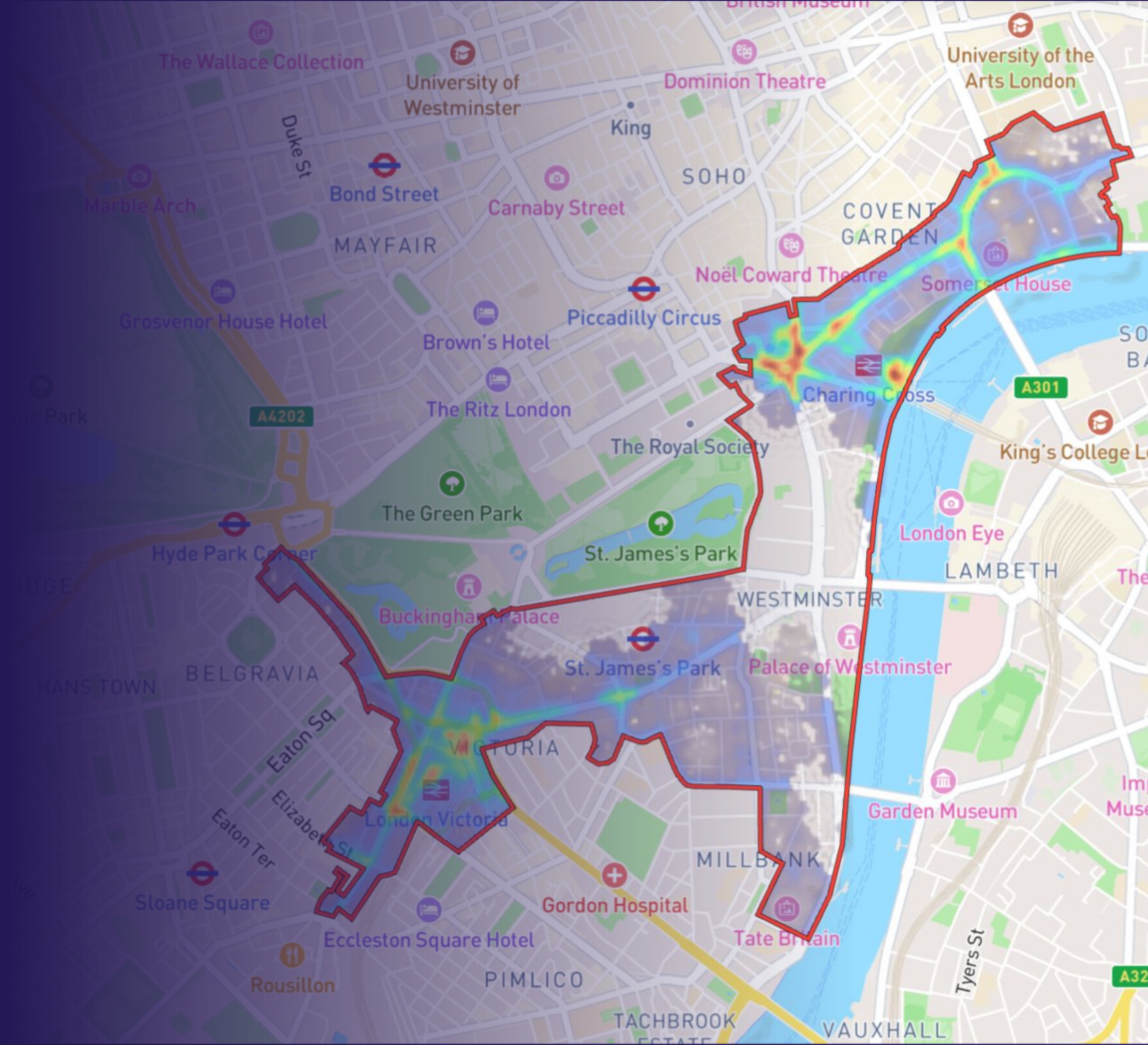
LONDON HERITAGE QUARTER

July 2026 report



huq | Introduction

What is London Heritage Quarter?

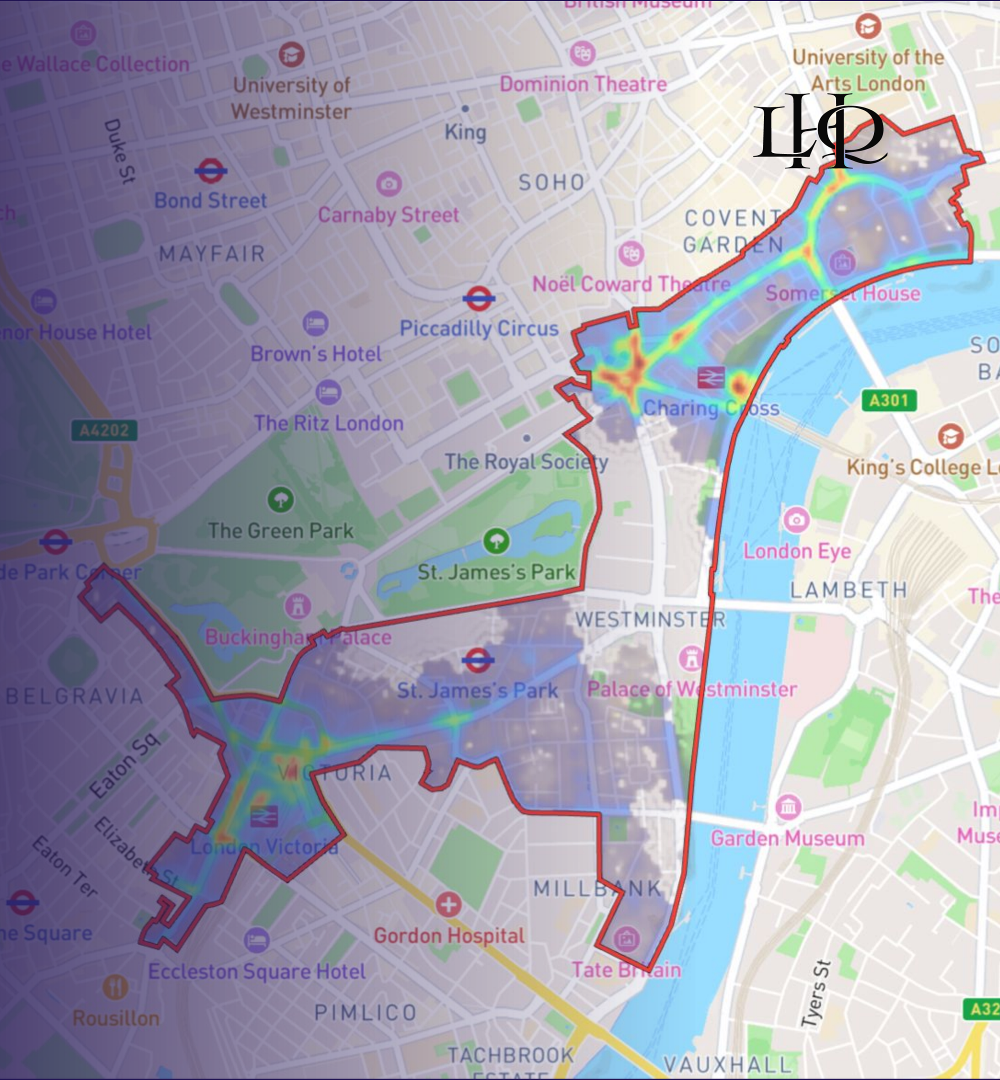
Stretching from Belgravia through to Parliament Square and along the Strand to the Royal Courts of Justice, London Heritage Quarter is a collective of four Business Improvement Districts representing over one thousand organisations.

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 | July 2026

Month-on-month trend

12.5m total daily visitors in July 2026

- **+4.2%** compared with previous month
- **-6.3%** compared with July 2025

Year to date comparison against same period in 2025 shows a **9.07% decrease** in visit performance.

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Total Daily Visitors

Northbank BID

6.0 million

Victoria BID

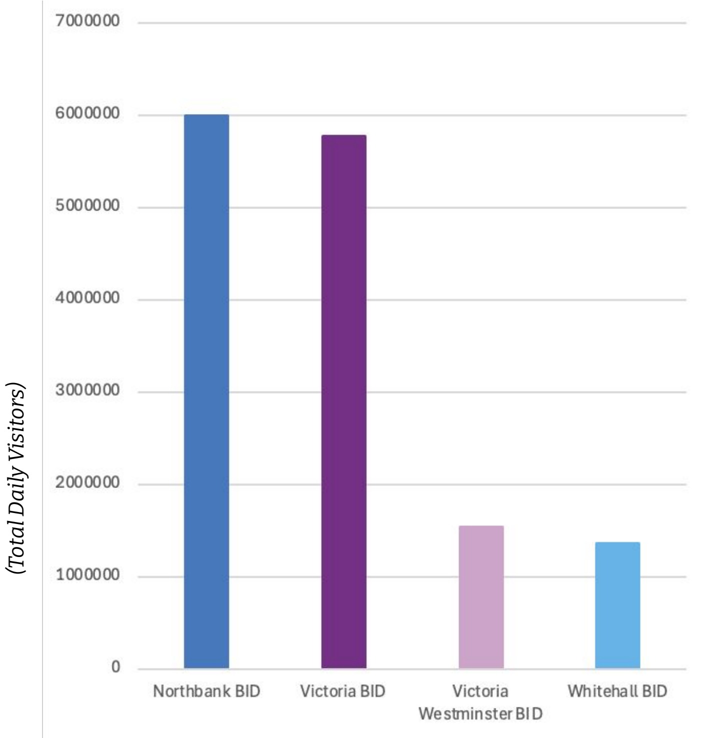
5.8 million

Victoria Westminster BID

1.5 million

Whitehall BID

1.4 million



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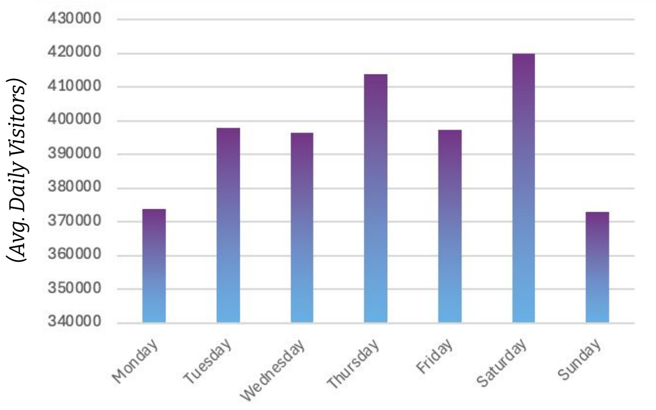
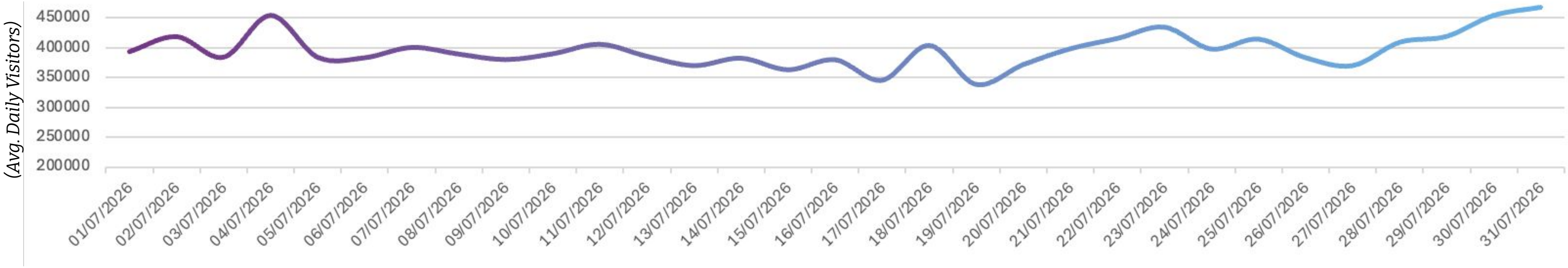
Unique daily visitors

Saturday remained the strongest day in July 2026, with **Thursday also performing particularly well**. Weekday visitation was broadly consistent, while Sunday and Monday recorded the lowest average daily footfall.

Daily traffic showed **greater movement through the month**, with a softer mid-July period followed by a clear recovery in the final third. Visitor levels strengthened steadily from 20 July onwards, culminating in the highest daily footfall at month-end.

Overall, July points to **strong late-month momentum and resilient weekend activity**, supporting a positive picture of ongoing engagement across the London Heritage Quarter.





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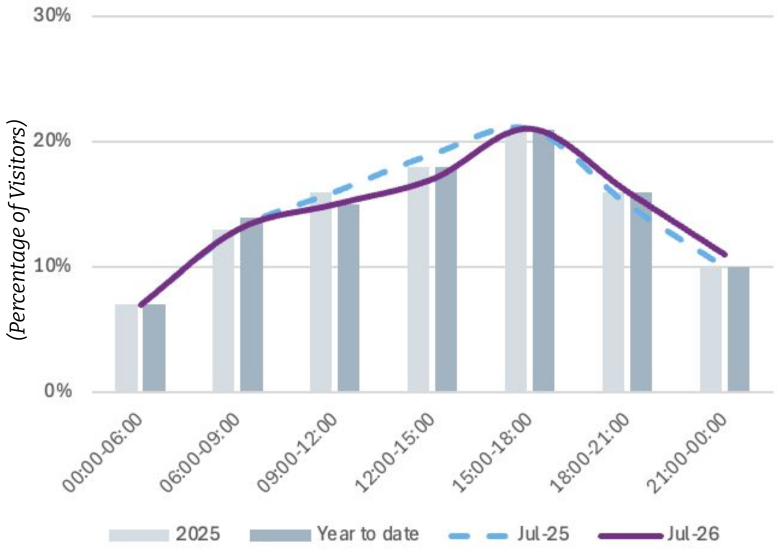
Time of day

July 2026 shows a **clear afternoon-led visitation pattern**, with footfall building steadily through the day to a strong peak between 15:00-18:00, accounting for around one fifth of daily visitors. Activity is slightly softer than July 2025 across the late morning and early afternoon, before converging with historic levels at the peak, indicating **sustained demand across the core trading period**.

Following the peak, visitation eases gradually through the evening, with 18:00–21:00 broadly aligned with comparative periods and late-evening activity remaining resilient after 21:00. For the BIDs, the **profile highlights a strong mid-afternoon opportunity for retail, hospitality and on-street activity,** alongside **continued potential to extend dwell and spend into the evening economy**.



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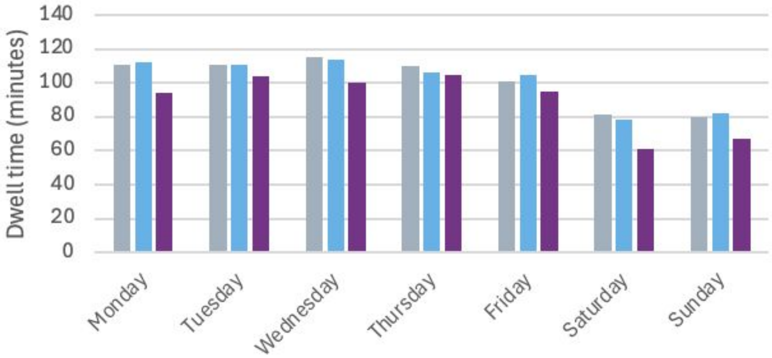
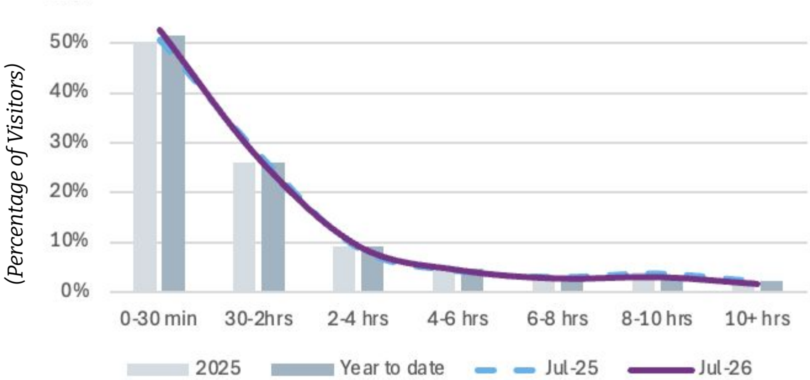
Dwell time

July 2026 shows a clear reduction in average dwell time compared with both July 2025 and the year-to-date average, with shorter visits recorded across every day of the week. **Weekday dwell remains relatively resilient**, particularly Tuesday and Thursday, while the largest declines are concentrated at the weekend, with Saturday and Sunday averaging around an hour.

The overall **distribution of visit lengths remains remarkably stable**. Just over half of visits last 0–30 minutes, broadly in line with previous periods, while the proportions of visitors staying for longer durations show only minor movement. This suggests **the decline in average dwell is not being driven by a major change in the overall visitor mix**.

For the BID area, the key shift is therefore less time spent in the district rather than a fundamentally different pattern of visitation. The softer weekend dwell is particularly notable, potentially reducing opportunities for visitors to explore, engage with businesses and extend their activity across the area.





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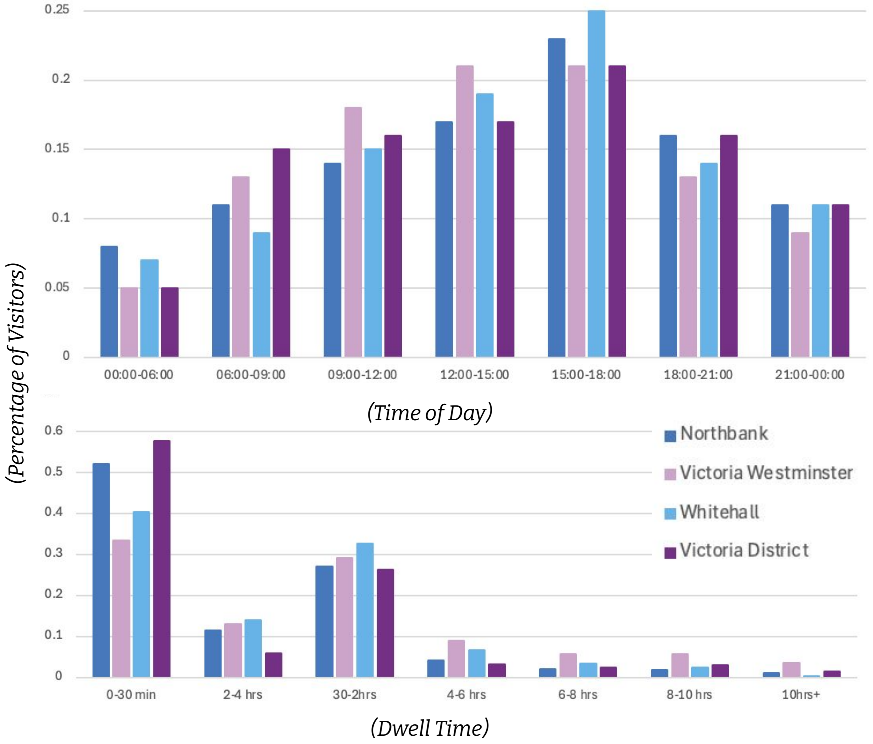
Time of day & Dwell time by area

July reinforces a highly purposeful, short-stay visitor pattern, with 0-30 minute visits the largest dwell category across all four BIDs. This is most pronounced in Victoria District and Northbank, while Whitehall and Victoria Westminster retain a broader mix of medium and longer stays. Westminster continues to show the strongest representation across the 4-10+ hour categories, suggesting greater potential for sustained local spend.

Footfall remains **firmly daytime-led, with activity building from the morning and peaking between 12:00-18:00**. The clearest afternoon concentration is in Whitehall, where 15:00-18:00 accounts for a quarter of visits, with Northbank also showing a strong late-afternoon peak. Victoria Westminster has the most even spread across lunchtime and late afternoon.

For BIDs, the July pattern highlights a clear opportunity to convert strong afternoon footfall into longer dwell and local spend, particularly through hospitality, retail, public-realm and after-work activation. **Evening movement remains relatively resilient across the quarter, supporting continued focus on the post-work economy**.



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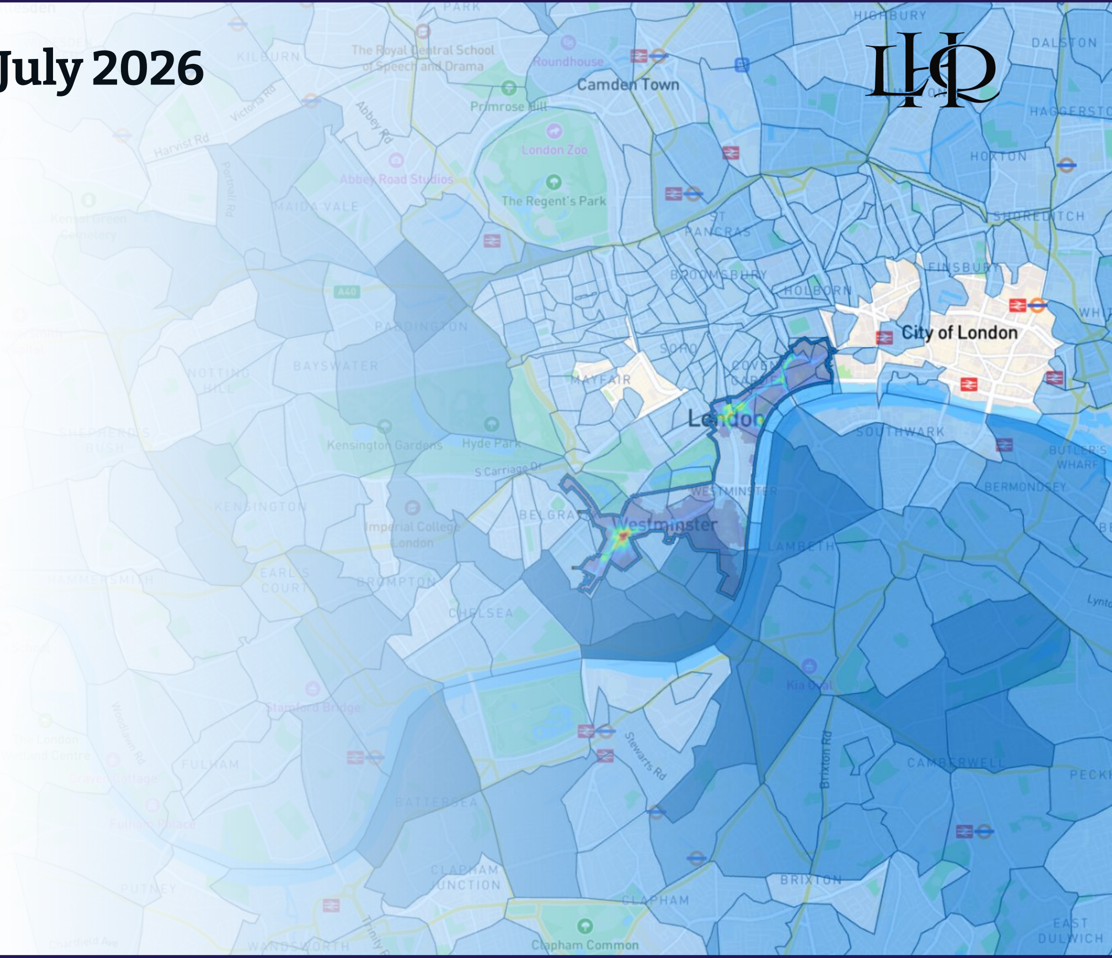
Top visiting postcodes

Rank	Postcode	Percentage (%)	Distance (km)
1	SW1V 3	0.56	1.52
2	W2 1	0.46	5.00
3	SW1P 2	0.44	0.72
4	SW1P 4	0.43	1.20
5	SW1V 4	0.37	1.61
6	SW1V 2	0.35	1.19
7	SW8 2	0.35	2.52
8	SW8 1	0.34	2.81
9	SE5 0	0.33	5.21
10	SE1 7	0.31	1.99



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Demographics

July 2026 continues to show a **highly balanced adult visitor profile**, with 30-44s remaining the largest age group (27.9%), followed closely by 15-29s (25.6%). Visitors aged 45-59 (22.8%) and 60+ (22.6%) also maintain strong representation, indicating **broad appeal across generations rather than reliance on a single demographic**.

Disposable income is more concentrated around the €21,000-€31,500 range, led by the €24,500 band at 16%, followed by €21,000 (14%) and €28,000 (13%). Representation then tapers across higher income brackets, pointing to a **predominantly mid-income visitor base** with additional reach across a wide spending spectrum.

For the BIDs, this combination of working-age concentration, generational breadth and mid-market spending power **supports a diverse mix of retail, hospitality, leisure and cultural propositions**, with opportunities to engage multiple audiences rather than narrowly targeted visitor segments.