KNIGHTSBRIDGE
PARTNERSHIP

MONTHLY INSIGHTS

Footfall – Spending - Transactions

September 2026



The month in focus – September 2026

Trading conditions in the Knightsbridge District remained challenging in September 2026, with spending falling by -6.7% year-on-year, driven by a sharp contraction in transaction volumes.

Transactions declined among both domestic and international customers (-17.3% and -22.0% respectively), indicating a reduction in the number of customers making purchases in the District. This is consistent with the -5.8% decline in footfall, contrasting with growth of +2.8% in the West End.

Despite fewer domestic transactions, domestic spending increased by +2.3%, supported by a substantial +23.8% rise in average transaction value (ATV). This suggests that, although fewer domestic customers made purchases, those who did spent considerably more per transaction. International ATV also increased (+14.5%), but this was insufficient to offset the significant decline in international transaction volumes.

Quarterly results highlight the deepening nature of Knightsbridge's trading challenges. Transaction volumes have declined year-on-year in every quarter since Q2 2025, with Q3 2026 recording the steepest falls to date: -16.8% for domestic customers and -24.1% for international customers. Until recently, rising ATVs, particularly among international customers, had helped cushion the impact of a shrinking customer base. However, the sharper contraction in transaction volumes during Q3 2026 overwhelmed these gains, resulting in a -9.6% decline in quarterly spending — the largest annual fall since the series began.

International visitors remain central to Knightsbridge's trading performance, accounting for 66% of total spending in September 2026, down from 69% a year earlier. The average transaction value of international purchases also remained more than three times that of domestic purchases (£186.90 compared with £60.63). The data underline Knightsbridge's continued dependence on international spending and suggest that reversing the decline in international customer activity will be critical to restoring growth.

-5.9%	District footfall YoY
+2.8%	West End footfall YoY

-6.7%	Total spending YoY
+2.3%	Domestic spending YoY
-10.7%	International spending YoY

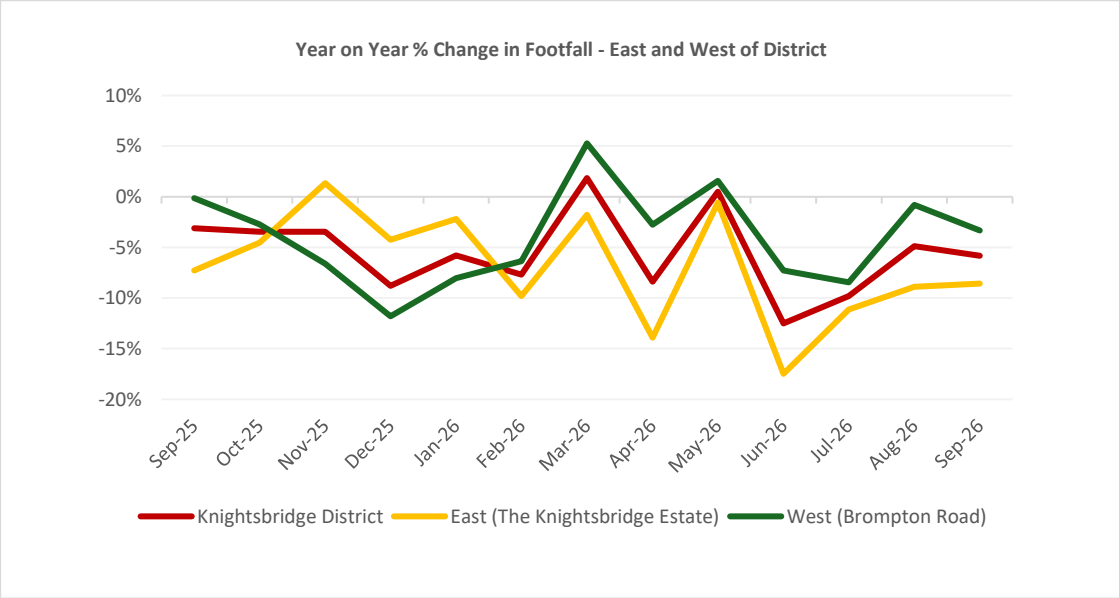
-17.3%	Domestic transaction volumes
-22.0%	International transaction volumes

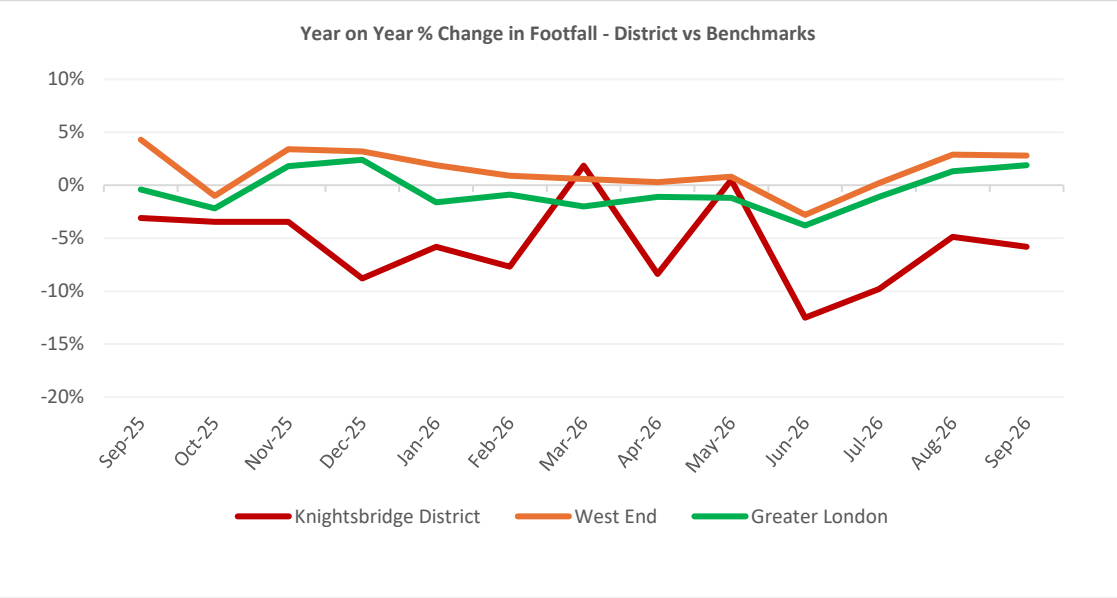
£60.63	Domestic ATV
£186.90	International ATV

Footfall performance

Knightsbridge Footfall - September 2026		
	YoY % Change	MoM % Change
Knightsbridge	-5.8%	-19.9%
The Knightsbridge Estate	-8.6%	-23.9%
Brompton Road	-3.3%	-16.2%

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





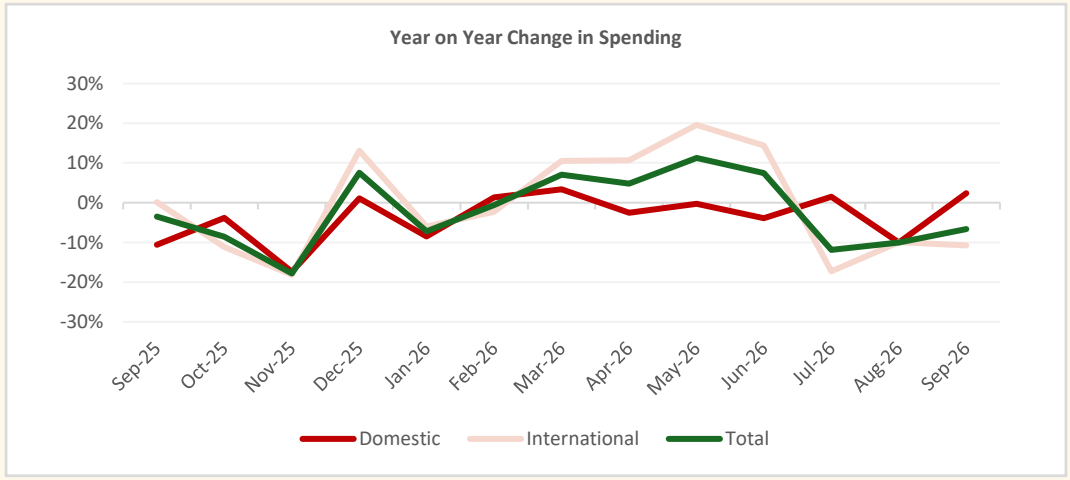
Source: MRI

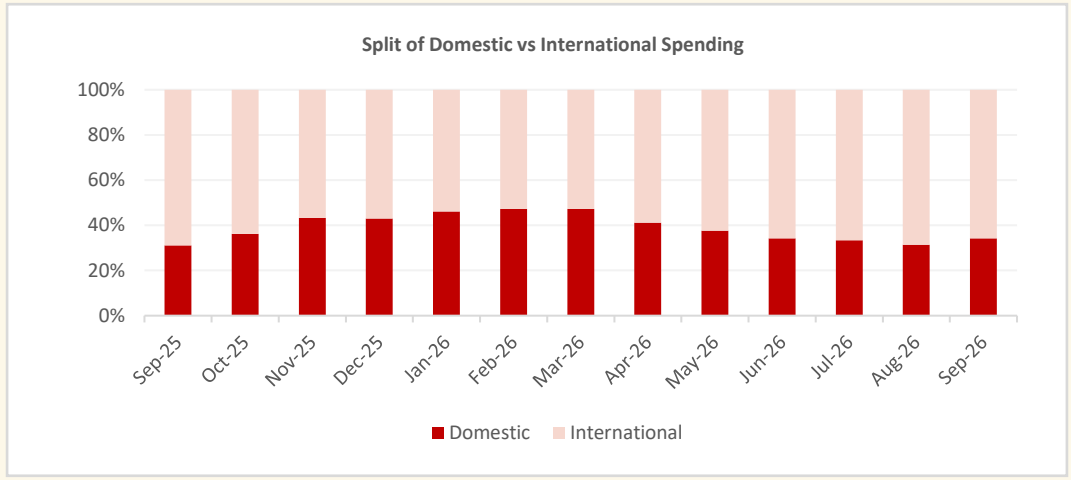
Domestic vs international spending

Domestic vs International Spending (£ million)			
	Domestic spending	International spending	Total spending
Sep-26	£7.67	£7.67	£7.67
Sep-25	£7.49	£7.49	£7.49

Domestic vs International Spending - % Change - September 2026			
	Domestic spending	International spending	Total spending
YoY % Change	2.3%	-10.7%	-6.7%
MoM % Change	6.1%	6.1%	6.1%
YoY % change YTD	-2.1%	-1.7%	-1.8%

Domestic vs International Spending Split		
	Domestic spending	International spending
Sep-26	34%	66%
Sep-25	31%	69%





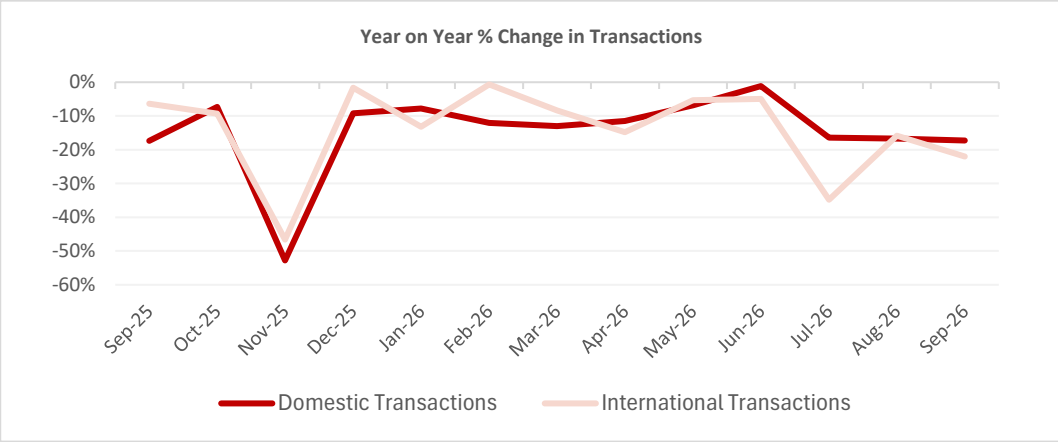
Source: Savills

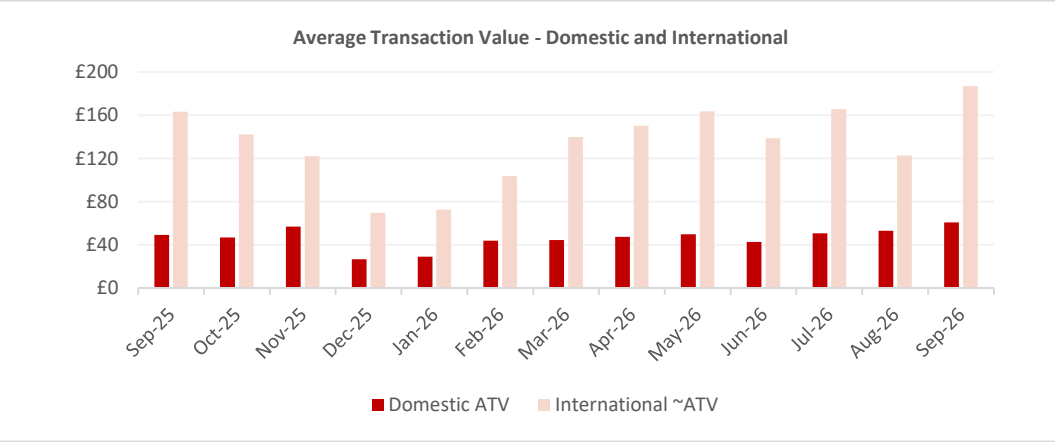
Domestic vs International Transactions

Domestic Spending - YoY % Change - September 2026		
	Transactions	Average Transaction Value
Sep-26	-17.3%	23.8%
Sep-25	-17.3%	8.2%

International Spending - YoY % Change - September 2026		
	Transactions	Average Transaction Value
Sep-26	-22.0%	14.5%
Sep-25	-6.4%	7.0%

Average Transaction Value - September 2026		
	Domestic spending	International spending
Sep-26	£60.63	£186.90
Sep-25	£48.99	£163.30



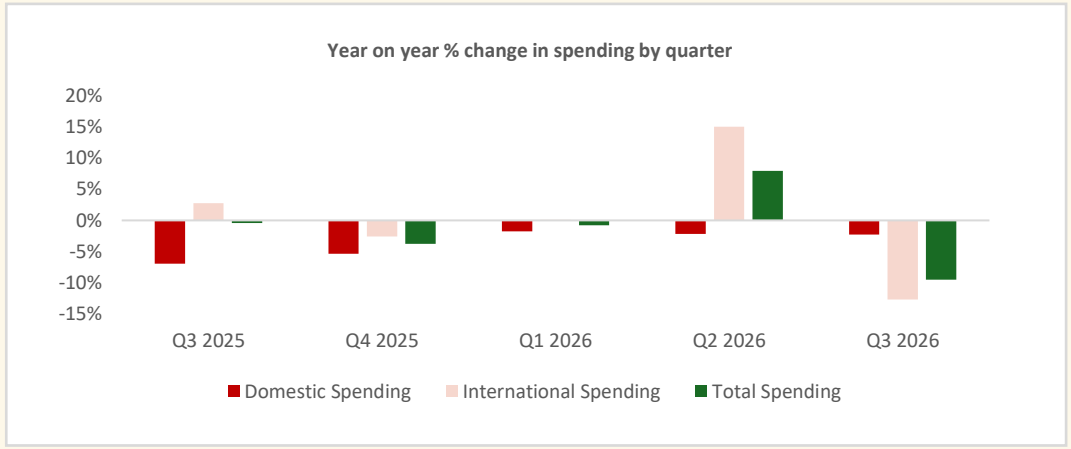


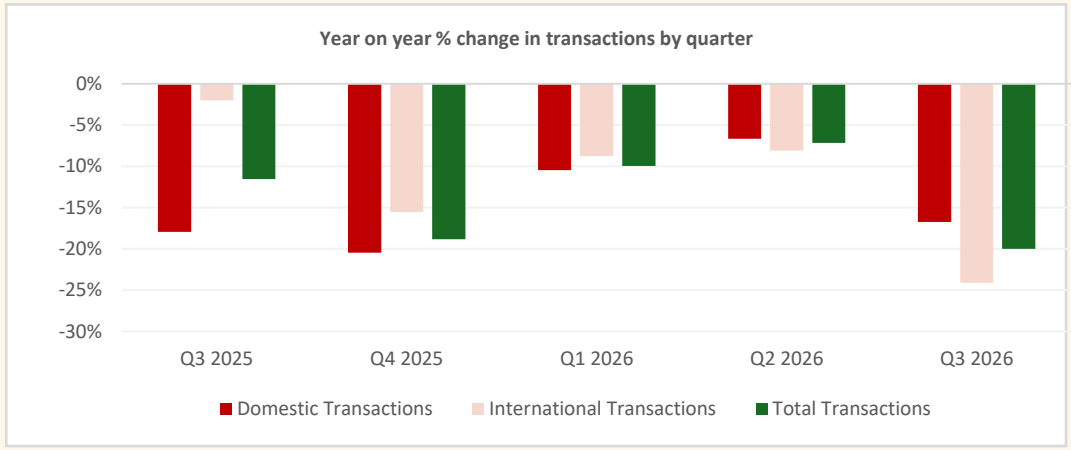
Domestic vs International Spending by Quarter – September 2026

Year on year % change in spending by quarter			
	Domestic spending	International spending	Total spending
Q3 2025	-6.9%	2.8%	-0.4%
Q4 2025	-5.4%	-2.6%	-3.8%
Q1 2026	-1.7%	0.1%	-0.8%
Q2 2026	-2.2%	15.1%	8.0%
Q3 2026	-2.3%	-12.7%	-9.6%

Year on year % change in transactions by quarter			
	Domestic Transactions	International Transactions	Total Transactions
Q3 2025	-17.9%	-2.0%	-11.6%
Q4 2025	-20.5%	-15.6%	-18.8%
Q1 2026	-10.5%	-8.8%	-9.9%
Q2 2026	-6.6%	-8.1%	-7.2%
Q3 2026	-16.8%	-24.1%	-20.0%

Year on year % change in average transaction value by quarter		
	Domestic ATV	International ATV
Q3 2025	13.0%	5.6%
Q4 2025	28.4%	17.0%
Q1 2026	12.0%	9.6%
Q2 2026	4.8%	25.6%
Q3 2026	17.5%	16.3%





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.