

KNIGHTSBRIDGE
PARTNERSHIP

MONTHLY INSIGHTS REPORT

July 2026



KEY RESULTS – JULY 2026

Knightsbridge's reliance on international customers was exposed in July, with overall spending falling -11.9% year on year as international spending dropped -17.3%. Meanwhile, domestic spending remained resilient, increasing modestly by +1.5% despite the continued hot weather.

The scale of the international decline is significant. July was only the fourth month since July 2025 to record a year-on-year fall in international spending and, at -17.3%, it was the second-largest decline exceeded only by the -18.1% recorded in November 2025.

International customers continue to underpin the District's performance, accounting for 67% of total spending in July, however this has declined from 71% a year earlier.

The primary driver of the drop in international spending appears to be a significant reduction in the volume of transactions, which is an indicator of declining international footfall. Overall footfall in the BID District fell by -9.8% year on year, sharply underperforming the West End benchmark of +0.2%. Whilst there were lower transaction volumes among both domestic and international customers, the decline in international transactions was more than twice as large as the fall in domestic transactions (-34.8% versus -16.4%).

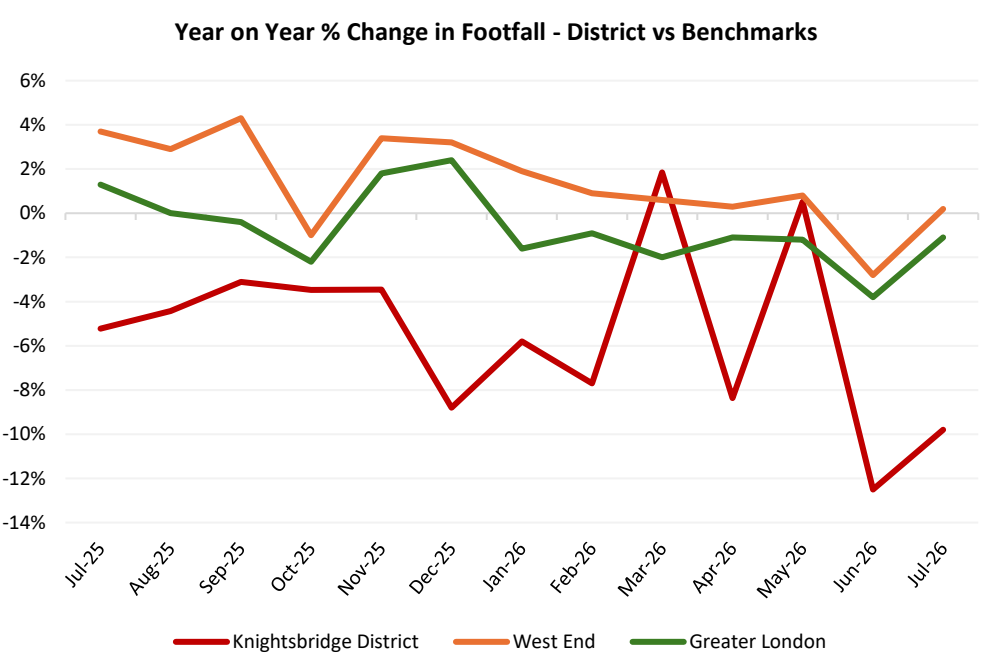
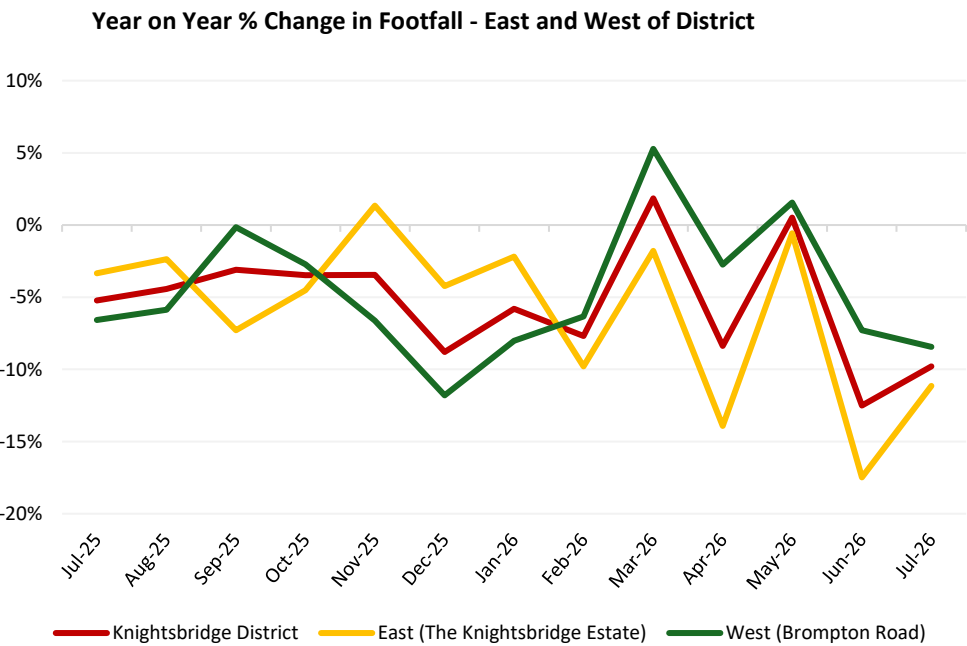
With domestic demand remaining broadly stable, the July performance points to a weakening in international visitor demand rather than a broader deterioration in consumer spending.

- ❖ Year on year on decrease in footfall of -9.8% (+0.2% in the West End)
- ❖ Year on year decrease in total spending of -11.9%
- ❖ Year on year increase in domestic spending of +1.5%
- ❖ Year on year decrease in international spending of -17.9%
- ❖ Year on year decrease in domestic transactions of -16.4%
- ❖ Year on year decrease in international transactions of -34.8%
- ❖ Year on year increase in the ATV of domestic purchases of +21.3%
- ❖ Year on year increase in the ATV of international purchases of +26.8%
- ❖ ATV of domestic purchases was £50.75
- ❖ ATV of international purchases was £165.62
- ❖ International spending accounted for 67% of total spending

KEY HIGHLIGHTS – FOOTFALL – JULY 2026

Knightsbridge Footfall - July 2026		
	YoY % Change	MoM % Change
Knightsbridge	-9.8%	10.1%
The Knightsbridge Estate	-11.1%	13.0%
Brompton Road	-8.4%	7.3%

Footfall Benchmarks - July 2026		
	YoY % Change	MoM % Change
West End of London	0.2%	9.6%
Greater London	-1.1%	6.8%



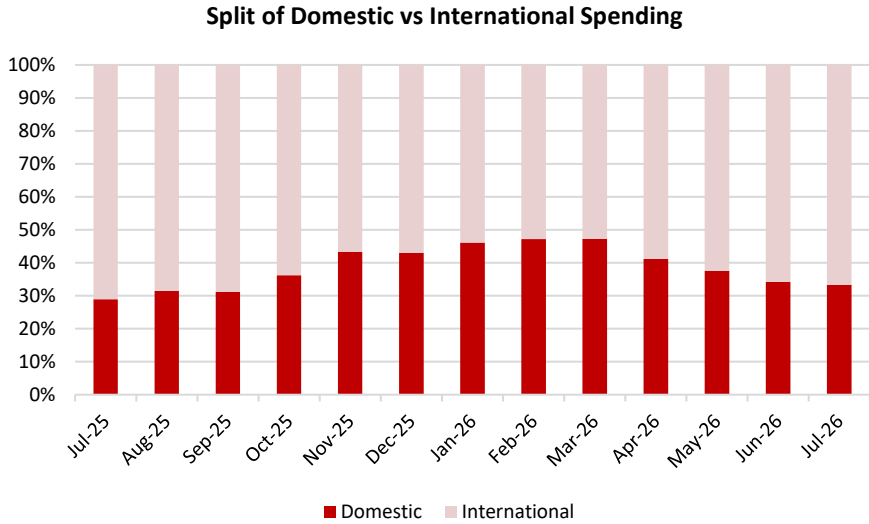
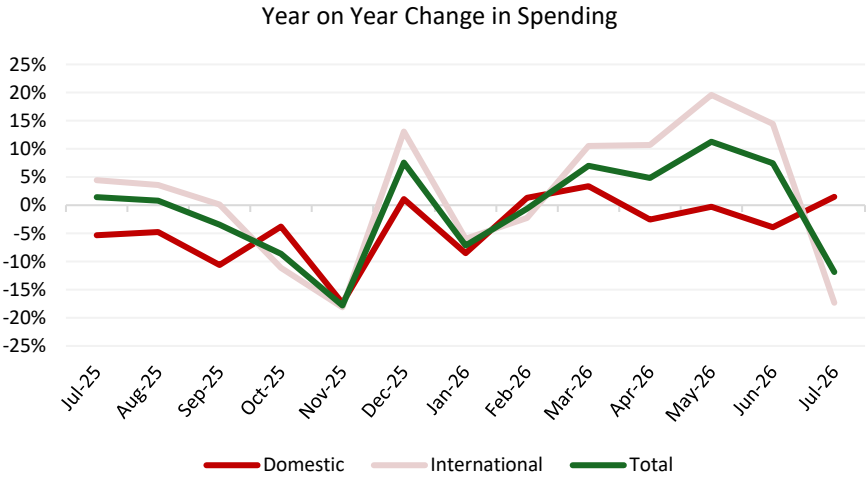
Source: MRI

KEY HIGHLIGHTS – SPENDING – JULY 2026

Domestic vs International Spending (£ million)			
	Domestic spending	International spending	Total spending
Jul-26	£7.46	£14.90	£22.36
Jul-25	£7.35	£18.02	£25.37

Domestic vs International Spending - % Change - July 2026			
	Domestic spending	International spending	Total spending
YoY % Change	1.5%	-17.3%	-11.9%
MoM % Change	9.4%	13.5%	12.1%
YoY % change YTD	-1.5%	2.4%	0.8%

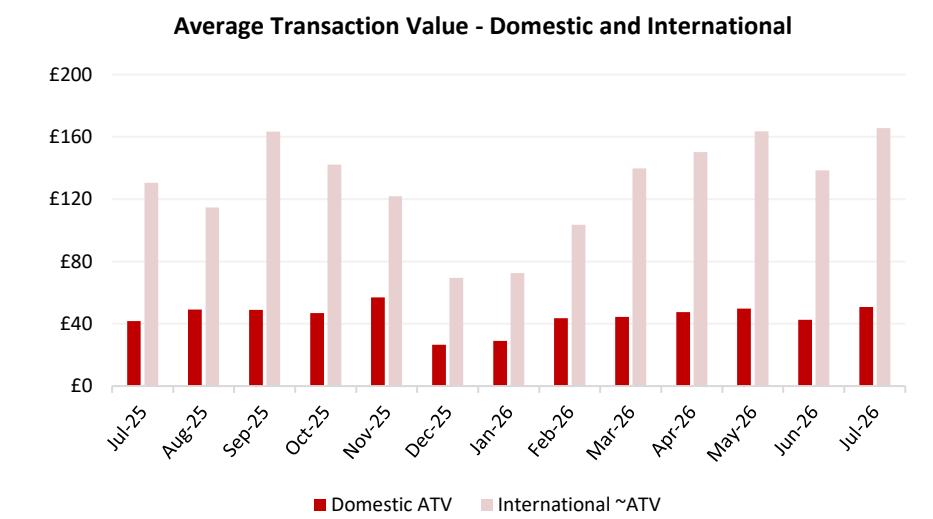
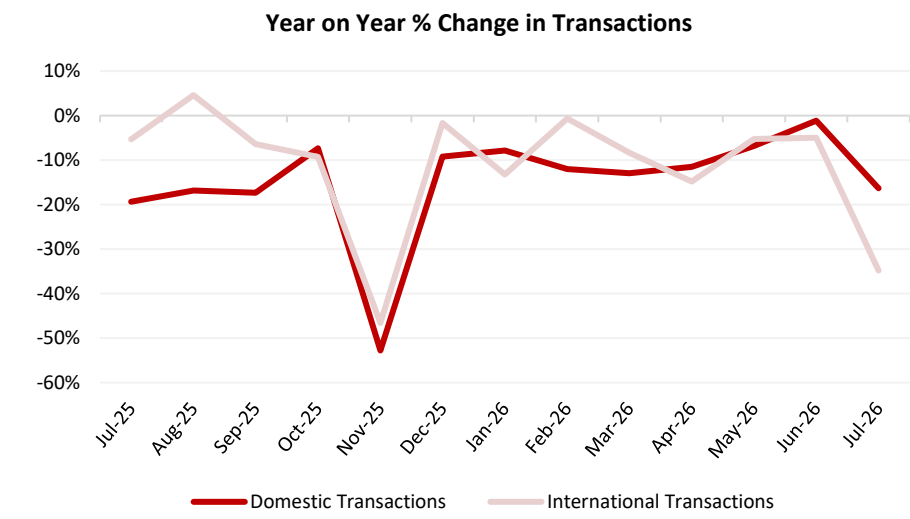
Domestic vs International Spending Split		
	Domestic spending	International spending
Jul-26	33%	67%
Jul-25	29%	71%



KEY HIGHLIGHTS – TRANSACTIONS – JULY 2026

Transactions - YoY % Change - July 2026		
	Transactions	Average Transaction Value
Domestic	-16.4%	21.3%
International	-34.8%	26.8%

Average Transaction Value - July 2026		
	Domestic Spending	International Spending
Jul-26	£50.75	£165.62
Jul-25	£41.82	£130.56



Source: Savills

INSIGHTS COMMENTARY – NOTES

- MRI monthly footfall is based on a 445 calendar. 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.