

SOUTH BANK BID QUARTERLY REPORT

JULY – SEPTEMBER 2026

South Bank BID

SUMMARY

The third quarter of 2026 brought a welcome improvement in footfall across South Bank, following a challenging spring with numbers tracking more closely to 2025 figures.

Between July and September, the area welcomed approximately 10 million visits, a marginal increase of 1.5% compared with the same period last year. This marks a notable change from the previous quarter, when footfall was 10.8% below last year's levels.

A strong programme of summer events, exhibitions, performances and attractions gave visitors plenty of reasons to spend time in South Bank.

However, the recovery was not consistent across all audiences. International visitation grew significantly, increasing by 17.8% year-on-year, while domestic visitors (-2.2%) and workers (-5.5%) remained below 2025 levels. Although both declines were considerably smaller than those recorded during April to June, the figures highlight the continued importance of international tourism in supporting South Bank's visitor economy.

Digital performance was particularly strong demonstrating a continued interest in the area.

The South Bank London website attracted 219,319 visits, an increase of 19.2% year-on-year, and generated 5,391 onward referrals to businesses and attractions. Interest in major cultural events and film releases was a significant driver, with the release of tickets for The Odyssey at BFI IMAX generating a particularly notable spike in website traffic.

A note on spend data

Unfortunately, we are unable to include domestic spend figures in this quarter's report due to issues with the Mastercard data, which have distorted the reported figures. The GLA High Streets Data Service team are working to resolve these discrepancies and will provide an update as soon as reliable data becomes available. We apologise for any inconvenience this may cause.

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FOOTFALL

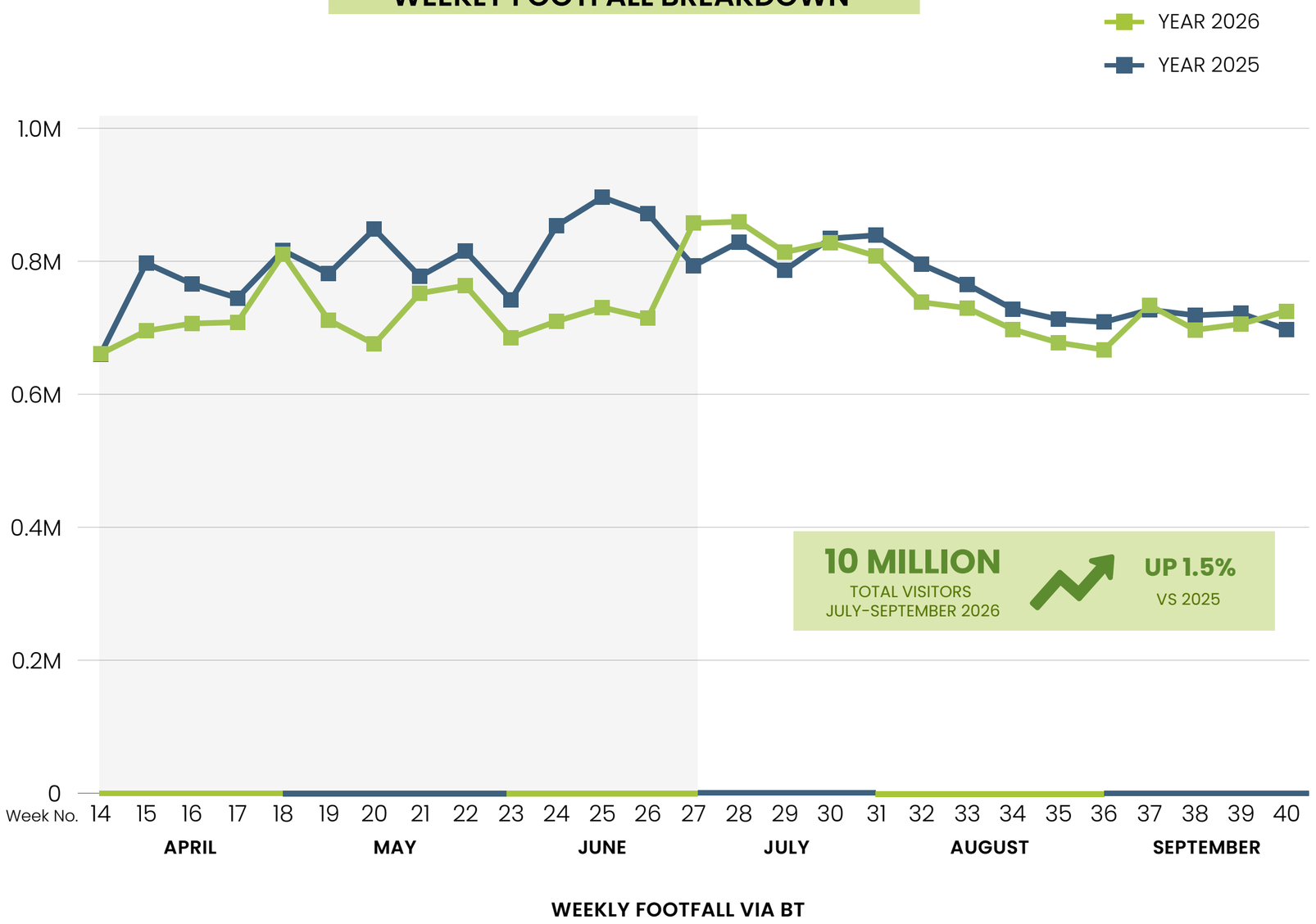
Footfall across South Bank reached approximately 10 million visits between July and September 2026, an increase of 1.5% compared with the same period last year. July was the strongest month of the quarter, with several weeks exceeding 2025 levels.

South Bank benefited from a busy summer programme, with exhibitions, performances, festivals and attractions providing plenty of reasons to visit. The summer holidays also brought additional leisure audiences into the area, supported by South Bank's established appeal as a destination for families and international tourists.

Weather conditions may also have played a part. Following the prolonged spells of exceptionally hot weather experienced during the previous quarter, temperatures became somewhat more manageable, potentially making visits to central London more appealing.

While the overall increase is modest, it suggests that South Bank's visitor economy has regained some momentum. However, as the following pages demonstrate, much of this improvement has been driven by international visitors, rather than a broad recovery across all audiences.

WEEKLY FOOTFALL BREAKDOWN



WEEKLY FOOTFALL VIA BT

FOOTFALL

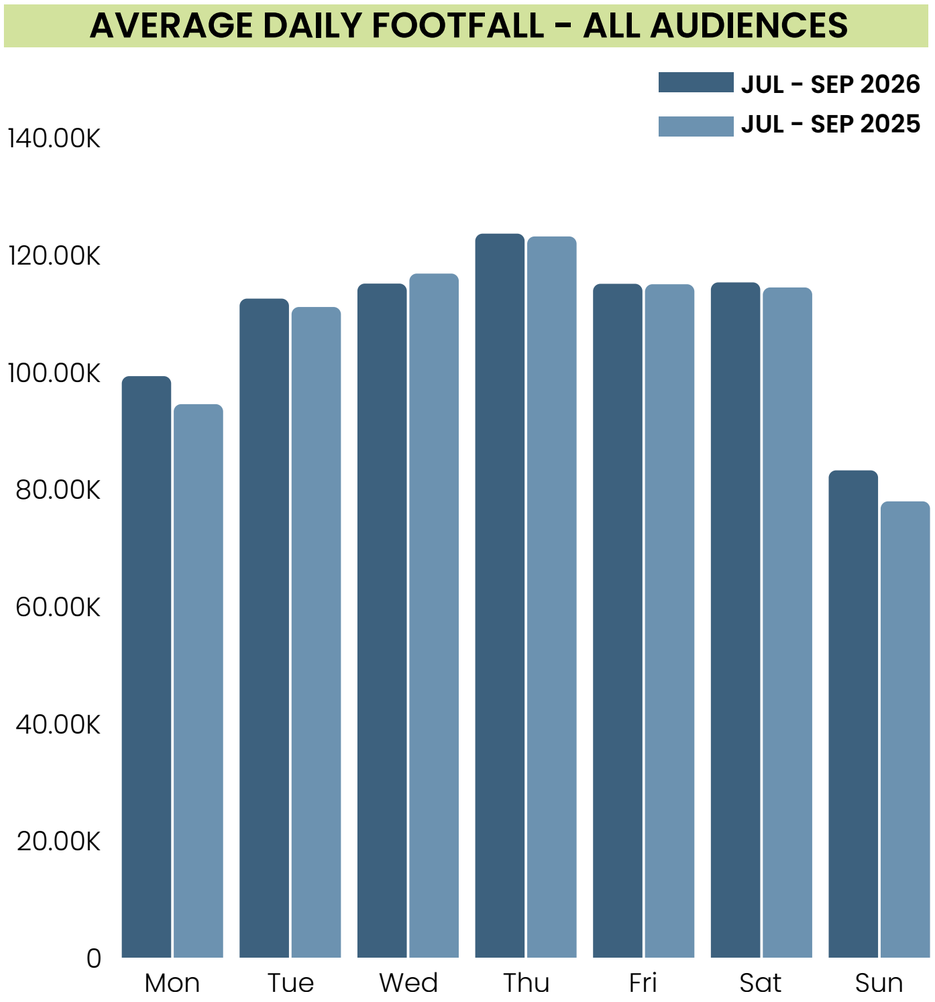
Average daily footfall showed a more stable picture during July to September, with overall visitor numbers broadly matching or exceeding 2025 levels across most days of the week.

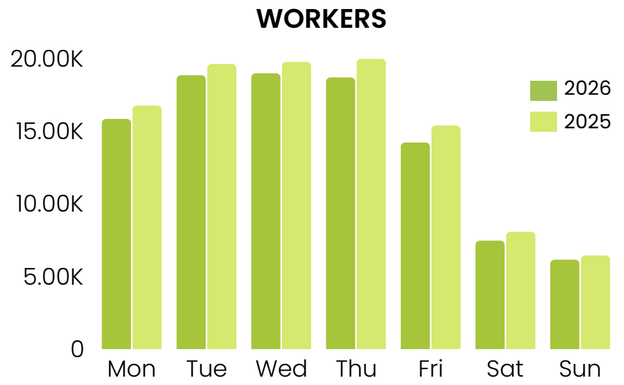
Worker footfall continued to fall below 2025 levels, particularly during the middle of the week. The summer holiday period may also have contributed, with annual leave affecting weekday activity.

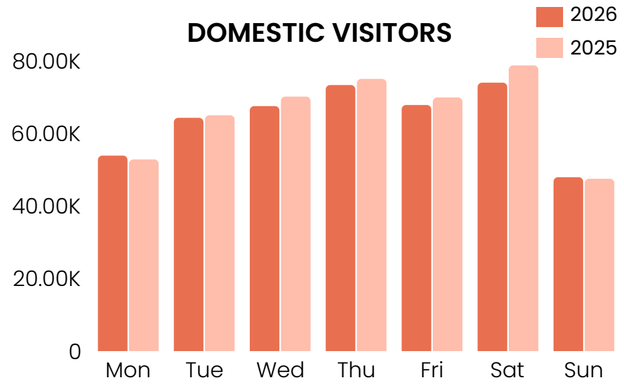
Domestic visitor numbers were more mixed, with some continued softness on Saturdays. While the summer programme provided a strong offer, households may still be making more considered choices about leisure trips and discretionary spending as cost of living pressures continue to have an impact.

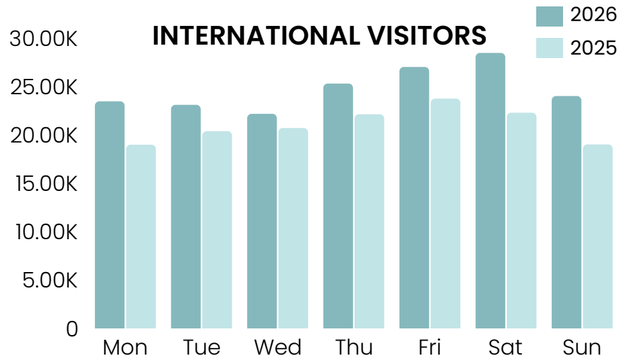
International visitors presented a much stronger picture, with growth recorded across every day of the week. This audience has become increasingly important in sustaining visitor numbers, supporting South Bank's wider visitor economy.

The contrasting trends highlight the importance of South Bank's diverse audience mix. While international tourism is helping to drive overall growth, domestic and worker audiences remain important to the area's day-to-day economy.









FOOTFALL

The overall improvement in footfall during July to September was driven largely by international visitors, who increased by 17.8% compared with the same period in 2025. This represents a significant acceleration from the 5.2% growth recorded during April to June and highlights the continued appeal of South Bank to overseas audiences.

Domestic footfall remained 2.2% below 2025 levels, although this was a considerable improvement on the 16.6% decline recorded during the previous quarter. More manageable summer weather may have encouraged visitors back into central London, while the school holidays and seasonal programming provided additional reasons to visit. Nevertheless, the figures suggest that domestic audiences remain more cautious than in previous years.

South Bank's audience profile continued to evolve, with international visitors accounting for 23% of footfall, up from 20% in 2025. Domestic visitors remained the largest audience at 60%, although their share fell slightly from 62% last year.

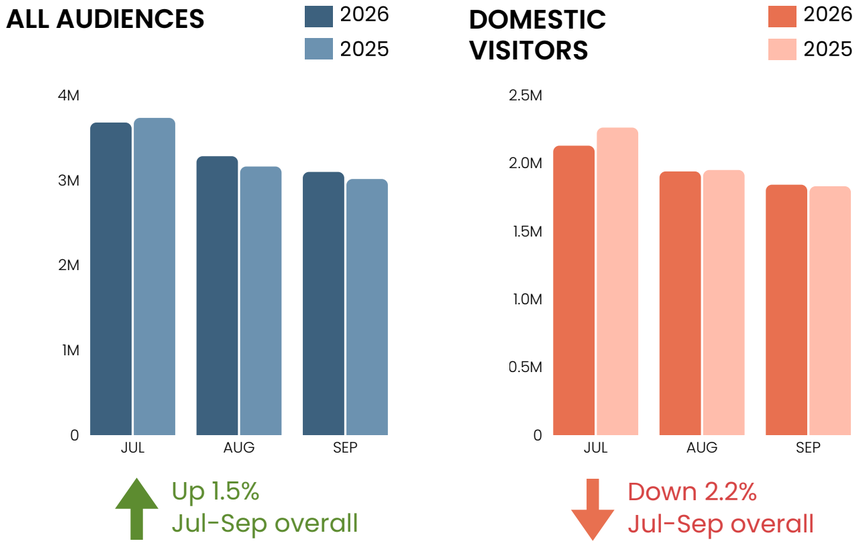
Workers accounted for 13% of footfall and residents 4%, both slightly below the previous quarter. The reduction in the resident audience may reflect seasonal changes, particularly fewer students living in the area over the summer months. However, the proportion remains consistent with the same period in 2025.

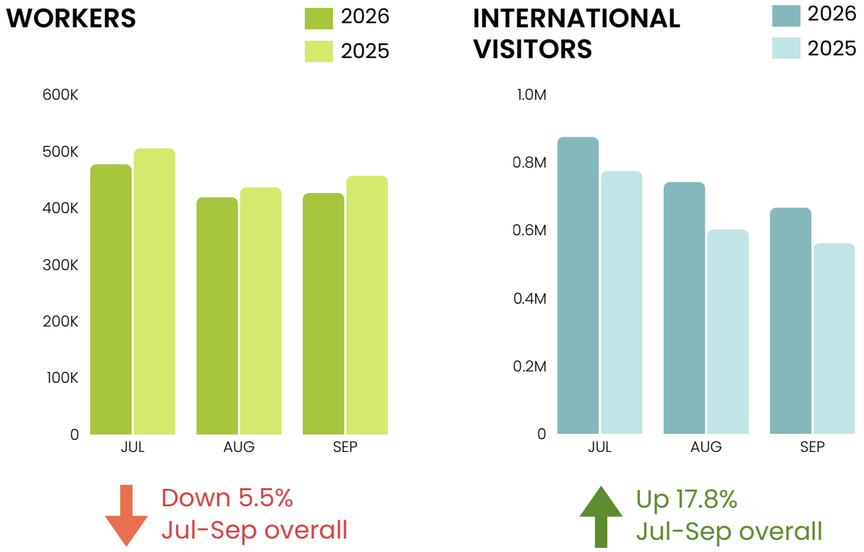
The split between daytime (64%) and night-time (36%) activity was unchanged from the previous quarter, demonstrating a consistent pattern in how people use the area.

Average dwell times were higher than in 2025 during July (up 5.7%) and August (up 2.9%), suggesting visitors continued to spend a meaningful amount of time in the area. September recorded the longest average dwell time at 128 minutes, although this was marginally below last year's figure (-0.6%).

While the growth in dwell time has moderated since the previous quarter, the figures continue to demonstrate that visitors are spending considerable time in the neighbourhood.

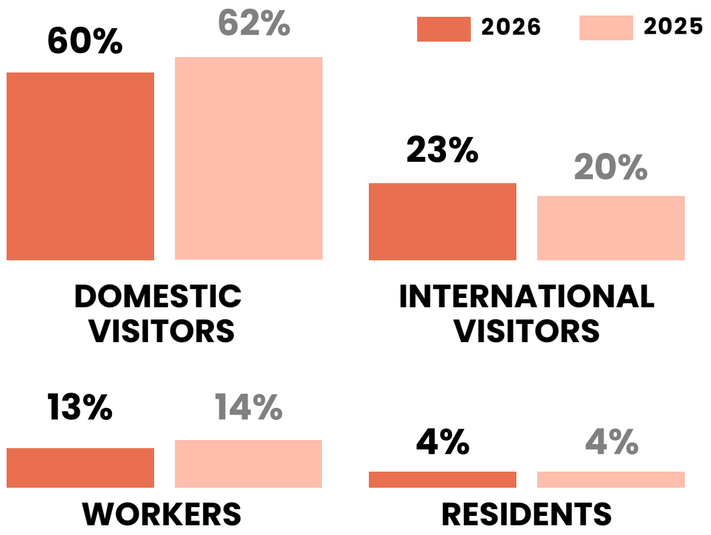
MONTHLY FOOTFALL BY AUDIENCE



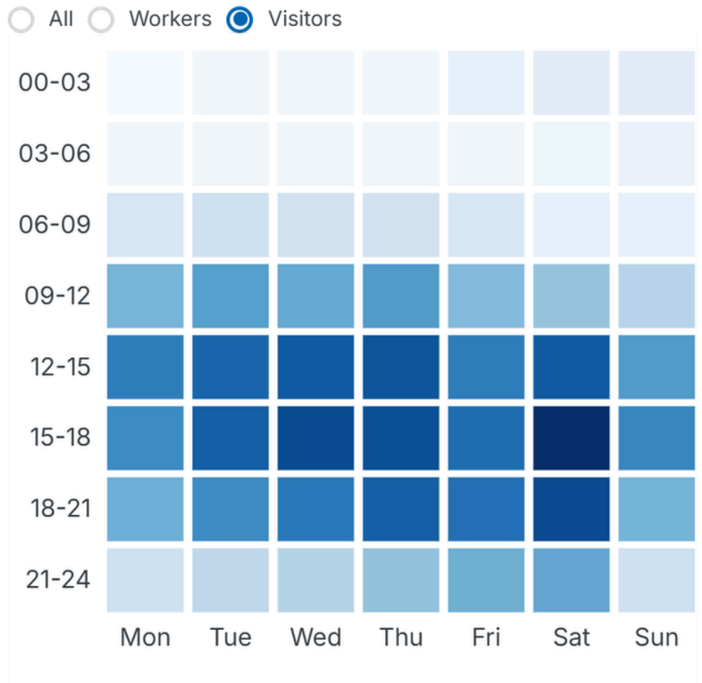


FOOTFALL

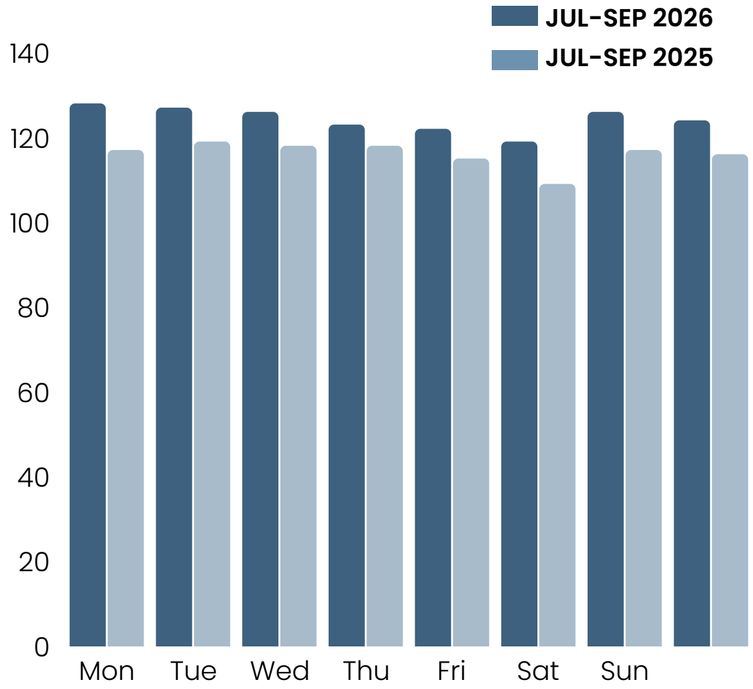
AUDIENCE MAKE-UP



AVG VISITOR FOOTFALL TIME/DAY



AVG. DWELL TIME (ALL AUDIENCES)



PEAK TIMES

HIGHEST AVG. DAILY FOOTFALL	PEAK TIME FOR FOOTFALL
Thursday	Thursday 12-3pm

DAY / NIGHT TIME PROPORTIONS

FOOTFALL

DAYTIME	NIGHT-TIME
64%	36%

AVERAGE DWELL TIME VS 2025

JUL	120 mins	↑ 5.7%
AUG	119 mins	↑ 2.9%
SEP	128 mins	↓ -0.6%

SOUTH BANK LONDON WEBSITE ANALYTICS

The southbank.london website attracted 219,319 visits between July and September 2026, an increase of 19.2% compared with the same period last year and represents one of the largest periods of web traffic in recent years.

A particularly notable driver of traffic was the release of tickets for The Odyssey at BFI IMAX, which generated a substantial spike in website visits in July. The level of interest demonstrates the extraordinary demand surrounding major film releases shown at BFI IMAX, and the important role these cultural moments can play in bringing audiences to South Bank.

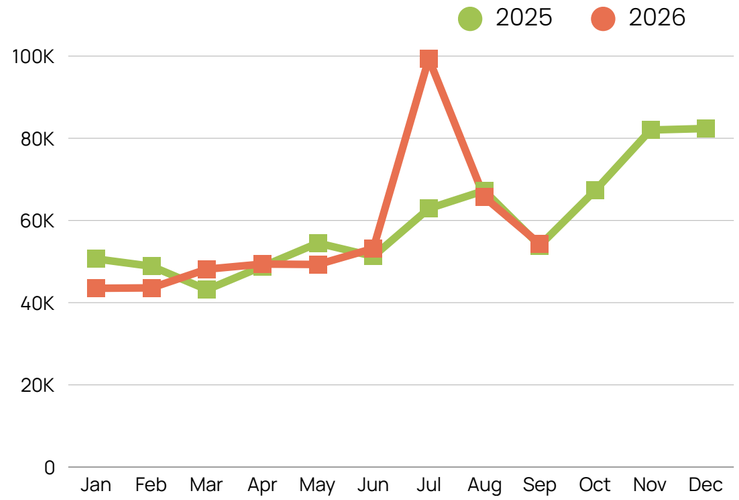
More broadly, the area's busy summer programme provided a wealth of content to promote. Southbank Centre's 75th anniversary programme including Anish Kapoor at the Hayward Gallery featured prominently among the website's most popular pages, alongside the main What's On, Eat & Drink and See & Do listings.

The quarter demonstrates the value of timely, relevant destination content, particularly around major cultural events and high-profile releases. By bringing together the activity taking place across South Bank and making it easy for audiences to discover, the website continues to play an important role in promoting the destination and directing visitors towards its businesses and attractions.

TOP CONTENT

1 What's On: The Odyssey at BFI
2 What's On listings page
3 What's On: Anish Kapoor at Hayward Gallery
4 Guide: Where to watch sport (world cup)
5 Eat & Drink listings page
6 See & Do listings page
7 Guide: Family Day Out Top 10
8 What's On: Winter Market
9 What's On: Steel Scenes
10 See & Do: BFI IMAX
11 What's On: Dune Part Three in IMAX 70mm
12 Guide: Half Term & School Holiday Fun
13 What's On: Electra Persona at the NT
14 Guide: Top Free Things to do in South Bank
15 What's On: Jeppe Heins Appearing Rooms Fountain

SITE VISITS

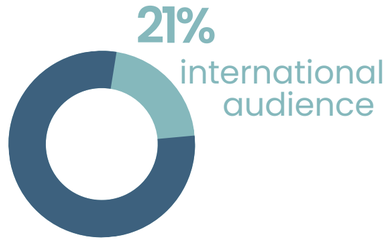


219,319 up 19.2% on last year

total website visits Jul - Sep 2026

5,391

Onward clicks generated to websites, booking links, social profiles or telephone numbers



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.

Unfortunately, we are unable to include domestic spend figures in this quarter's report due to issues with the Mastercard data, which have distorted the reported figures. The GLA High Streets Data Service team are working to resolve these discrepancies and will provide an update as soon as reliable data becomes available. We apologise for any inconvenience this may cause.

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