SOUTH BANK BID QUARTERLY REPORT

APRIL - JUNE 2025

South Bank BID

APRIL TO JUNE 2025

Over these three months, South Bank has seen the welcome return of international visitors, and our footfall numbers reflect this. The consistent warm weather has helped, particularly over the May Bank Holidays.

However, on the ground spend continues to be impacted by wider economic challenges - consumer spending is down, as visitors consider their spending decisions. Hospitality has performed slightly better than overall on the ground spend, indicating that consumers are willing to prioritise spending on this sector.

KEY TAKEAWAYS

Footfall continues to surpass 2024, with a rise in passenger numbers to Waterloo Station.

2025's May Bank Holidays saw around a **15%** uplift in footfall, due to the better weather.

April to June saw a footfall uplift of around **25%** on January to March, but only around a **10%** corresponding uplift in spend on Q1.

Hospitality transaction counts are up in this quarter, compared to the same period in 2024, outperforming general spend.

FOOTFALL

+ 3%

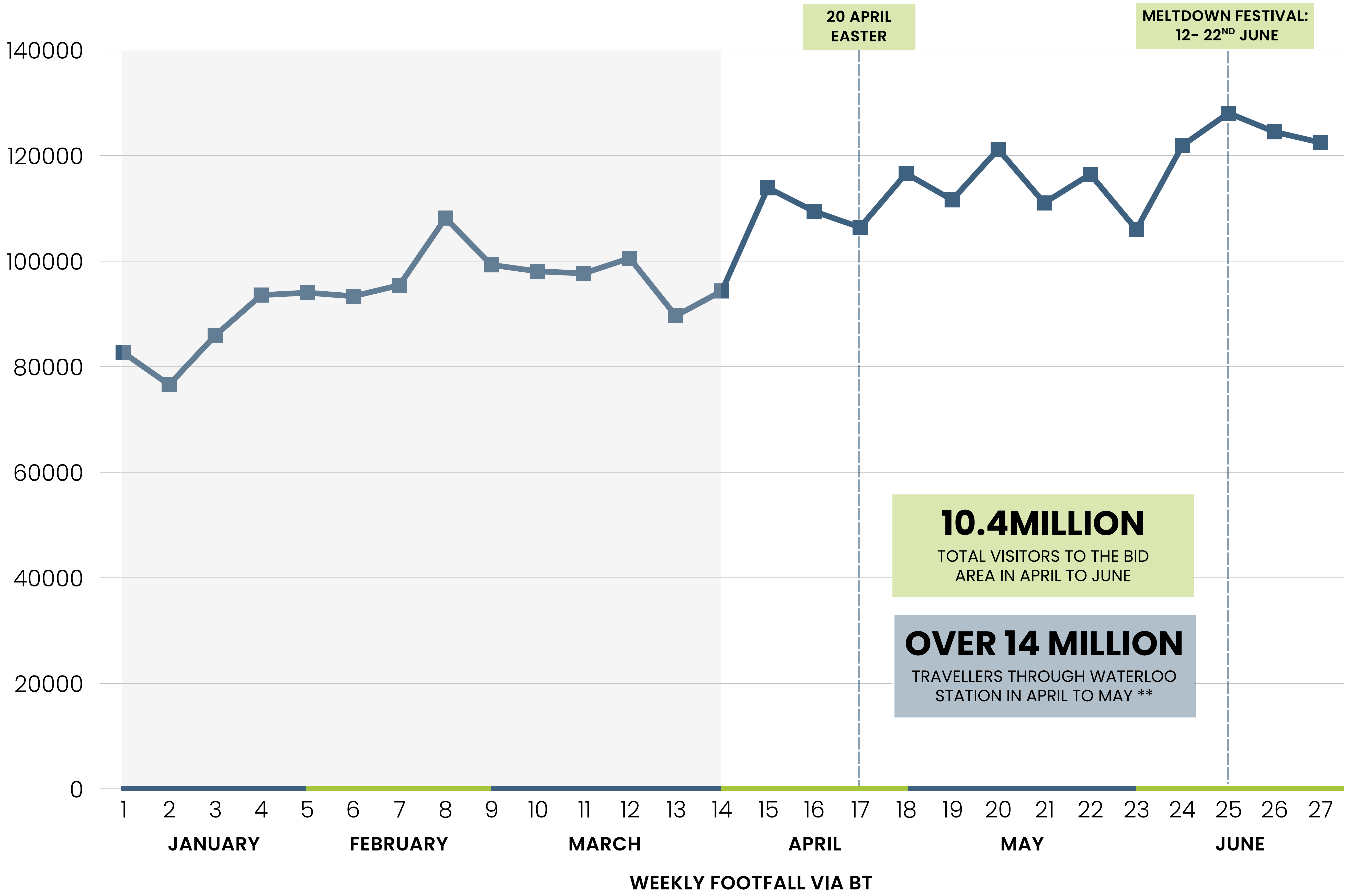
GROWTH IN TUBE JOURNEYS THROUGH WATERLOO STATION (TFL)

So far, 2025 has followed the seasonal patterns that we saw in 2024: a relatively slow Easter, strong public holidays, and the welcome influx of seasonal tourists in May and June.

Both TFL and Network Rail data show an uplift on 2024's footfall figures, and whilst due to technical issues it's challenging to do a direct comparison of BT's data*, we are confident in reporting that overall footfall has increased in 2025.

According to the BT's footfall data, London's **Central Activities Zone** saw a **5%** uplift in footfall, and all available data indicates that South Bank has outpaced this. The uplift is partly due to the better weather this year, with clear peaks on time periods such as the May Bank Holidays. Alongside the weather, key footfall drivers have included Southbank Centre's **Meltdown Festival**, **Ascot** (for travellers through Waterloo Station), and the range of Summer pop-ups and programming, including Yoshitomo Nara at the **Hayward Gallery**.

WEEKLY FOOTFALL NUMBERS



*explained further in the appendix

**DATA VIA NETWORK RAIL

FOOTFALL

AVG. FOOTFALL DURING THE WEEK

THURSDAY 3PM TO 6PM

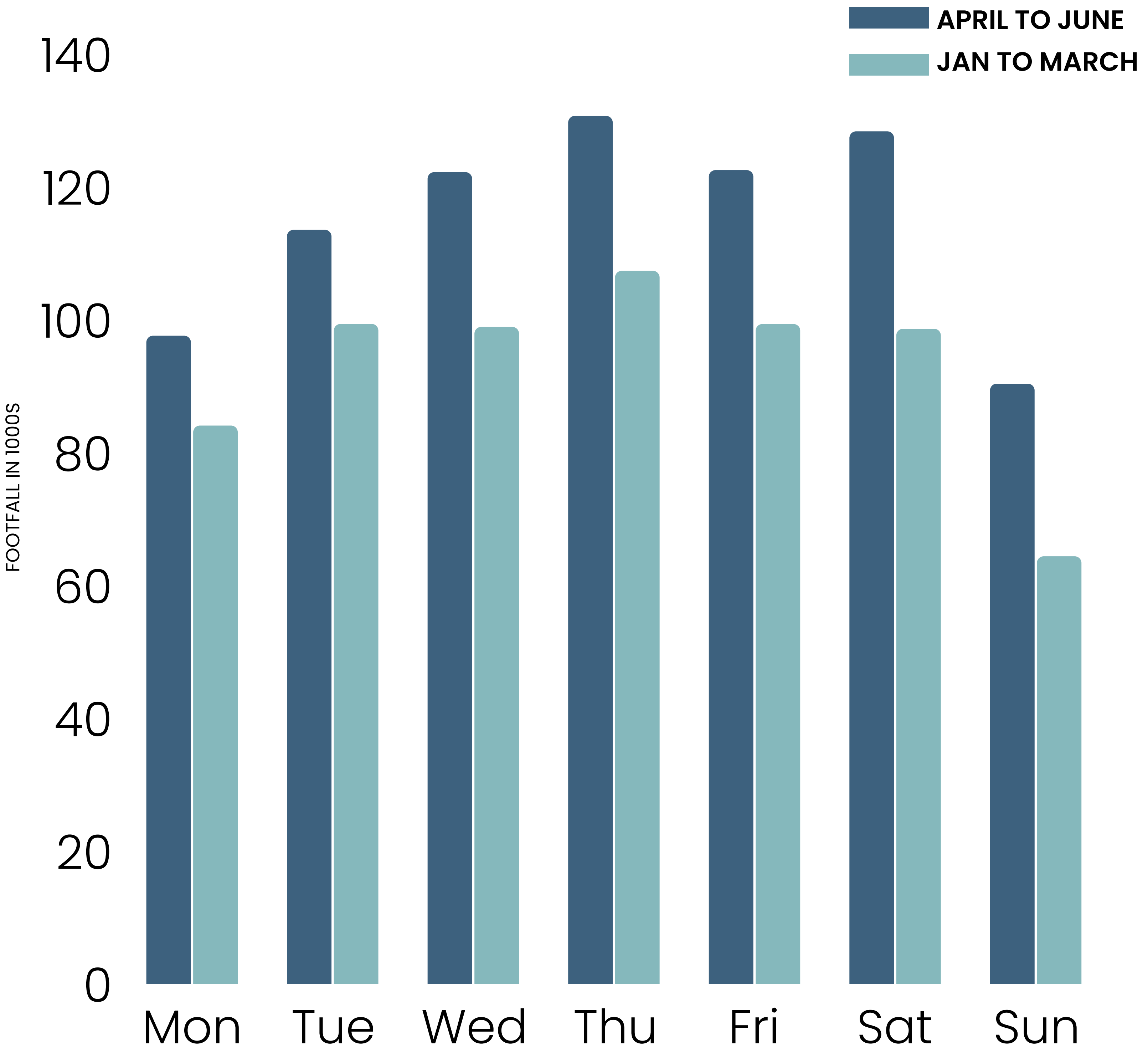
PERIOD WITH HIGHEST LEVELS OF FOOTFALL

Issues with BT's 2024 data may show an artificially high uplift in 2025 when compared to 2024 but there is clear evidence of footfall uplifts to the BID area across all days in the week.

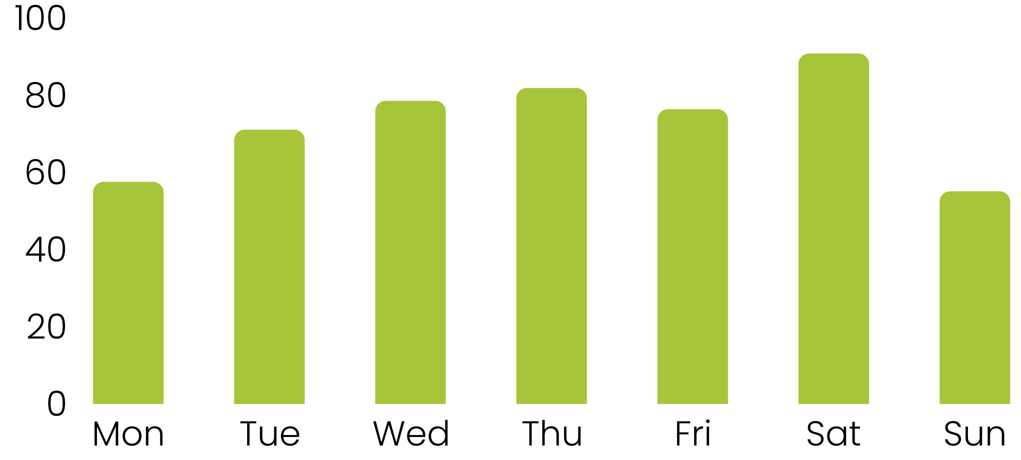
In comparison to the January to March quarter, we see footfall uplifts that have been driven by visitors over the weekend, Saturdays in particular. However, weekend visitors don't appear to spend longer here than those here on weekdays.

Thursdays and Saturday continue to be peak days, due to the combined audiences of workers and visitors. Thursday remains the highest day for tube travel to Waterloo.

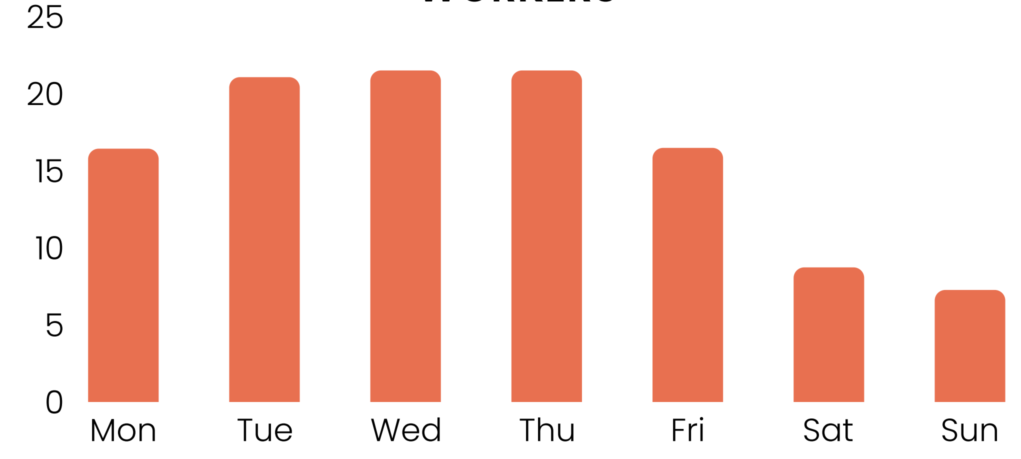
ALL AUDIENCES



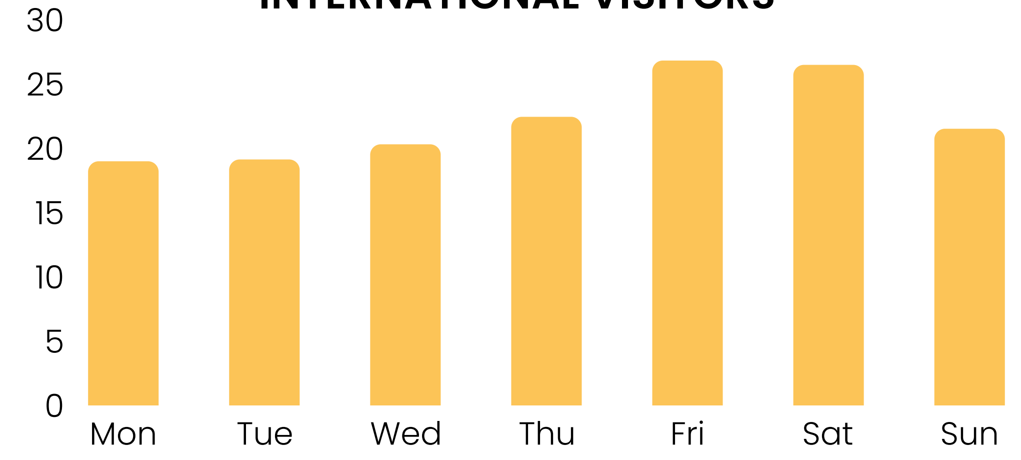
DOMESTIC VISITORS



WORKERS



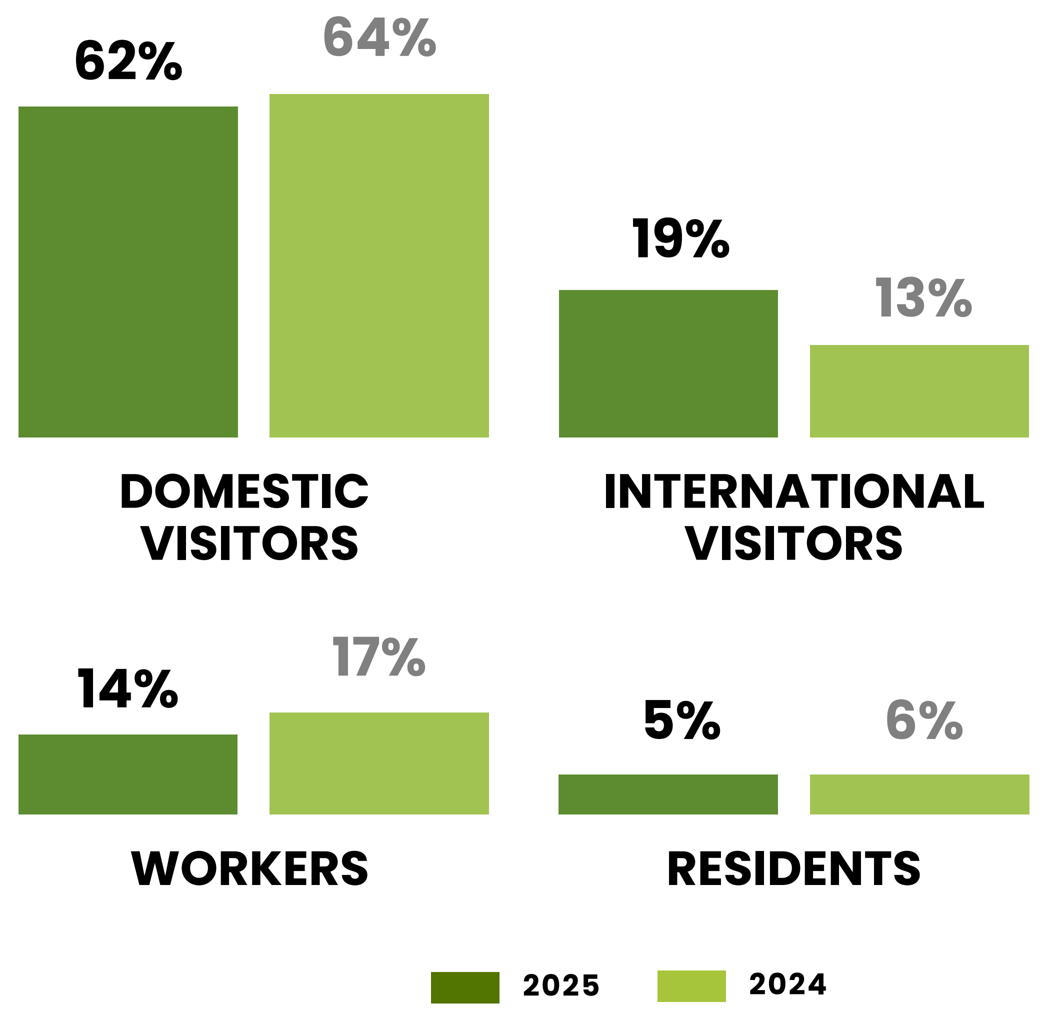
INTERNATIONAL VISITORS



AVERAGE DAILY FOOTFALL

FOOTFALL

AUDIENCE MAKE-UP

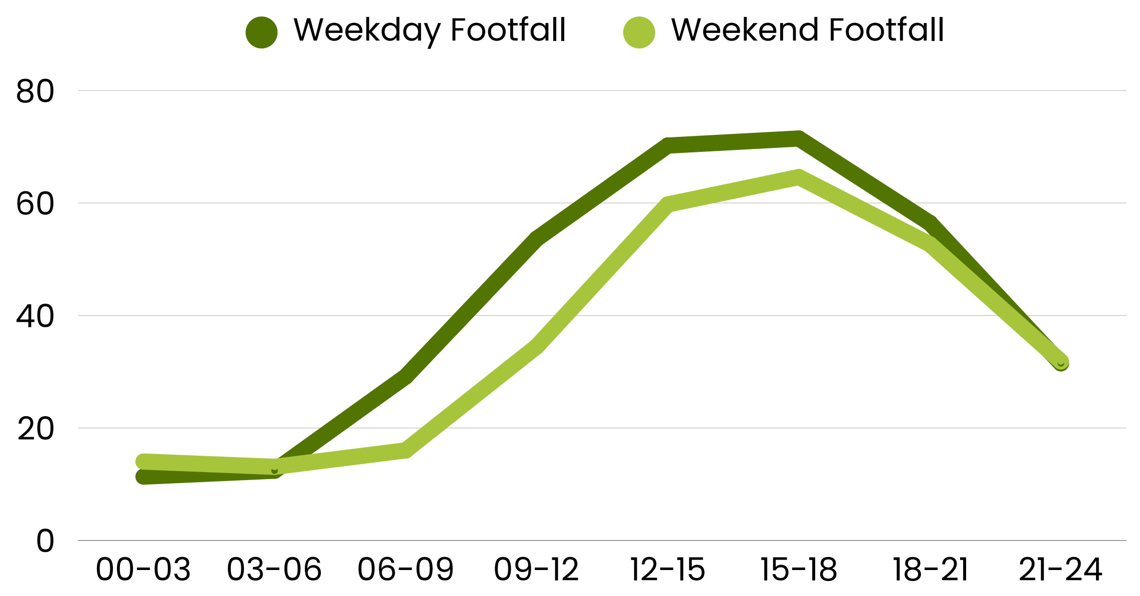


We can see a strong upswing in the overall percentage of international visitors during this period: they became the second highest audience group, overtaking workers. However, mirroring the lack of direct relationship between footfall and spend, international spend levels have remained the same as last year, even dropping below 2024 levels during certain time periods, such as May.

AVG. DWELL TIME

AM	PM
89 mins	112 mins

FOOTFALL ACROSS 24 HRS



Footfall across the day has remained similar to last year - however dwell time in comparison to earlier in the year has dropped slightly. This has been by about **10 average minutes** in both the daytime and evening.

AM VS PM FOOTFALL

ALL AUDIENCES

	DAYTIME	NIGHT-TIME
ALL AUDIENCES	64%	36%
DOMESTIC VISITORS	62%	38%
INTERNATIONAL VISITORS	66%	34%
WORKERS	68%	32%

EVENING SPEND

62%	38%

As the weather gets better, we see evening activity increase: this is a pattern that repeats annually, requiring a corresponding increase in BID funded services focused on the evening periods, including the Night-time economy marshals. The % of spend remains on par with the level of visitors, with 6 to 9pm on Saturday having the highest number of transactions.

DOMESTIC SPEND INDEX

SATURDAY 6 TO 9 PM

PERIOD WITH HIGHEST LEVELS OF ON THE GROUND SPEND

-4% IN WEEKDAY SPEND AMOUNT

-7% IN WEEKEND SPEND AMOUNTS

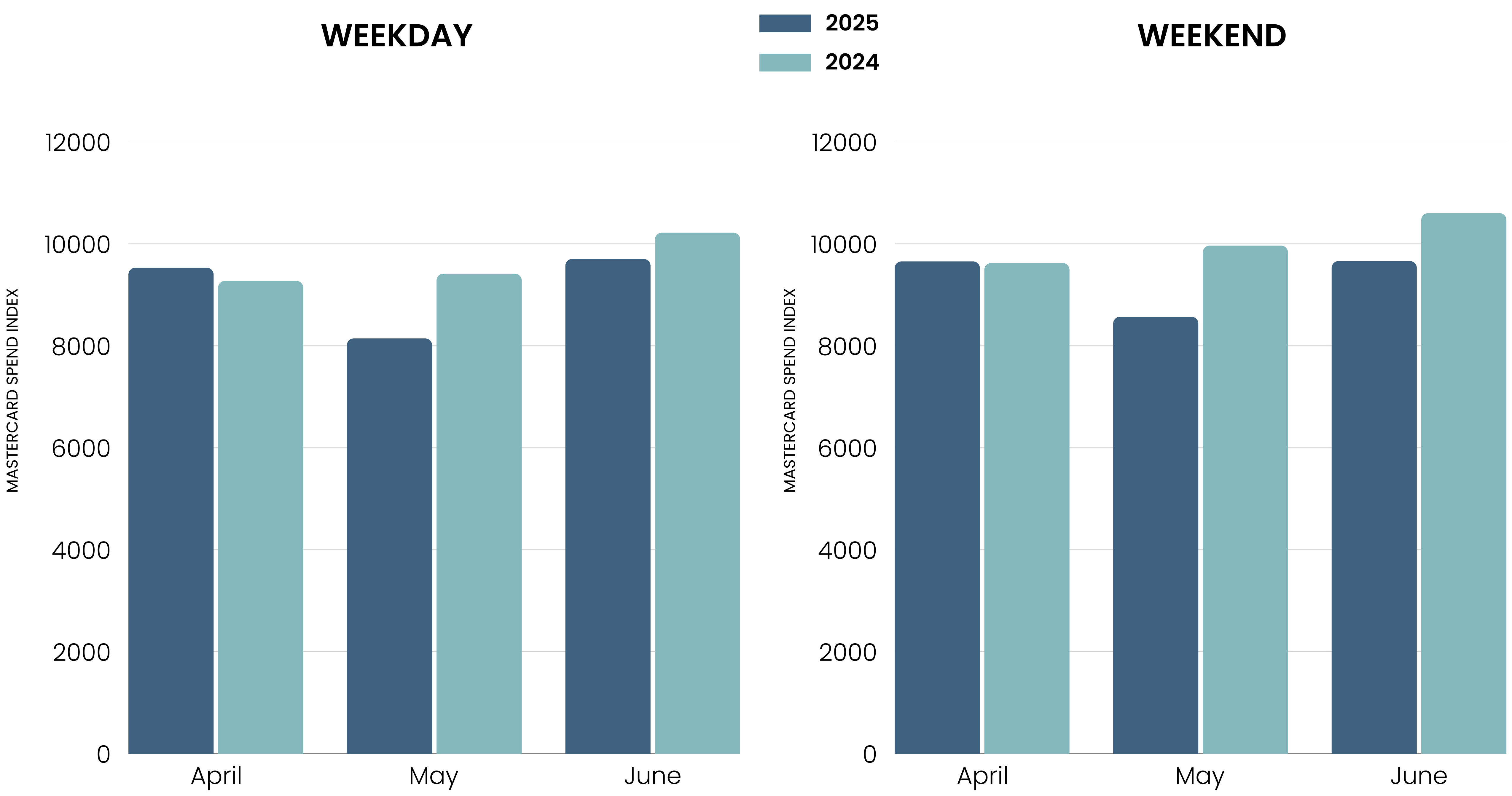
+1% IN WEEKDAY TRANSACTION COUNTS

-3% IN WEEKDAY TRANSACTION COUNTS

April was a strong month for spend, however both May and June suffered a dip on 2025. This difference is more pronounced on the weekend, and with leisure visitors. Hospitality purchases have remained steady, and at times have been higher than last year, accounting for inflation.

Transaction counts on weekdays rose on 2024, indicating that the weekday visitors, including workers, have maintained their routine spend. However, there has been a drop on the weekend, highlighting how leisure visitors are considering their transactions.

AVERAGE MONTHLY SPEND INDEX



*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*

PEAKS – APRIL TO JUNE

DAYS WITH HIGHEST FOOTFALL

- THURSDAY 19TH JUNE
- SATURDAY 17TH MAY
- SATURDAY 3RD MAY
- SATURDAY 21ST JUNE

June and May saw clear clusters of days with higher footfall: in June, this coincided with Meltdown Festival and the opening weeks of the Nara exhibition, whereas in May this covered the first Bank Holiday. The 19th of June was also the day with the highest level of tube travel to Waterloo.

DAYS WITH HIGHEST AVG. SPEND *

- SATURDAY 26TH APRIL
- SATURDAY 3RD MAY
- THURSDAY 1ST MAY
- SATURDAY 28TH JUNE

Many of these days of higher spend coincided with the Bank Holidays, reflecting the importance of the family audience to spend within the South Bank BID area. However, it also shows how higher footfall in June (see table on left) did not necessarily lead to higher amounts of spend.

HIGHEST TRANSACTION COUNTS *

- THURSDAY 1ST MAY
- THURSDAY 19TH JUNE
- SATURDAY 3RD MAY
- FRIDAY 2ND MAY

Transaction counts reflect both the spend amounts and footfall - the run up to the early May Bank Holiday saw the highest average transaction counts across the quarter.

reflects on the ground spend and does not account for pre-booked or online spend.

WHAT'S DRIVING FOOTFALL?

2024 KEY FOOTFALL DRIVERS

SPORT EVENTS LIFT VISITOR NUMBERS

In the summer of 2024 we could see through our digital channels, alongside reports back from local businesses, that a large amount of audience interest was generated through key sporting events taking place.

While there have been large sporting events in 2025, that same peak and audience interest hasn't been matched. Ascot saw a similar number of travellers through Waterloo Station as last year, with only a small uplift in hospitality spend on those days.

2025 BY CONTRAST

AUDIENCES STILL MOTIVATED BY THE FREE

In a pattern mirroring 2024, the start of the summer season saw an uplift in footfall. However, this doesn't correlate to spend: April to June 2025 saw 25% higher footfall than January to March, but only a 10% uplift in spend.

While audience budgets remain a challenge across London, this difference seems particularly acute in South Bank, which has multiple free options available to visitors. Interest in free events remains high across our digital channels, with open access areas such as the Leake Street Graffiti Tunnels maintaining a strong level of visitor numbers.


2024 EURO FANZONE


LEAKE STREET TUNNEL


FREE ACTIVITIES FOR VISITORS

WHAT'S COMING UP
LATE SUMMER/AUTUMN 2025

Visitor survey on how audiences feel about South Bank underway

CLICK FOR MORE INFO

Waterloo Station Masterplan gains traction through new partnership

CLICK FOR MORE INFO

Gilbert & George open at the Hayward Gallery

CLICK FOR MORE INFO

Spine Route phase 2 work due to be completed.

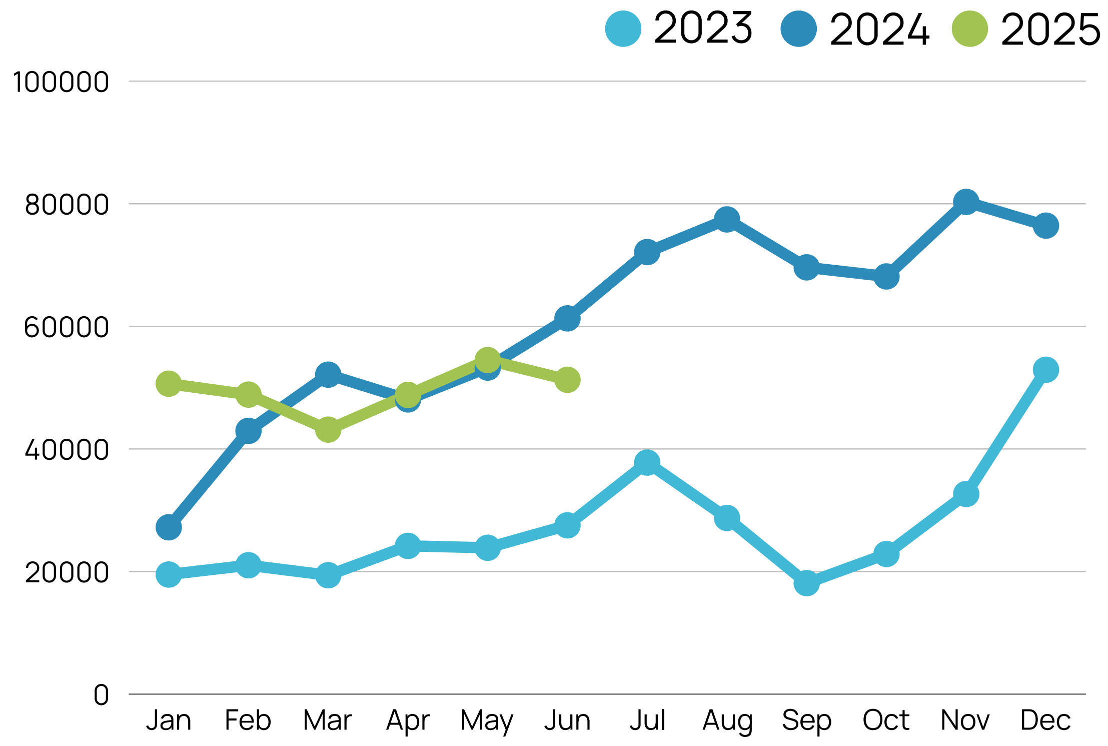
CLICK FOR MORE INFO

SOUTH BANK LONDON WEBSITE ANALYTICS

SITE VISITS

Website traffic for the April–June quarter remained largely consistent with the same period last year, suggesting ongoing interest in South Bank through our digital platforms. While there was a slight dip in visits during June, the overall trend points to steady engagement.

Onward clicks from our site to other businesses remained very strong however, generating over 5,000 leads for the second quarter in a row.



TOP CONTENT

1	What's On listings page	10.4%
2	Eat & Drink listings page	9.0%
3	See & Do listings page	3.3%
4	Guide: Family Day Out Top 10	2.7%
5	What's On: Hayward Gallery-Yoshitomo Nara	2.3%
6	Guide: Easter Holiday Family Fun	2.0%
7	What's On: Little Simz' Meltdown	1.7%
8	Guide: Top Free Things to do in South Bank	1.7%
9	Guide: What's On this Half Term	1.3%
10	What's On: Moomins at 80	1.3%
11	Guide: South Bank Summer Pop Ups	1.2%
12	Southbank Centre	1.1%
13	Jubilee Gardens	1.0%
14	Summer	1.0%
15	Leake Street	1.0%

Our Guide pages remain a key driver of engagement, with a third of the top 15 most-visited pages in this category. They highlight a wide range of things to do, often featuring hidden gems and lesser-known venues alongside well-known attractions.

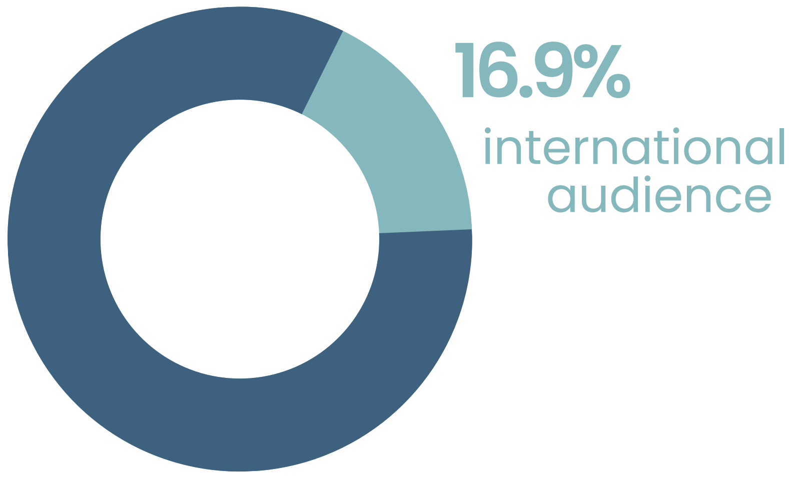
Their continued popularity reinforces our position as a trusted and inspiring resource for visitors. Crucially, they also provide valuable exposure for businesses featured on the site, helping them connect with audiences actively looking for places to visit, eat, and explore in the area.

APR - JUN 2025 PERFORMANCE

150,729 total website visits Apr-Jun 2025

5,363

Onward clicks generated to venues' 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.

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.

AUDIENCE RESEARCH

South Bank BID works with **Indigo** to deliver qualitative audience research which explores evolving audience perceptions of South Bank, most recently a survey around the 2024/25 festive period. This survey included questions on: Dwell time and visitor behaviour, Perceptions and ratings of the festive 'offer', and Perceptions of overall look and atmosphere. The surveys were distributed both face-to-face and online.

Indigo did not separate out visitors from residents and workers in this round of research, but respondents needed to have visited the area 'for leisure' during the 2024/25 festive period.

SOUTH BANK BID AREA