

## PROVIDING BUSINESS SUPPORT AND INSIGHT

Summary – April 2023



### Spend Data

- Sales in King's Road in April 2023 were higher than the same month in 2019 (+1%) and 2022 (+2%). While this was the strongest performance so far in 2023, King's Road's sales performance was weaker than Marylebone, Sloane Square, and Knightsbridge.
- Customer numbers were up +4% in April 2022, although down -1% in April 2019.
- Of the five largest retail sectors, only two sectors experienced growth compared to both April 2022 and April 2019. Household experienced the strongest sales growth (+18% vs April 2022 and +23% vs April 2019). Parallel figures for Fashion were +4% and +3%. Grocery sales shrank on both a year-on-year and year-on-2019 basis.
- Food & Drink sales shrank -5% compared to April 2022, while they increased by +9% compared to April 2019. Parallel figures for Health & Beauty were +2% and -9%.
- The trend to localisation of sales has continued. For the last 12 months, the share of sales to customers from Chelsea & Kensington averaged 26% compared to 28% in calendar year 2019. Over the same period, by contrast, the share of sales to customers from the Rest of GB decreased from 38% to 34%.

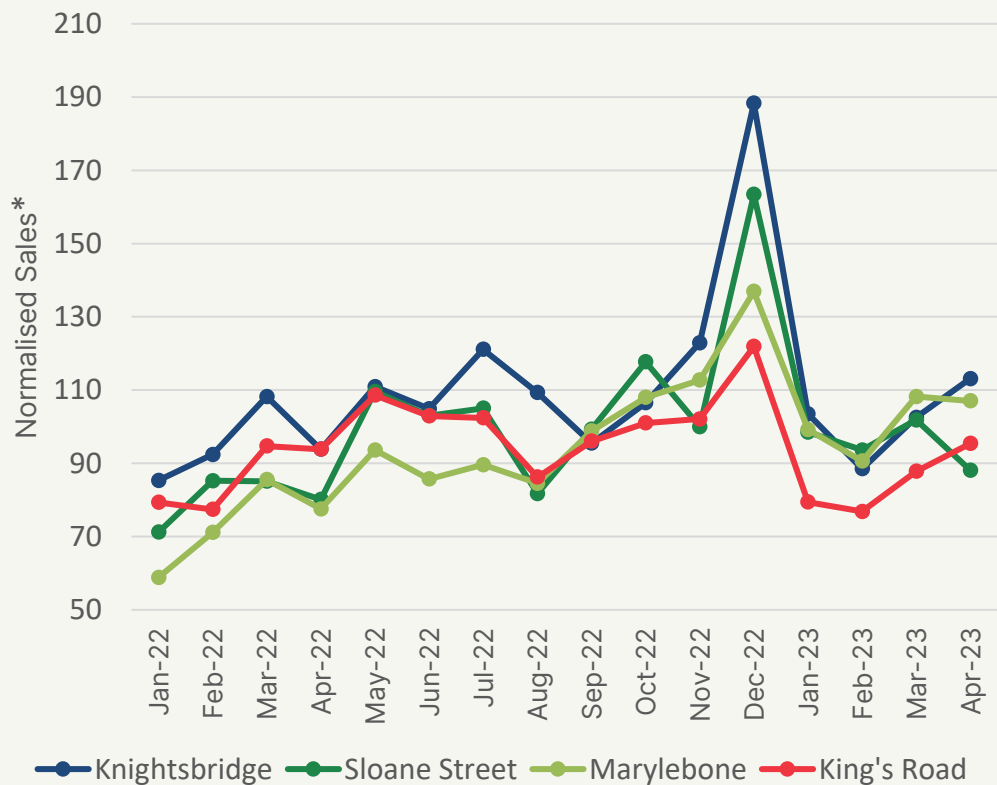
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### Spend Data

A partnership with Beauclair Data has been brokered for the benefit of all members. Beauclair specialise in sourcing and analysing big data for the benefit of local communities and neighbourhoods. This will provide members with an in-depth review of the King's Road customer enabling them to make evidence driven decision making when planning for the future. The data comes from a national data set of offline transactions from over 11 million debit and credit cards - each transaction is geo tagged and delivered in real time, tracking merchant location and sector. All data is anonymized and aggregated.

### Area Sales

Sales in King's Road in April 2023 were higher than the same month in 2019 (+1%) and 2022 (+2%).



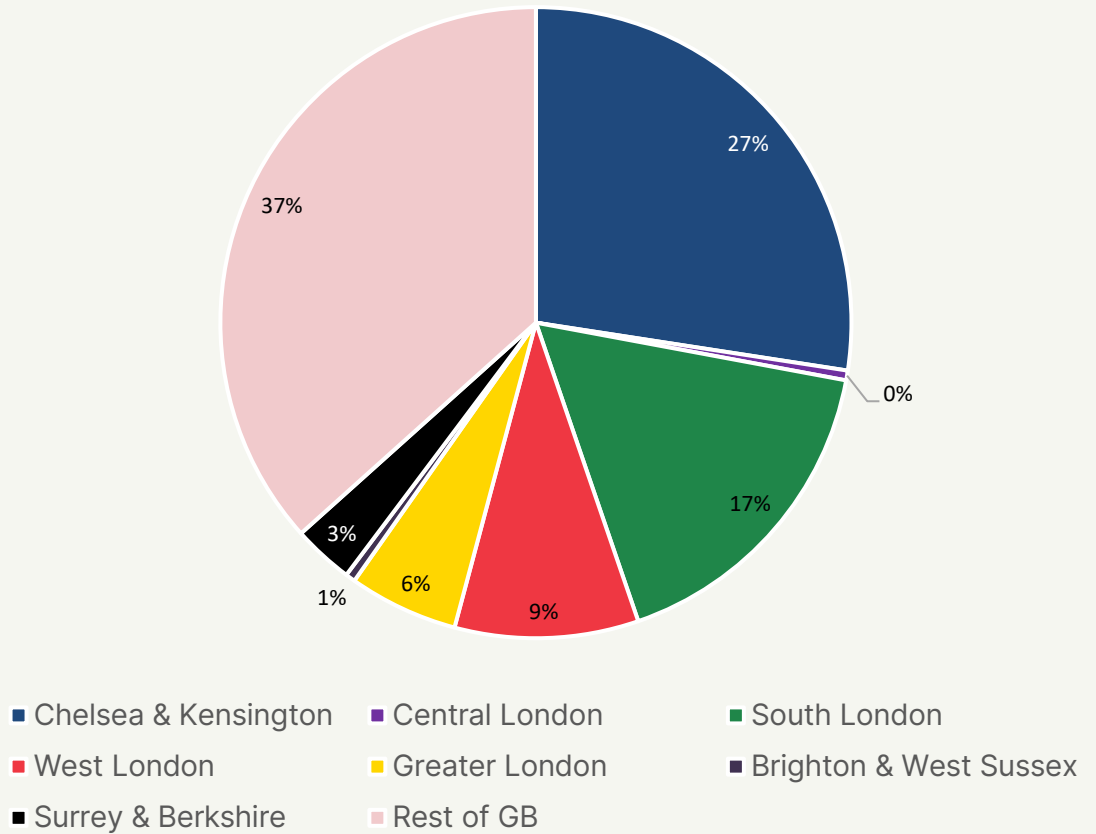
\*Values are normalised to average month in 2019

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### Spend Data

#### Origin Sales Contribution

In April, there was an increase in sales from the Rest of the GB compared to March where it represented 34% of sales. 27% of sales in April were from customers within the Royal Borough of Chelsea and Kensington and 17% of sales from customers in South London (Battersea, Lambeth Wandsworth, Clapham, Brixton and Streatham). There is growth potential in Central London (WC and EC postcodes), which represents 0.5% of total sales in King's Road.

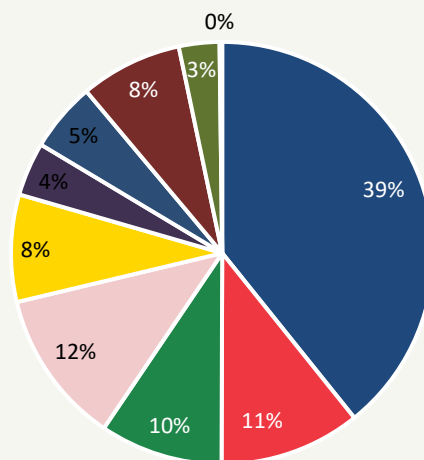


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### Spend Data

#### Demographic Sales Contribution

39.2% of King's Road catchment fall within the 01- Business Elite customer affluence score, which is the most affluent CAMEO type. 12% fall within 04 – Content Communities and 11% in 02-Prosperous Professionals CAMEO types. 71.2% of the King's Road catchment fall within the top 4 customer affluence categories, which was a decrease of 1% compared to March 2023.



- 01 - Business Elite
- 02- Prosperous Professionals
- 03 - Flourishing Society
- 04 - Content Communities
- 05 - White Collar
- 06 - Enterprising Mainstream
- 07 - Paying the Mortgage
- 08 - Cash Conscious
- 09 - On A Budget
- 10 - Family Value

#### Customer Affluence Score

CAMEO UK, produced by TransUnion, classifies over 50 million British consumers at postcode, household and individual level into 10 key marketing segments based primarily on affluence

Customer affluence is calculated by analysing the percentage of spend from each CAMEO-type for a given area, sector or time period

A lower affluence score equates to a more affluent customer base

A customer affluence score of 1 = 100% of sales from the most affluent CAMEO-type: 01 - Business Elite

A customer affluence score of 10 = 100% of sales from the least affluent CAMEO-type: 10 - Family Value

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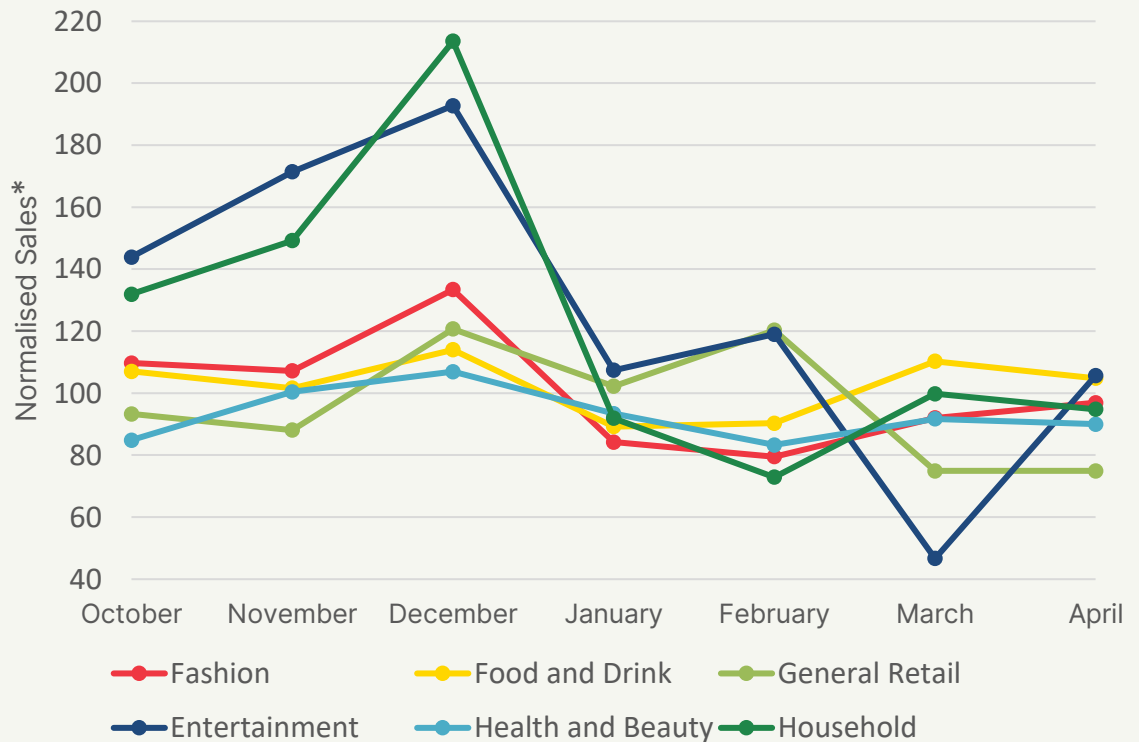
### Spend Data

#### Average Transaction Value

Travel and accommodation has seen an 171.8.2% increase on the average transaction value in comparison to the same period in 2022. Health and beauty, general retail and household are starting to see growth on the ATV.

SECTOR	ATV April 2022	ATV April 2023	Percentage Change	
Fashion	£57.72	£52.98	7.2%	↓
Food & Drink	£22.58	£20.22	10.5%	↓
General Retail	£16.09	£16.12	0.2%	↑
Entertainment	£14.15	£11.80	16.6%	↓
Health and Beauty	£34.03	£35.09	3.1%	↑
Household	£55.26	£60.47	9.4%	↑
Travel and Accommodation	£12.88	£35.01	171.8%	↑

#### Sector Sales



\*Values are normalised to average month in 2019