

KING'S ROAD

MONTHLY INSIGHTS

Footfall – Spending – Transactions

August 2026



The month in focus – August 2026

Trading in the Kings Road District weakened in August 2026, with annual spending growth slowing sharply to +1.5%, compared with +9.6% in July. The slowdown was driven by a -4.1% decline in international spending – its first annual fall since July 2025 – while domestic spending continued to grow, rising by +4.4%.

The weakness in international spending may partly reflect the ongoing conflict in the Middle East, which combined with the extreme heat experienced during August, may have contributed to lower levels of overseas visitation.

This may be reflected in footfall which also softened, falling by -0.4% year-on-year compared with growth of +0.9% in July. This contrasts with the West End, where footfall increased by +2.9% during August. The challenge of ensuring growth is shared across the District also remains evident: footfall in the East increased by +1.7%, while the West recorded a sharp decline of -5.0%.

The contrasting performance of domestic and international spending is particularly evident when transaction volumes and values are considered – both of which combine to drive overall sales. Domestic spending increased despite a -14.3% decline in transaction volumes, as the average transaction value surged by +22.5%. International spending, meanwhile, saw a modest +3% increase in transaction volumes, but this was more than offset by a -7% decline in average transaction value, resulting in an overall fall in international spending.

International visitors nevertheless continue to generate nearly a third of total spending in the District, with significantly higher value purchases than domestic customers. Their average transaction value during August 2026 was £57.94, almost twice the £35.46 average for domestic customers.

Overall, August highlights the growing importance of understanding both visitor numbers and the value and volume of transactions underpinning spending performance across the District.

AT A GLANCE

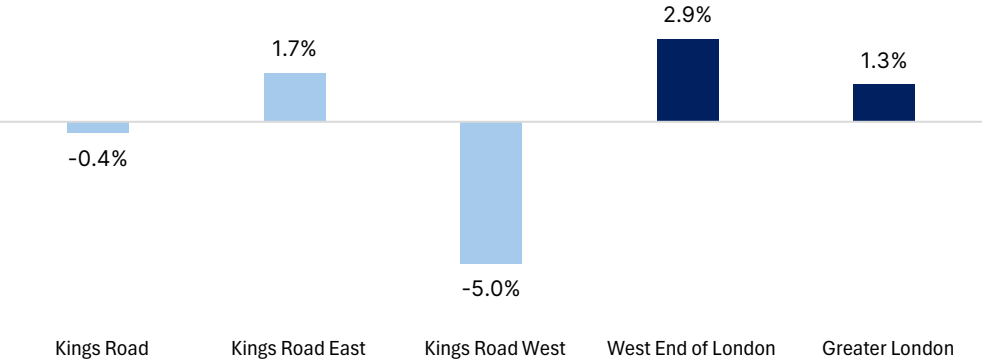
-0.4%	District footfall YoY
+2.9%	West End footfall YoY
+1.5%	Total spending YoY
+4.4%	Domestic spending YoY
-4.1%	International spending YoY
£35.46	Domestic ATV
£57.94	International ATV
68%	Share of spending from domestic customers

Footfall performance

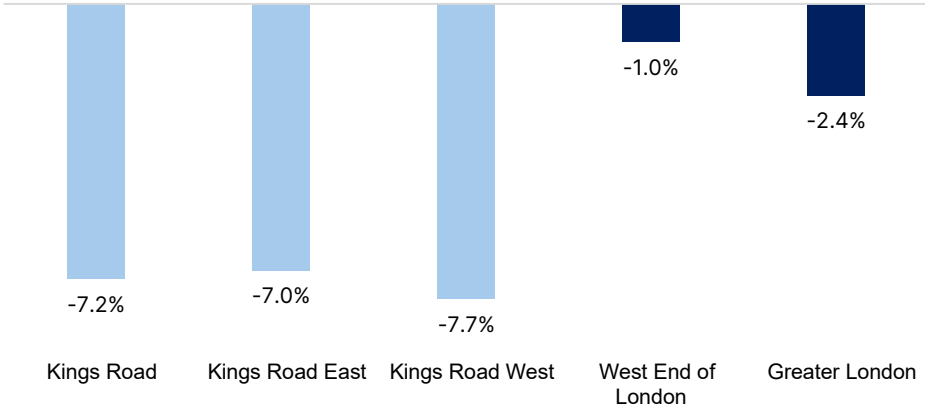
Footfall – August 2026		
	YoY % Change	MoM % Change
Kings Road	-0.4%	-7.2%
Kings Road East	1.7%	-7.0%
Kings Road West	-5.0%	-7.7%

Footfall Benchmarks – August 2026		
	YoY % Change	MoM % Change
West End of London	2.9%	-1.0%
Greater London	1.3%	-2.4%

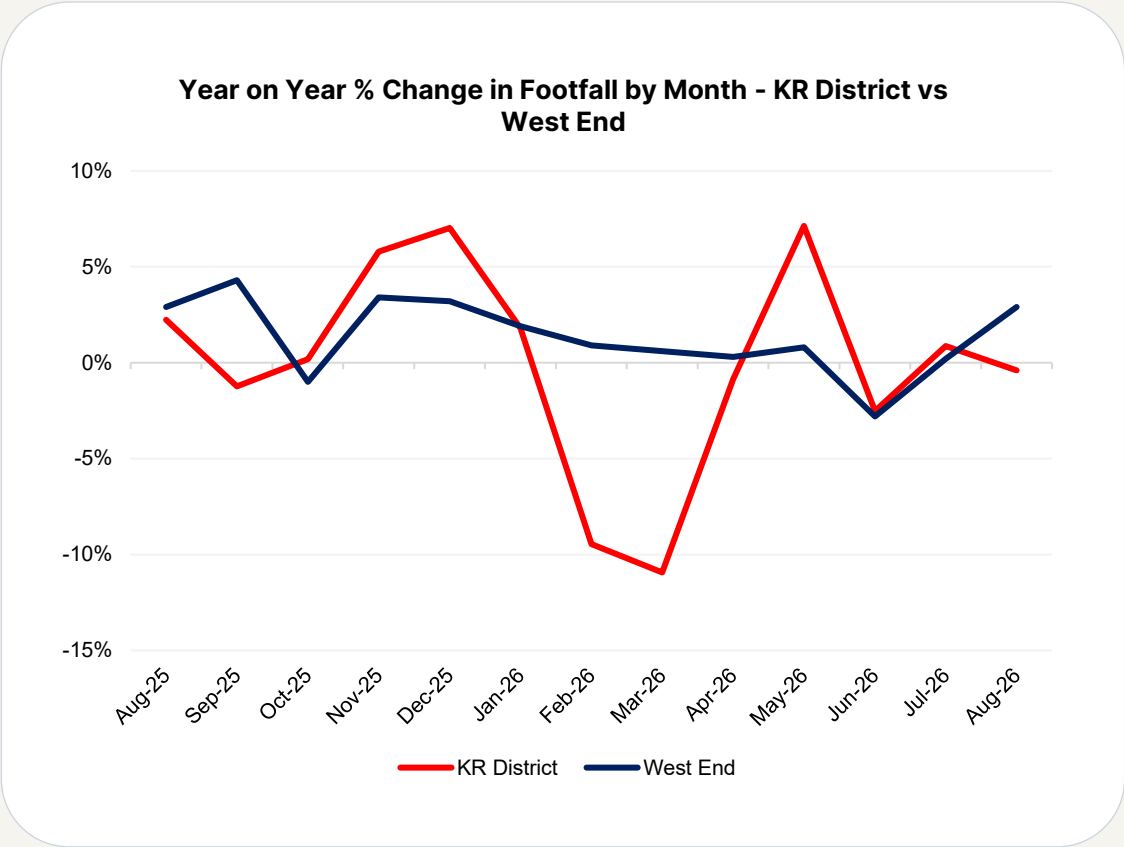
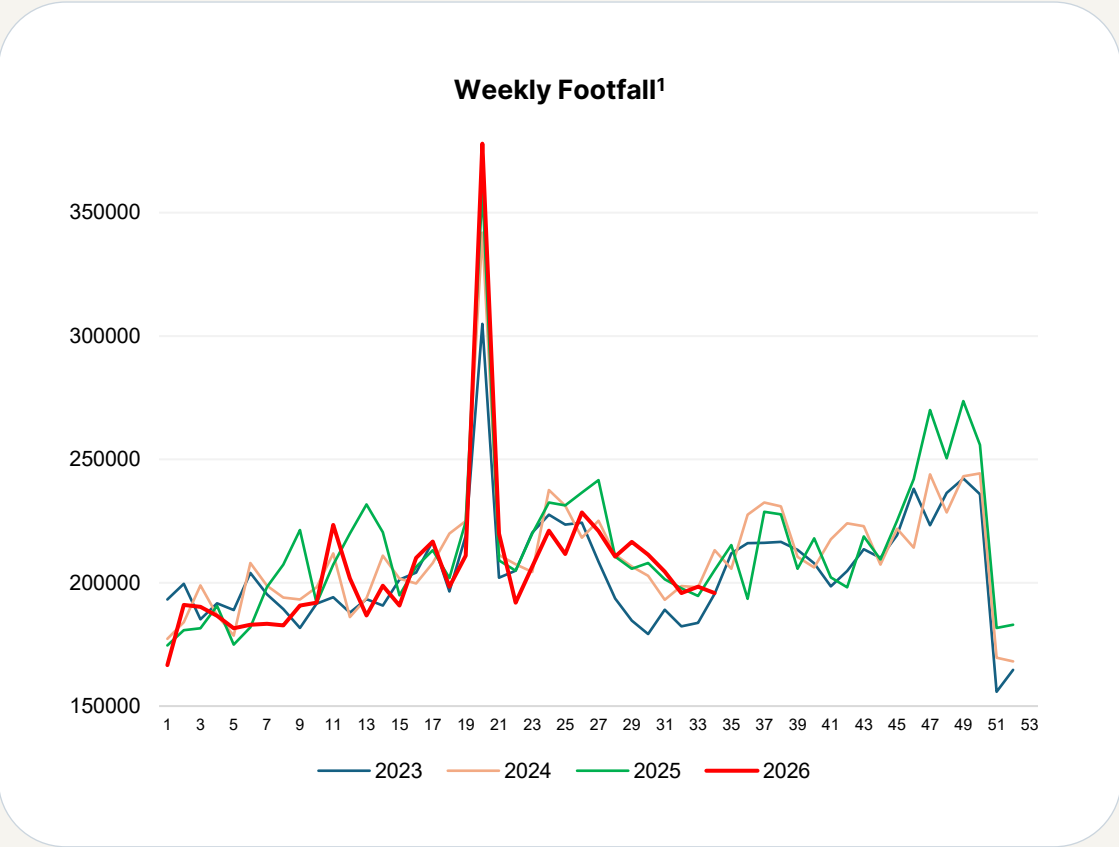
Year on Year % Change in Footfall - August 2026



Month on Month % Change in Footfall - August 2026



Footfall benchmarks



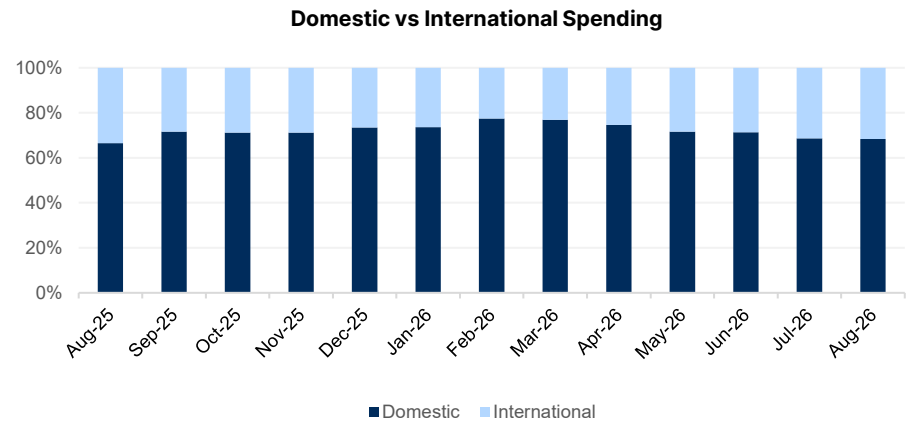
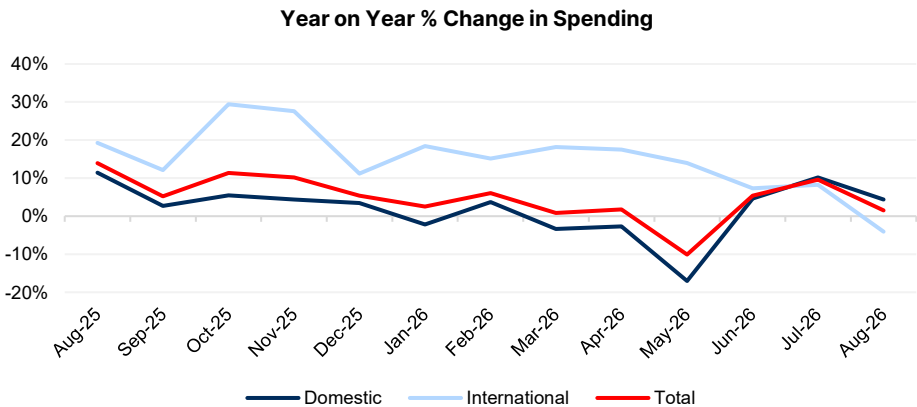
¹Locations: King's Rd (Chelt'ham Terr) East; King's Rd (Chelt'ham Terr) West; King's Rd 34 (Trotters) East; King's Rd 34 (Trotters) West

Domestic vs international spending

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

Domestic vs International Spending - % Change - August 2026			
	Domestic spending	International spending	Total spending
YoY % Change	4.4%	-4.1%	1.5%
MoM % Change	-14.4%	-13.3%	-14.0%
YoY % change YTD	-0.7%	10.2%	2.1%

Domestic vs International Spending Split		
	Domestic spending	International spending
Aug-26	68%	32%
Aug-25	67%	33%



Domestic vs International Transactions

Domestic Spending - YoY % Change - August 2026

	Transactions	Average Transaction Value
Aug-26	-14.3%	22.5%
Aug-25	-2.6%	15.0%

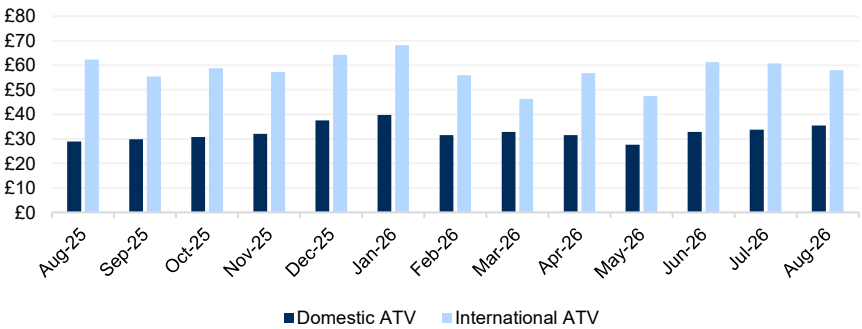
International Spending - YoY % Change - August 2026

	Transactions	Average Transaction Value
Aug-26	3.0%	-7.0%
Aug-25	7.9%	10.8%

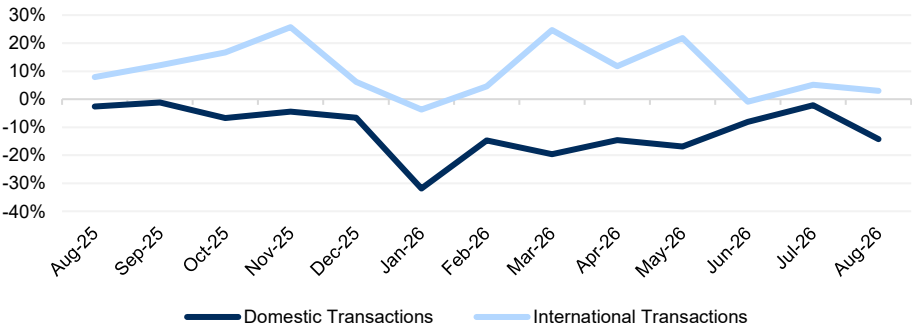
Average Transaction Value - August 2026

	Domestic Spending	International Spending
Aug-26	£35.46	£57.94
Aug-25	£28.95	£62.27

Average Transaction Value - Domestic and International



Year on Year % Change in Transactions



Notes

- MRI monthly footfall is based on a 445 calendar. August 2026 spans Monday 3rd August 2026 to Sunday 30th August 2026. 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.