



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

**JANUARY - MARCH**  
**2026**

South  
Bank  
BID

# SUMMARY

The first quarter of 2026 reflects a broadly stable period for South Bank, against what many businesses have reported as a challenging trading environment. Footfall reached 8.3 million visits between January and March, a slight decrease of 0.7% compared to the same period last year. This performance comes despite a particularly wet winter and continued pressure on consumer confidence, both of which have influenced patterns of visitation and spend.

Domestic spend saw a modest increase of 2% year-on-year, with daytime activity remaining relatively steady. However, this has been offset by softer performance in evening trading, reflecting the more cautious consumer behaviour reported by many businesses across the area.

International visitors remain an important component of South Bank's audience, accounting for over 16% of total footfall and increasing by 12.7% year-on-year. While this growth continues to support overall activity levels, it sits alongside a more complex domestic trading picture.

It is also important to note that these figures reflect a period prior to the escalation of conflict in the Middle East. We recognise that this is likely to have a further impact on consumer confidence, international travel patterns, and overall behaviour in the months ahead.

Digital engagement trends align with this broader picture. Website visits were slightly behind last year, reflecting changing consumer habits and a growing reliance on social platforms for discovery. However, international usage remained consistent, and family-focused content around half term and Easter continued to perform well, indicating ongoing demand for planned visits.

Looking ahead, we enter the spring and summer period with a significant programme of activity. Our destination marketing campaign, A World by the River, will mark the 75th anniversary of the Festival of Britain and highlight the breadth of the neighbourhood's offer. Alongside this, continued business engagement, levy payer activity, and events will support the area through what is expected to remain a complex operating environment.

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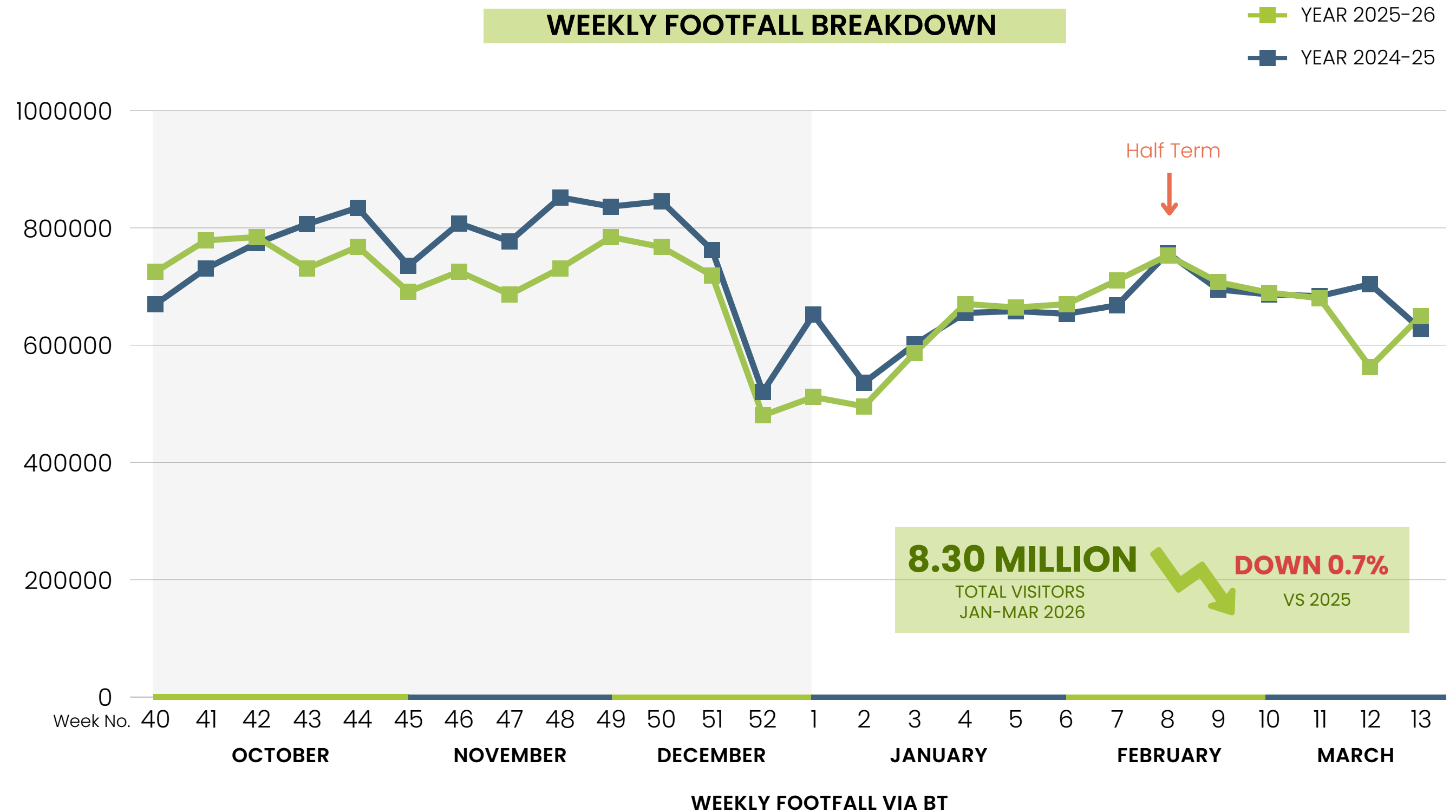
# FOOTFALL

Footfall across South Bank remained broadly stable in the first quarter of 2026, with total visits from January to March reaching 8,303,050 – a slight decrease of just 0.7% compared with 8,360,300 during the same period last year.

Most weeks tracked closely in line with, and often ahead of, 2025 levels, showing strong resilience despite a particularly challenging winter. With one of the wettest winters on record and persistent poor weather impacting dwell time and spontaneous visits, this is still a very strong result and reflects the underlying strength of South Bank as a destination.

February was a relative high point within the quarter, with several weeks exceeding last year's figures. This was supported by half-term activity, demonstrating continued interest in the area despite wider pressures on consumer behaviour.

## WEEKLY FOOTFALL BREAKDOWN



### FOOTFALL IN OTHER BID AREAS VS JAN - MAR 2026

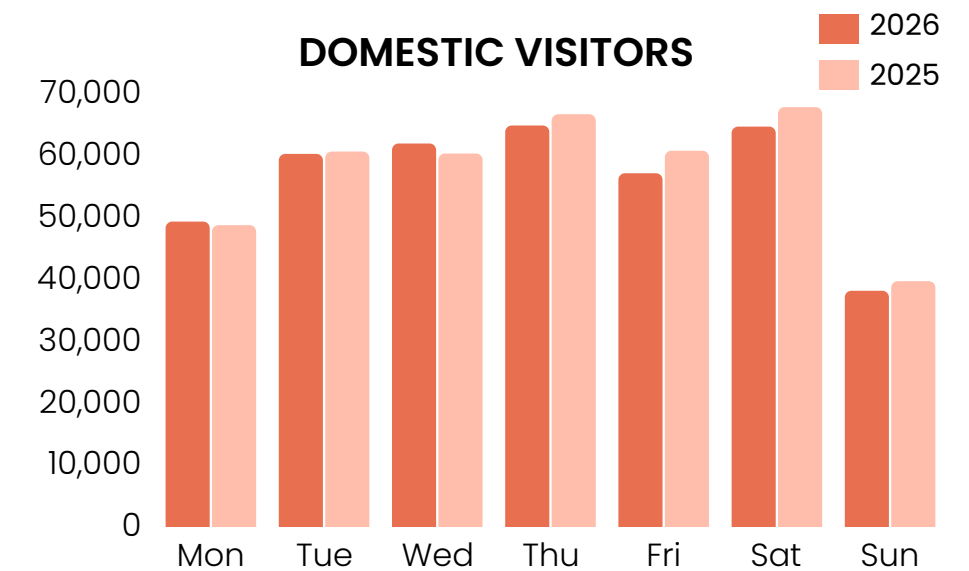
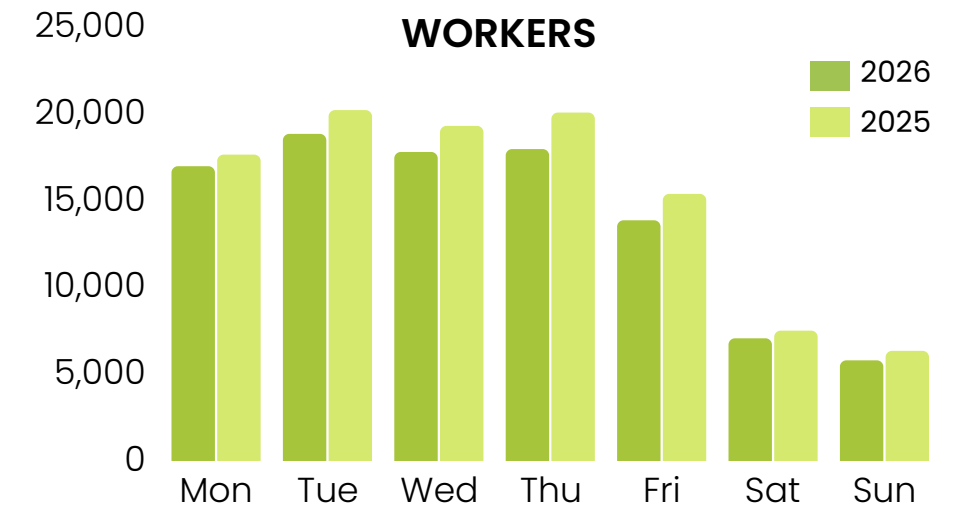
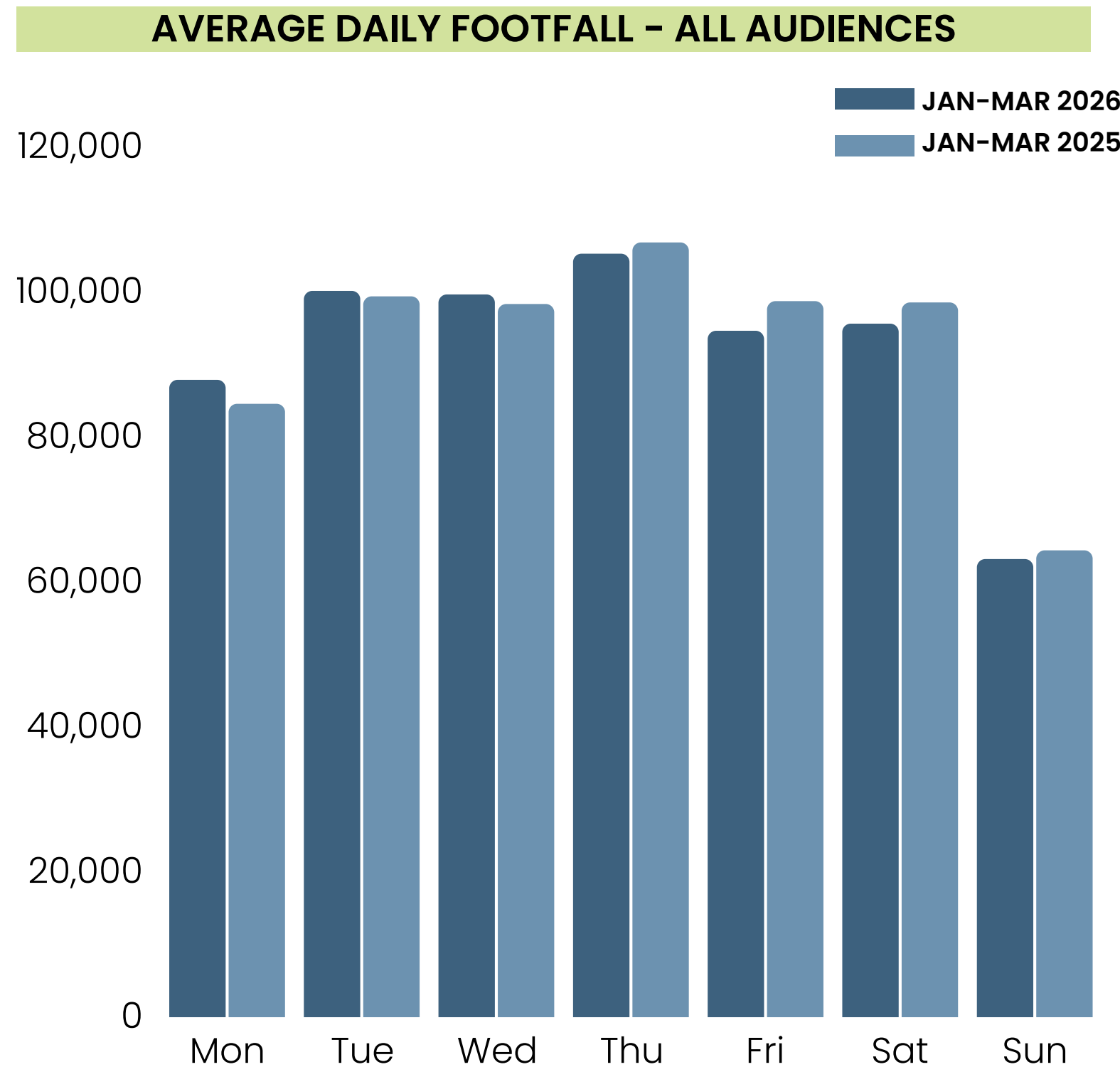
Heart of London Business Alliance	+13%	Team London Bridge	+3%	Fitzrovia Partnership	+5%	CDA - Holborn	-4%
New West End Company	+12%	Better Bankside	-2%	Northbank BID	-5%	We Are Waterloo	-14%

# FOOTFALL

Worker footfall has seen small declines across the week compared with the same period last year, although volumes remain strong overall and continue to provide the core foundation of weekday activity across South Bank.

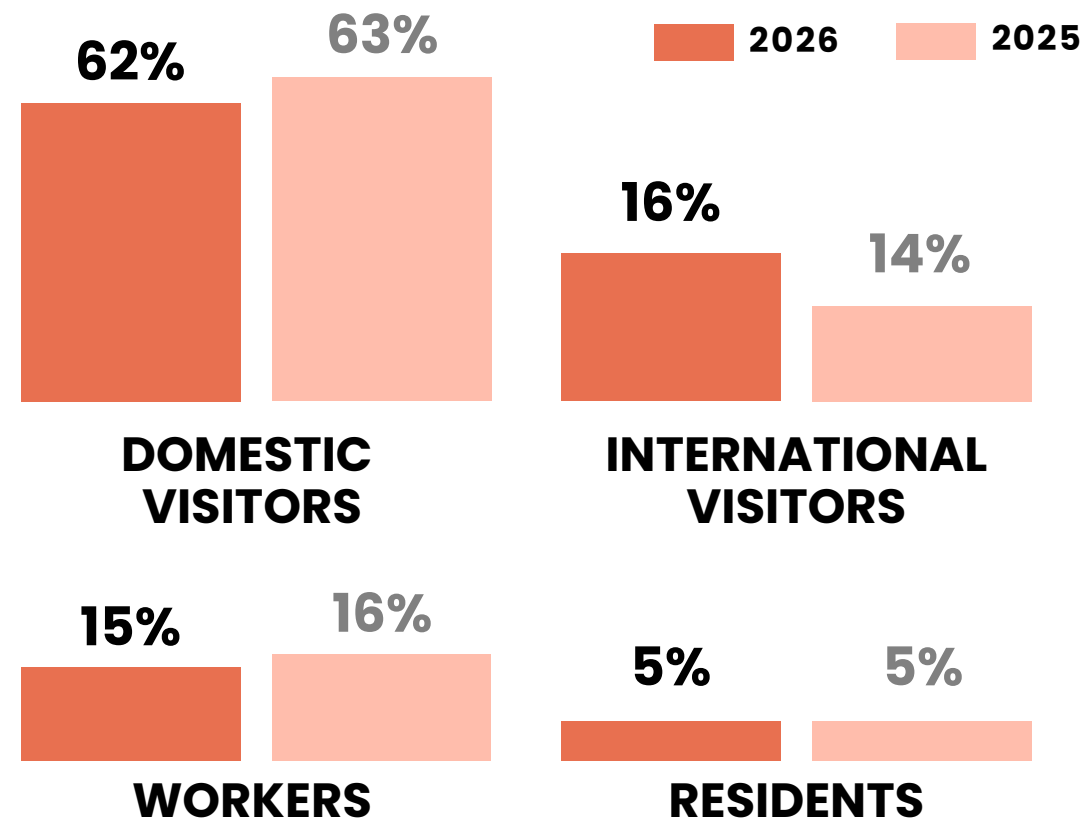
The strongest growth continues to come from international visitors, with increases seen consistently throughout the week. This audience is playing an increasingly important role in supporting overall footfall, particularly on Mondays and Sundays where other audience groups typically record lower volumes.

Domestic visitor patterns remain broadly stable, with Saturdays continuing to be the strongest day for leisure-led activity. The combination of resilient weekend visitation and growing international demand is helping to offset softer worker volumes and maintain stable overall performance across the quarter.



# FOOTFALL

## AUDIENCE MAKE-UP



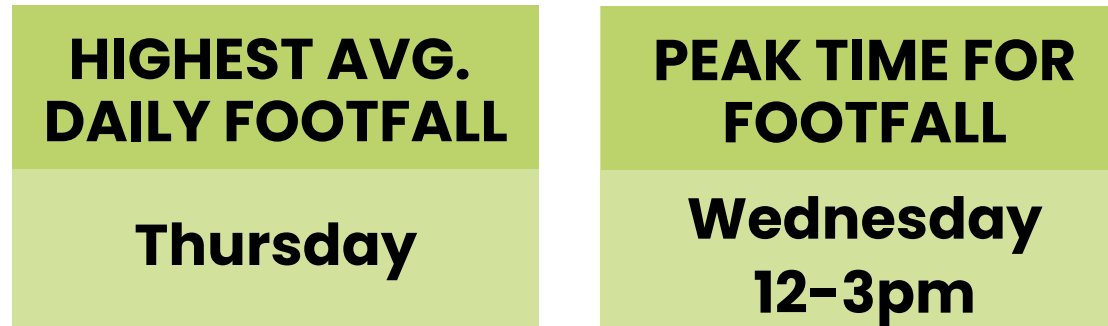
The most notable shift this quarter has been in international visitors, now accounting for 16.4% of total visitation. International footfall increased by 12.7% year-on-year, underlining the importance of this audience and South Bank’s global appeal.

However, feedback from businesses indicates that travel patterns remain uneven, partly influenced by ongoing conflict in the Middle East. This is an area we will continue to monitor closely, as it may impact performance in the months ahead.

## AVERAGE DWELL TIME



## PEAK TIMES



Average dwell time has increased across both day and night periods, showing stronger visitor engagement across the neighbourhood. Day dwell time rose to 102 minutes, up from 95 minutes last quarter and 93 minutes during the same period last year. Evening dwell time also increased to 133 minutes, compared with 118 minutes last quarter and 124 minutes last year.

## DAY / NIGHT TIME PROPORTIONS

### FOOTFALL



### SPEND



Footfall has shifted slightly towards stronger daytime visitation this quarter, while overall day and night-time proportions remain broadly stable. This reflects South Bank’s balanced economy, with consistent activity across both daytime and evening audiences.

# DOMESTIC SPEND INDEX – VS 2025

## TOTAL SPEND INDEX – JAN-MAR



**+2%**

VS 2025

## HIGHEST AVG. DAILY SPEND

**Saturdays**

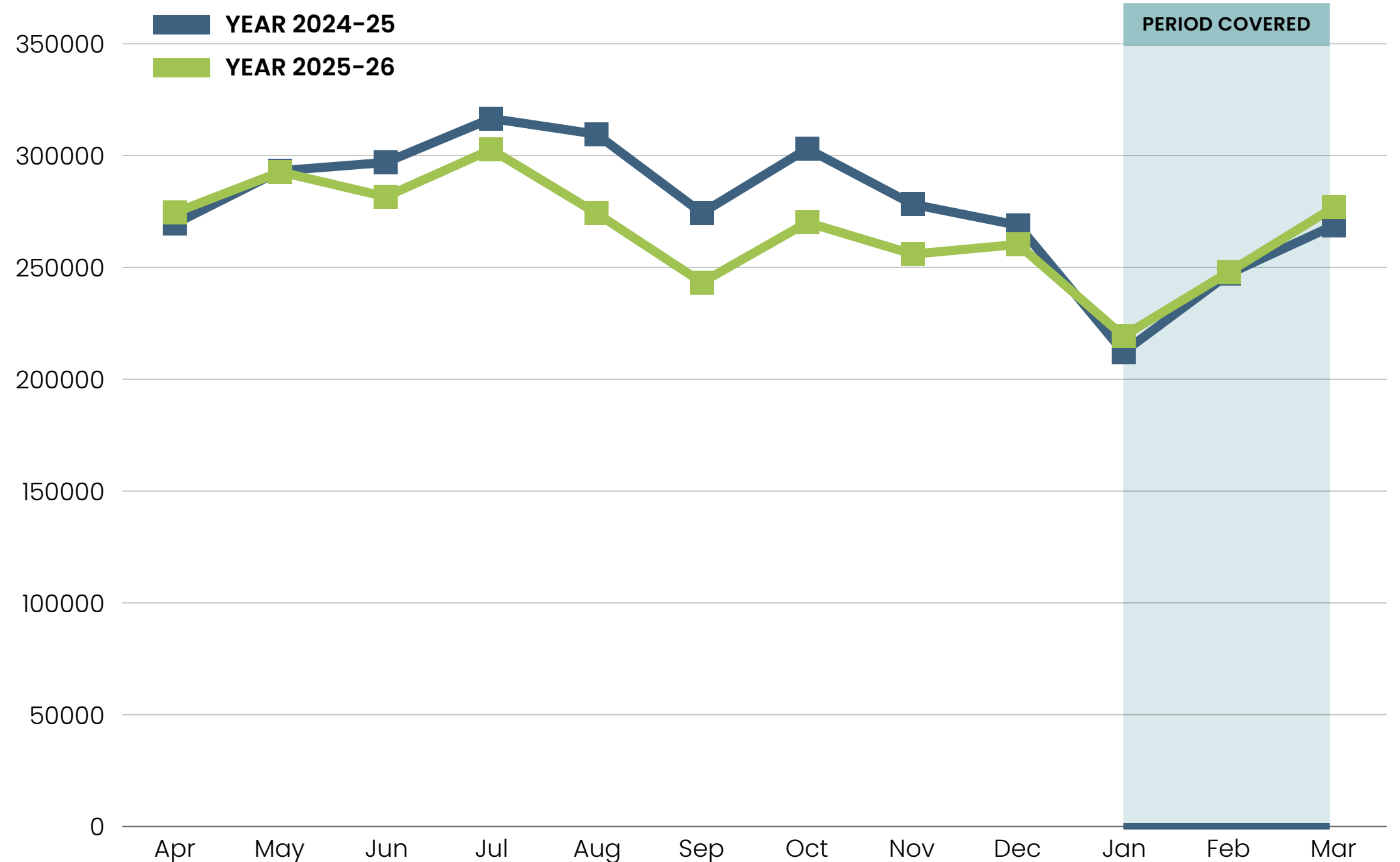
## PEAK TIME FOR SPEND

**Saturday  
12-3pm**

Domestic spend performance has been strong in the first quarter of 2026, with total spend up 2% compared with the same period last year. This is a particularly positive result given the continued economic uncertainty and ongoing pressure on household spending.

Average daytime spend increased by 7%, showing strong daytime trading across the neighbourhood, while night-time spend saw a small decline of 5%, reflecting more cautious evening spending patterns. Saturdays continue to be the strongest day for spend, aligning with higher visitor volumes across weekends and reinforcing South Bank's position as a leading leisure and destination economy.

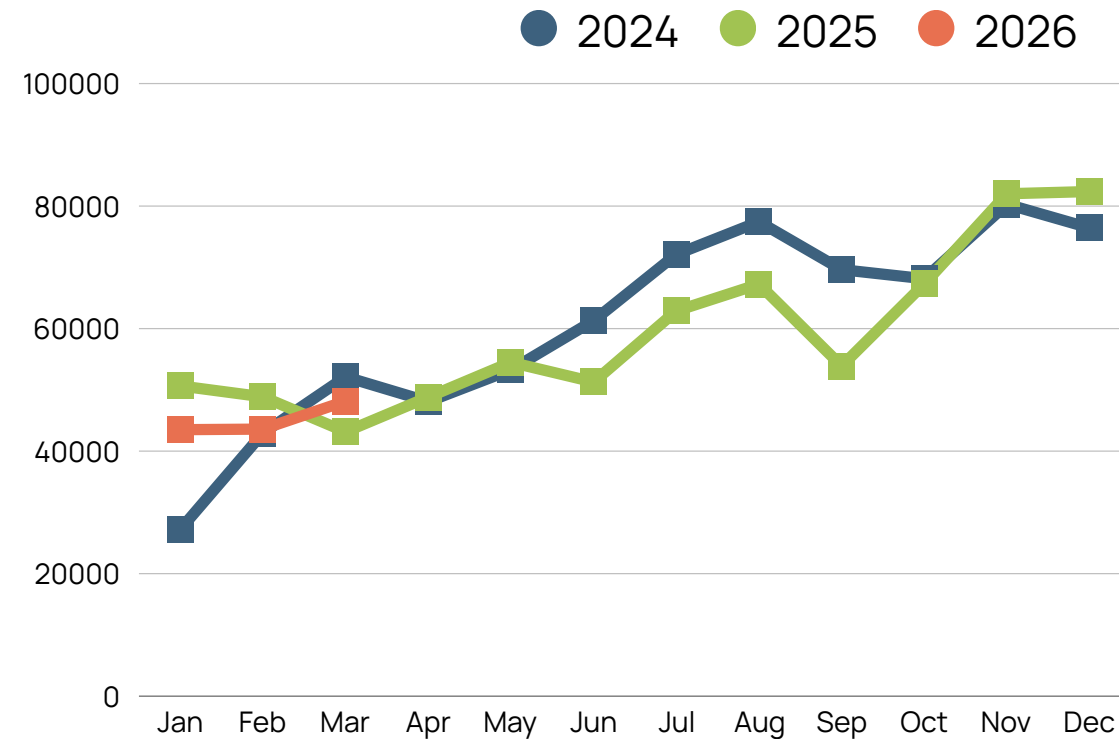
## AVERAGE MASTERCARD SPEND INDEX PER MONTH (DOMESTIC)



*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



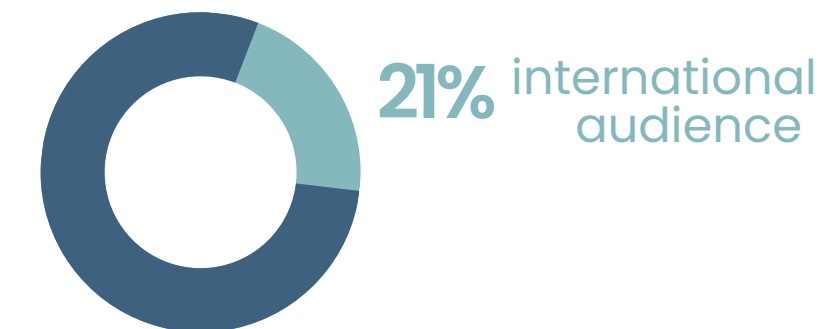
## TOP CONTENT

1	What's On listings page	7.8%
2	Eat & Drink listings page	5.1%
3	Guide: Easter Holiday Family Fun	3.6%
4	Guide: Half Term & School Holiday Fun	3.5%
5	What's On: Chiharu Shiota at Hayward Gallery	3.5%
6	See & Do listings page	2.6%
7	Guide: Family Day Out Top 10	2.4%
8	Guide: Top Free Things to do in South Bank	1.4%
9	Southbank Centre	1.2%
10	What's On: Imagine Children's Festival	1.2%
11	What's On: Winter Market	1.1%
12	See & Do: BFI IMAX	1.1%
13	Guide: Where to get breakfast in South Bank	1.0%
14	Guide: Discounts, Deals & Special Offers	1.0%
15	See & Do: The Paddington Bear Experience	1.0%

## JAN-MAR 2026 PERFORMANCE

**135,246**  **down 5% on last year**  
total website visits Jan-Mar 2026

**4,731**  Onward clicks generated to venues' websites, booking links, social profiles or phone numbers



Website visits for January to March totalled 135,246, sitting slightly behind 2025 performance and down 5% year on year. This is broadly in line with changing consumer behaviour, as audiences increasingly turn to social media channels for search, inspiration and trip planning rather than traditional website browsing.

Performance improved through March as visitors began planning for Easter holidays and spring trips, with family-focused content performing particularly

strongly. Guides around half term, Easter activities and family days out were among the most visited pages, alongside core What's On and Eat & Drink listings.

International audiences remain consistent at 21% of total site visits, reinforcing South Bank's continued appeal as a destination for overseas visitors planning London itineraries and using the platform to research experiences before travelling.

# UPCOMING ACTIVITY

This month, we're excited to launch our new destination marketing campaign for South Bank.

## A World by the River

South Bank is where London comes alive by the river – bold, vibrant, and full of energy. From world-class culture and iconic attractions to independent restaurants, rooftop bars, family adventures, and hidden gems, there is always something happening.

But South Bank is far more than a riverside walkway and this campaign has been created to reflect the full richness of our neighbourhood.

## Celebrating the Festival of Britain

2026 marks the 75th anniversary of the Festival of Britain – the moment that set South Bank on the path to becoming the world-class destination it is today. At the heart of the celebrations is Southbank Centre and the iconic Royal Festival Hall – the Festival's only lasting physical legacy – with a major anniversary programme set to attract even more visitors this summer.

Through our South Bank London brand, we are using this moment to shine a spotlight on the wider neighbourhood – encouraging people to explore more, discover new venues, stay longer, and support local businesses.

Over the coming months, the campaign will come to life through a number of varied channels, including:

- A printed What's On booklet, already distributed to 35,000 local homes and businesses.
- Out-of-home media across the TfL network and South Western Railway station platforms.
- Advertising and editorial coverage in tourism-led media, including WHERE Magazine and London Planner.
- Targeted video and story-led social media advertising to drive awareness and inspire visits.

## Be in the South Bank Spotlight

Alongside this, we are launching South Bank Spotlights – a specialist Instagram and TikTok campaign designed to showcase the neighbourhood through authentic, experience-led content.

Working with our new social media content team, Roots, we'll create short-form videos that bring your business to life – your venue, food and drink, product offering, atmosphere, and the experience you create.

We know audiences are prioritising memorable, high-quality experiences. South Bank has that in abundance – and this campaign is about helping more people discover it.



## We'd love for you to be part of it.

If you'd like to feature in South Bank Spotlights, support booklet distribution, or offer opportunities for campaign visibility through poster sites or any other available channels, please get in touch with the team at [southbankbid@sbeg.co.uk](mailto:southbankbid@sbeg.co.uk).

# 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.

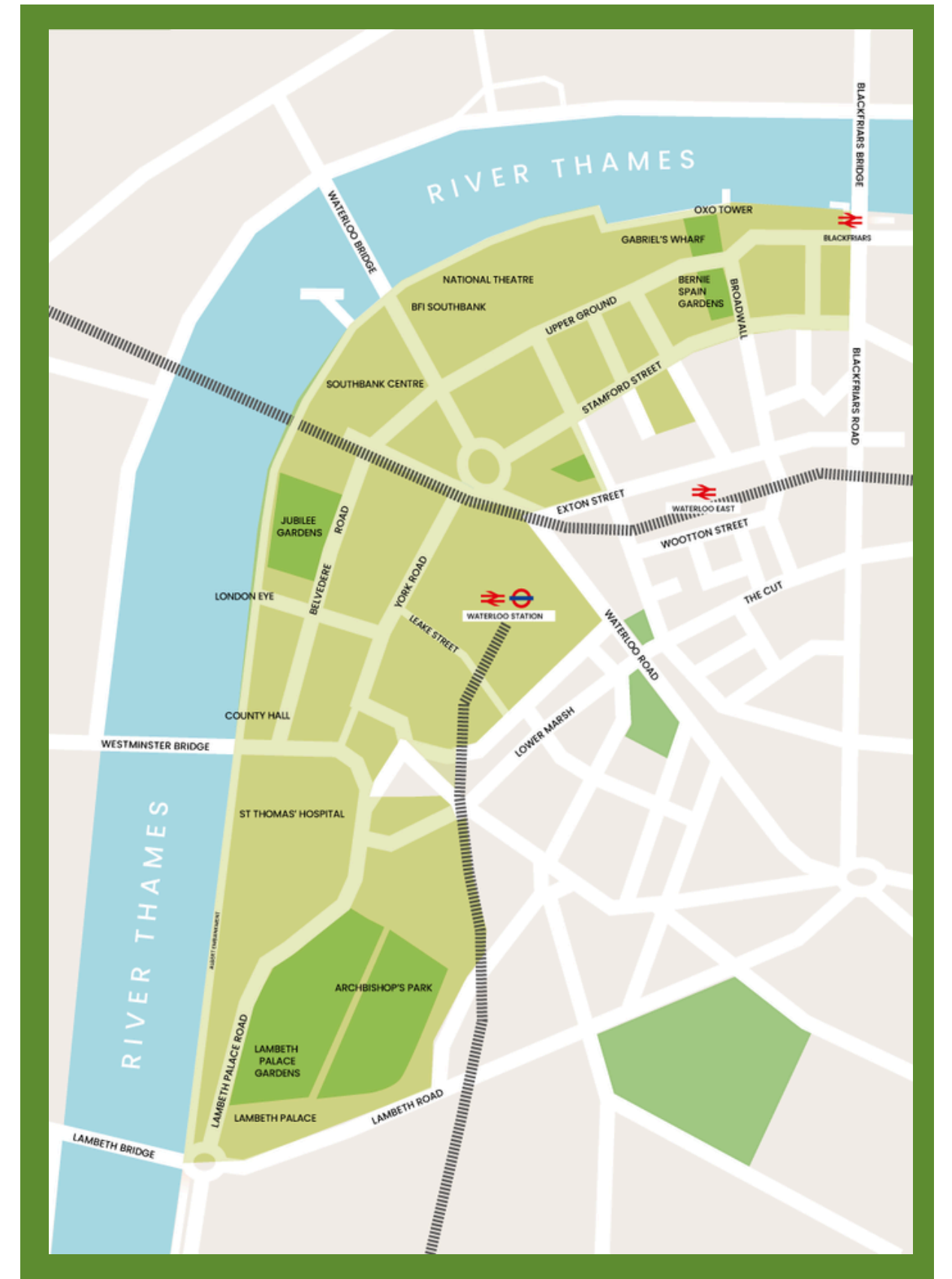
Due to phone movements, home locations and work locations can also be ascertained, and can then be used to break audiences into demographic segments such as Visitor, Worker, and Resident.

### 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