



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

JULY – SEPTEMBER
2025



SUMMARY

This quarter paints a picture of steady and resilient footfall for South Bank. Visitor numbers between July and September 2025 remained broadly in line with the same period last year – up by around 2% overall – but eased slightly from the previous quarter, which benefitted from exceptionally high spring temperatures and early summer events that boosted activity.

Despite this quarter’s modest dip of 5.5% in total footfall compared with April–June, South Bank continues to outperform many parts of London’s Central Activities Zone (CAZ), reflecting its enduring strength as an outdoor, riverside destination. The area’s ability to attract both international visitors – now at 20% of total footfall – and domestic audiences seeking affordable days out, continues to underpin its appeal.

On-the-ground spend data, however, reveals a more cautious consumer landscape. Transaction volumes and values have softened slightly against last quarter across both weekdays and weekends, aligning with wider economic trends that are seeing households tighten discretionary spending.

It’s important to note that these figures capture only physical, in-person purchases, excluding online ticket sales or advance bookings, which remain a significant component of South Bank’s cultural and leisure economy.

To help provide deeper context into these behavioural shifts, this quarter’s report also draws on additional research from Baker Richards, commissioned by the Association of Leading Visitor Attractions (ALVA) earlier this summer. The study explores the attitudes and needs of family visitors – the findings of which echo what we see locally: while families continue to prioritise shared experiences and cultural outings, they are making more prudent choices around secondary spend such as food and drink, often opting for lower-cost options like picnics or casual dining.

Together, these insights paint a nuanced picture: South Bank remains one of London’s most popular destinations, continuing to draw significant and diverse audiences, even as spending behaviours evolve.

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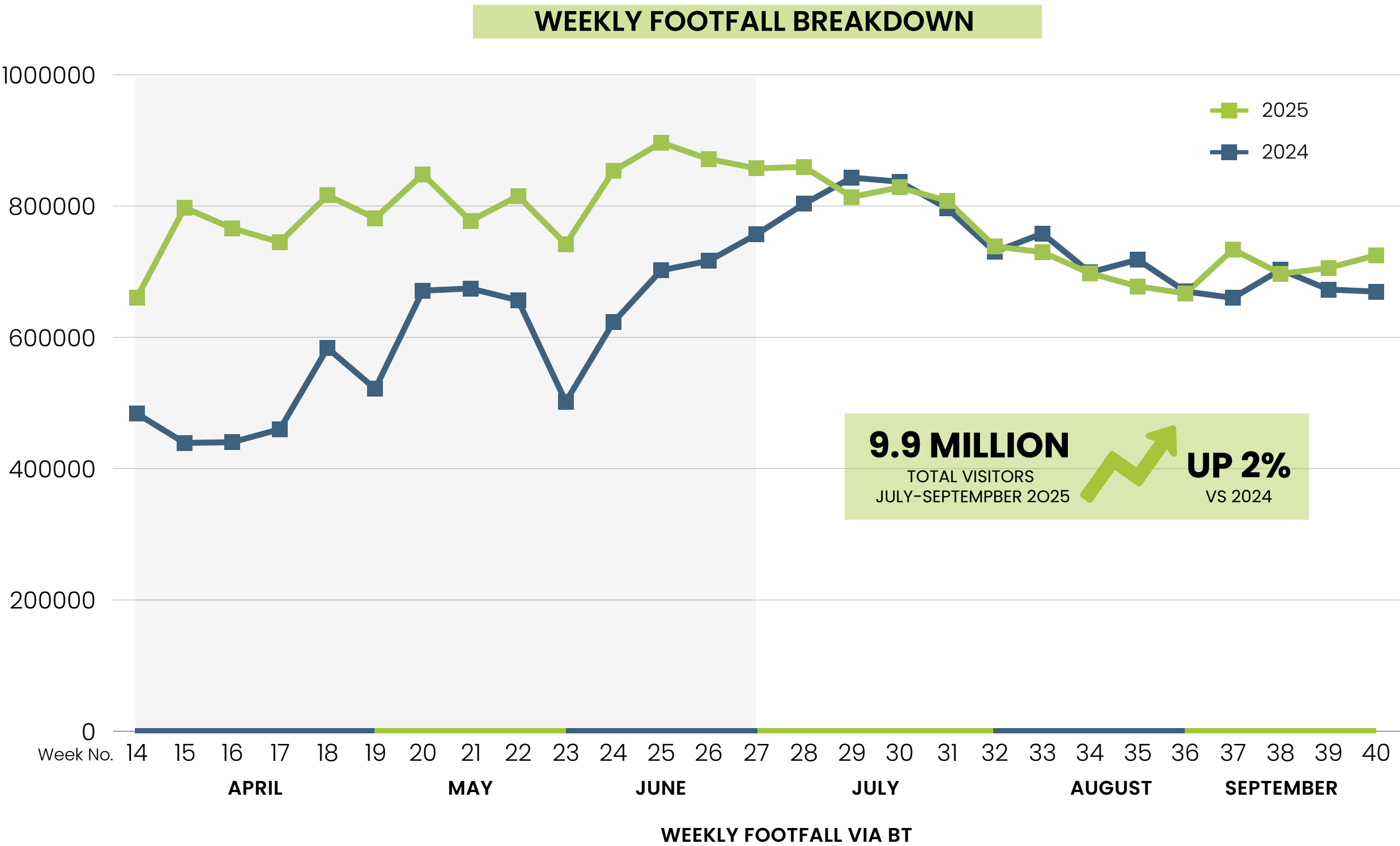
FOOTFALL

Weekly footfall between July and September 2025 remained consistent with the same period last year, showing only a marginal overall increase of 2%. The pattern across the quarter is steady, with week-to-week figures closely tracking 2024 levels.

However, total footfall is 5.5% lower than the previous quarter, which benefitted from particularly high visitor numbers during the high temperatures of May and June. The summer period has therefore shown a more typical pattern of activity, with consistent levels across the weeks and only modest variation, reflecting a stable quarter for visitor numbers across South Bank.

Notably, South Bank has largely bucked the trend when compared with other parts of London’s CAZ, many of which recorded a slight decline in footfall over the same period.

This underlines the area’s broad appeal as an outdoor destination, particularly for families, where the riverside setting and range of free or low-cost things to do continue to influence visitor decision-making – especially among domestic audiences seeking affordable days out.



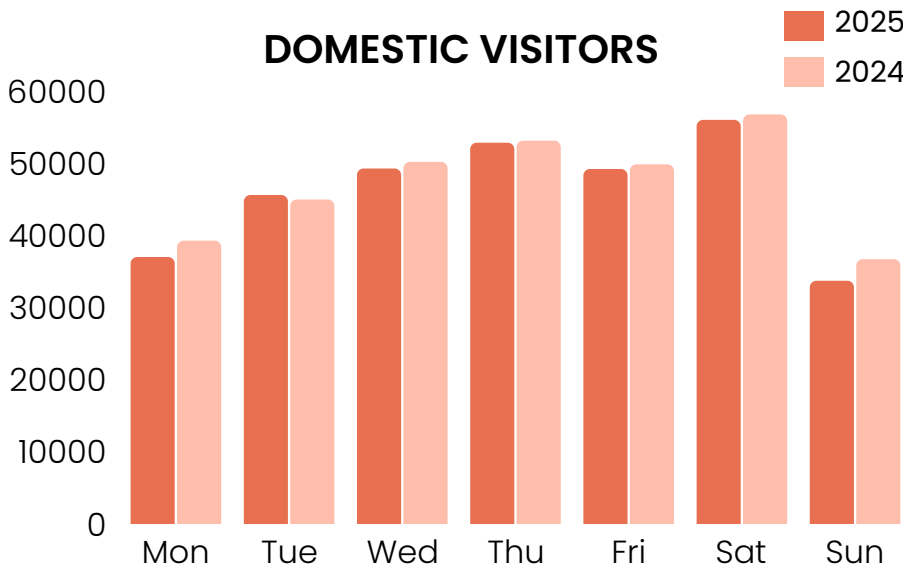
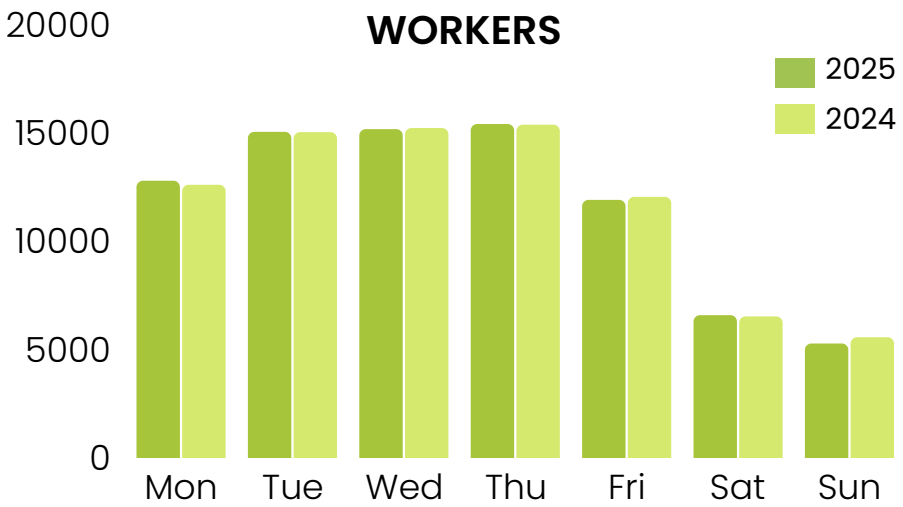
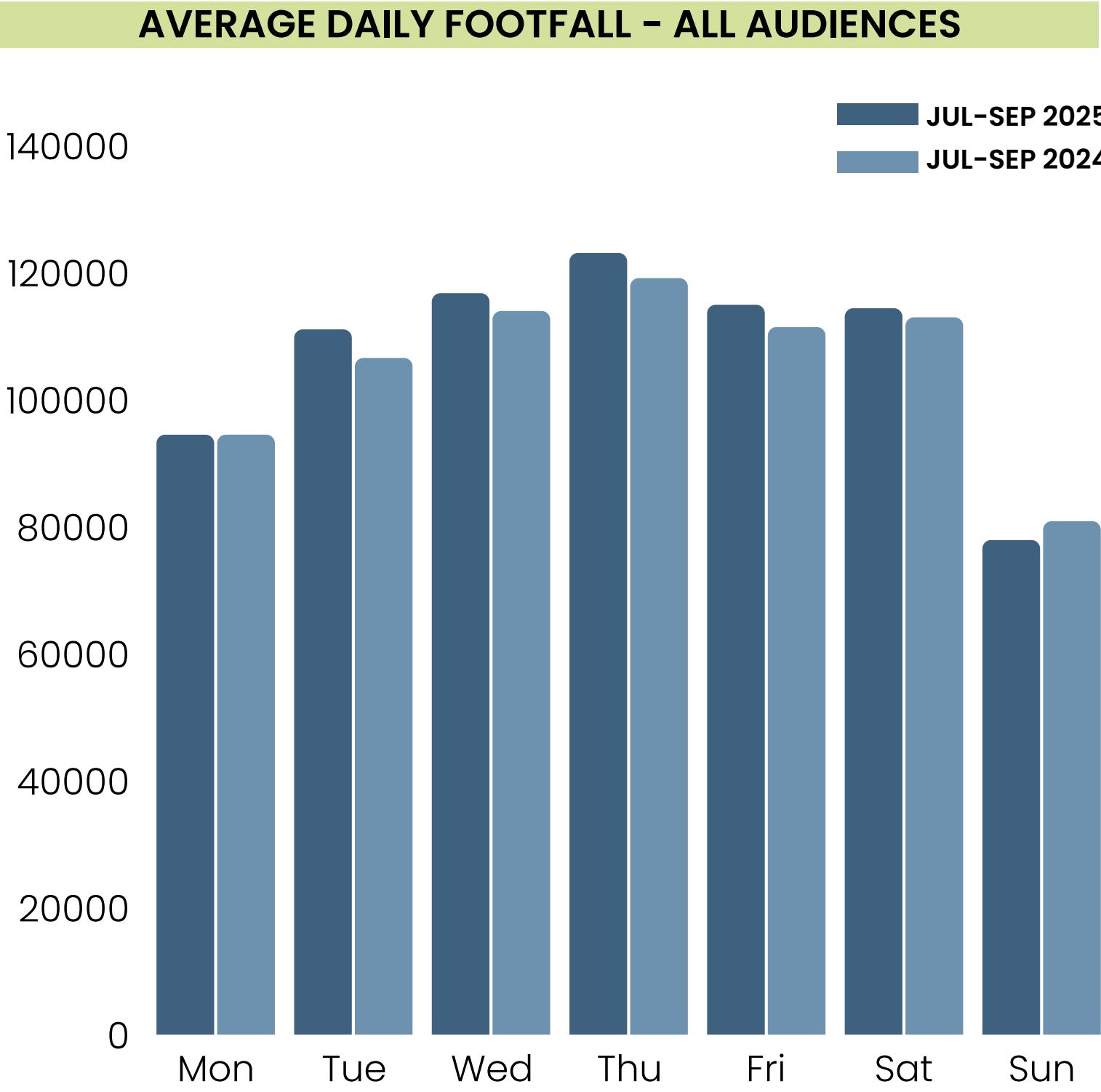
FOOTFALL

Daily footfall across South Bank between July and September 2025 has remained broadly in line with the same period in 2024, following a similar weekday-to-weekend pattern. Overall levels are steady, with only minor fluctuations across the week. Worker footfall has held consistent year-on-year, maintaining strong weekday activity along with a slight increase on Mondays.

Domestic visitor numbers have softened slightly, particularly from Friday through Sunday, contributing to a noticeable dip in Sunday footfall. This aligns with anecdotal feedback from businesses reporting quieter Sunday trading.

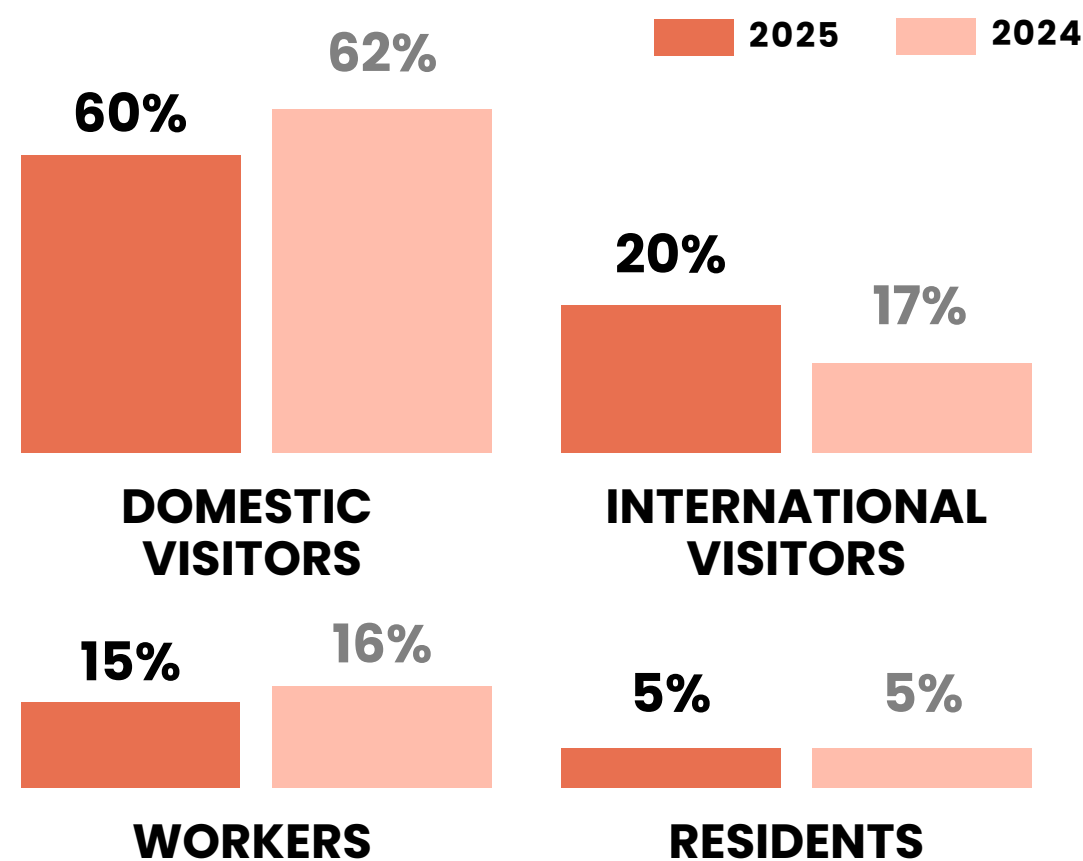
In contrast, international visitors have shown clear year-on-year growth, especially across the weekend, highlighting the continued recovery of overseas tourism and South Bank’s strong pull for international audiences.

Together, these trends suggest a stable overall picture, with international tourism offsetting slight declines in domestic activity, and reaffirm South Bank’s position as a balanced destination for both work and leisure.



FOOTFALL

AUDIENCE MAKE-UP



The overall audience mix this quarter shows small but notable shifts. Domestic visitors continue to make up the majority of South Bank’s footfall at 60%, though this is a slight decrease on last year’s 62%. International visitors have grown from 17% to 20%, continuing their steady recovery, while worker and resident proportions remain largely unchanged.

AVERAGE DWELL TIME

DAY TIME	NIGHT TIME
95 mins	119 mins

PEAK TIMES

HIGHEST AVG. DAILY FOOTFALL	PEAK TIME FOR FOOTFALL
Thursdays	Saturday 12–3pm

Average dwell times have increased marginally since the previous quarter – daytime visits rising from 89 to 95 minutes and evening visits from 112 to 119 minutes.

The busiest time of the week has shifted from Thursday afternoons 3–6pm to Saturdays between 12–3pm, reflecting stronger weekend activity over the summer holidays.

DAY / NIGHT TIME PROPORTIONS



The proportion of daytime to evening footfall remains consistent, though spend has shifted slightly towards the daytime, with evening spend now accounting for 36% of total daily spend compared with 38% last quarter. Coupled with the shift in peak activity to Saturday afternoons, this suggests that South Bank has attracted more daytime visitors over the summer months, particularly families and leisure audiences making the most of the area’s outdoor offer.

DOMESTIC SPEND INDEX – VS LAST QUARTER

Saturdays – 12–3pm
PEAK TIMES FOR SPEND

-2%
WEEKDAY TRANSACTION
AMOUNTS VS LAST QUARTER

-4%
WEEKEND TRANSACTION
AMOUNTS VS LAST QUARTER

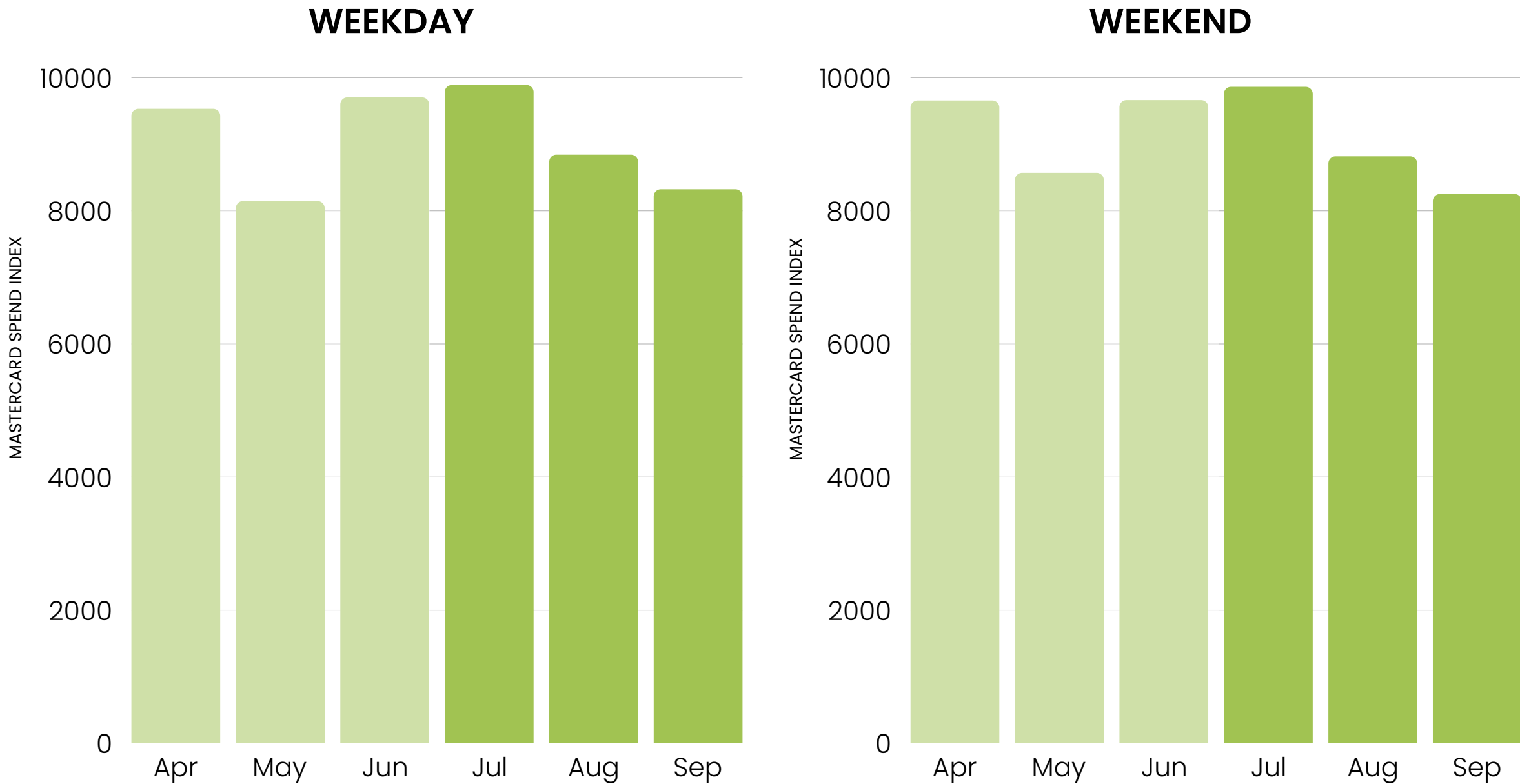
-6%
WEEKDAY TRANSACTION
COUNTS VS LAST QUARTER

-8%
WEEKEND TRANSACTION
COUNTS VS LAST QUARTER

Domestic spend levels between July and September have softened slightly compared with the previous quarter, reflecting the 5.5% dip in overall footfall. The average monthly spend index shows a gradual easing from the higher levels recorded in early summer, suggesting a more cautious consumer environment as wider economic pressures continue to influence discretionary spending.

The peak spend period has also shifted from Saturday evenings (6–9pm) to earlier in the day, now concentrated between 12–3pm. This reflects a pattern of daytime visits where visitors are engaging in lower-cost, family-oriented activities and spending more modestly across food, drink and leisure, consistent with broader economic trends.

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*

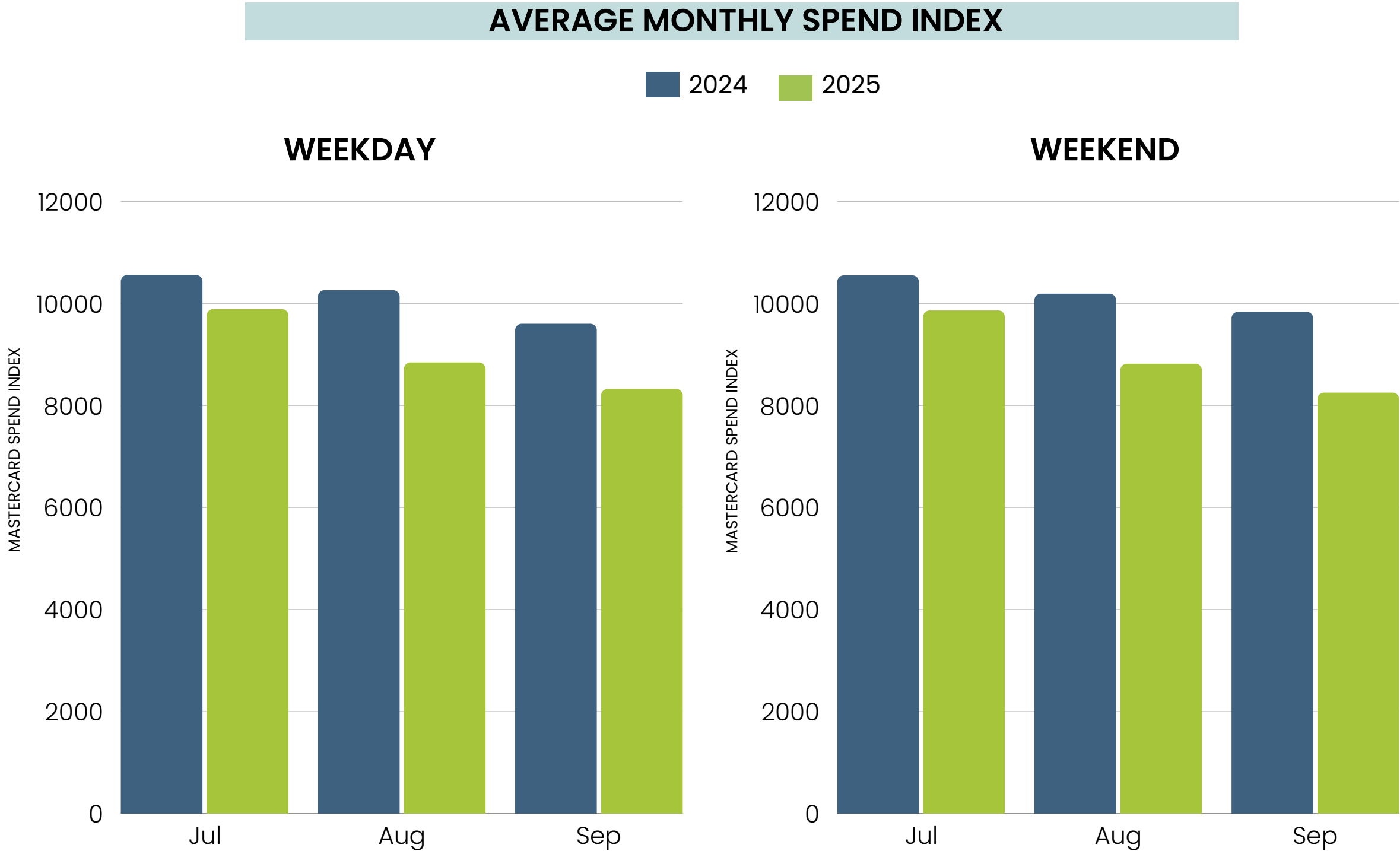
DOMESTIC SPEND INDEX – VS 2024

-18%	-19%
WEEKDAY TRANSACTION AMOUNTS VS LAST YEAR	WEEKEND TRANSACTION AMOUNTS VS LAST YEAR
-10%	-13%
WEEKDAY TRANSACTION COUNTS VS LAST YEAR	WEEKEND TRANSACTION COUNTS VS LAST YEAR

Domestic spend between July and September 2025 was notably lower than the same period in 2024, reflecting the impact of ongoing economic pressures.

Weekday transaction amounts fell by 18% year-on-year and weekends by 19%, with corresponding declines in transaction volumes of 10% and 13%.

The data indicates a clear softening in discretionary spend, particularly at weekends, where tighter household budgets appear to be influencing leisure and hospitality activity. While South Bank continues to attract consistent visitor numbers, spend levels suggest visitors are being more selective with their purchases – opting for lower-cost experiences and free outdoor activities amid wider cost-of-living constraints.



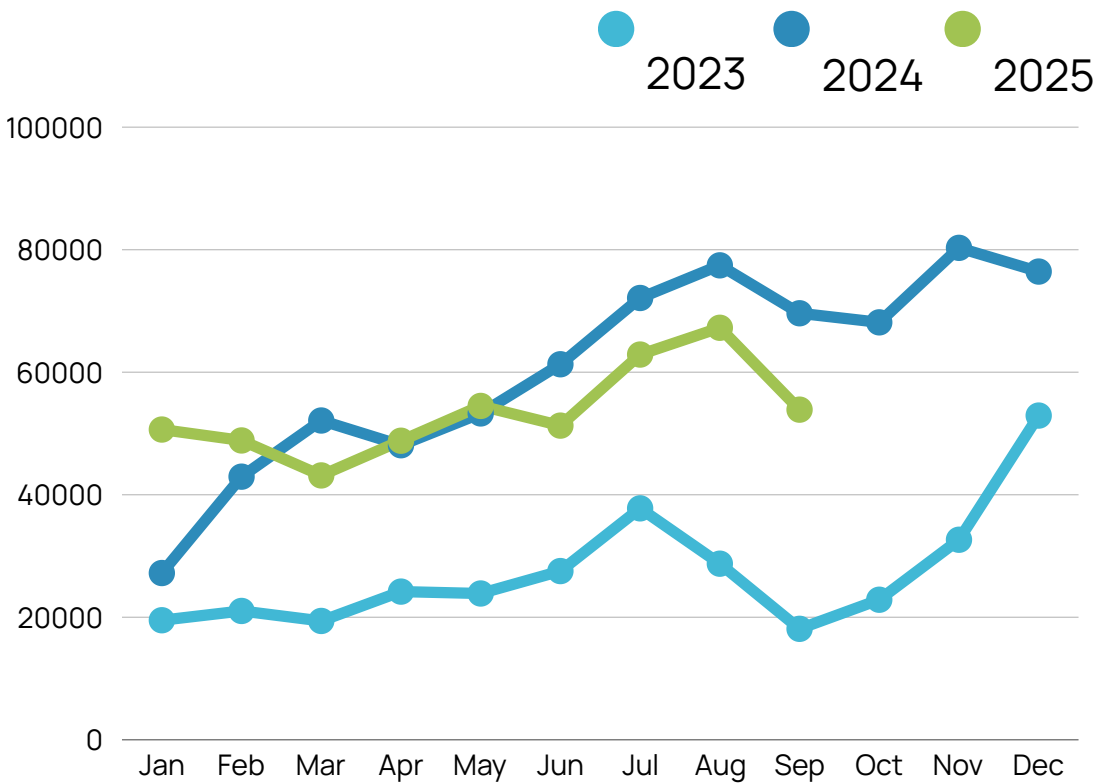
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SOUTH BANK LONDON WEBSITE ANALYTICS

SITE VISITS

Despite lower traffic than the same period last year, engagement remains healthy, with users spending an average of 2 minutes and 12 seconds per visit and generating over 5,500 onward clicks to venues and partner websites.

International audiences continue to grow, now accounting for 22% of total users – up from 16.3% for the same period last year – highlighting South Bank’s ongoing appeal to overseas visitors researching trips and activities online.



TOP CONTENT

1	What's On listings page	10.0%
2	Eat & Drink listings page	7.2%
3	What's On: Hayward Gallery-Yoshitomo Nara	6.0%
4	See & Do listings page	3.0%
5	Guide: Family Day Out Top 10	2.8%
6	Summer	2.8%
7	What's On - Winter Market	2.6%
8	News - Utopia bagels pop up	2.2%
9	Guide: Top Free Things to do in South Bank	1.4%
10	Guide: Summer Holiday Fun for Families	1.3%
11	Southbank Centre	1.2%
12	Guide: Best Beer Gardens & Terraces	1.0%
13	Guide: South Bank Summer Pop Ups	0.9%
14	Guide: Where to get breakfast in South Bank	0.9%
15	Between the Bridges	0.8%

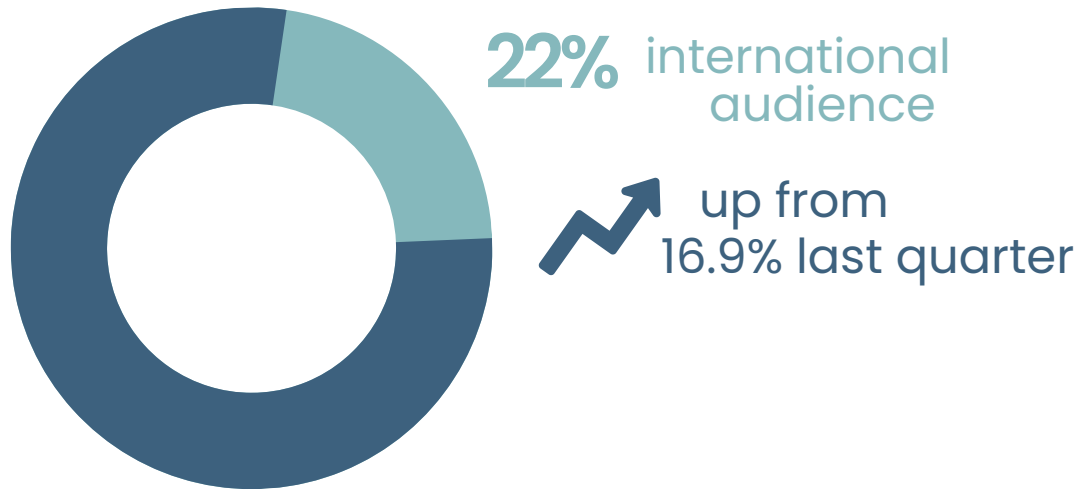
The Guide pages remain a key driver of engagement, with over a third of the top 15 most-visited pages in this category. They highlight a wide range of things to do, often featuring hidden gems and lesser-known venues alongside well-known attractions helping inspire visits and provide valuable exposure for businesses. In the September months there was a considerable spike in page visits for the Winter Market as audiences eagerly awaited announcements for their return!

JUL - SEP 2025 PERFORMANCE

184,028 total website visits
Jul - Sep 2025

5,575

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



EXTERNAL RESEARCH: EXPLORING THE ATTITUDES AND NEEDS OF FAMILY VISITORS

We're pleased to share some key takeaways from a national study commissioned by the Association of Leading Visitor Attractions (ALVA) and undertaken by Baker Richards earlier this year.

Although this research was not carried out specifically for South Bank, it provides valuable wider context on consumer behaviour. The study explores how adults who regularly care for children – whether as parents, guardians, or in other roles – are making decisions about leisure in 2025, and how perceptions of value are shaping those choices.

Drawing on a nationally representative survey of over 1,000 UK adults, supported by wider sector analysis, the research explores how families judge value, what motivates their choices, and how financial and emotional considerations shape a day out. It provides valuable context for the trends we're seeing in South Bank, where visitors continue to seek meaningful shared experiences but are becoming more selective about discretionary and secondary spend.

Throughout the research, the term family is used as shorthand, though the study recognises the full diversity of people's experiences, relationships, and identities within this audience group.

ALVA BAKERRICHARDS

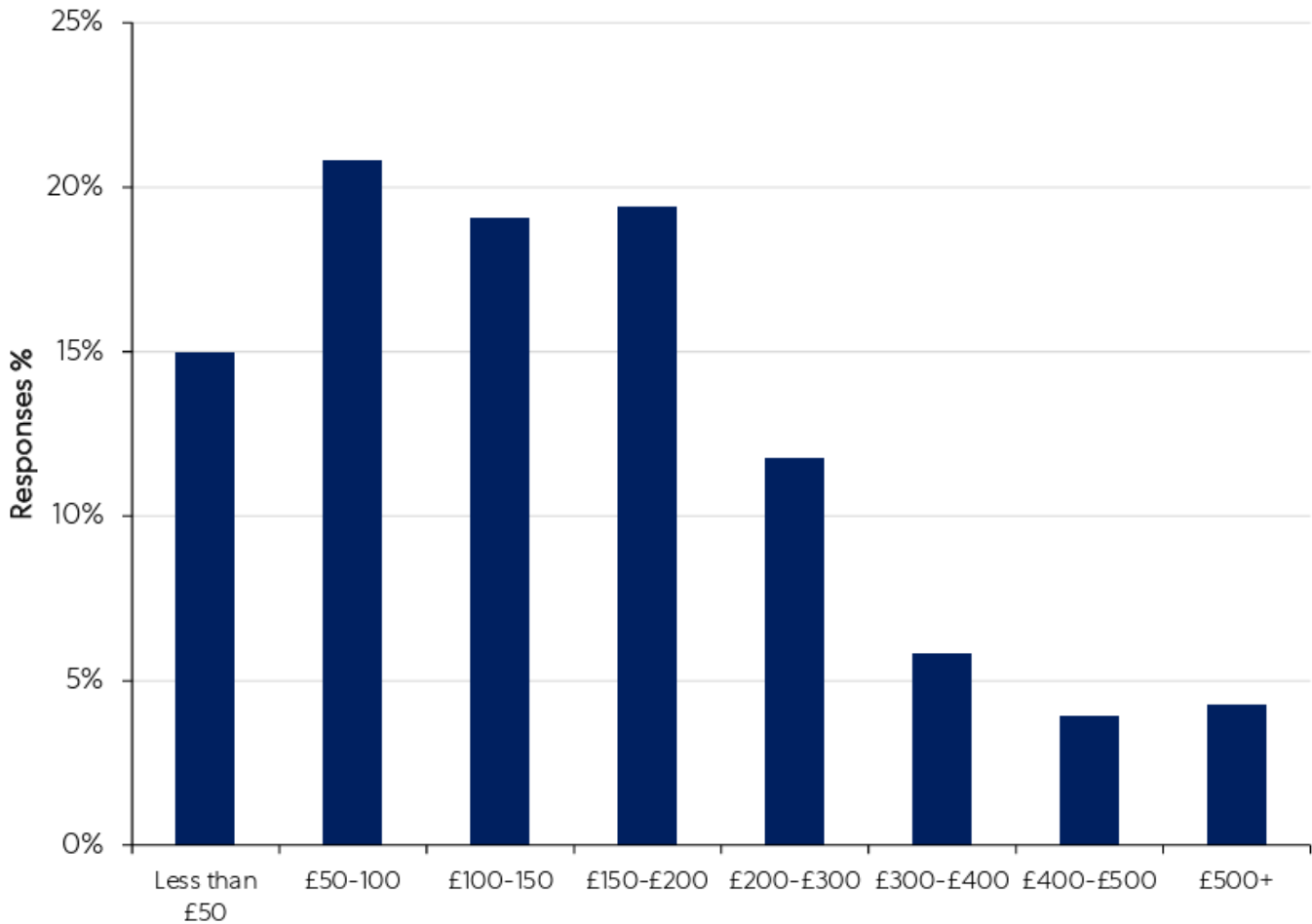
Key Headlines

- Families aren't spending less overall; they're investing more strategically in meaningful experiences. They are far more selective.
- 74% of families have less than £200 monthly for all leisure activities, yet most spend over £100 on a single day out. This paradox shows families view these excursions as special occasions worth saving for, typically managing two or three annually.
- While visit frequency has slightly reduced, families are willing to exceed their monthly leisure budgets for the 'right' experiences.
- Traditional "family tickets" only work for 41% of families due to the rise of diverse modern family structures (e.g., single parents, multi-generational groups).
- Nearly 1 in 5 (1.9 million) children have identified Special Educational Needs*. This is a growing segment looking for welcoming and appropriate experiences.
- While 49% of families research weeks ahead, 44% book within just 48 hours of their visit.

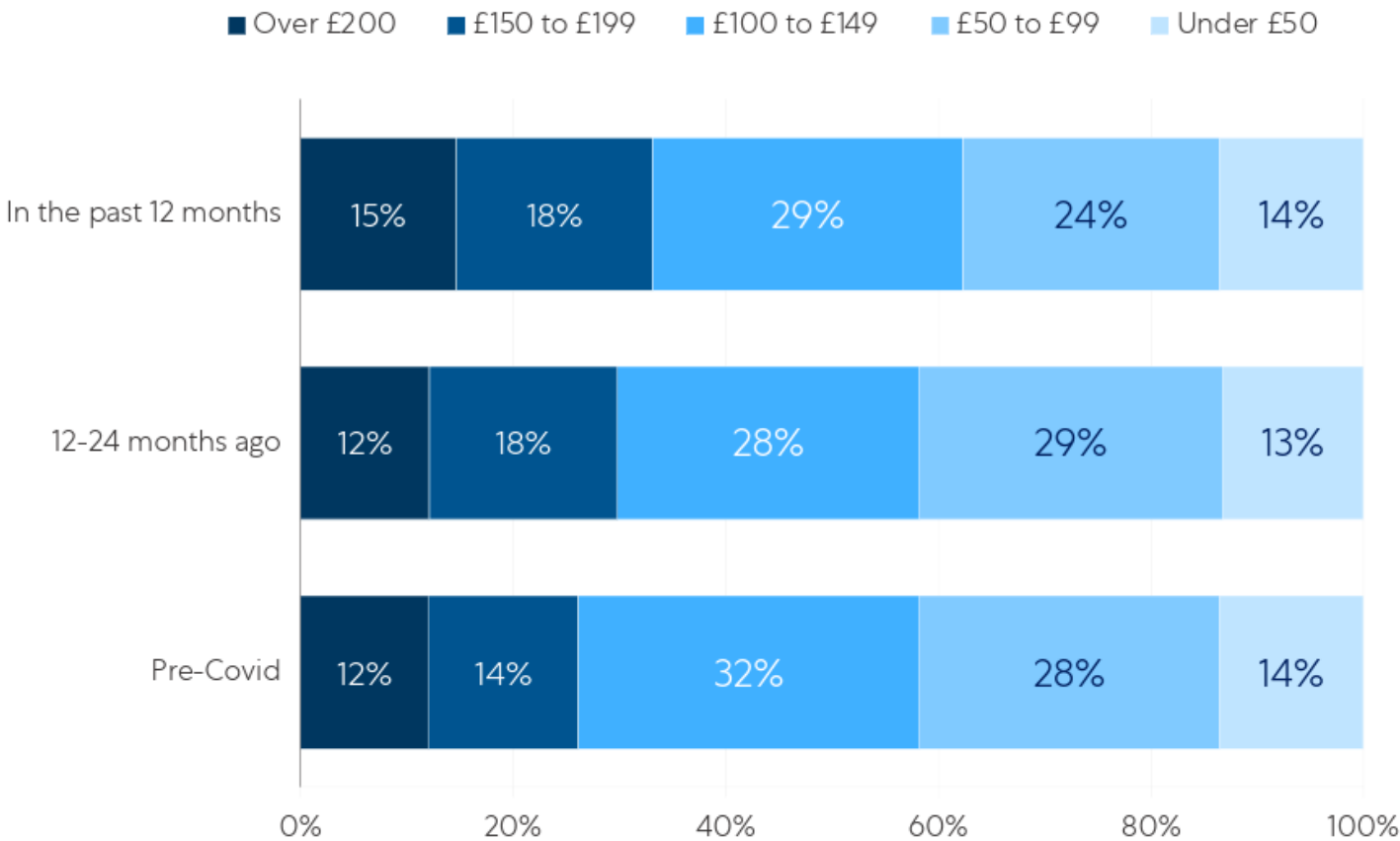
**View
the full
report**

*<https://publications.parliament.uk/pa/cm5901/cmselect/cmpubacc/353/report.html>

How much do you have to spend on leisure activities as a household, each month?



Typical spend for the whole family on a day out (including travel, food, tickets)

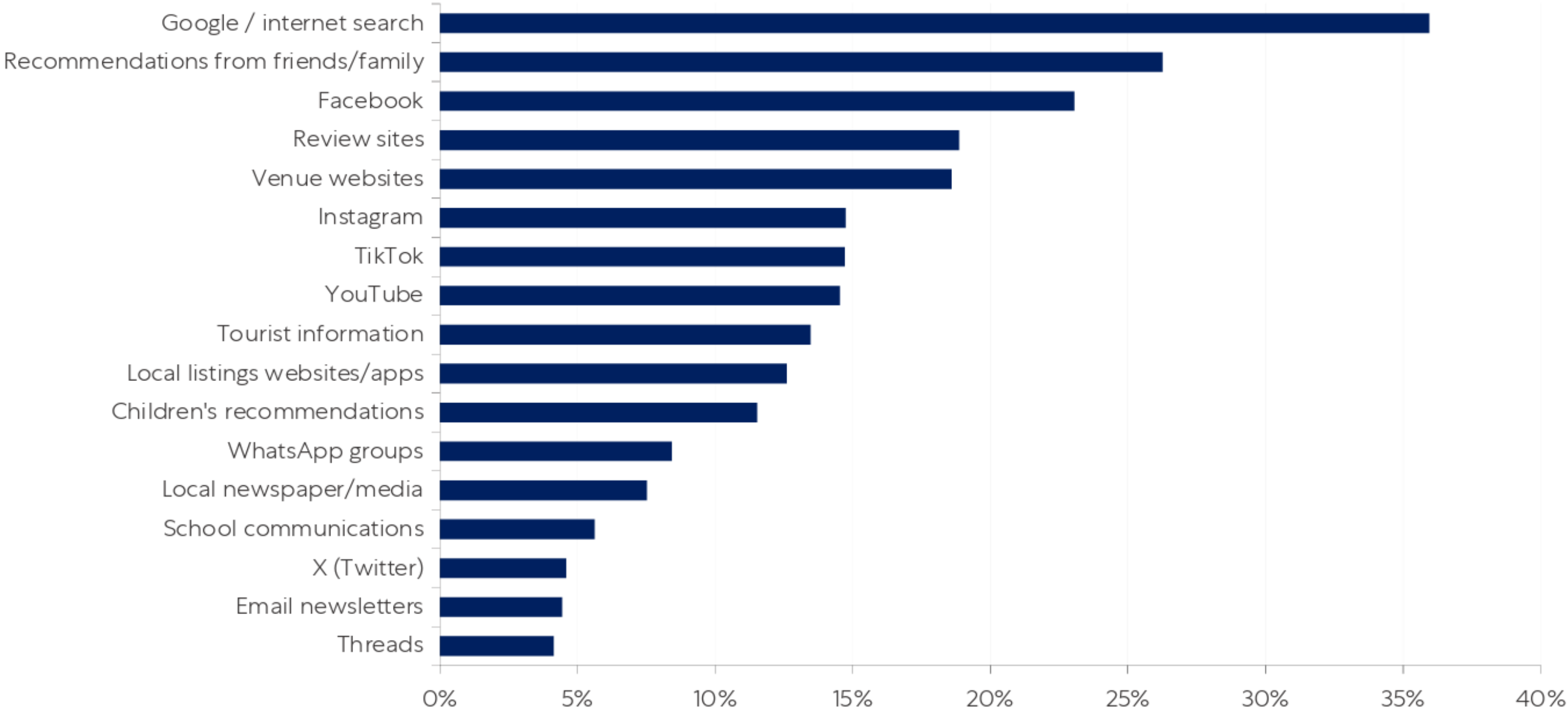


36% of families have less than £100 to spend on leisure activities as a household, per month.

74% have less than £200.

However, 62% of families expect to pay over £100 on a day out, suggesting a day out is a significant outlay in the family budget – something to be saved for and highly valued.

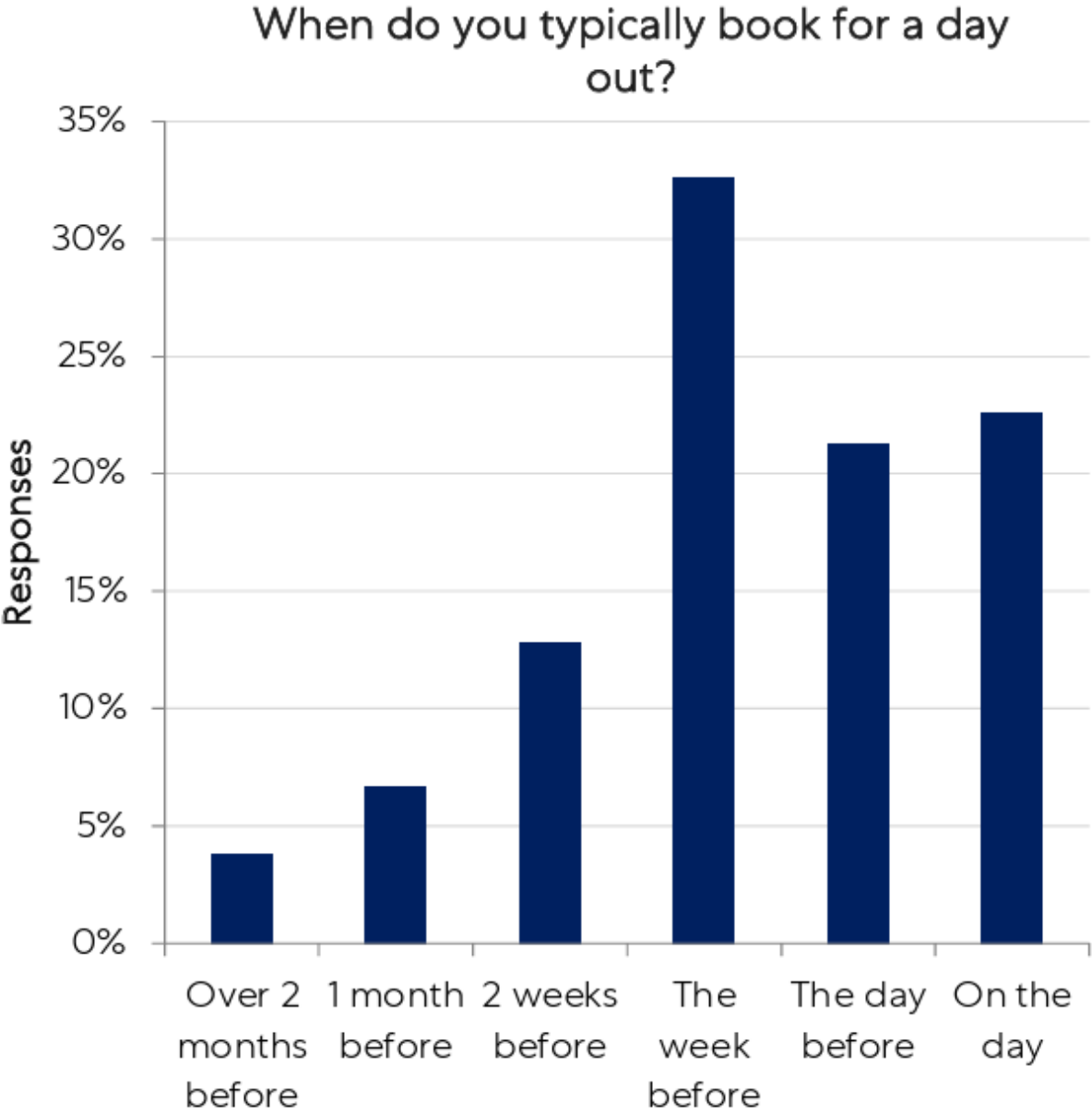
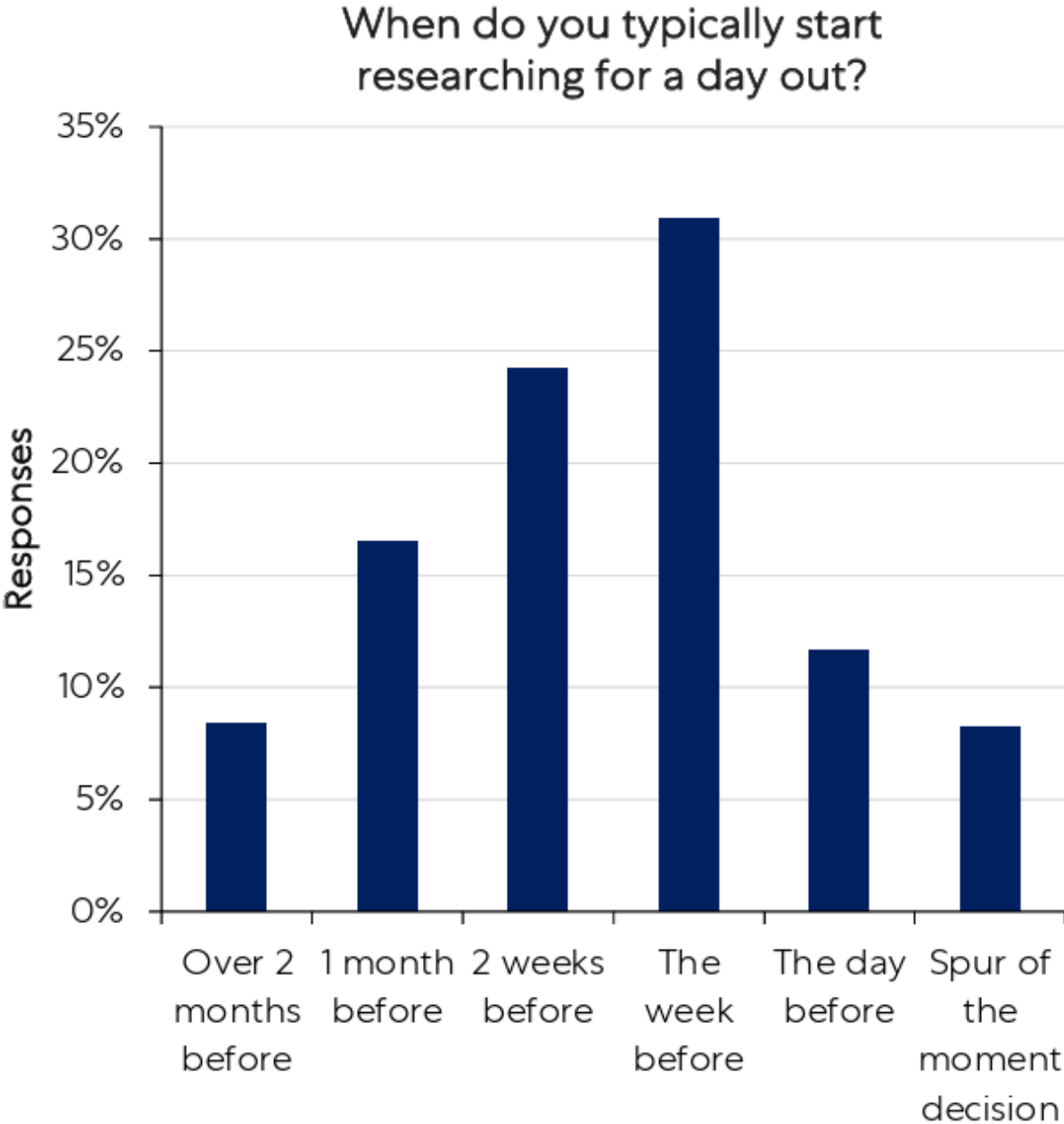
Where do you typically discover ideas for family activities? (Select top 3)



When planning days out, Google (36%) and Facebook (23%) are the key platforms, as well as word of mouth (26%) and review sites (19%)

This further emphasises the importance of Meta as a digital advertising platform, and Google for both advertising and search-engine optimisation.

49% respondents start researching for a day out 2+ weeks in advance, while 44% book within 48 hours.



49% said they start researching days out more than two weeks before they visit, but a significant proportion convert much later, with 44% of bookings happening in the 48 hours before visit.



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.

RESEARCH REPORT: EXPLORING THE ATTITUDES AND NEEDS OF FAMILY VISITORS

Conducted in April-May 2025, the research was commissioned by ALVA, and delivered by Baker Richards. The full report is available at: www.baker-richards.com/wp-content/uploads/2025/07/BR-x-ALVA-Family-Research-Findings-Distribution-Copy.pdf



SOUTH BANK BID AREA