KING’S ROAD

MONTHLY INSIGHTS

Footfall – Spending - Transactions

September 2026



The month in focus – September 2026

International spending in the Kings Road District rebounded sharply in September 2026, rising +31.6% year-on-year following a -4.1% decline in August. This contrasted with domestic spending, which edged down by -0.9%.

The surge in international spending drove overall spending growth of +8.3% from September 2025 and lifted quarterly spending by +6.6% from Q3 2025 — the strongest quarterly performance of the year. Over Q3 2026, the growth in international spending of +10.9% was virtually double that of domestic spending (+4.6%).

The growth in international spending during September suggested a substantial uplift in international visitor activity to the District; international transaction volumes rose by +22.7% and the average transaction value (ATV) for international purchases also increased (+7.4%).

The likelihood of increased international visitors during September was supported by a +3.4% annual increase in footfall in the District, outperforming the West End (+2.8%). At the same time, it is likely that domestic visitors declined as transaction volumes for domestic spending dropped by -10.7%, albeit that the impact was partially offset by an +11.7% increase in the ATV for domestic purchases indicating that UK shoppers who made purchases spent more.

The strength of international spending during September was reflected in its contribution to total spending, accounting for 35% of total spending in September 2026, up from 28% a year earlier. This highlights the growing importance of international customers to the District’s spending performance.

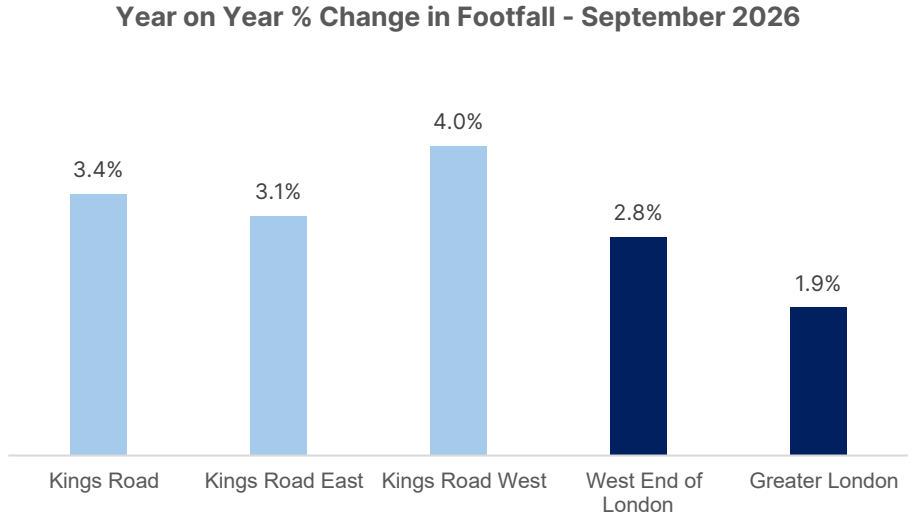
AT A GLANCE

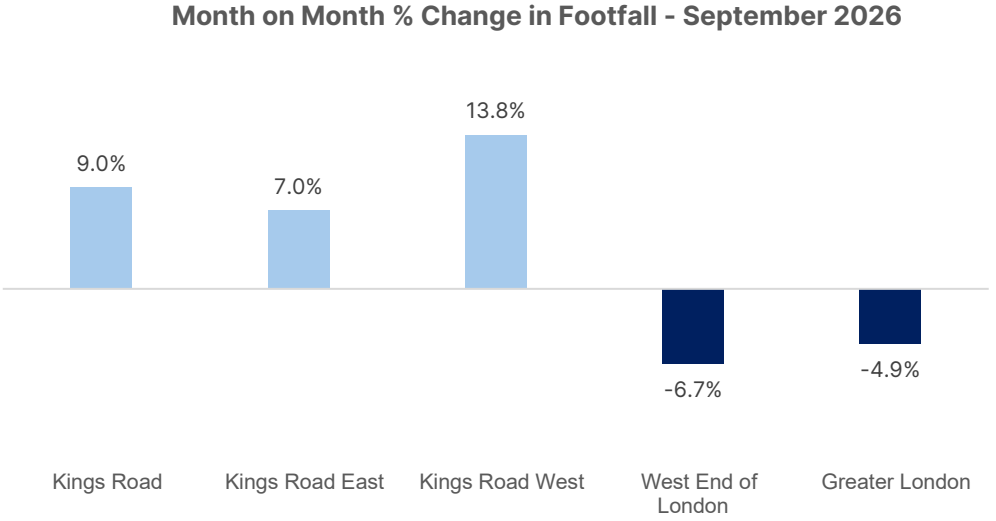
+3.4%	District footfall YoY
+2.8%	West End footfall YoY
+8.3%	Total spending YoY
-0.9%	Domestic spending YoY
+31.6%	International spending YoY
£33.20	Domestic ATV
£59.43	International ATV
65%	Share of spending from domestic customers – Sep 2026
72%	Share of spending from domestic customers – Sep 2025

Footfall performance

Footfall – September 2026		
	YoY % Change	MoM % Change
Kings Road	3.4%	9.0%
Kings Road East	3.1%	7.0%
Kings Road West	4.0%	13.8%

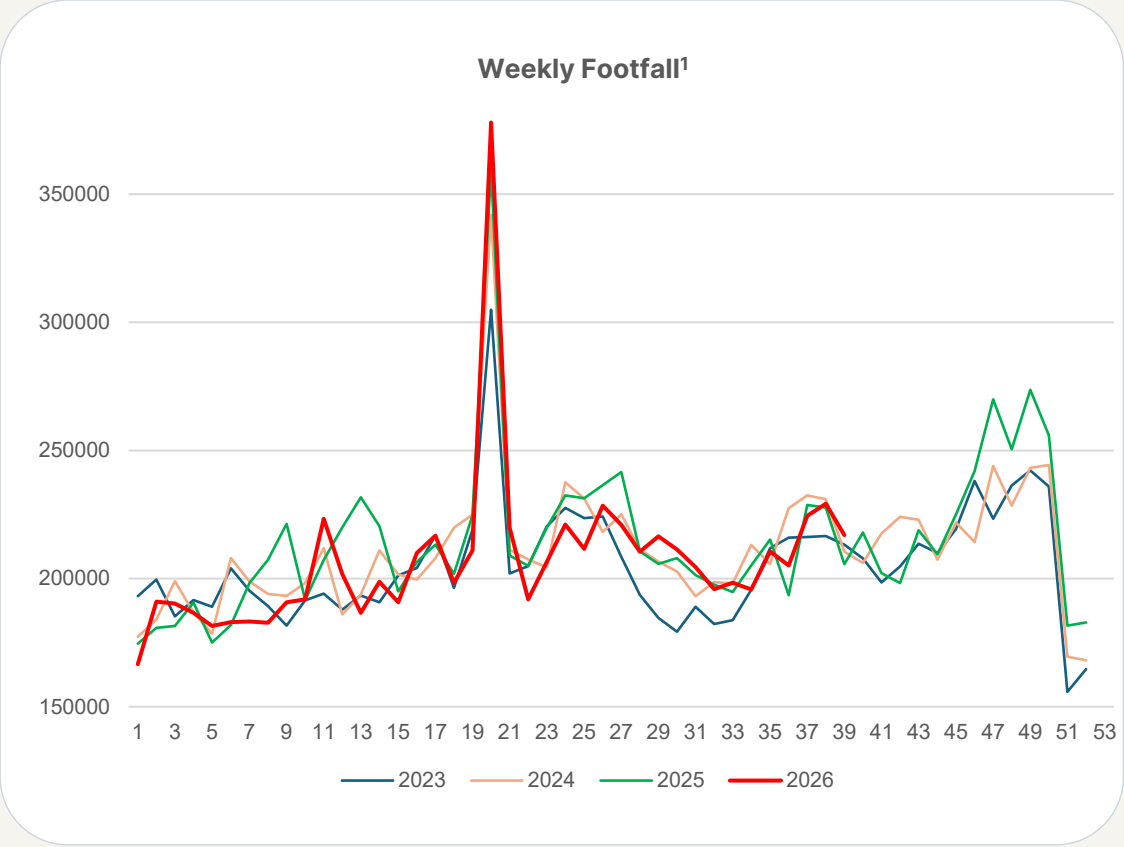
Footfall Benchmarks – September 2026		
	YoY % Change	MoM % Change
West End of London	2.8%	-6.7%
Greater London	1.9%	-4.9%

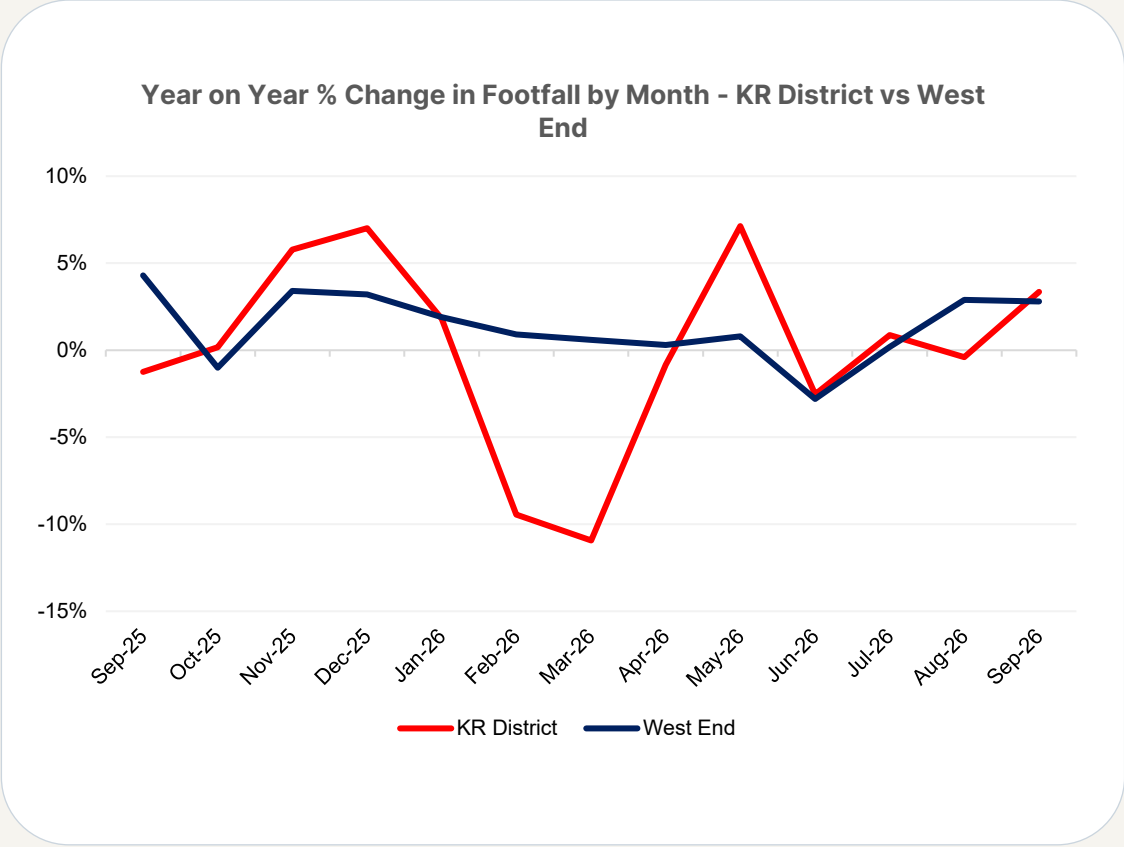




Source: MRI

Footfall performance





[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

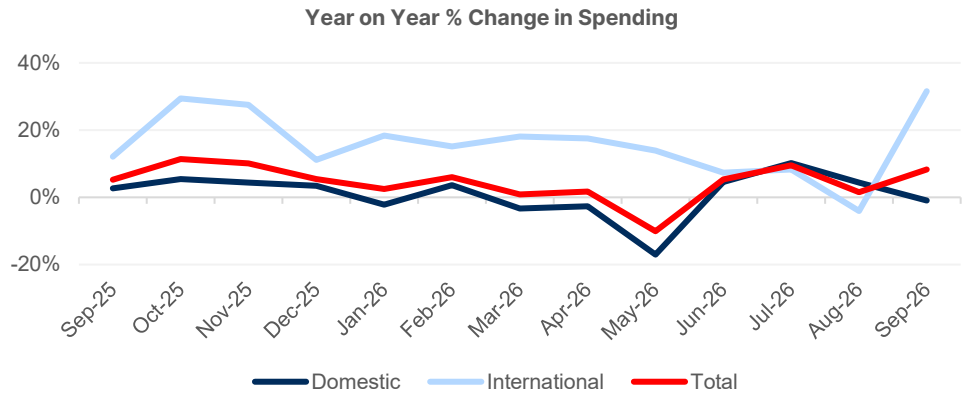
Source: MRI

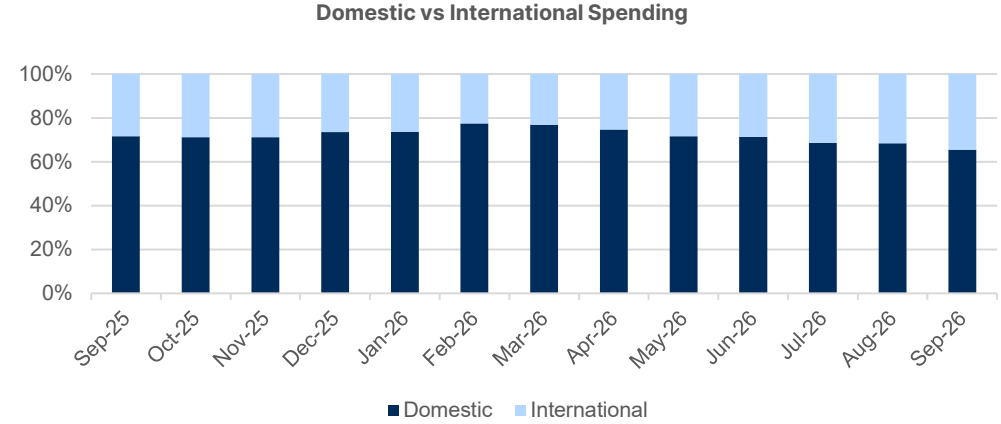
Domestic vs international spending

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

Domestic vs International Spending - % Change - September 2026			
	Domestic spending	International spending	Total spending
YoY % Change	-0.9%	31.6%	8.3%
MoM % Change	3.1%	17.5%	7.6%
YoY % change YTD	-0.7%	12.9%	2.8%

Domestic vs International Spending Split		
	Domestic spending	International spending
Sep-26	65%	35%
Sep-25	72%	28%





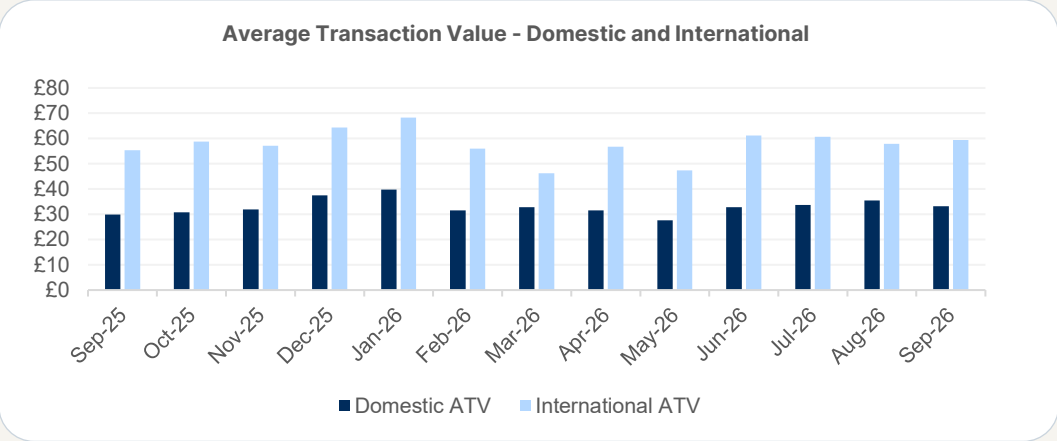
Source: Savills

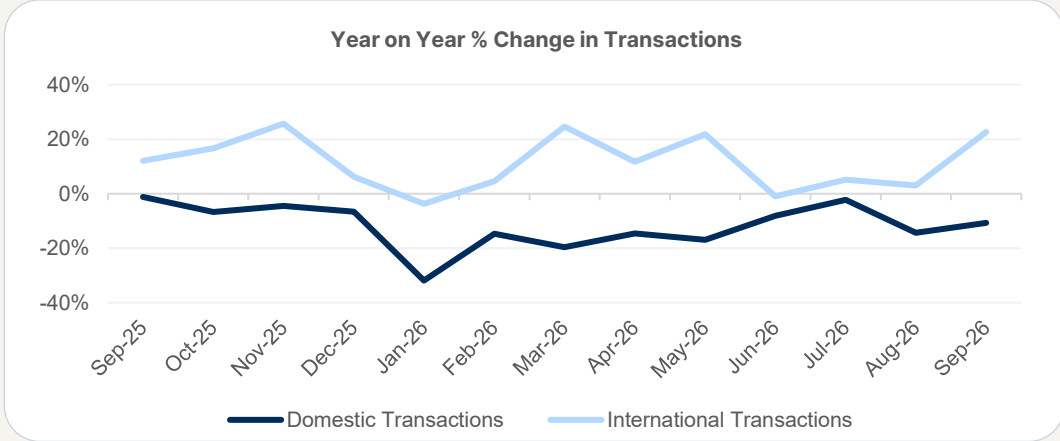
Domestic vs International Transactions

Domestic Spending - YoY % Change - September 2026		
	Transactions	Average Transaction Value
Sep-26	-10.7%	11.3%
Sep-25	-1.2%	4.1%

International Spending - YoY % Change - September 2026		
	Transactions	Average Transaction Value
Sep-26	22.7%	7.4%
Sep-25	12.1%	0.1%

Average Transaction Value - September 2026		
	Domestic Spending	International Spending
Sep-26	£33.20	£59.43
Sep-25	£29.84	£55.34





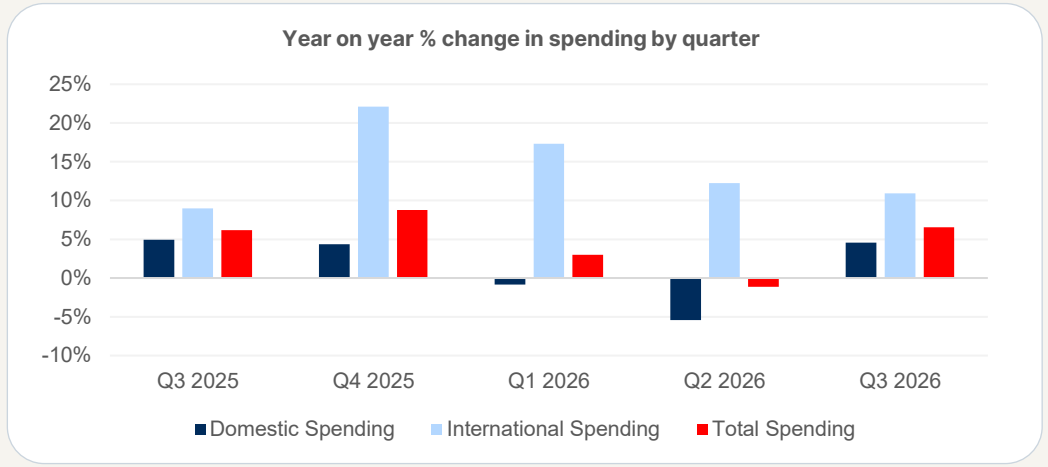
Source: Savills

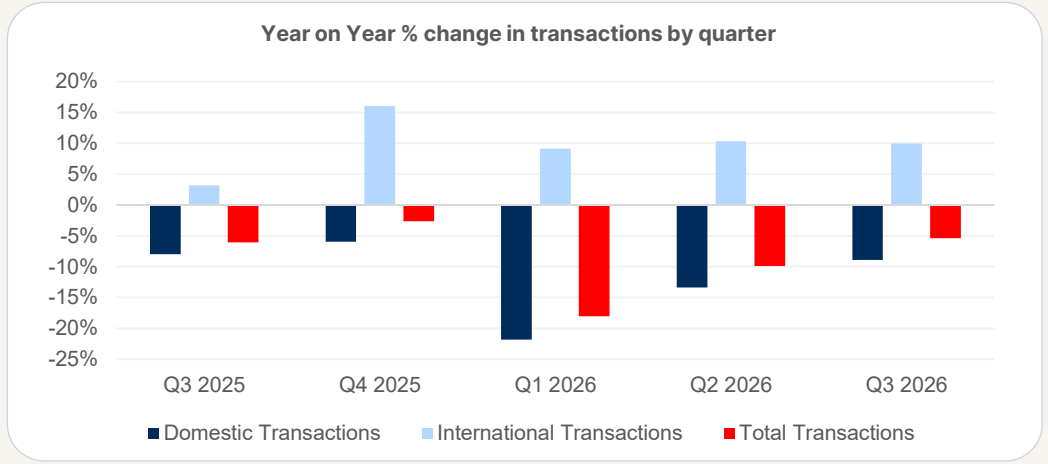
Domestic vs International Spend by Quarter – Q3 2026

Year on Year % Change in Spending by Quarter			
	Domestic Spending	International Spending	Total Spending
Q3 2025	4.9%	9.0%	6.2%
Q4 2025	4.4%	22.1%	8.8%
Q1 2026	-0.8%	17.3%	3.0%
Q2 2026	-5.4%	12.3%	-1.1%
Q3 2026	4.6%	10.9%	6.6%

Year on Year % Change in Transactions by Quarter			
	Domestic Transactions	International Transactions	Total Transactions
Q3 2025	-8.0%	3.2%	-6.1%
Q4 2025	-5.9%	16.0%	-2.6%
Q1 2026	-21.8%	9.2%	-18.0%
Q2 2026	-13.4%	10.4%	-9.9%
Q3 2026	-8.9%	10.0%	-5.4%

Year on Year % Change in Average Transaction Value by Quarter		
	Domestic ATV	International ATV
Q3 2025	14.0%	5.7%
Q4 2025	11.4%	5.7%
Q1 2026	29.6%	10.0%
Q2 2026	9.6%	2.6%
Q3 2026	15.6%	0.9%





Source: Savills

Notes

- MRI monthly footfall is based on a 445 calendar. September 2026 spans Monday 31st August 2026 to Sunday 4th October 2026. August 2026 spans Monday 3rd August 2026 to Sunday 30th 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.