SOUTH BANK BID QUARTERLY REPORT

APRIL - JUNE 2026

SUMMARY

The second quarter of 2026 presented a mixed but informative picture for South Bank. Overall footfall declined by 10.8% compared with the same period in 2025, driven largely by softer domestic demand and influenced by a combination of exceptionally warm weather, continued cost-of-living pressures and changing leisure behaviours.

Despite attracting fewer visitors, the overall quality and value of visits remained strong. International visitors continued to grow, average dwell times increased across every month, and domestic consumer spend outperformed 2025, with the Mastercard Spend Index increasing by 15% and transaction volumes rising by 40%. Compared with other central London BID areas, South Bank experienced one of the larger declines in footfall but delivered comparatively stronger spend performance, suggesting visitors who did choose South Bank continued to engage with the destination and support local businesses.

Digital performance also remained encouraging. The South Bank London website attracted more than 151,000 visits during the quarter and generated over 4,700 onward referrals to businesses across the area.

Organic search remained the primary source of traffic, while AI platforms emerged as a significant source of referrals, demonstrating that South Bank's editorial content continues to perform strongly as consumer search behaviour evolves.

Looking ahead, the operating environment remains uncertain. Feedback from South Bank's hotel operators suggests international tourism continues to face challenges, with softer forward bookings reflecting ongoing geopolitical instability and weaker global travel confidence. There are, however, measures underway to stimulate demand: London & Partners is preparing a £7m international tourism campaign for the autumn, designed to drive consideration and convert future bookings. As a strategic partner, we are working closely with L&P to ensure South Bank has strong visibility within the campaign and benefits from this activity.

While South Bank remains well positioned, both domestic demand and international visitor markets will require close monitoring over the coming months to understand how these wider economic and geopolitical pressures continue to influence performance.

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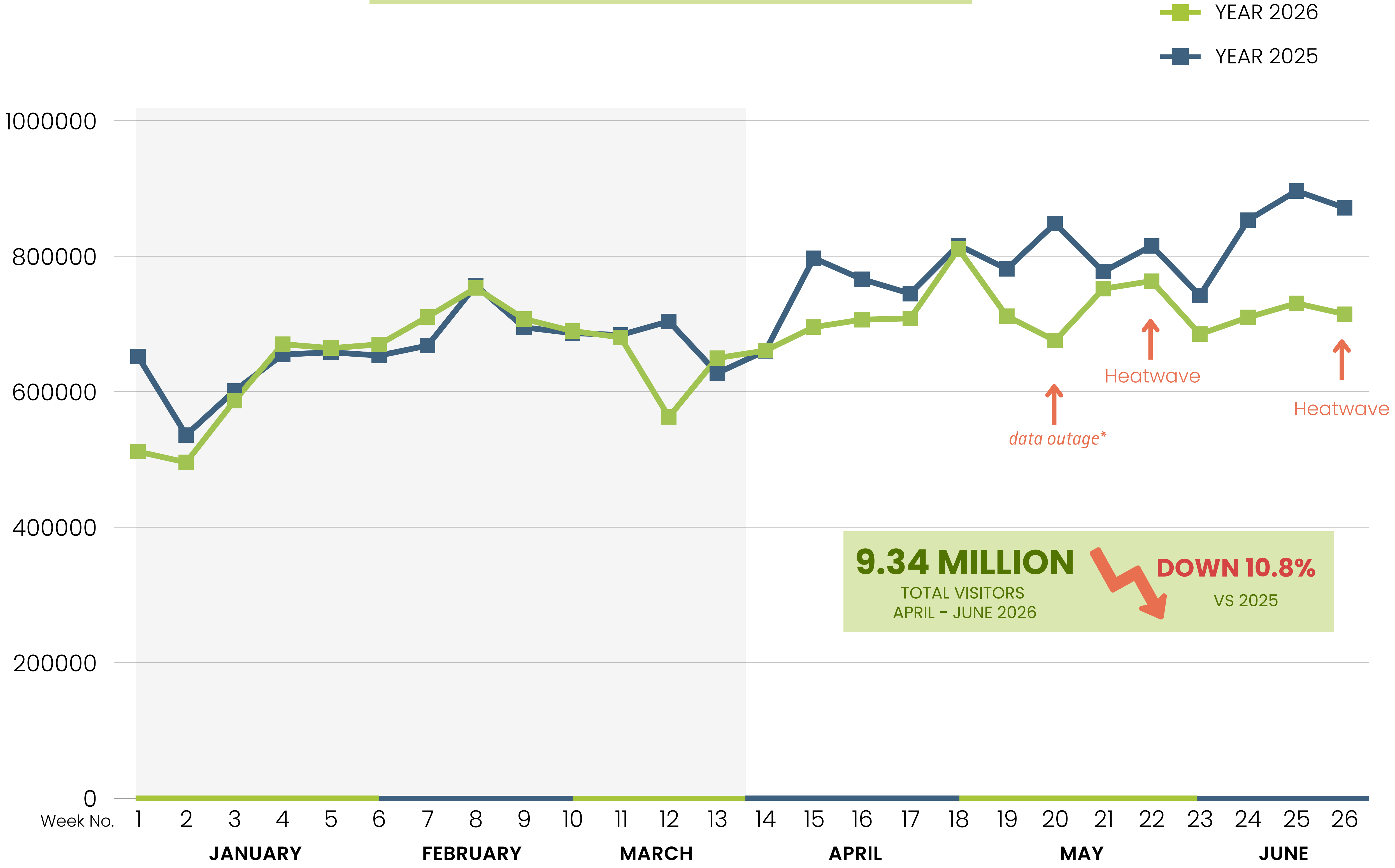
FOOTFALL

Footfall across South Bank totalled 9.34 million visits between April and June 2026, down 10.8% compared with the same period last year. While disappointing, the quarter was shaped by several external factors, including periods of exceptionally hot weather across London, which influenced how, when and where people chose to spend their leisure time.

April remained relatively resilient, tracking close to 2025 levels. However, performance softened through May and June, with several weeks falling noticeably behind last year. A BT data outage also affected reporting during one week in May.

The wet start to June along with prolonged spells of hot, dry weather during the period created mixed conditions for South Bank. While sunshine typically benefits the area, temperatures regularly exceeded seasonal norms, encouraging many visitors to seek cooler environments, travel to the coast or spend time in parks and green spaces closer to home to avoid traveling to central London. Combined with continued cost-of-living pressures and more cautious consumer spending, this resulted in lower overall footfall across much of the quarter.

WEEKLY FOOTFALL BREAKDOWN



WEEKLY FOOTFALL VIA BT

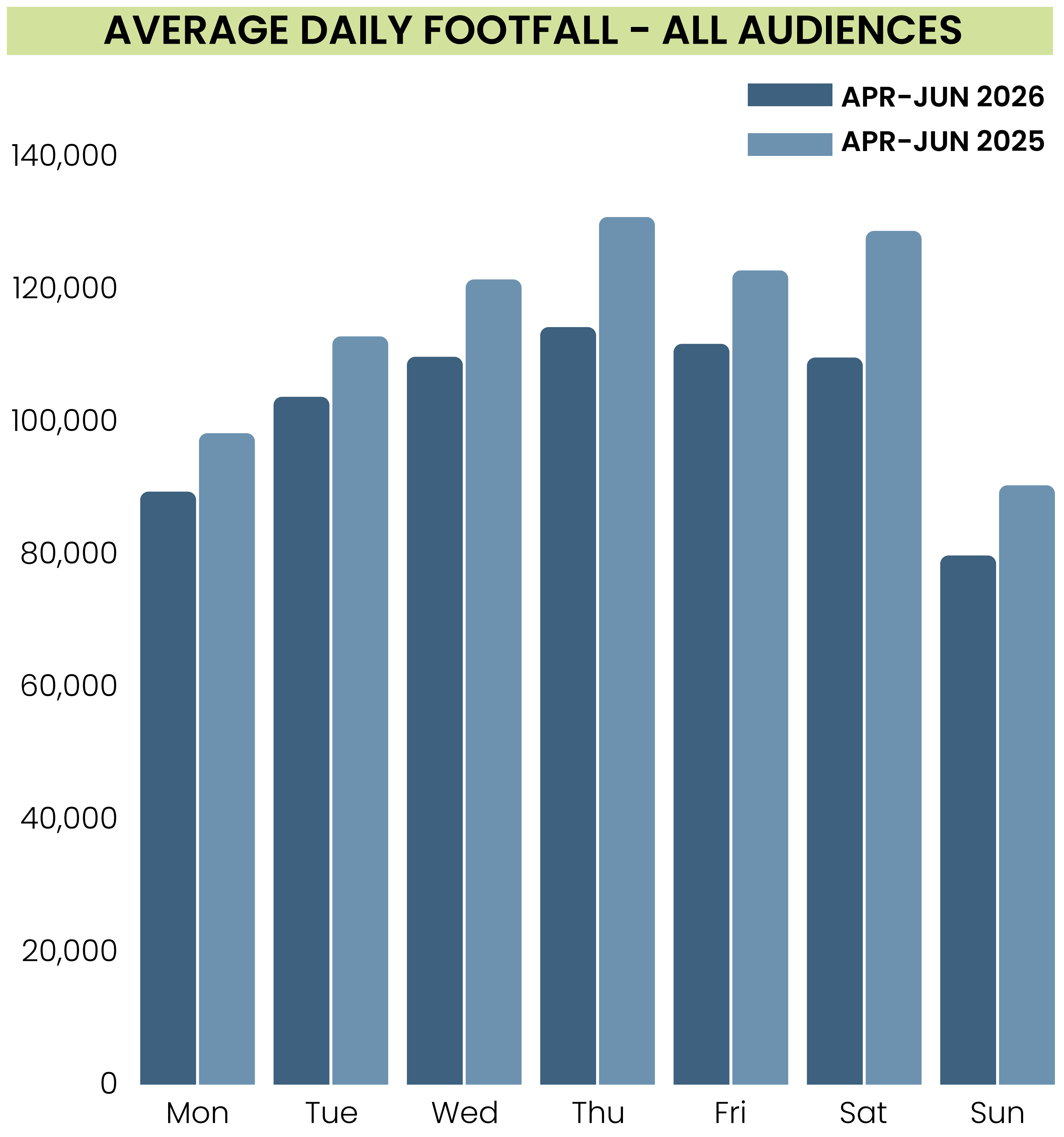
** We were made aware of an issue with BT data, hence showing slightly lower than expected figures.*

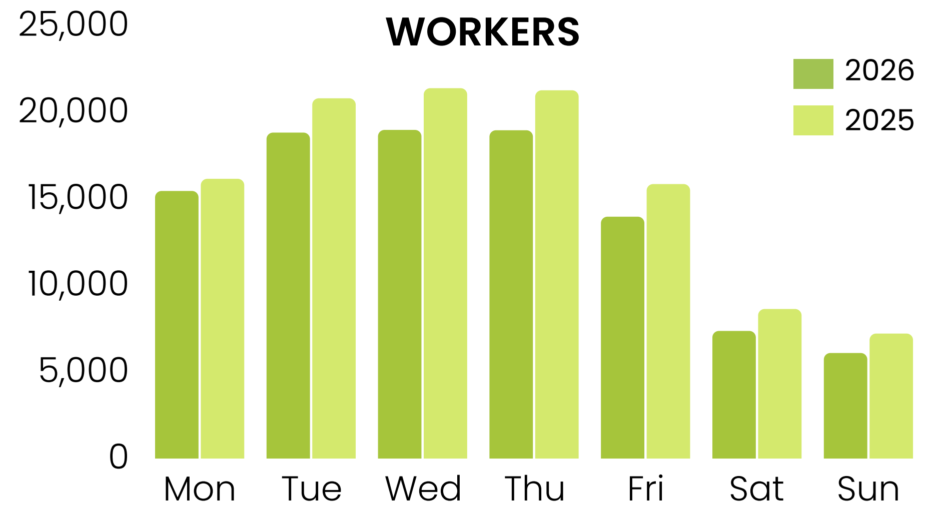
FOOTFALL

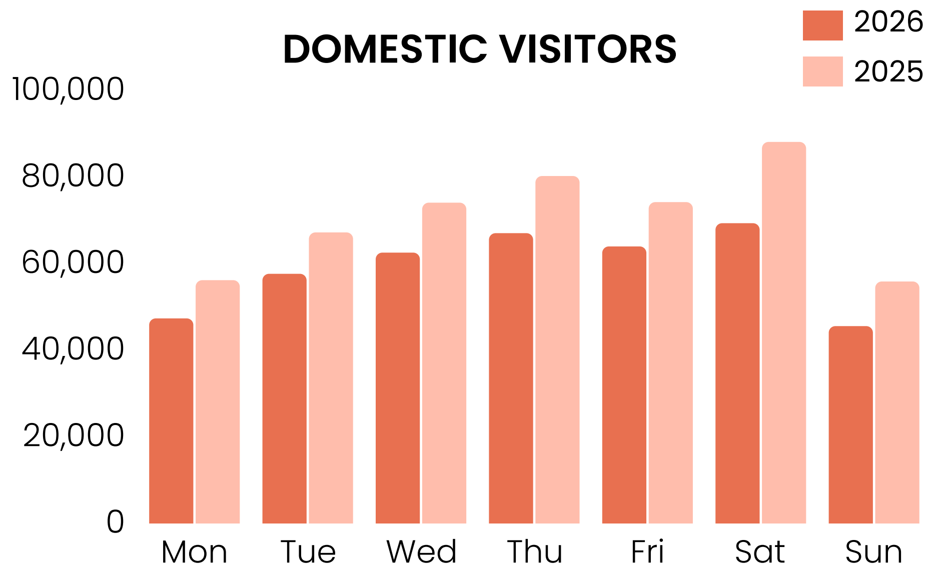
Average daily footfall declined across every day of the week compared with Q2 2025, reflecting the broader reduction in visitor volumes seen throughout the quarter. The largest reductions were recorded on Thursdays to Sundays, with Saturday showing the biggest year-on-year decline despite remaining one of South Bank's busiest days.

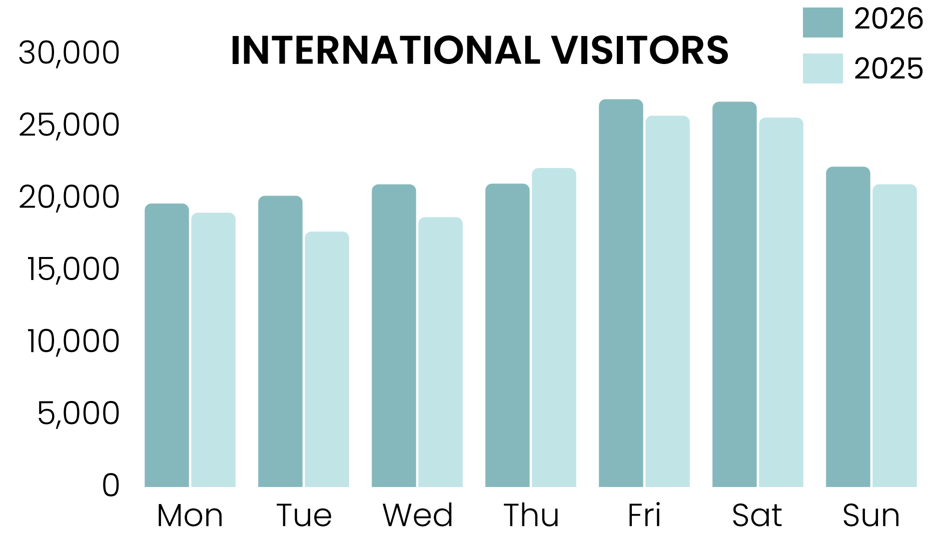
Domestic visitors accounted for much of the overall decline, with lower volumes recorded across every day of the week. This reflects a combination of continued pressure on household spending alongside the exceptionally warm weather, which impacted how people chose to spend their leisure time.

International visitation remained comparatively resilient throughout the quarter, with modest year-on-year growth. This audience continues to play an important role in supporting South Bank's visitor economy and helped to partially offset softer demand from domestic markets. However, with ongoing geopolitical instability alongside wider economic uncertainty, the outlook for international travel remains volatile and should be monitored closely over the coming months.









FOOTFALL

Looking beyond the overall reduction in footfall, the audience profile reveals a shift in who visited South Bank during the quarter. The decline was driven predominantly by domestic visitors, with volumes falling 16.6% year-on-year. Domestic audiences still accounted for almost six in ten visitors (59%), but their share of total footfall reduced compared with last year.

International visitors provided a more resilient picture, growing by 5.2% and increasing their share of total footfall from 19% to 22%. This helped to soften the overall decline and reinforces the continued importance of overseas markets to South Bank's visitor economy.

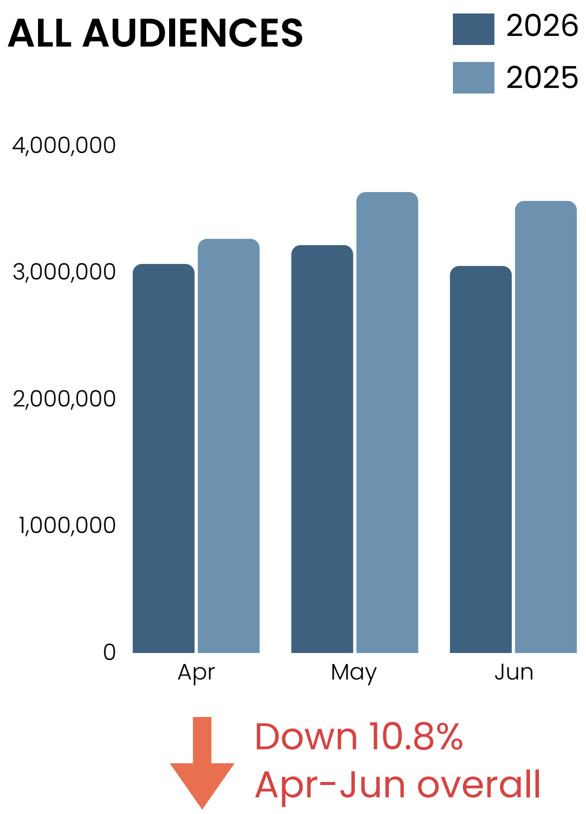
Despite lower visitor volumes, the way people used South Bank remained largely unchanged. Activity continued to peak during the middle of the week, with Thursday recording the highest average daily footfall and Wednesday between 12pm and 3pm remaining the busiest period. Visitor activity was strongest throughout the afternoon and early evening, particularly between Wednesday and Saturday, demonstrating the area's continued strength as a destination for culture, hospitality and leisure.

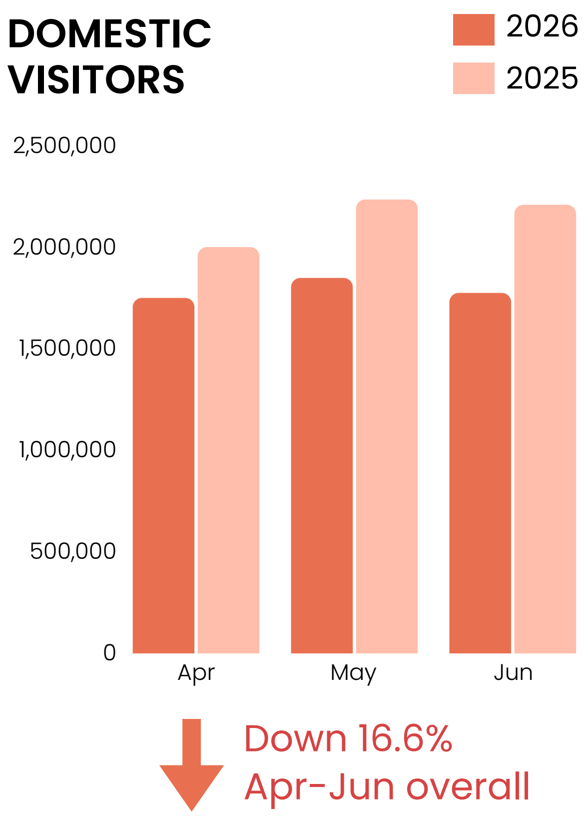
One of the quarter's most encouraging trends was visitor dwell time. Across every month, visitors spent longer in South Bank than during the same period in 2025, with dwell time increasing by 7.7% in April, 13.7% in May and 8.0% in June.

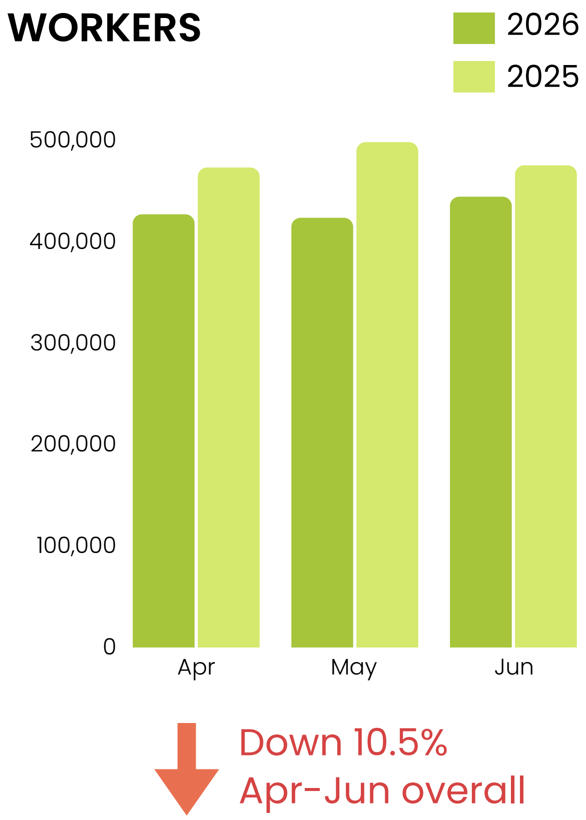
This suggests that while fewer people chose to visit, those who did continued to engage strongly with the destination, spending more time exploring its cultural attractions, hospitality venues and public spaces. Longer dwell times typically support higher-value visits and increased opportunities for spending across local businesses.

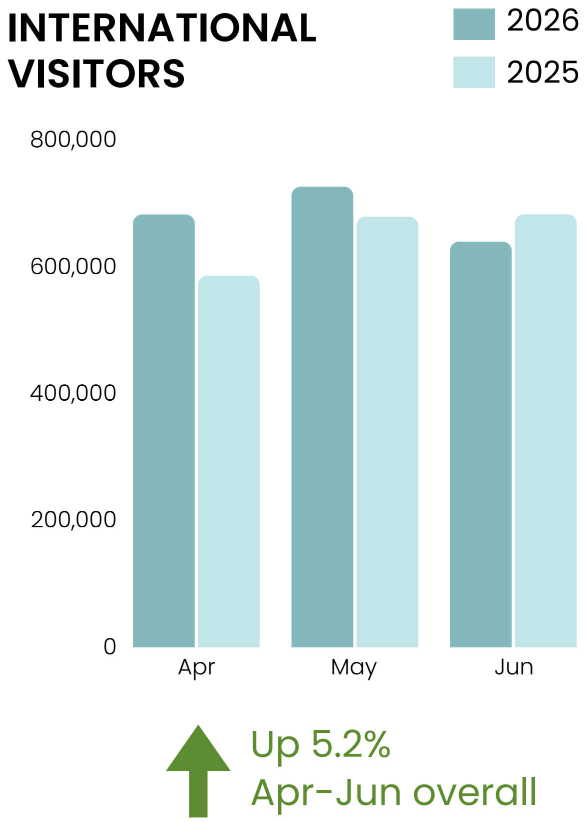
The audience trends observed this quarter are likely to have been influenced by a combination of wider external factors. A mix of very wet, and then particularly hot weather may have had an impact, alongside continued cost-of-living pressures, and geopolitical instability affecting international travel.

MONTHLY FOOTFALL BY AUDIENCE



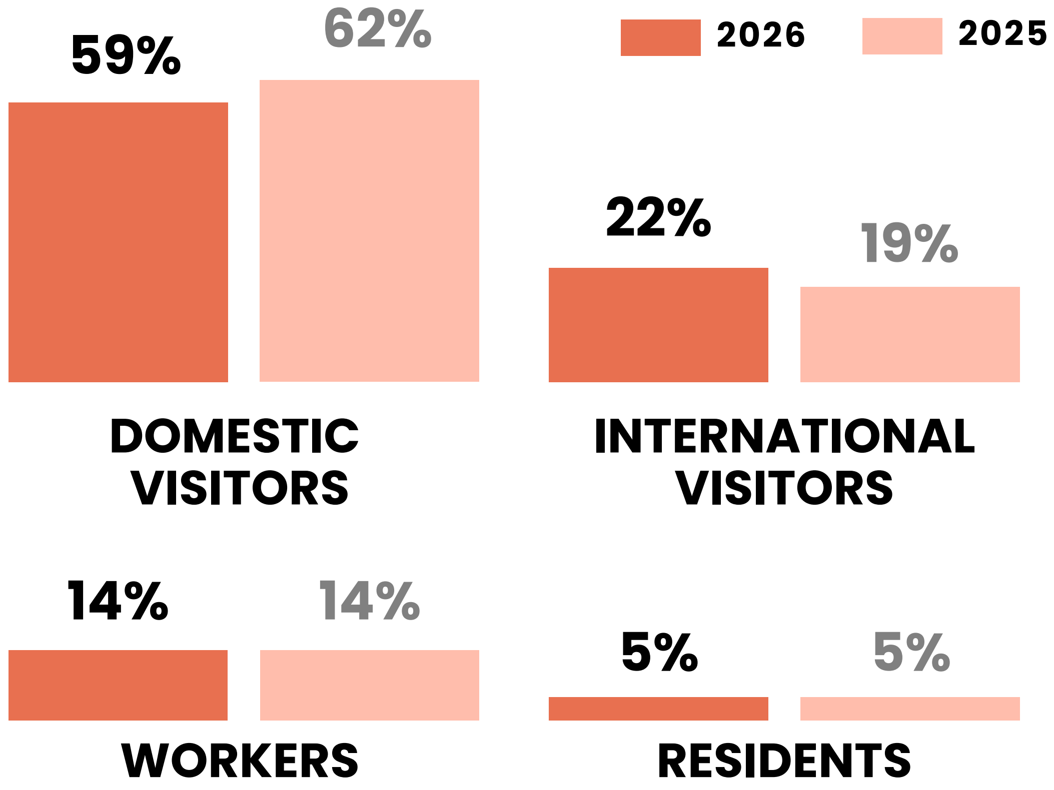






FOOTFALL

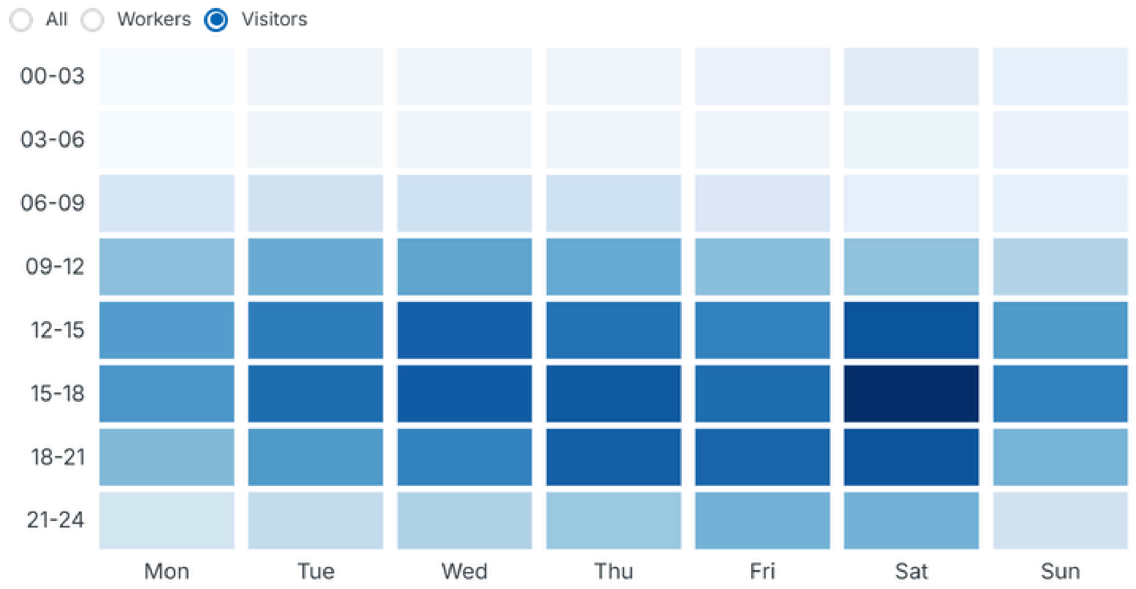
AUDIENCE MAKE-UP



PEAK TIMES

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

AVERAGE FOOTFALL TIME/DAY



DAY / NIGHT TIME PROPORTIONS

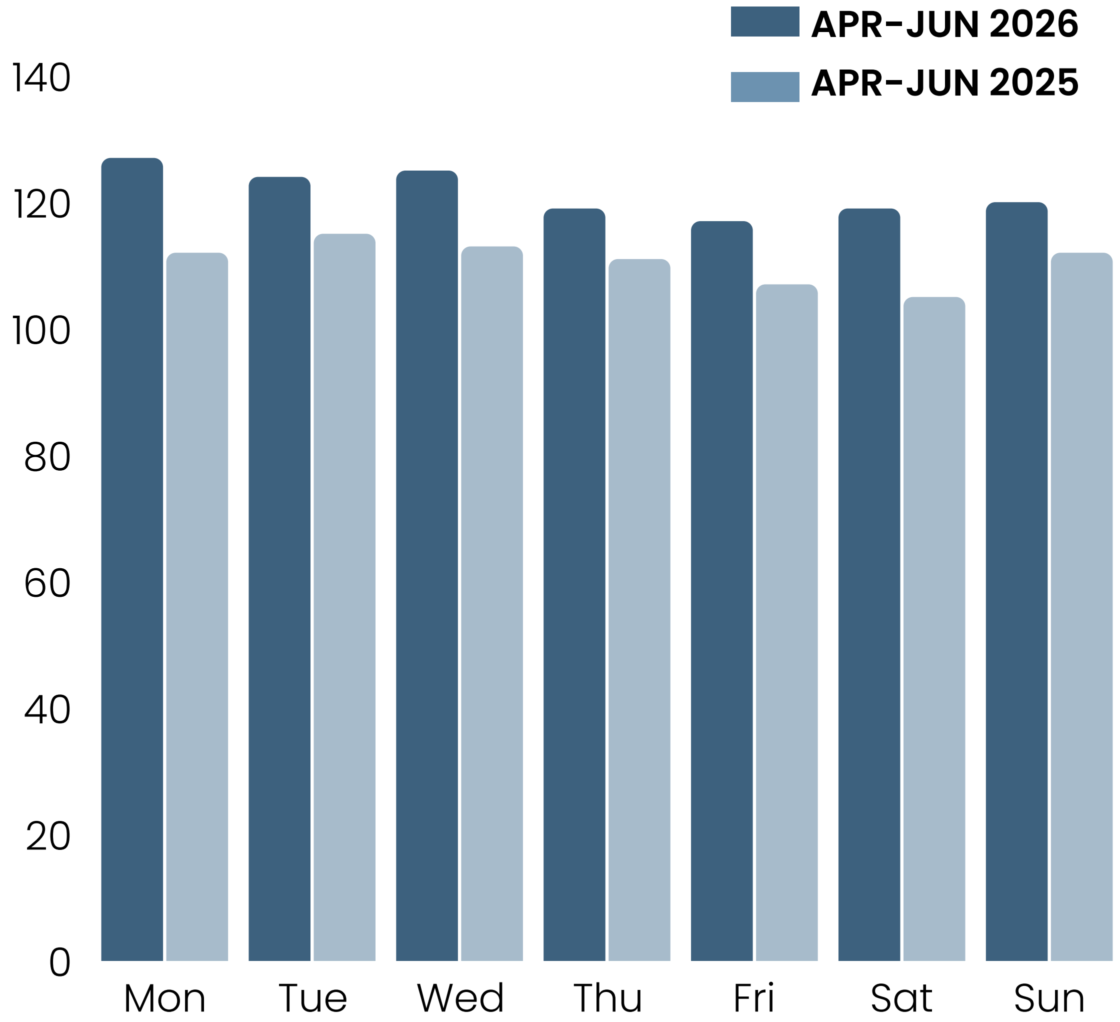
FOOTFALL

DAYTIME	NIGHT-TIME
64%	36%

SPEND

DAYTIME	NIGHT-TIME
65%	35%

AVG. DWELL TIME (ALL AUDIENCES)



AVERAGE DWELL TIME VS 2025

APR	121 mins	↑ 7.7%
MAY	125 mins	↑ 13.7%
JUN	119 mins	↑ 8.0%

DOMESTIC SPEND

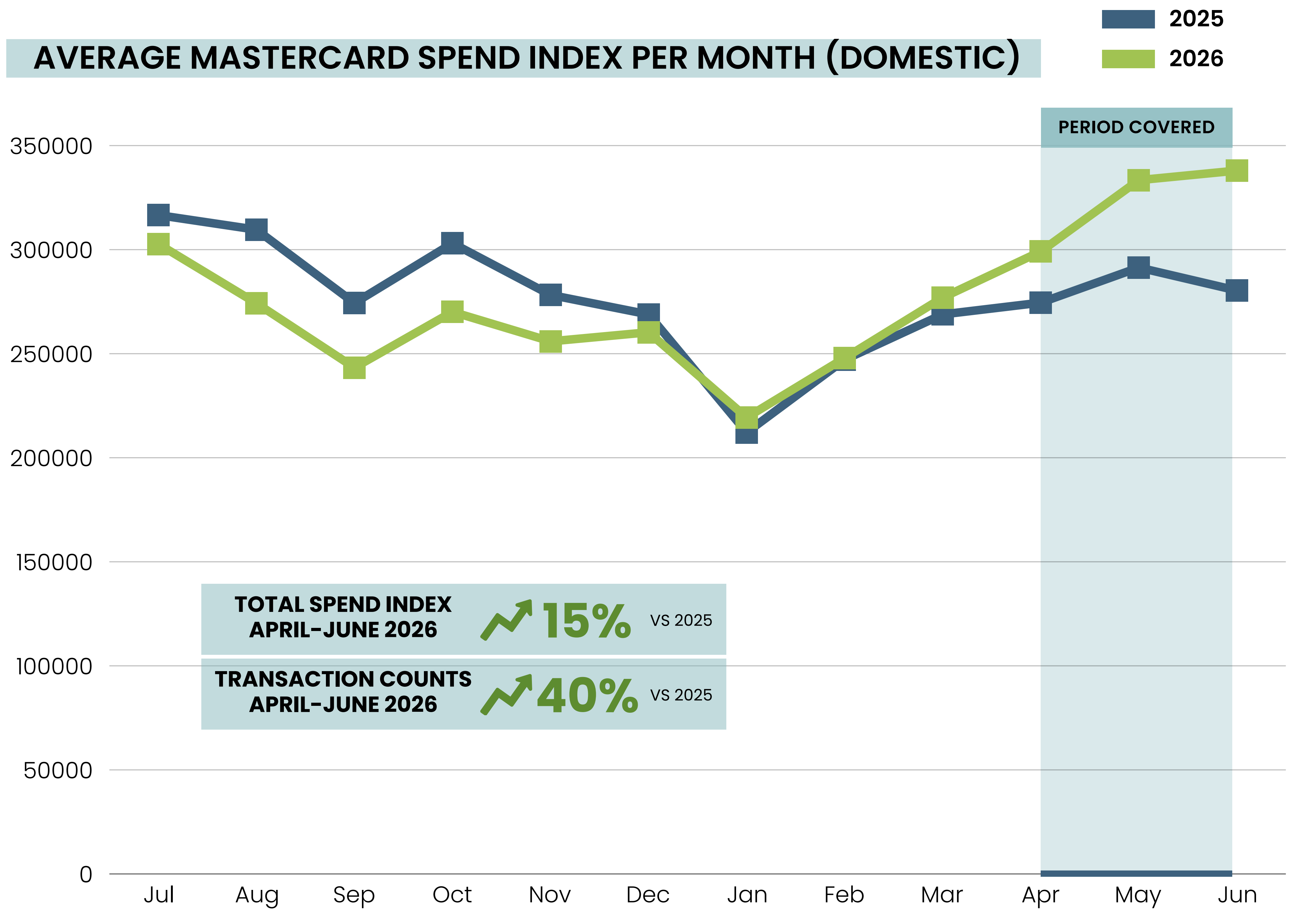
Despite lower domestic footfall during the quarter, consumer spending showed encouraging resilience.

The Domestic Mastercard Spend Index increased by 15% compared with Q2 2025, while transaction volumes rose by 40%, suggesting that visitors who came to South Bank continued to spend across the destination.

This aligns with the increase in average dwell time seen throughout the quarter, indicating that visitors were spending longer in the area and engaging with a broader range of hospitality, retail and cultural businesses.

Saturdays recorded the highest levels of domestic spend, reflecting the continued importance of weekend leisure visits to South Bank's economy.

The data suggests that while attracting visitors remained challenging, those who did choose to visit continued to generate strong economic value for local businesses.



*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

The southbank.london website attracted 151,865 visits during the quarter, a modest 2% decrease compared with 2025. This slight reduction is not considered a concern, reflecting broader shifts in consumer behaviour.

During the quarter, the website generated 4,710 onward clicks to venue websites, booking platforms and social media profiles, reinforcing its role in driving customers directly to South Bank businesses.

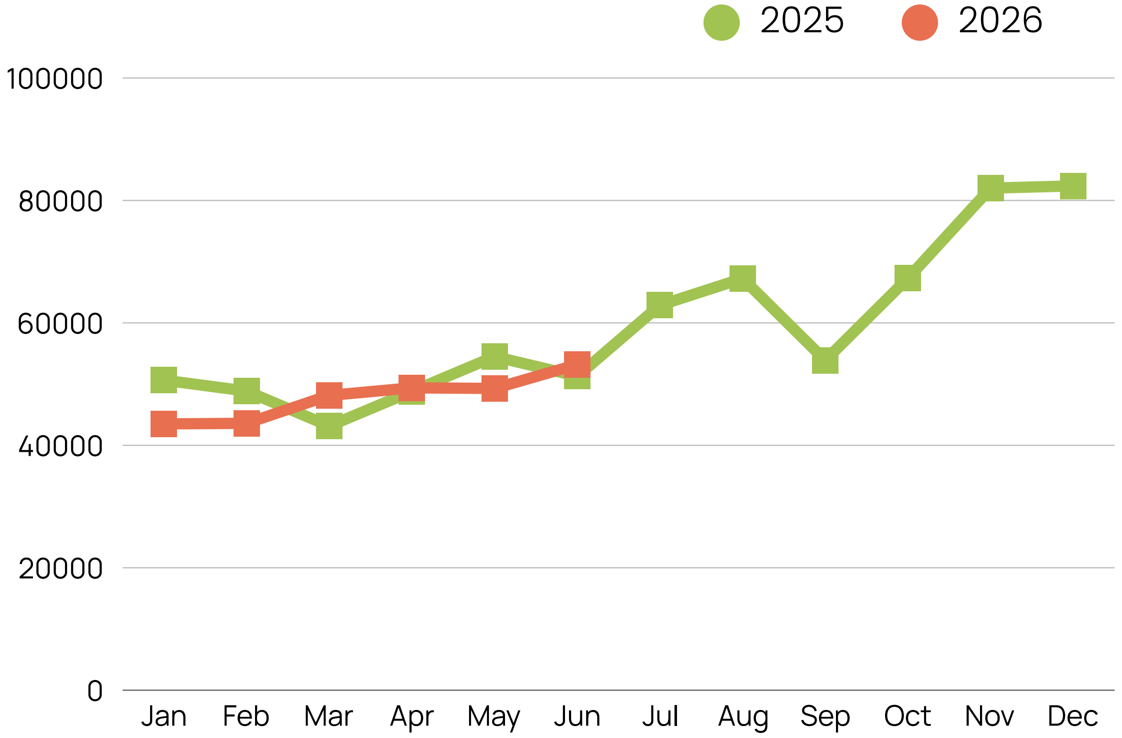
It continues to perform strongly as a destination discovery platform, with organic search remaining the primary driver of traffic. Visitors are increasingly finding South Bank London through event listings, editorial guides and venue pages rather than entering via the homepage, demonstrating strong SEO performance and broad visibility across search engines.

A particularly encouraging development is the emergence of AI platforms as a source of traffic. ChatGPT is now one of the website's largest external referrers, with additional visits arriving from other AI platforms such as Claude and Gemini. Together, these account for over 5,000 sessions during the quarter, suggesting the website's high-quality editorial content is increasingly being surfaced within AI-powered search tools. As consumer behaviour evolves, this places the website in a strong position to benefit from the continued growth of AI-assisted discovery.

TOP CONTENT

1	What's On listings page	6.8%
2	What’s On: Harry Styles’ Meltdown	6.3%
3	Eat & Drink listings page	4.9%
4	See & Do listings page	2.7%
5	What’s On: The Odyssey	2.7%
6	Guide: Family Day Out Top 10	2.3%
7	Guide: Where to watch sport (world cup)	2.3%
8	What’s On: Chiharu Shiota at Hayward Gallery	2.2%
9	Guide: Half Term & School Holiday Fun	1.8%
10	What’s On: Anish Kapoor at Hayward Gallery	1.6%
11	Guide: Easter Holiday Family Fun	1.3%
12	Guide: Top Free Things to do in South Bank	1.2%
13	Guide: Best Brunch Spots	1.0%
14	Guide: Top things to do this Easter Weekend	1.0%
15	Between the Bridges	0.9%

SITE VISITS

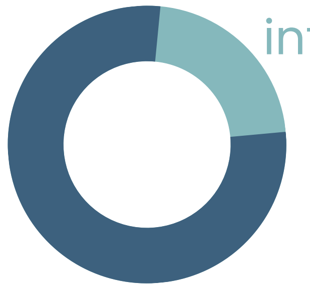


151,865 down 2% on last year

total website visits Apr-Jun 2026

4,710

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



22% international audience

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