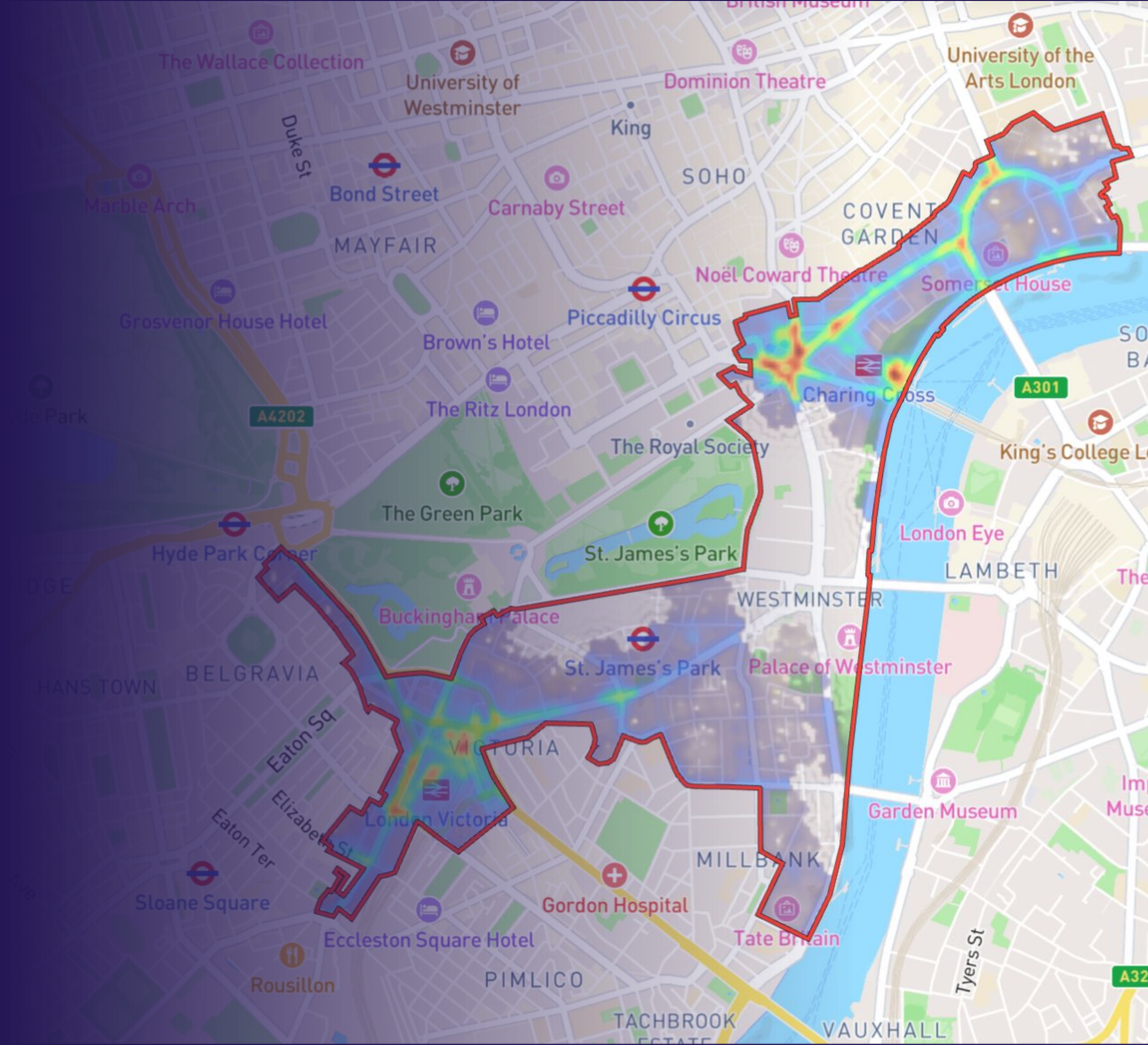
LONDON HERITAGE QUARTER

May 2026 report



huq | Introduction

What is London Heritage Quarter?

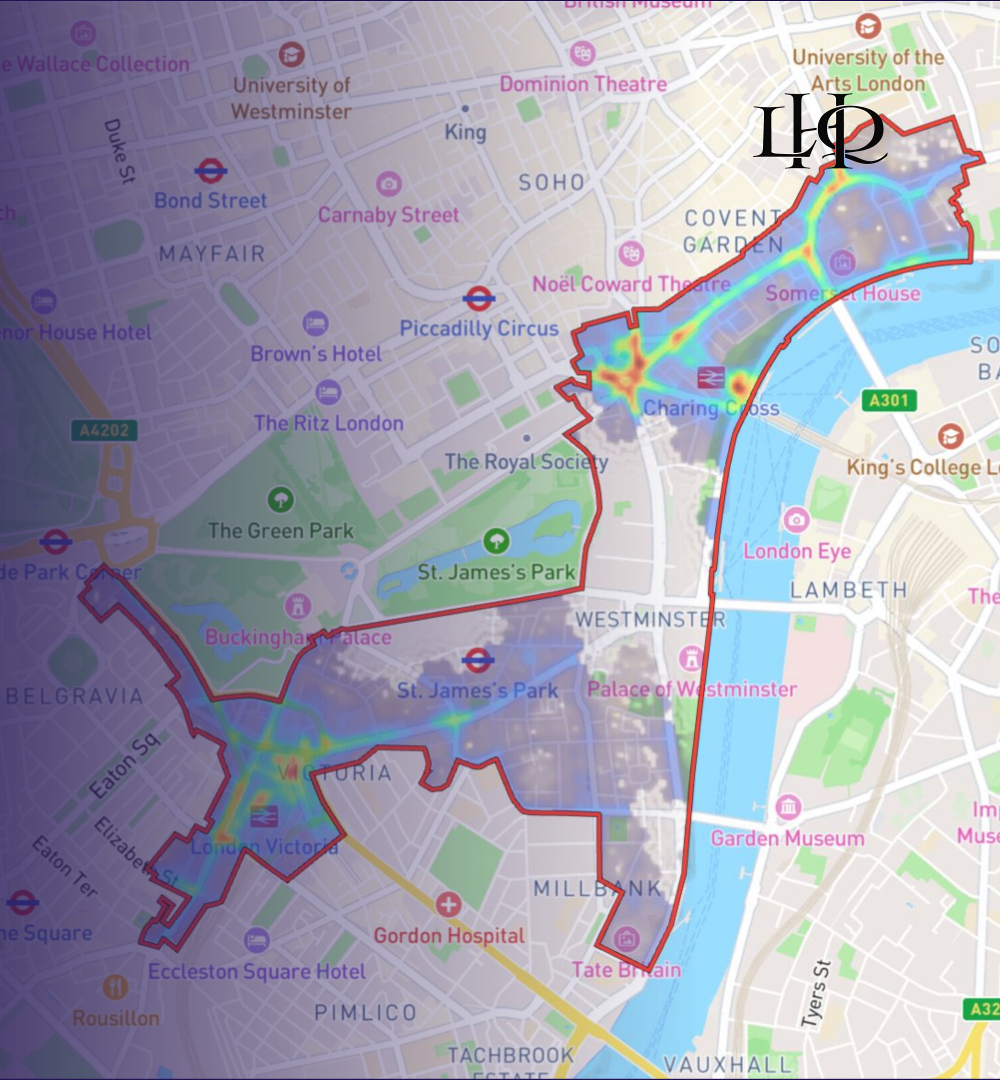
Stretching from Belgravia through to Parliament Square and along the Strand to the Royal Courts of Justice, London Heritage Quarter is a collective of four Business Improvement Districts representing over one thousand organisations.

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.



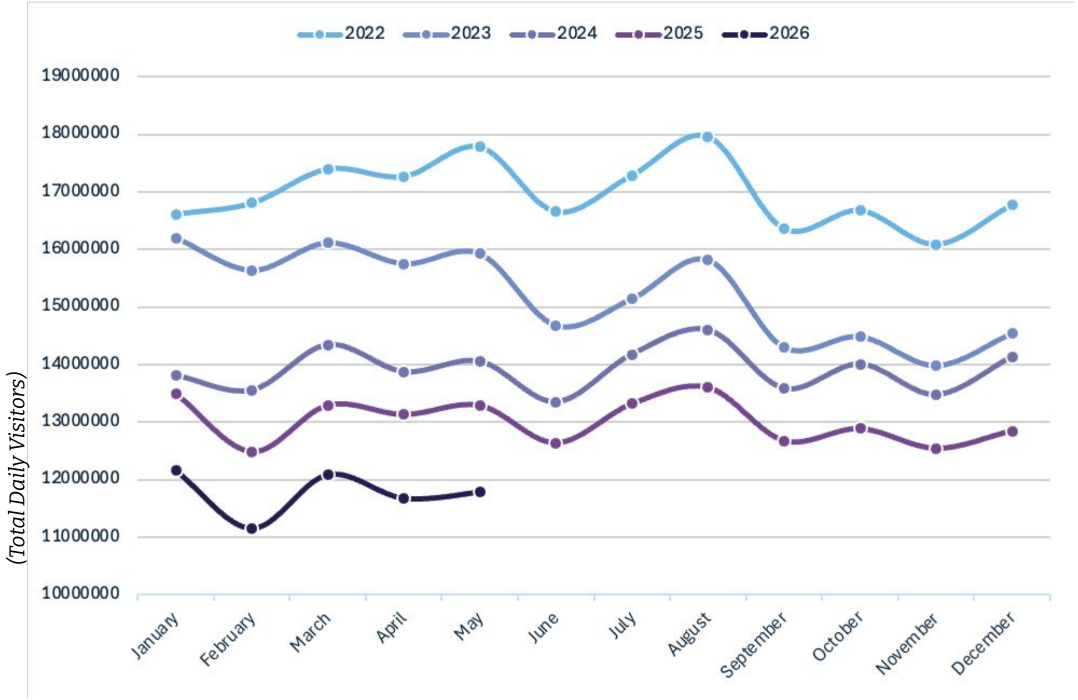
huq | Visit performance | May 2026

Month-on-month trend

11.8m total daily visitors in May 2026

- **+0.9%** compared with previous month
- **-11.3%** compared with May 2025

Year to date comparison against same period in 2025 shows a **10.39% decrease** in visit performance.



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Total Daily Visitors

Northbank BID

5.6 million

Victoria BID

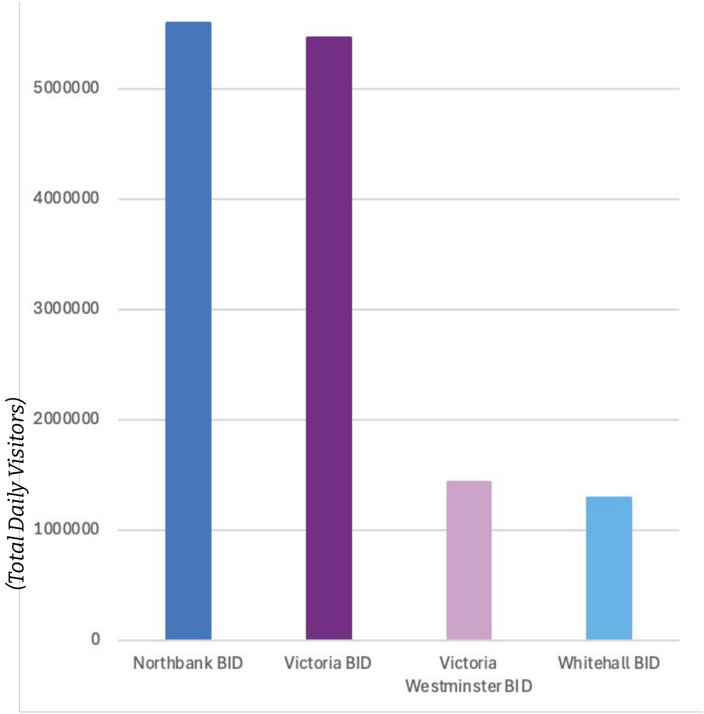
5.5 million

Victoria Westminster BID

1.4 million

Whitehall BID

1.3 million



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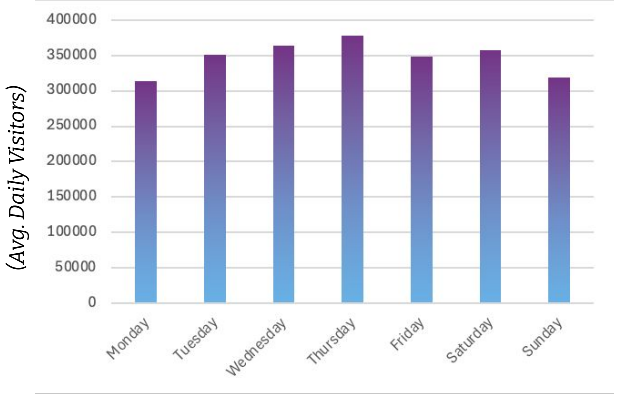
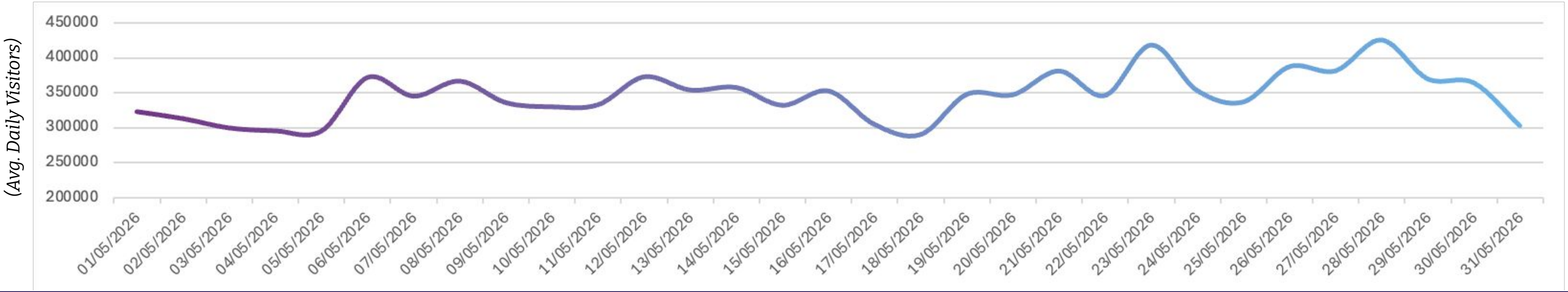
Unique daily visitors

Thursday was the strongest day in May 2026, closely followed by Wednesday and Saturday, highlighting a **balance between mid-week and weekend engagement**. Monday remained the lowest-performing day, while the remaining weekdays showed relatively consistent visitation levels.

Daily traffic was stable throughout much of the month, with a gradual uplift in the second half and several peaks during the final week before easing at month-end.

Overall, May reflects a **well-balanced usage pattern**, with sustained mid-week strength complemented by strong weekend engagement.

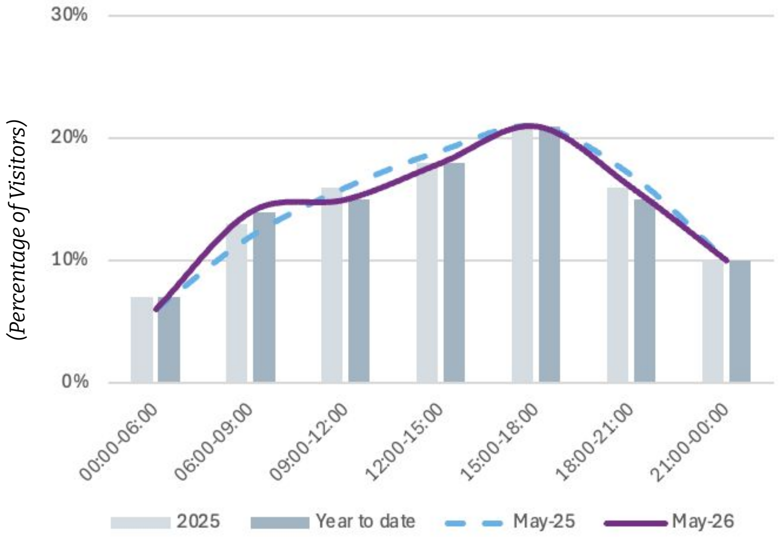




Time of day

Visitor activity in May 2026 displays a balanced daily pattern, with footfall building steadily from the early morning period and reaching its **highest point between 15:00-18:00**. During this peak window, May 2026 performs broadly in line with both May 2025 and year-to-date levels, indicating a **consistent distribution of visitors throughout the day**. The morning period from 06:00-12:00 shows positive momentum, with **activity tracking slightly ahead of the previous year** and maintaining a solid pace into the afternoon.

Following the afternoon peak, visitor numbers gradually decline through the evening, with 18:00-21:00 remaining closely aligned with historical benchmarks. Activity continues to taper after 21:00, though the decline is relatively measured compared with some earlier months. Overall, May 2026 highlights **stable daytime demand, a well-defined mid-afternoon peak, and a visitor profile that remains highly consistent with both recent and longer-term performance trends**.

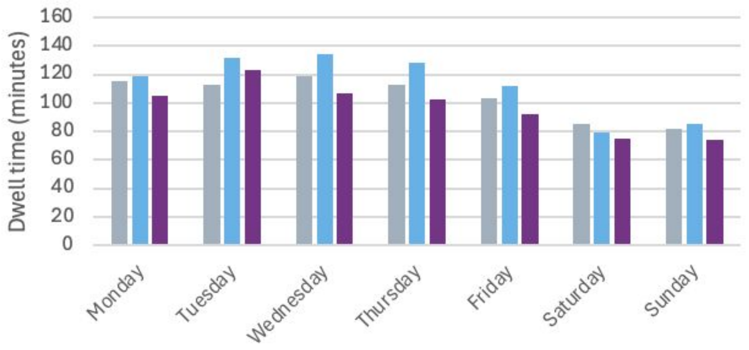


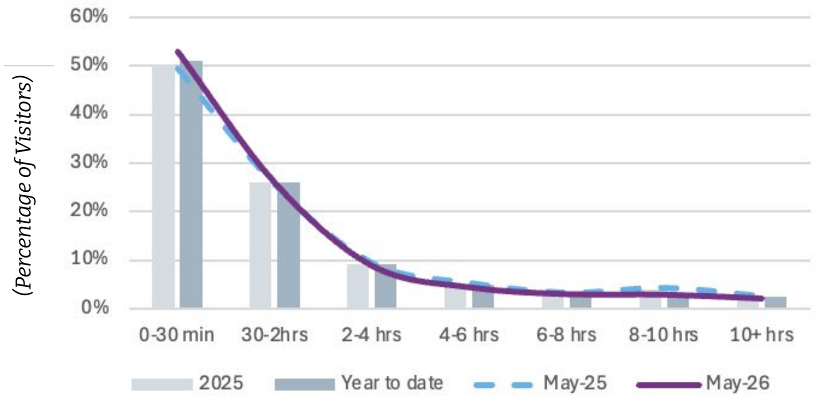
Dwell time

Dwell time analysis for May 2026 reflects a **different visitor profile than earlier months**, with patterns closely aligned to both May 2025 and year-to-date benchmarks. **Short visits (0-30 minutes) continue to dominate overall activity**, accounting for around half of all visits, while the distribution across longer dwell categories remains largely unchanged year-over-year. Minor declines in the 4+ hour segments suggest a slight softening in extended visits, but overall dwell behaviour remains stable.

May 2026 records lower average dwell times than May 2025 across every day of the week, with the largest declines occurring mid-week. Despite this, **performance remains broadly consistent with year-to-date averages**, indicating that the change is driven more by a return to typical visitation patterns than a significant shift in engagement.

Overall, May 2026 represents a **normalisation in visitor behaviour following several months of elevated dwell**. While visitors are spending slightly less time on-site than in May 2025, engagement levels remain steady and closely aligned with broader year-to-date trends.





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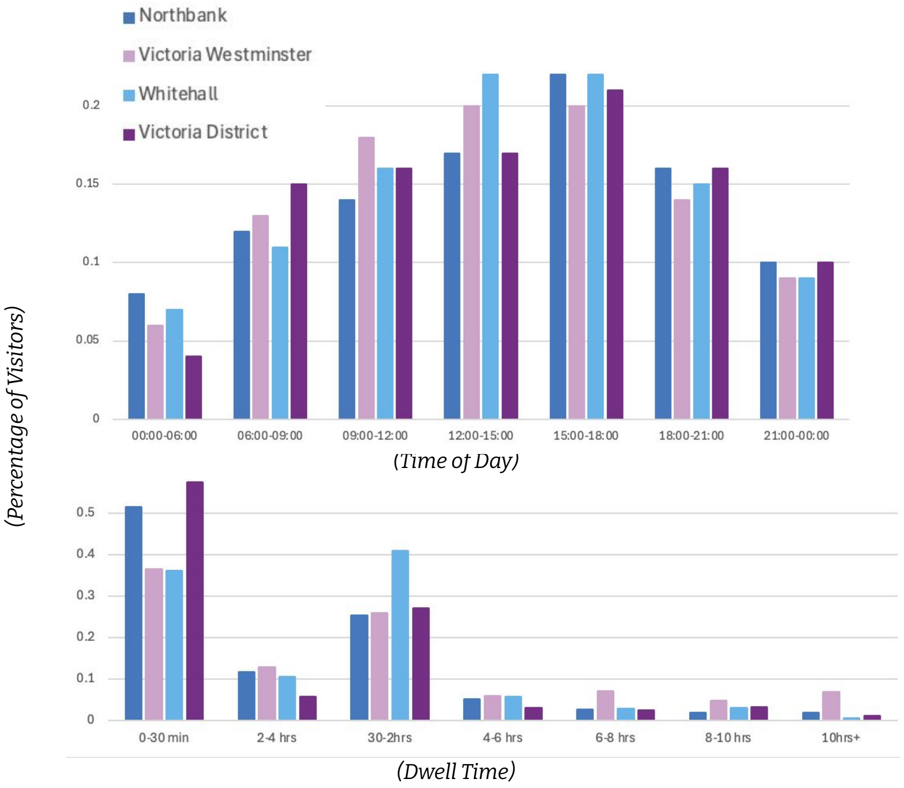
Time of day & Dwell time by area

May marks a noticeable shift toward shorter dwell times across all locations. 0-30 min visits dominate, particularly in Victoria District and Northbank, while 30 min-2 hrs remains the second-largest segment, especially in Whitehall. Longer stays (6 hrs+) account for only a small share of activity across all areas, although **Victoria Westminster retains the strongest proportion of extended visits**, including the highest 10 hrs+ share.

Time-of-day patterns remain consistent, with footfall building through the morning, peaking between 12:00-18:00 (especially 15:00-18:00), and gradually declining into the evening. Whitehall shows the strongest lunchtime and afternoon concentration, while Victoria Westminster peaks earlier around 09:00-15:00. Evening activity (18:00–00:00) remains relatively robust across all locations compared with previous months, suggesting a broader spread of visits throughout the day.

Overall, May is characterised by **more transient visitor behaviour**, with shorter stays becoming more prominent across all locations, while the **familiar daytime peak pattern remains firmly established**.



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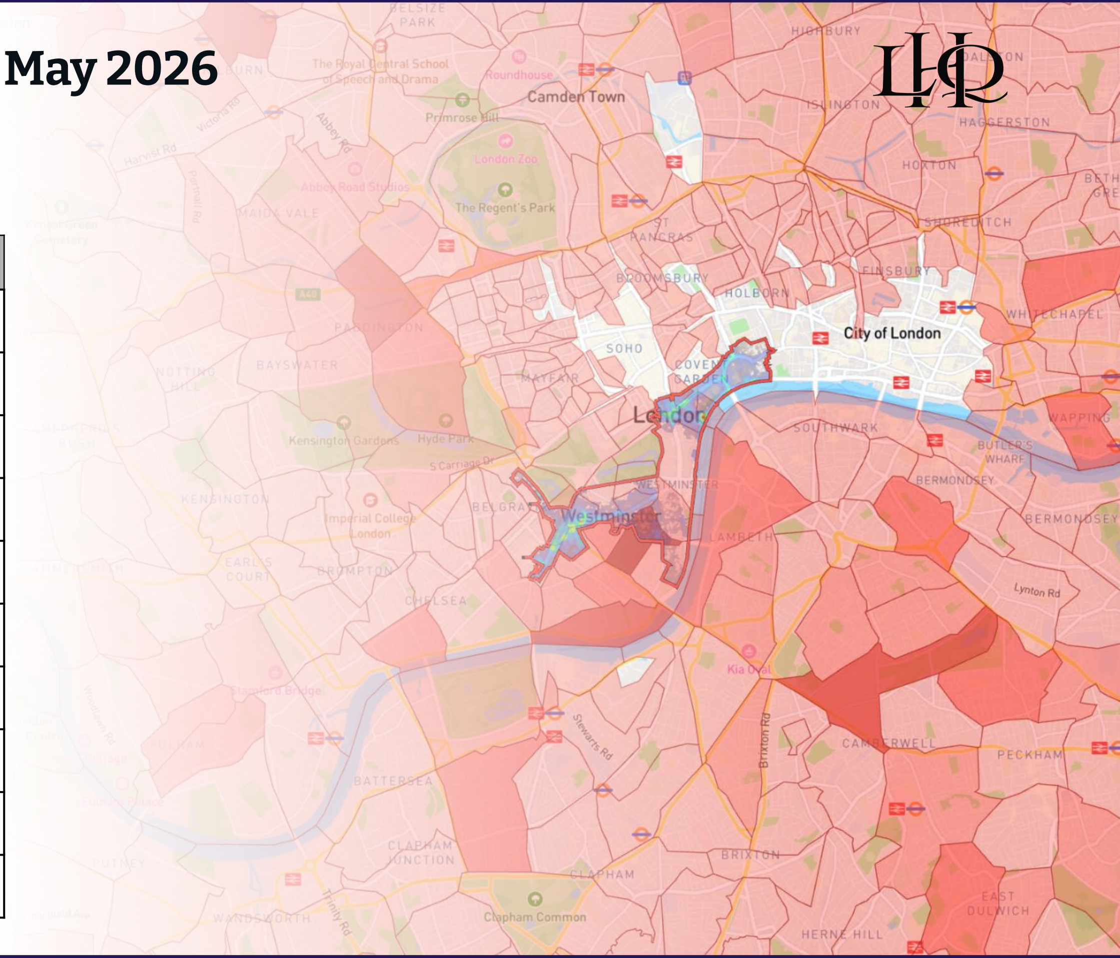
Top visiting postcodes

Rank	Postcode	Percentage (%)	Distance (km)
1	SW1P 2	2.82	0.72
2	W2 1	1.90	5.00
3	SE5 0	1.25	5.21
4	NW6 2	1.25	8.47
5	E4 8	1.05	18.22
6	SW1V 3	1.03	1.52
7	SW17 0	1.00	8.81
8	SW16 2	0.96	8.03
9	E13 9	0.86	18.91
10	E1W 2	0.81	8.30



huq | Visitor segmentation | May 2026

Demographics

May 2026 visitors show a **more balanced age profile** than the previous two months, with 30-44 remaining the largest segment (28.6%), closely followed by 15-29 (24.9%), 45-59 (23.1%), and 60+ (22.8%). The narrower spread between age groups suggests **broad appeal across adult audiences**, rather than a strong concentration in any single life stage.

Income distribution remains centred on lower-to-mid disposable income bands, with the **strongest concentration at €21,000 (17%)**. Significant representation continues across €24,500 (14%), €28,000 (13%), and €31,500 (13%), creating a **broad core of mid-income visitors**. While participation tapers beyond €35,000, smaller proportions are present across a wide range of higher income brackets, indicating a diverse spending profile.

Overall, May visitors represent a **well-balanced and economically stable audience**, combining strong working-age representation with a broad spread of mid-income earners and a modest presence of higher-income households, **supporting sustained leisure and discretionary spending**.