



# **SOUTH BANK BID** **QUARTERLY** **REPORT**

**OCTOBER – DECEMBER**  
**2025**

South  
Bank  
**BID**

# SUMMARY

The October - December quarter presents a more challenging trading picture for South Bank. Footfall totalled 9.4 million - down 7% on the same period in 2024. While October tracked relatively closely with last year, activity eased through November and early December, reflecting both unsettled weather and more cautious seasonal consumer behaviour.

Domestic spend followed a similar pattern, down 7.5% year-on-year, broadly in line with reduced visitor numbers. Retail-led destinations across central London saw more positive growth, suggesting festive activity was more concentrated around purposeful shopping trips, while discretionary leisure visits were comparatively subdued.

Encouragingly, the underlying audience profile remains stable. International visitation remains high, and dwell time patterns remain steady. Saturday has re-established itself as the busiest day of the week, supported by seasonal weekend visits linked to the Christmas markets and festive programming.

Digital engagement provides a strong counterpoint to softer on-the-ground performance. Website visits increased 25% on the previous quarter, with exceptional interest in Christmas-related content. The Winter Market listing alone accounted for 17.4% of total traffic - the single strongest content performance of the year - highlighting South Bank's powerful positioning as a festive destination and a clear opportunity to leverage further.

Alongside this data, we have included a summary of our audience sentiment research undertaken in summer 2025. Overall perception remains exceptionally positive, with 94% rating the area as good or very good - reinforcing South Bank's strength as a destination.

Taken together, this quarter reflects a resilient destination operating within tighter consumer conditions. Visitor numbers and spend have softened year-on-year, but sentiment remains strong, digital engagement is high, and the area's cultural and riverside offer continues to drive both loyalty and seasonal demand.

# CONTENTS

<b>Footfall in South Bank</b>	<b>Page 3</b>
<b>Domestic Spend in South Bank</b>	<b>Page 6</b>
<b>South Bank London website insights</b>	<b>Page 7</b>
<b>Audience Sentiment Research - Summary of Results</b>	<b>Page 8</b>
<b>Sources</b>	<b>Page 10</b>

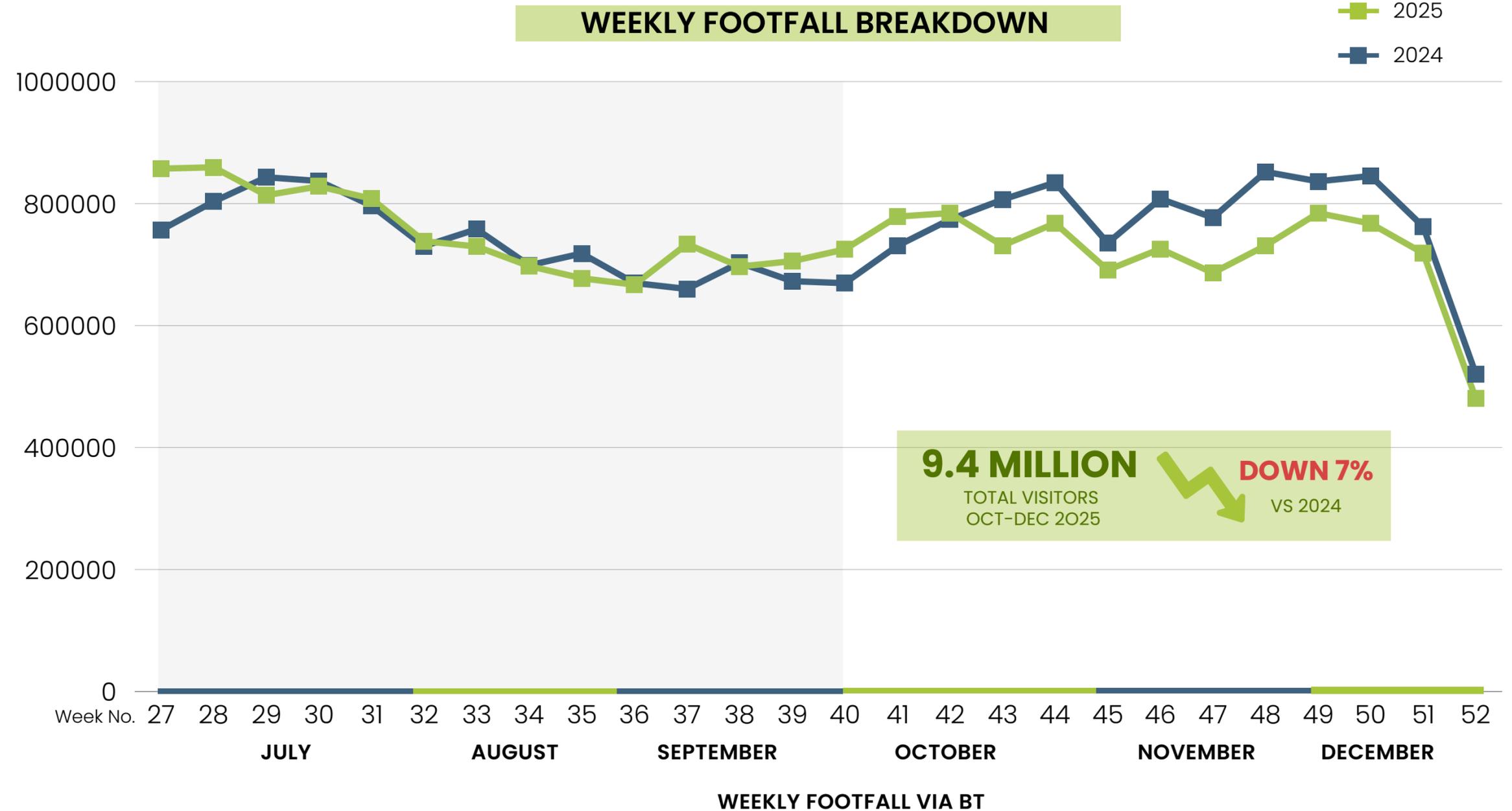
# FOOTFALL

Footfall for the quarter totalled 9.4 million, representing a 7% decrease compared with the same period in 2024 - marking a softening in activity following a steady summer and reflects a more challenging trading environment as the calendar year closed.

The weekly trend shows that October began relatively in line with last year, before a more noticeable divergence through November and into early December which saw a period of particularly wet and unsettled weather likely dampening leisure visits.

Contextually, performance across other London BID areas has been mixed. Retail-led destinations such as New West End Company recorded growth, likely driven by concentrated Christmas shopping activity.

This suggests that consumer behaviour skewed more heavily towards purposeful retail trips, with discretionary leisure visits comparatively subdued.



## FOOTFALL IN OTHER BID AREAS VS OCT-DEC 2024

Heart of London Business Alliance	+1%	Team London Bridge	+1%	Fitzrovia Partnership	-4%	CDA - Holborn	-4%
New West End Company	+7%	Better Bankside	-6%	Northbank BID	-2%	We Are Waterloo	-11%

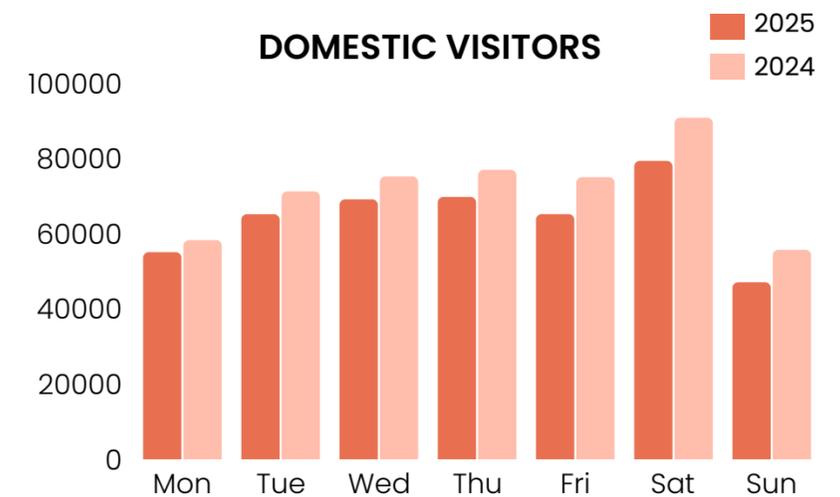
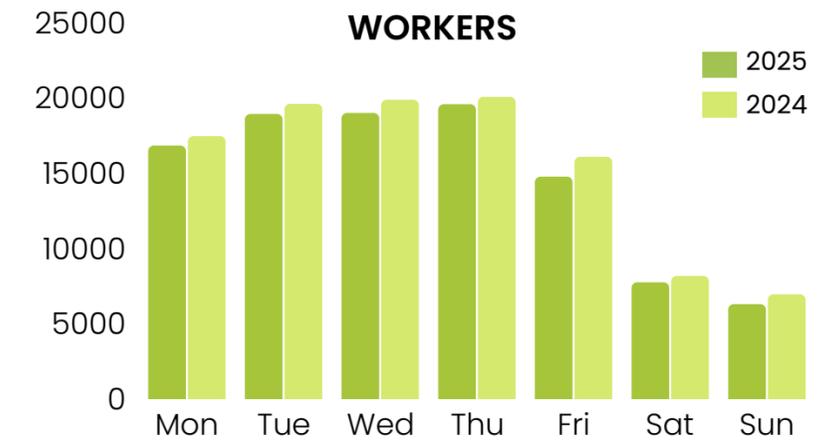
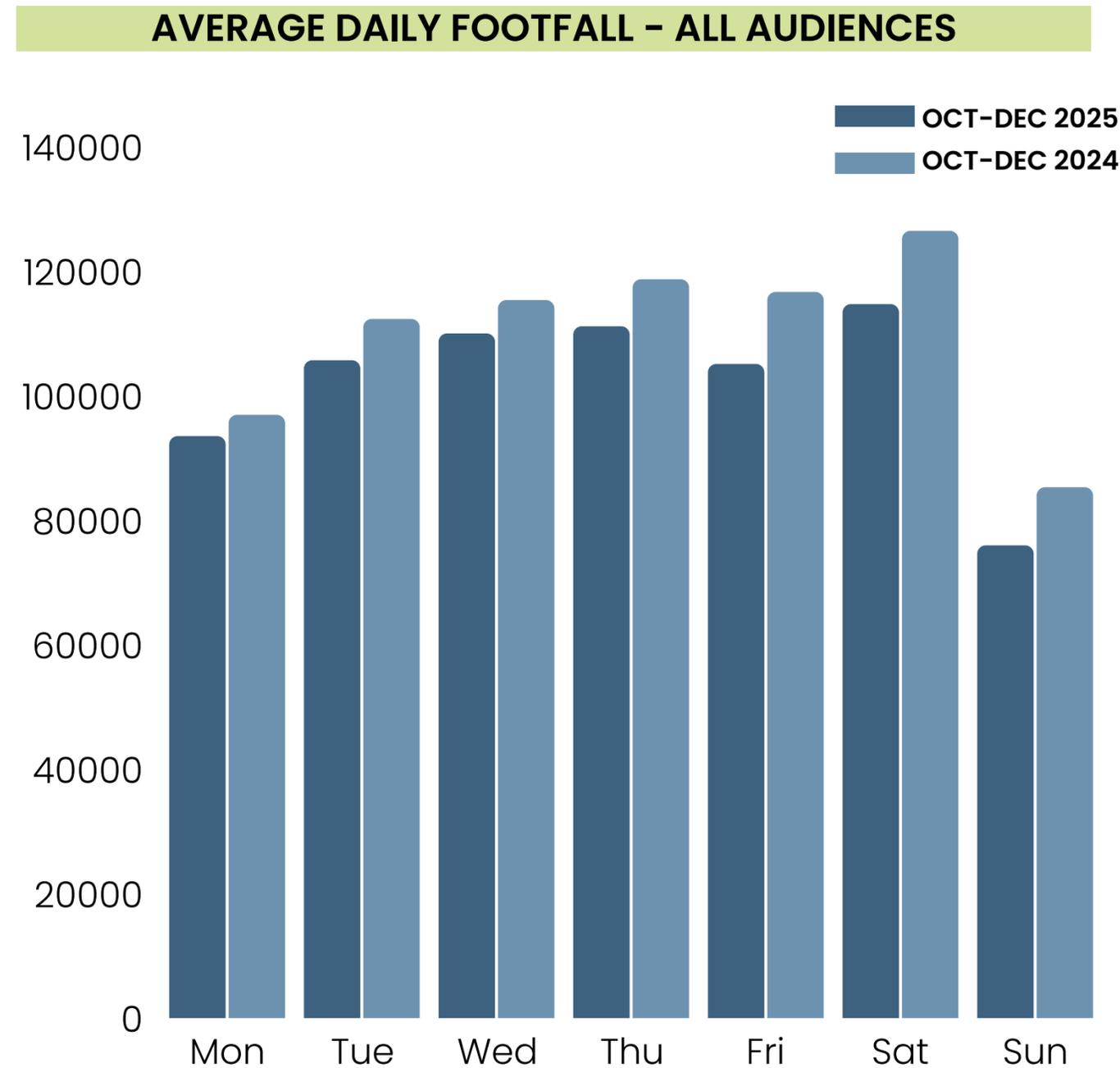
# FOOTFALL

Average daily footfall patterns across the quarter remain broadly consistent with last year, with only modest shifts across audience groups.

Weekday activity continues to be underpinned by a stable worker population, particularly Tuesday to Thursday, reflecting sustained office occupancy through the autumn period. As in previous quarters, Saturdays remain the busiest day overall, driven by leisure visitors and international audiences.

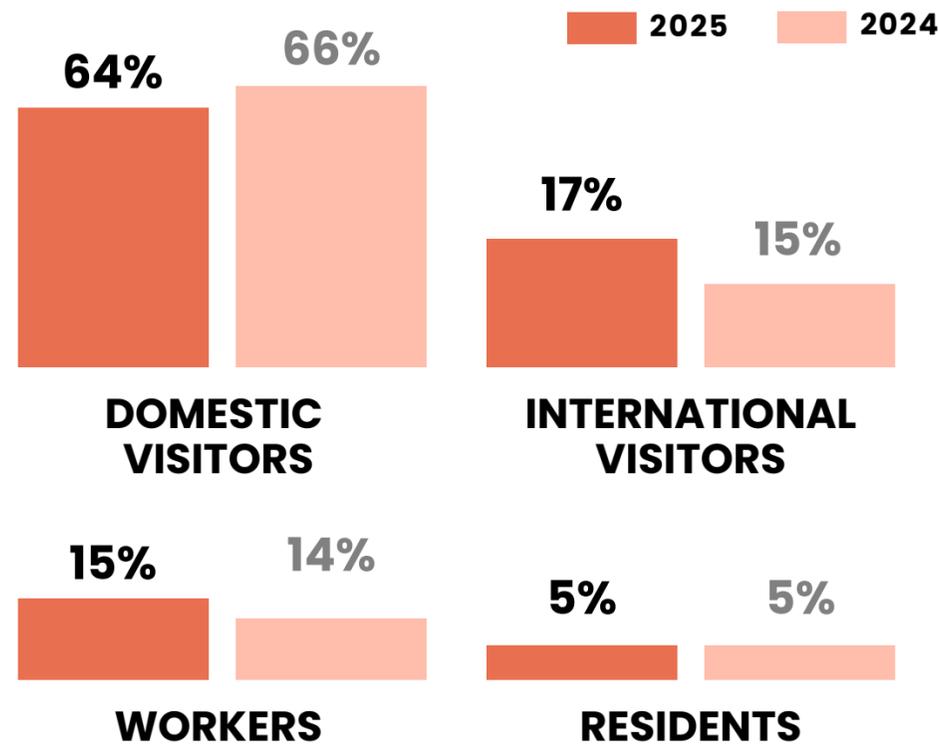
Sundays continue to record the lowest footfall of the week. This pattern is likely influenced not only by broader consumer behaviour but also by the area's programming mix, with fewer cultural performances taking place on Sundays, reducing reasons for evening and destination-led visits.

Overall, the audience composition remains balanced, with steady worker activity, resilient weekend leisure visits, and a gradual strengthening of international demand helping to offset softer domestic performance.



# FOOTFALL

## AUDIENCE MAKE-UP



The audience mix has shifted slightly from the summer period, when international visitors accounted for 20% of total footfall. In the Oct-Dec period, domestic audiences have made up a larger share of activity, with international visitation easing to 17% as seasonal travel patterns change and fewer overseas visitors travel during the winter months. Worker and resident proportions remain consistent with the summer, reflecting a stable underlying local and office-based presence.

## AVERAGE DWELL TIME



## PEAK TIMES



Average dwell time remains largely unchanged this quarter, shifting only marginally by a minute or two.

However, the highest average daily footfall has shifted back to Saturdays from Thursdays in the previous quarter, likely reflecting increased weekend visits linked to the Christmas markets and seasonal activity, as visitors come to enjoy the festive offer along the riverside.

## DAY / NIGHT TIME PROPORTIONS

### FOOTFALL



### SPEND



Day and night-time proportions remain consistent with the previous quarter, providing a stable and predictable pattern of activity across the district.

# DOMESTIC SPEND INDEX – VS 2024

## TOTAL SPEND INDEX – OCT-DEC



**-7.5%**

VS 2024

## HIGHEST AVG. DAILY SPEND

**Saturdays**

## PEAK TIME FOR SPEND

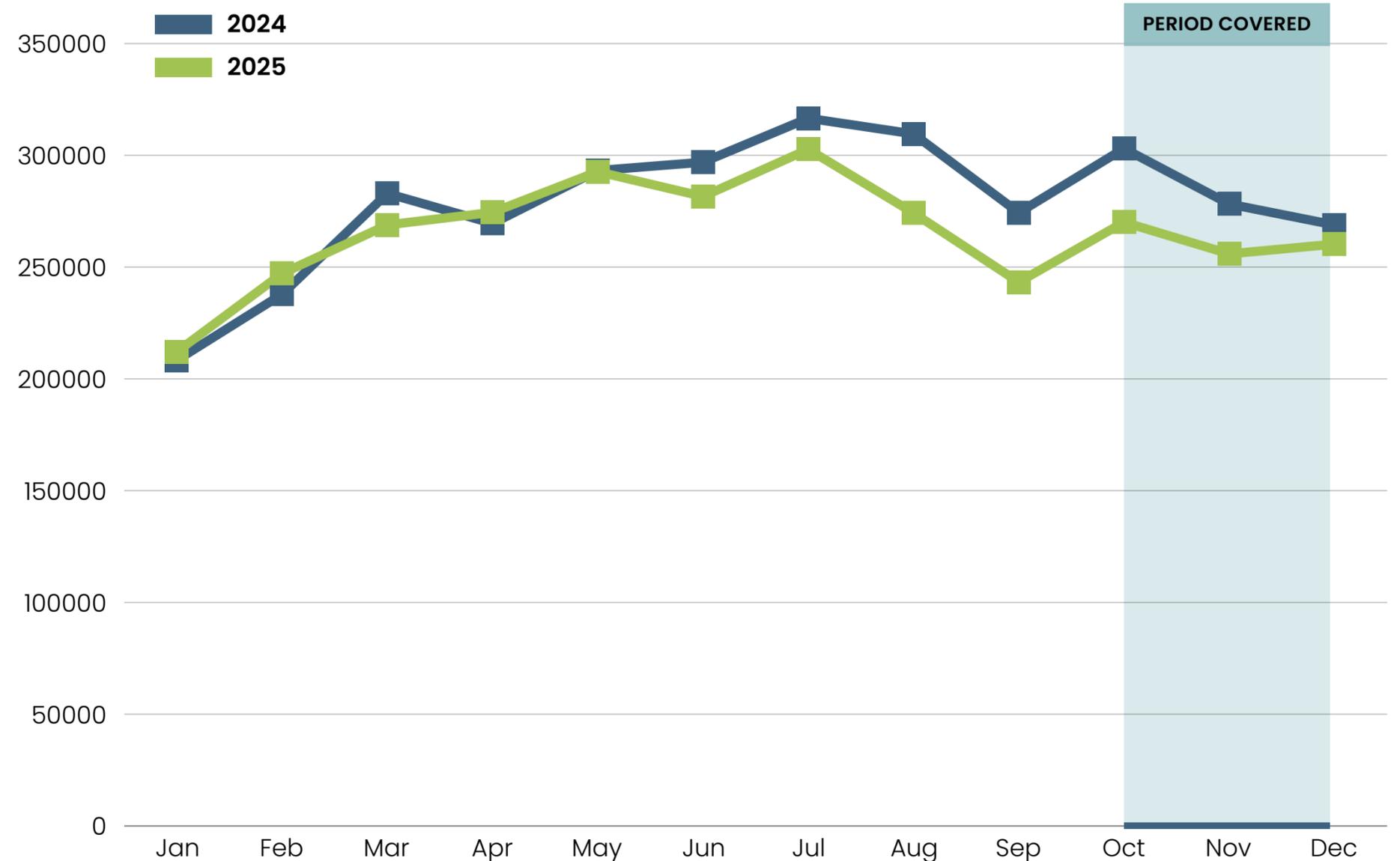
**Saturday  
12–3pm**

Domestic spend across October–December is down 7.5% compared with the same period in 2024, tracking closely with the reduction in overall footfall during the quarter.

The monthly index shows a steady but lower performance across the autumn and festive period, rather than any sharp peaks.

With visitor numbers softer year-on-year – particularly through November and early December – total on-the-ground spend has followed a similar pattern. While South Bank continues to attract consistent activity, the data suggests a more subdued trading environment compared with last year as households are further impacted by cost-of-living choices.

## AVERAGE MASTERCARD SPEND INDEX PER MONTH (DOMESTIC)



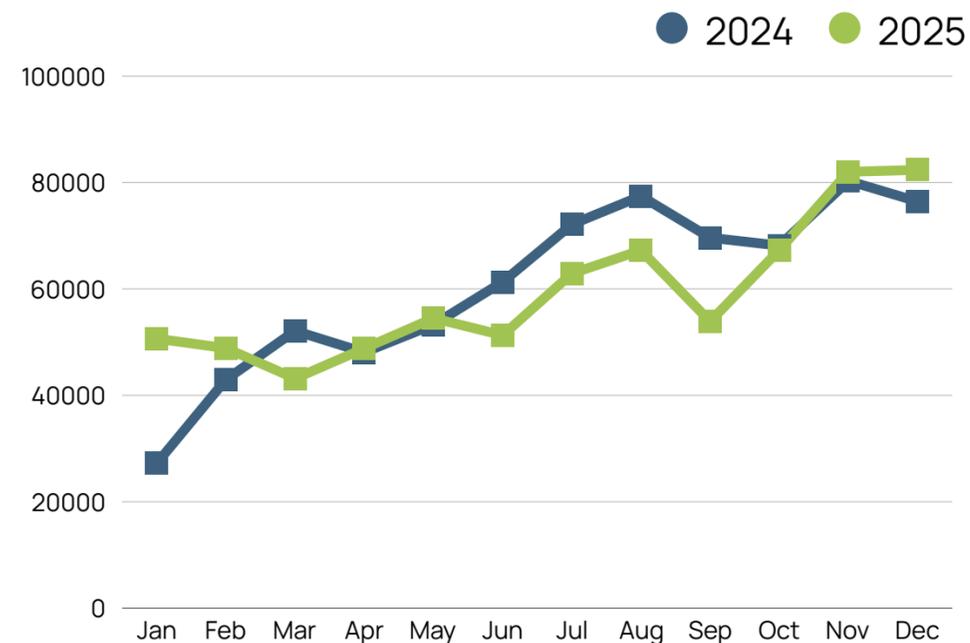
*Note: The **Mastercard Spend Index** tracks on the ground spend from millions of Mastercard users – this data is based on pound values that have been scaled to an index. The axis should not be read as pound values, but as overall trends. It does not reflect pre-booked/online spend*

# SOUTH BANK LONDON WEBSITE ANALYTICS

## SITE VISITS

Website traffic during October–December has returned to levels comparable with the same period in 2024, following softer performance earlier in the year. This stabilisation suggests renewed seasonal interest in South Bank’s offer as audiences actively research festive activity and winter events.

Engagement remains strong generating over 6,000 onward clicks to venues’ websites, booking links and partner pages. International users account for 21% of total visits this quarter, reinforcing South Bank’s continued visibility among overseas audiences planning trips and experiences online.



## TOP CONTENT

1	What’s On – Southbank Centre Winter Market	17.4%
2	Christmas	9.1%
3	What’s On listings page	8.5%
4	Eat & Drink listings page	4.4%
5	See & Do listings page	1.9%
6	New Year’s Eve	1.8%
7	Guide: New Year’s Eve Parties in South Bank	1.7%
8	Guide: Half Term & School Holiday Fun	1.7%
9	What’s On: Winter Light	1.4%
10	Guide: Family Day Out Top 10	1.2%
11	Southbank Centre	1.0%
12	Guide: Top Free Things to do in South Bank	0.9%
13	Guide: South Bank Winter Pop Ups	0.7%
14	What’s On: Xmas at Paddington Bear Exp.	0.7%
15	Guide: Halloween in South Bank	0.6%

Interest in Christmas-related content has been exceptional this quarter. The Southbank Centre Winter Market listing alone accounts for 17.4% of total site visits – significantly outperforming all other content and representing the single largest concentration of traffic seen at any point during the year.

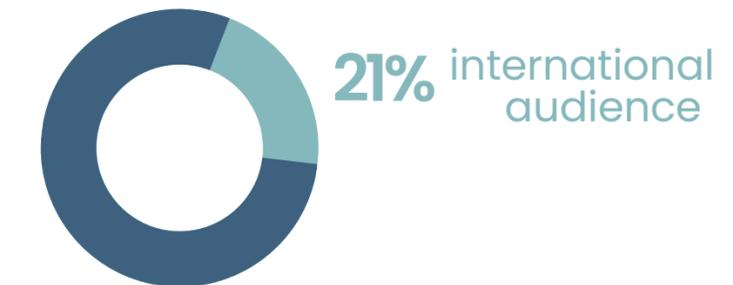
Seasonal searches for Christmas, Winter Light, festive guides and New Year’s Eve activity dominate the top

## OCT-DEC 2025 PERFORMANCE

**231,593**  up 25% on last quarter

total website visits Oct-Dec 2025

**6,210**  Onward clicks generated to venues’ websites, booking links, social profiles or phone numbers



rankings, demonstrating South Bank’s powerful draw as a Christmas destination. This level of demand presents a clear strategic opportunity.

The strength of online engagement highlights the potential to further leverage the Christmas positioning in future years – using it not only to maximise seasonal visibility, but also as a lever to help counteract wider declines in footfall and on-the-ground spend during the winter period.

# AUDIENCE RESEARCH 2025

Over the summer of 2025, we conducted audience sentiment research to better understand what visitors think of South Bank, what drives their visits, and what they do when they're here.

A deeper analysis will be shared at our upcoming Data, Research and Insights event on 4 March, to which all Levy Payers are invited. What follows is a short summary of the key findings. This year's study builds on research undertaken in 2024, enabling us to track sentiment and behaviour over time and develop a clearer year-on-year picture of how the area is performing.

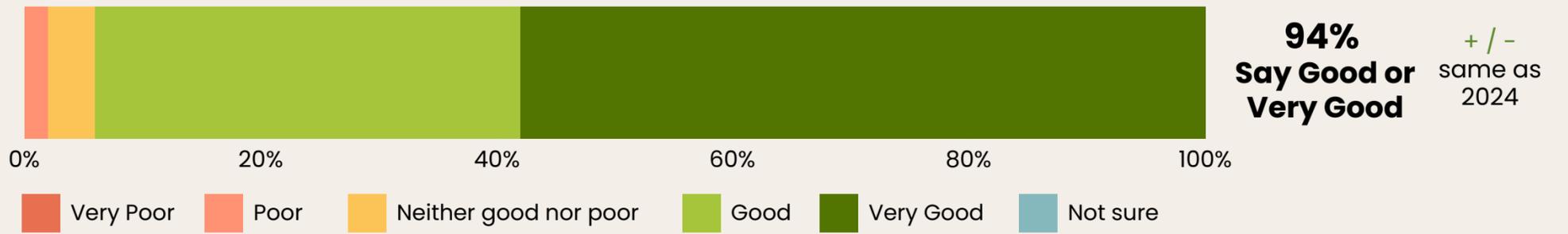
## Key Findings

Overall sentiment towards South Bank remains exceptionally strong. 94% of respondents rate the area as good or very good, consistent with last year's results. This reinforces the area's reputation as a high-quality destination.

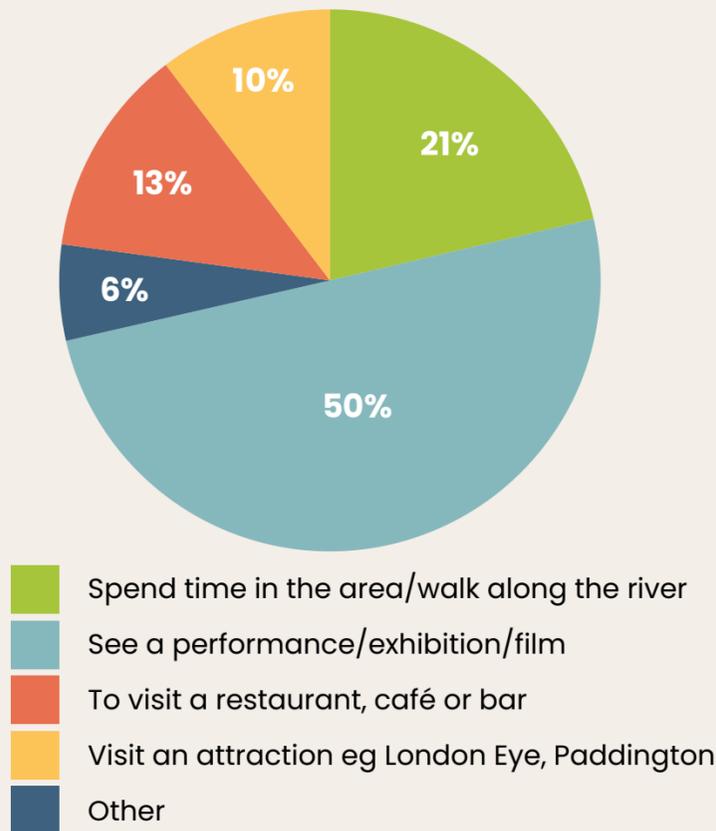
Culture remains the primary driver of visits, however, the riverside setting itself should not be underestimated with a significant proportion of visitors citing spending time in the area or walking along the river as their main reason for coming.

Importantly, behaviour data shows that visitors are not confined to their primary reason for coming. Even when culture is the main driver, many go on to eat, shop, and explore the wider area. This highlights South Bank's strength as a layered destination, where one anchor experience encourages wider exploration, longer dwell time and broader spend across the area.

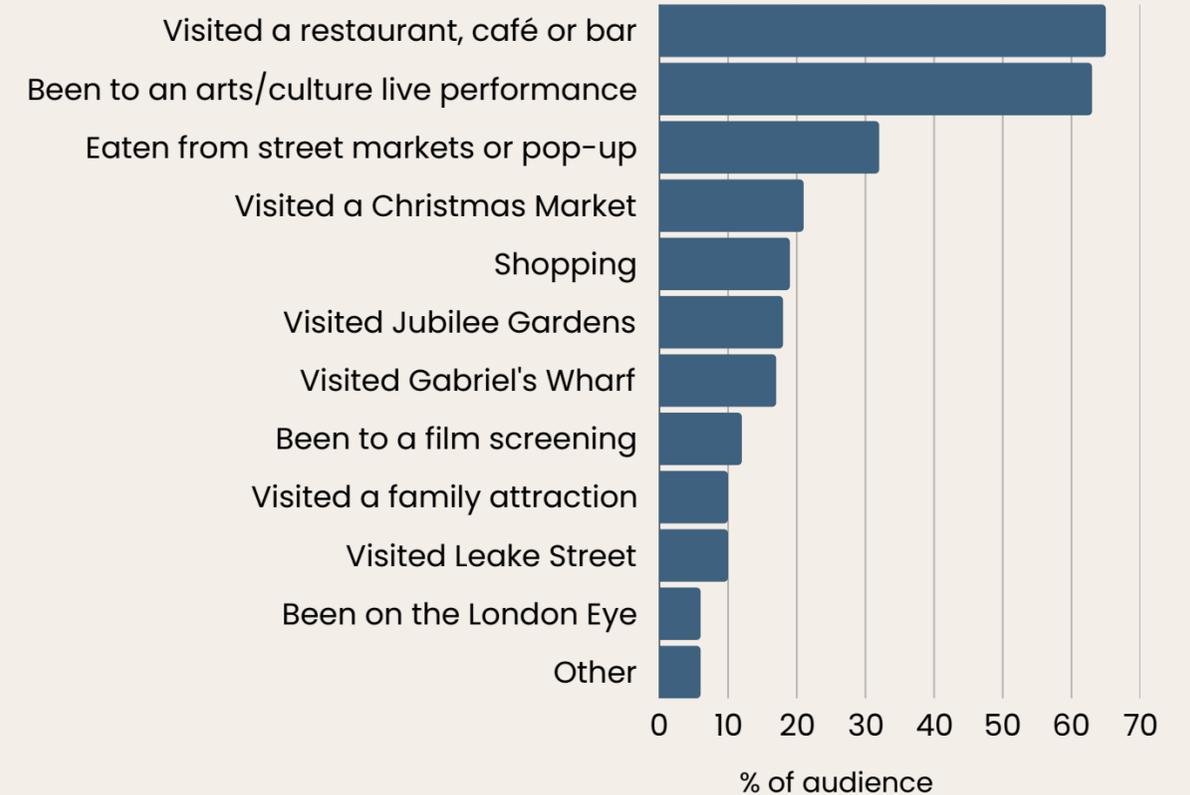
## OVERALL, HOW WOULD YOU RATE SOUTH BANK



## MAIN REASON FOR LAST VISIT



## WHAT HAVE YOU DONE IN SOUTH BANK



# AUDIENCE RESEARCH 2025

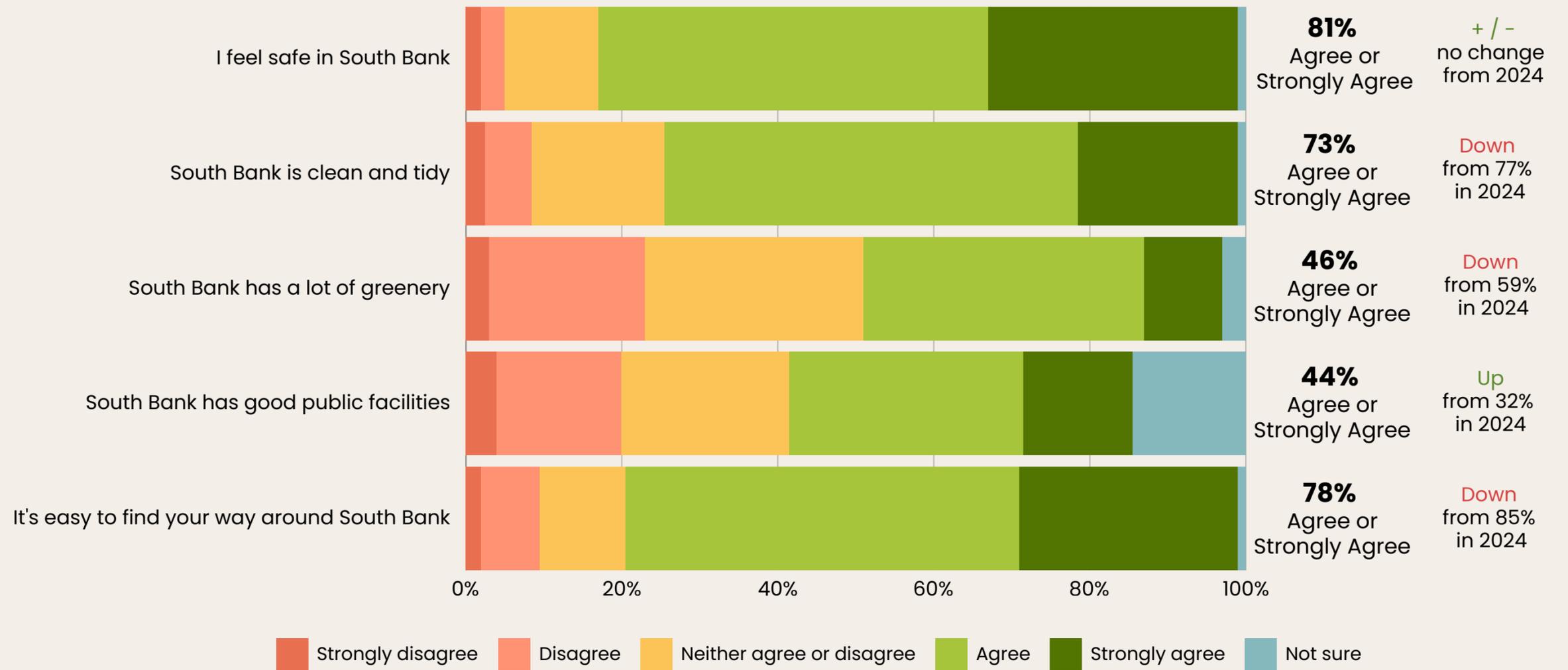
Overall sentiment remains positive across all key measures, with strong majorities agreeing that South Bank is safe (81%) – the same level as last year.

While the overall results are encouraging, they also highlight the ongoing importance of the day-to-day place management services that the BID supports.

Small declines in perceptions of cleanliness and wayfinding, alongside lower agreement around greenery, demonstrate that expectations remain high and that continued investment in enhanced cleaning, safety and security, and increased work toward creating a sustainable and resilient neighbourhood.

In short, the ratings are strong – but they reinforce that maintaining a safe, welcoming and well-managed environment requires consistent, visible effort.

## STATEMENT RATINGS



# SOURCES

## THE GLA'S HIGH STREETS DATA SERVICE

All footfall and spend data comes from the GLA's High Streets Data Service, a collective purchasing model and service created by the Mayor of London to allow local Councils and BIDs access to detailed footfall and spend data at a lower and more efficient cost. HSDS data is also used by teams within the GLA to track and monitor the impacts of activations and events across London.

All GLA data referenced in the report is aggregated across the wider BID area, shown in the map to the right.

### Footfall

The GLA's footfall data comes from **BT's Geolocated Mobile Network Data (GeoMND)**. BT's data geolocates 100% of all devices connected to BT's network on a 24x7 basis: GeoMND allows BT to accurately estimate user locations down to within several hundred metres so that we can say with high confidence which MSOA a user belongs to. Data is anonymised, weighted and scaled up proportionally.

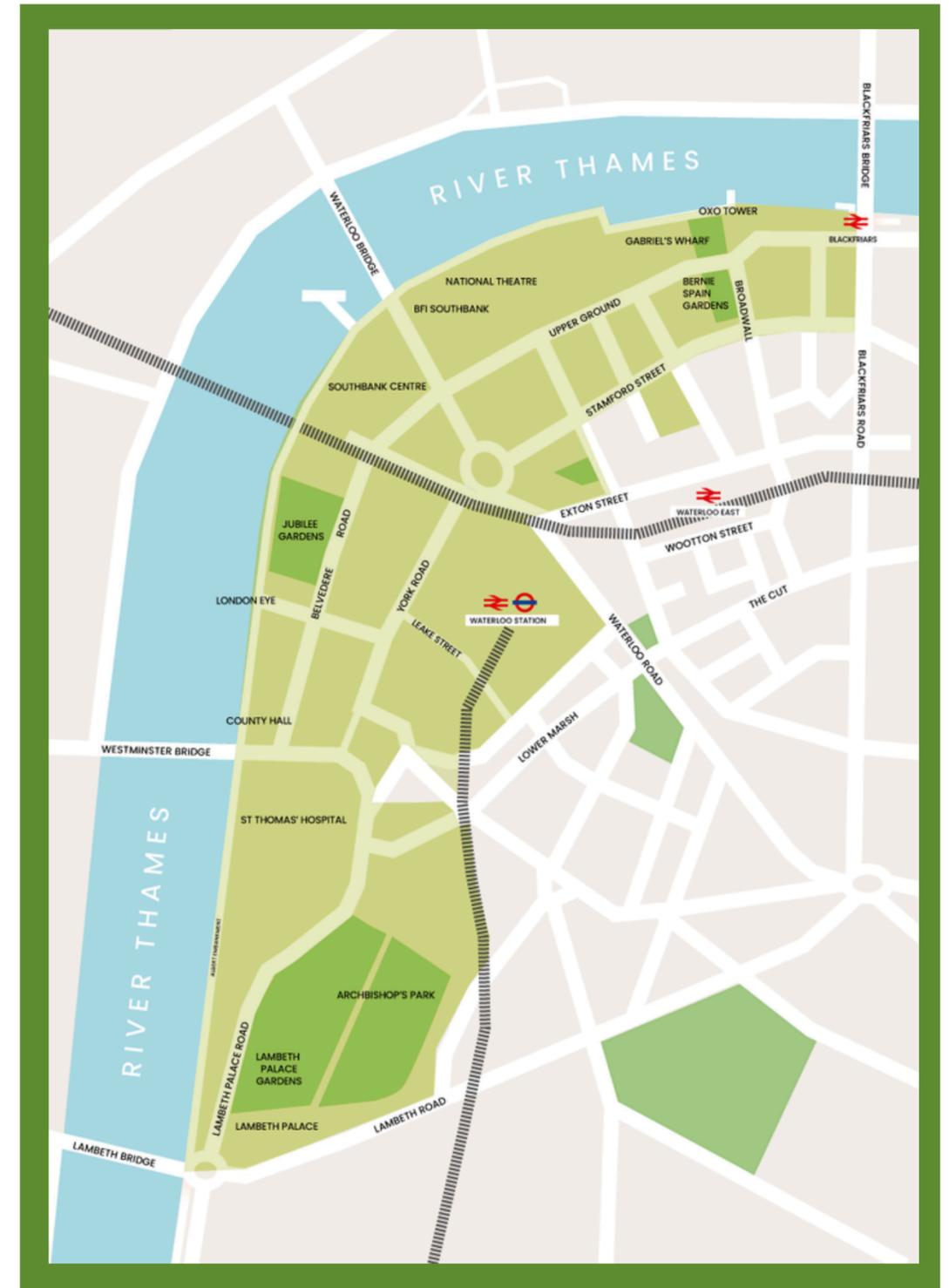
Due to phone movements, home locations and work locations can also be ascertained, and can then be used to break audiences into demographic segments such as Visitor, Worker, and Resident.

### Spend

The GLA's spend data comes from **Mastercard** and Mastercard's Retail Location Insights. Using Mastercard's proprietary Retail Location Scoring leveraging anonymized and aggregated transaction data from billions of cards, MRLI provides spending insights; relative metrics are derived from Mastercard transaction data, and are shown as an index of spend. All GLA data referenced in the report is aggregated across the wider BID area, shown in the map to the right. Spend is solely on the ground spend, and does not incorporate purchases made online.

### Data Suppression

Certain periods of 2024, primarily April to May 2024, saw issues with BT's footfall algorithms that lead to numbers reported being lower than in reality. In light of this, we have chosen not to directly compare with 2024 in this report, but compare directly with Q1 of 2025.



SOUTH BANK BID AREA