

JANUARY 2025 TOWN & CITY CENTRE BEAUCLAIR INSIGHTS

Sales in UK towns and cities during January 2025 declined by -3.2% annually. Whilst sales remained lower than last year, this result was an improvement on the result for January 2024 when sales were -5.2% lower than during January 2023. According to **Diane Wehrle, of Rendle Intelligence and Insights & Beauclair's Brand Ambassador.**

The driver of lower sales were reductions in both the number customers and the number of transactions (-5.2% and -4.9%).

Whilst the number of customers and transactions both declined in January, average transaction value rose by +1.8% from January 2024, when it had declined by -2.5% from January 2023. This demonstrates that those customers who were purchasing spent more per transaction than during January last year. This is a continuation of the trend identified during 2024, when the decline in sales was largely accounted for drops in both the number of customers making purchases and in the number of transactions, whilst the average transaction value was far more resilient.

Sales declined in each of the five key sectors that account for 85% of town and city centre spending during January 2025. The largest drops occurred in the Food & Drink and General Retail sectors (-4.9% and -4.2%, respectively). The decline in these two sectors was greater than that observed in January 2024 (-1.9% and -1.0%, respectively). The strongest performer was Grocery with a decline in sales of just -1%.

Notably, the drop in Fashion sales in January 2025 (-2.7%) was less than the drop observed in January 2024 (-10.1%) continuing a trend of a slowdown in the decline in Fashion sales. In the first six months of 2024, the average year-on-year decline was -7% when the other four key sectors were in growth. Over the last six months (July 2024 - January 2025), the average monthly decline in Fashion sales, at -3%, has been more in line with the other sectors. This may be a hopeful sign that Fashion sales could start to recover. With Fashion currently accounting for 24% of total town centre sales, if this trend continues this could turn into a positive indicator for high streets in 2025.

Looking at city size, sales in large cities in January (-2.4%) dropped more than sales in medium cities (-1.7%). This was a reversal of trends in the Golden Quarter 2024 (October to December 2024).

GB Benchmark – January 2025

Sector	Sales vs Jan 2024	Customers vs Jan 2024	ATV vs Jan 2024	ATV
All Sectors	-3.2%	-5.2%	+1.8%	£17.96
Fashion	-2.7%	-4.6%	+2.6%	£29.57
Food & Drink	-4.9%	-3.4%	-0.2%	£12.60
General Retail	-4.2%	-2.3%	-3.0%	£15.37
Grocery	-1.4%	-3.5%	+1.9%	£14.62
Health & Beauty	-1.8%	-4.7%	+3.6%	£26.64
All Sectors	-3.2%	-5.2%	+1.8%	£17.96

Our GB Benchmark is based on the median retail performance of 62 nationwide Town & City Centres.