

## MAY 2025 TOWN & CITY CENTRE BEAUCLAIR INSIGHTS

**SALES IN GB TOWNS AND CITIES FELL BACK ONCE AGAIN DURING MAY 2025, ALTHOUGH STRONGER FOOD & DRINK SALES PARTIALLY OFFSET THE CONTINUING CONTRACTION IN FASHION SALES.** According to **Diane Wehrle, of Rendle Intelligence and Insights & Beauclair's Brand Ambassador.**

Sales in GB towns and cities dipped once again in May, by -1.8% from May 2024, following a modest annual rise of +0.7% in April.

As in many previous months the key driver of the drop in town and city centre sales during May was the Fashion sector, where sales were -3.6% lower than in May 2024. Fashion is one of the five key sectors that accounts for 85% of total town and city centre sales across GB, and the average annual change across the other four sectors (Food & Drink, General Retail, Grocery and Health & Beauty) was positive at +0.1%.

By far the strongest performer of the five key sectors was Food & Drink, with sales +1.9% higher than in May 2024. However, this sector is not without its challenges as both the number of customers and transactions declined annually in May, with all the increase in sales emanating from a higher ATV. This indicates that spending growth in this sector depended on a fewer number of customers spending more per visit, with the same pattern being true for Grocery and Health & Beauty. In contrast, there were rises in the number of customers and transactions in the General Retail sector, however, a drop in the ATV of -2.7% - a reflection of the number of value led retailers now in this sector - led to an overall drop in sales of -0.7%.

All three sales metrics of customers, transactions and ATV were lower than in May 2024 (-1.3% drop in both customers and transactions and a -0.5% drop in the ATV). This indicates that fewer customers made purchases, they bought fewer items and spent less per transaction, which reflects the ongoing consumer caution about spending.

### GB Benchmark - May 2025

sector	Sales vs May 2024	Customers vs May 2024	ATV vs May 2024	ATV
All Sectors	-1.8%	-1.3%	-0.5%	£18.58
Fashion	-3.6%	-2.3%	-1.8%	£39.19
Food & Drink	+1.9%	-1.8%	+3.6%	£13.58
General Retail	-0.7%	+1.4%	-2.7%	£16.42
Grocery	-1.3%	-0.7%	+0.6%	£15.03
Health & Beauty	+0.2%	-0.5%	+1.1%	£26.25

### GB Benchmark - YTD May 2025

sector	YTD Sales vs May 2024	YTD Customers vs May 2024	YTD ATV vs May 2024	YTD ATV
All Sectors	-2.3%	-3.5%	+1.6%	£18.35
Fashion	-4.5%	-3.3%	-0.9%	£37.53
Food & Drink	-1.9%	-3.1%	+2.6%	£13.43
General Retail	-0.6%	-2.6%	+1.4%	£16.12
Grocery	-2.2%	-1.9%	-0.3%	£15.00
Health & Beauty	-0.8%	-2.7%	+2.8%	£26.36

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