the dayparts. Overall, **April 2026 highlights a particularly strong mid-afternoon peak and resilient daytime demand, though with a more accelerated evening decline compared with previous periods**.



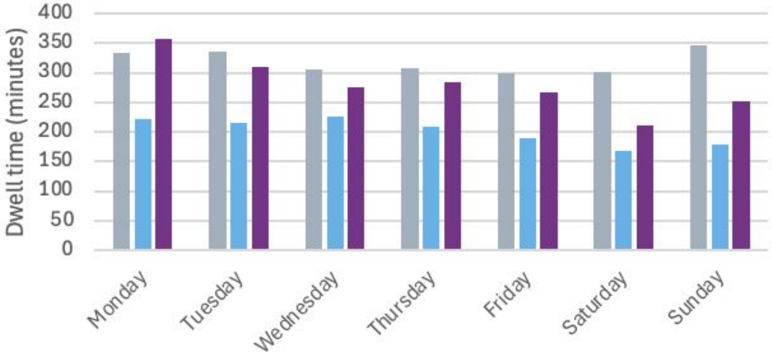
huq | Visitor behaviour | April 2026

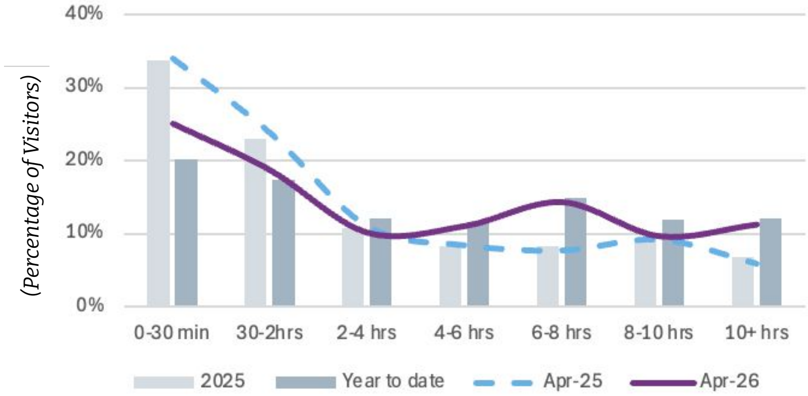
Dwell time

Dwell-time analysis for **April 2026 shows continued improvement in visitor engagement compared with April 2025**, with a noticeable shift away from shorter stays toward more sustained visits. While short visits (0-30 minutes) still represent the largest share of activity, their proportion has declined significantly year-over-year. At the same time, the 4-6 hour, 6-8 hour, and 10+ hour categories have strengthened, indicating a **broader spread of longer and more immersive visits**.

April 2026 records stronger dwell times than April 2025 across every day of the week, with the **most notable gains occurring on Monday and Tuesday**. Mid-week performance remains solid, while weekend dwell, although softer relative to year-to-date averages, still shows clear improvement over last year.

Overall, the data suggests **visitors in April 2026 are spending more time on-site and engaging more consistently across the week**. The continued reduction in short visits alongside growth in longer dwell periods points to sustained momentum in deeper visitor engagement.





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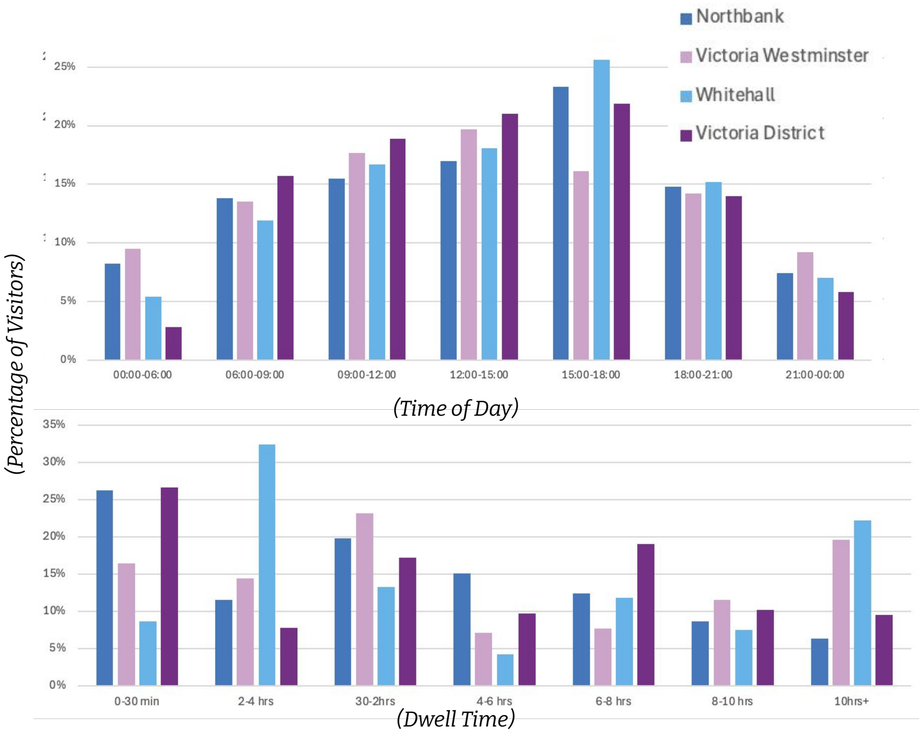
Time of day & Dwell time by area

April continues the established daytime pattern across all locations, with footfall building from 06:00-09:00, remaining strong through the afternoon, and peaking between 15:00-18:00 before easing into the evening. Overnight activity stays low overall, though **Victoria Westminster and Victoria District show slightly stronger early-morning presence than the other areas**.

Dwell behaviour becomes more differentiated in April. **Whitehall** stands out for both short visits (2-4 hrs) and a notably high 10 hrs+ share, suggesting a mix of transient and full-day activity. **Victoria Westminster** is more evenly distributed across dwell lengths, with stronger representation in 30 min-2 hrs and 10 hrs+ stays. **Northbank** shows a balanced profile centred on short-to-mid stays, particularly 0-30 min, 30 min-2 hrs, and 4-8 hrs, with fewer all-day visits. **Victoria District** remains mixed but leans toward shorter and medium-length visits, with high 0-30 min, 30 min-2 hrs, and 6-8 hrs activity alongside moderate longer stays.

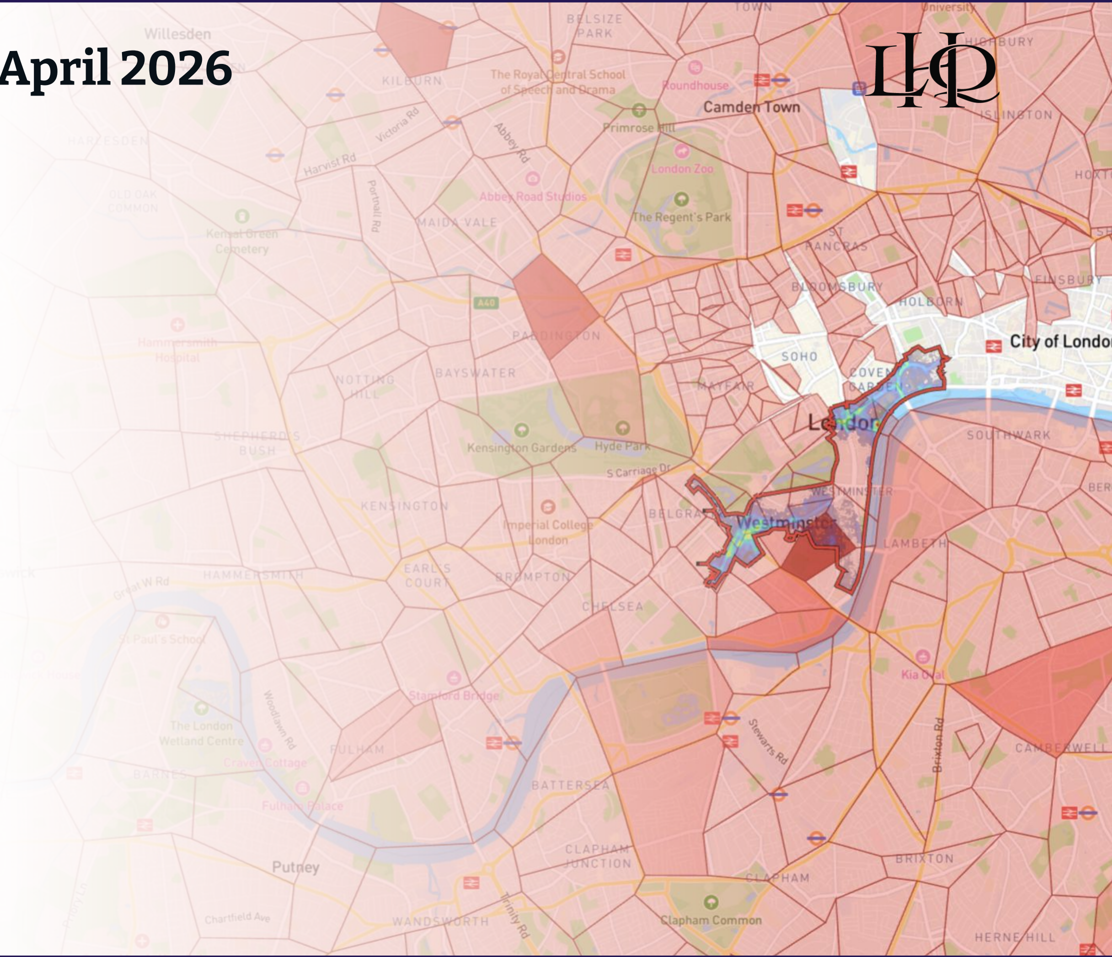
Overall, while time-of-day trends remain closely aligned, April highlights Whitehall's polarised short/long pattern, Westminster's broad dwell mix, Northbank's balanced mid-length profile, and Victoria District's shorter, purpose-led behaviour.



huq | Visitor segmentation | April 2026

Top visiting postcodes

Rank	Postcode	Percentage (%)	Distance (km)
1	SW1P 2	2.67	0.69
2	W2 1	1.90	4.94
3	NW6 2	1.16	8.59
4	SE5 0	1.15	5.19
5	SW1V 3	1.03	1.67
6	SW17 0	1.02	9.03
7	SW16 2	0.93	7.72
8	E4 8	0.85	18.22
9	KT3 5	0.81	18.80
10	E13 9	0.81	18.98



huq | Visitor segmentation | April 2026

Demographics

April 2026 **visitors continue the trend toward a working-age audience**, with 30-44 remaining the dominant segment (31.3%), followed by 15-29 (25.9%), 45-59 (22.5%), and 60+ (20.3%). Compared with earlier months, the **profile is slightly more concentrated around mid-career adults, reinforcing the destination's appeal among economically active visitors**.

Income distribution is strongly centred on the €21,000-€31,500 range, peaking at €24,500 (18%) and €21,000 (17%), with continued strength at €31,500 (16%). Moderate representation extends through €35,000-€49,000, including a **notable €49,000 cluster (10%)**, while higher income bands above €52,500 remain smaller but consistently present.

Overall, April visitors reflect a **confident mid-income audience with an increasing concentration of prime working-age adults, suggesting sustained discretionary spending potential and continued engagement** across core visitor segments.