Monthly Insights Report

July 2026

KING’S ROAD PARTNERSHIP

Insights Commentary – July 2026

The Kings Road District delivered another month of robust trading in July 2026. Footfall recovered from the -2.5% decline recorded in June, increasing +0.9% year on year and outperforming the West End benchmark of +0.2%. The key challenge remains ensuring this growth is shared across the District: while footfall in the East increased by +3.8%, it fell by -5.3% in the West.

This resilience in visitor numbers translated into a strong performance in spending, which rose +9.6% year on year – the largest increase since November 2025. Both domestic and international spending contributed, increasing +10.2% and +8.3% respectively. However, the year-to-date picture remains more polarised: international spending is up an average +13.1%, while domestic spending is down -1.3%.

The clearest distinction between the two markets is transaction volume. International transactions have continued to build consistently, while domestic transactions have declined in every month over the past year. In July, domestic transactions fell -2.2%, compared with a +5.2% increase in international transactions. This points to a steadily growing international visitor base, although domestic customers still account for more than two thirds of total spending.

International visitors also continue to deliver significantly higher-value purchases, with an average transaction value of £60.70 – almost twice the £33.72 average for domestic customers. The combination of rising international transaction volumes and substantially higher spend per transaction therefore remains a key driver of the District’s overall performance.

- Year on year on increase in footfall of +0.9% across the District (+0.2% in the West End)
- Year on year increase in footfall in the east of the District (+3.8%), but a decrease in the west (-5.3%)

- Year on year increase in total spending (+9.6%)
- Year on year increase in domestic spending (+10.2%) – decrease in transactions (-2.2%) and increase in ATV (+13.1%)
- Year on year increase in international spending (+8.3%) – increase in transactions (+5.2%) and increase in ATV (+3.0%)

- Domestic spending accounts for 69% of total spending, and international spending 31%

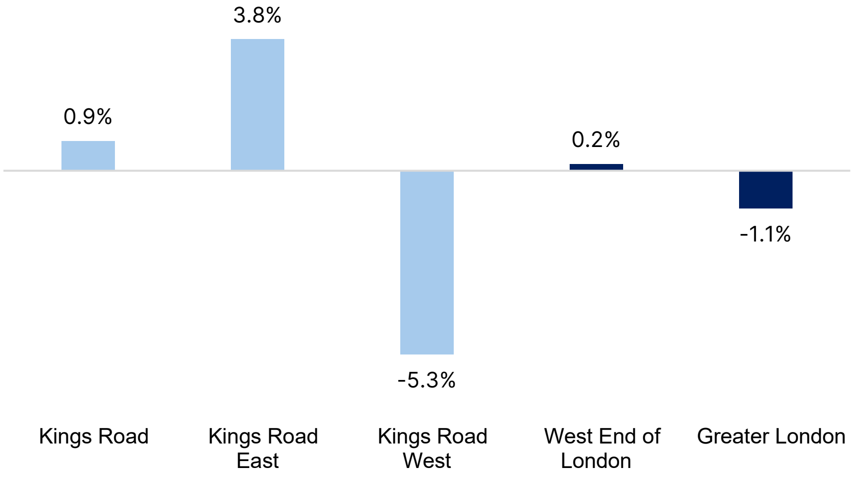
- Average transaction value of domestic purchases was £33.72 vs £60.70 for international purchases

Key Highlights – Footfall – July 2026

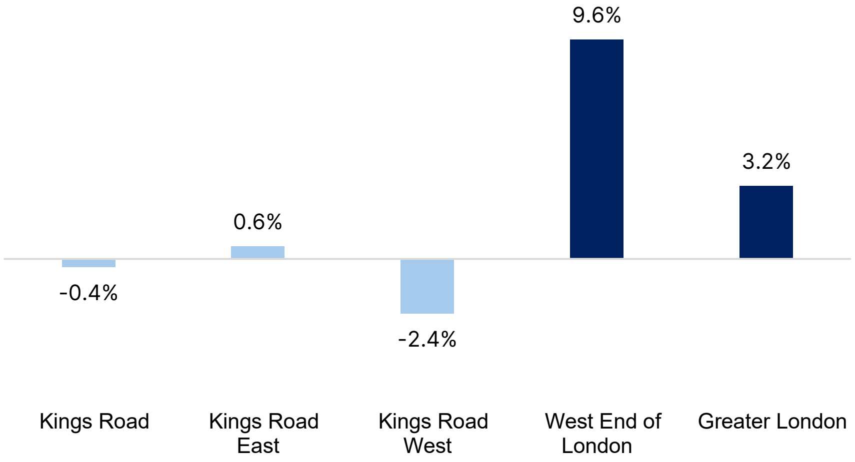
Footfall – July 2026		
	YoY % Change	MoM % Change
Kings Road	0.9%	-0.4%
Kings Road East	3.8%	0.6%
Kings Road West	-5.3%	-2.4%

Footfall Benchmarks – July 2026		
	YoY % Change	MoM % Change
West End of London	0.2%	9.6%
Greater London	-1.1%	3.2%

Year on Year % Change in Footfall - July 2026

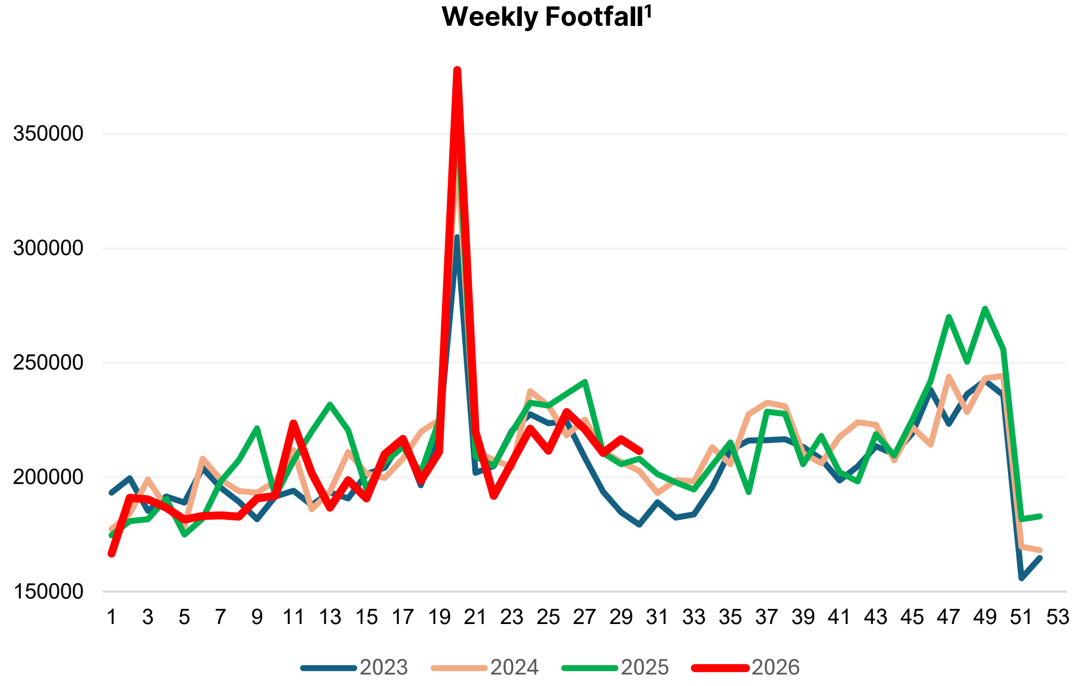


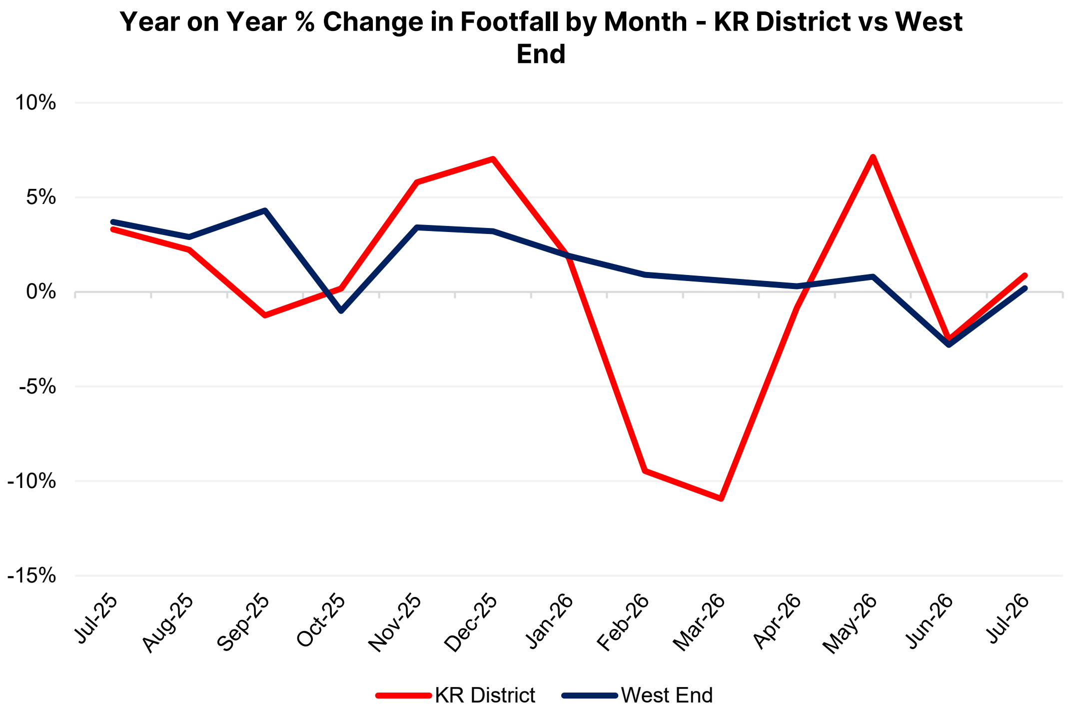
Month on Month % Change in Footfall - July 2026



Source: MRI

Key Highlights – Footfall – July 2026





[1]Locations: King's Rd (Chelt'ham Terr) East; King's Rd (Chelt'ham Terr) West; King's Rd 34 (Trotters) East; King's Rd 34 (Trotters) West

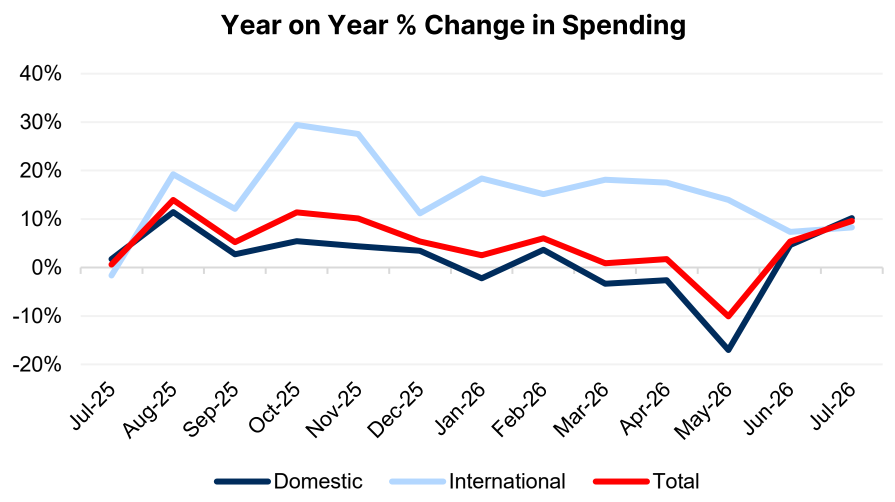
Source: MRI

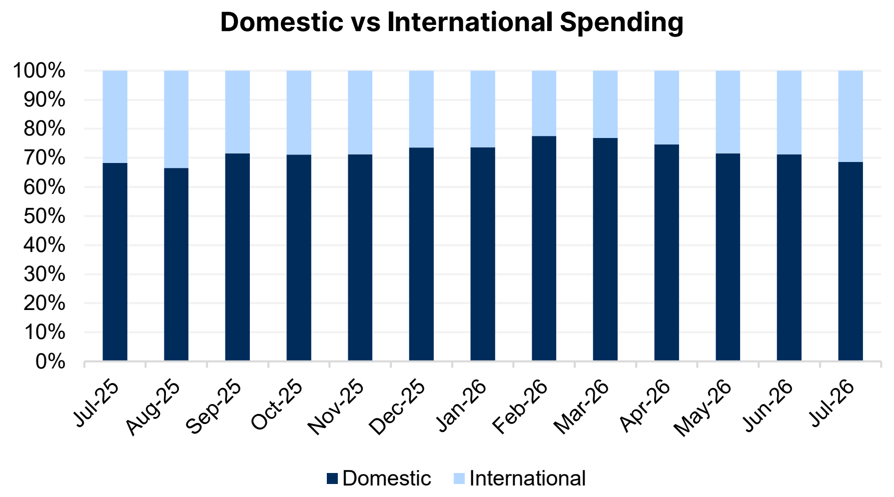
Key Highlights – Domestic and International Spending – July 2026

Domestic vs International Spending (£ million)			
	Domestic spending	International spending	Total spending
Jul-26	£8.02	£3.66	£11.68
Jul-25	£7.28	£3.39	£10.66

Domestic vs International Spending - % Change - July 2026			
	Domestic spending	International spending	Total spending
YoY % Change	10.2%	8.3%	9.6%
MoM % Change	1.0%	14.6%	4.9%
YoY % change YTD	-1.3%	13.1%	2.2%

Domestic vs International Spending Split		
	Domestic spending	International spending
Jul-26	69%	31%
Jul-25	68%	32%





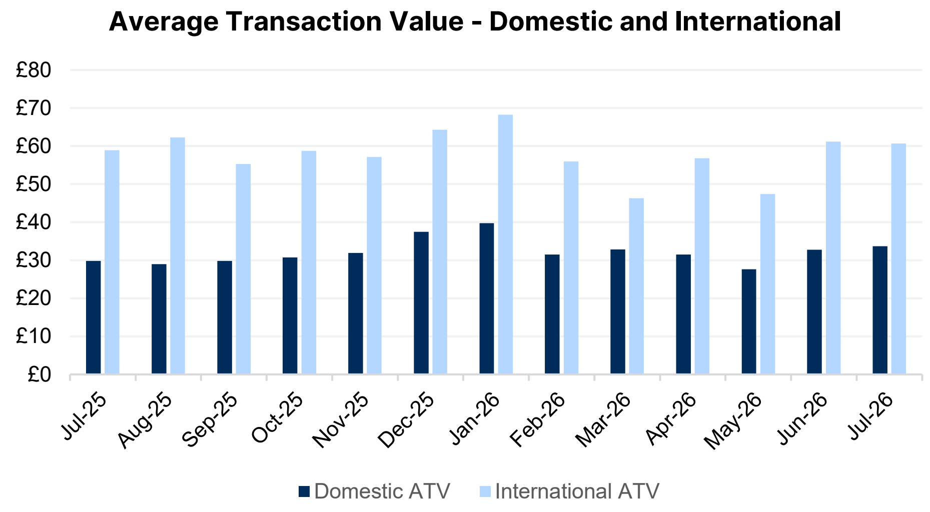
Source: Savills

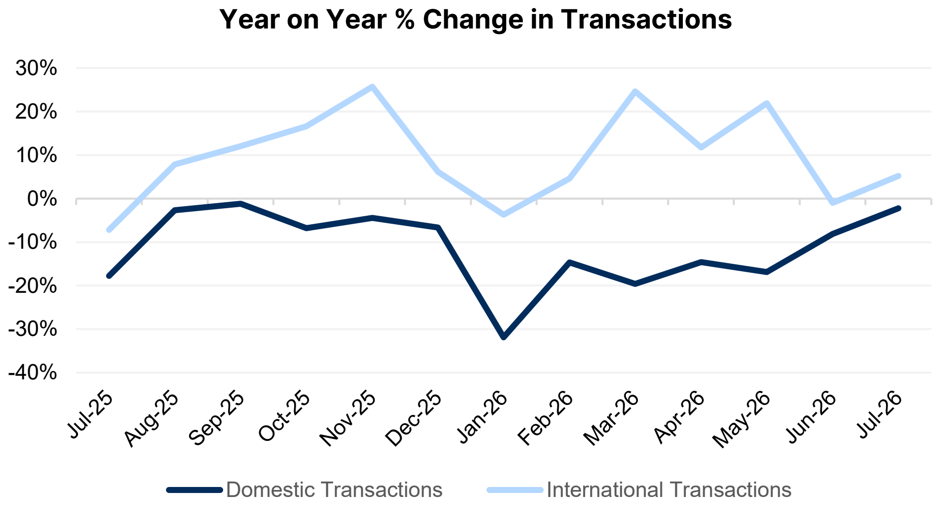
Key Highlights – Domestic and International Transactions – July 2026

Domestic Spending - YoY % Change - July 2026		
	Transactions	Average Transaction Value
Jul-26	-2.2%	13.1%
Jul-25	-17.7%	24.6%

International Spending - YoY % Change - July 2026		
	Transactions	Average Transaction Value
Jul-26	5.2%	3.0%
Jul-25	-7.2%	6.1%

Average Transaction Value - July 2026		
	Domestic Spending	International Spending
Jul-26	£33.72	£60.70
Jul-25	£29.81	£58.94





Source: Savills

Notes

- MRI monthly footfall is based on a 445 calendar. June spans Monday 1st June 2026 to Sunday 5th July 2026 and July spans Monday 6th July 2026 to Sunday 2nd August 2026. Annual % change is based on a comparison with the same weeks during 2025.

- Savills spending data for the month is sourced from domestic and international Visa card transactions. The data is based on a total sample (not like for like), and so the result will reflect additions and reductions to the number of merchants in the sample, in addition to customer activity. It is estimated that the data accounts for circa 60% of total spending in the District.