JUNE 2025 TOWN & CITY CENTRE BEAUCLAIR INSIGHTS

The majority consumers remained cautious about spending during a challenging June on the high street. However, there were still some positive examples of resilience, in the face of ongoing economic pressures. According to **Diane Wehrle, of Rendle Intelligence and Insights & Beauclair's Brand Ambassador.**

Sales across GB towns and cities during June 2025 were -8.5% lower than during June 2024, which was a noticeable annual decrease predominantly driven by drops in both transactions (-7.5%) and customers (-5.6%). In contrast, the ATV only declined annually by -1.1%, suggesting that the value of the amount spent by those who made purchases was largely similar to June 2024.

This result indicates that consumers continued to pull back on spending during June, however this may have been impacted by the hot weather tempting consumers to head out to recreational areas, the coast and the countryside to enjoy the weather rather than making visits to town and city centres.

The drop in sales will have been exacerbated by a small but significant shift in the calendar between June 2025 and June 2024. June 2025 commenced on Sunday and therefore included only four Saturdays compared with five Saturdays in June 2024. Saturday is the peak day for sales in towns and cities so the absence of such a key trading day will have impacted sales over the month, particularly as the missing Saturday coincided with the second weekend of the half term holiday, when spending – particularly discretionary spending - is likely to have increased ahead of the return to school.

This is illustrated clearly by the fact that Food & Drink sales during June 2025 declined annually by -10.5% whilst Grocery, General Retail and Health & Beauty sales – all of which comprise a far greater proportion of necessary spending - declined by -5%, -3.7% and -6.9% respectively. Despite fewer Food & Drink customers in June, the ATV in the Food & Drink sector declined by just -0.2% demonstrating that the level of spending amongst hospitality customers held up.

The news wasn't disappointing for all towns and cities; as there was a small proportion with some growth. What seems to be apparent is that while the majority consumers remain cautious about spending, focussing their spending on key dates in the annual calendar, there remain positive examples of resilient town and city centres, in the face of ongoing economic pressures.

GB Benchmark – June 2025

sector	Sales vs Jun 2024	Customers vs Jun 2024	YTD ATV vs Jun 2024	YTD ATV
All Sectors	-8.5%	-5.6%	-1.1%	£18.32
Fashion	-10.8%	-10.5%	-1.7%	£37.68
Food & Drink	-10.5%	-7.9%	-0.2%	£13.05
General Retail	-3.7%	-5.4%	-0.4%	£15.69
Grocery	-5.0%	-3.6%	-1.1%	£14.71
Health & Beauty	-6.9%	-7.1%	+0.3%	£26.10

GB Benchmark – YTD June 2025

sector	YTD Sales vs Jun 2024	YTD Customers vs Jun 2024	YTD ATV vs Jun 2024	YTD ATV
All Sectors	-3.3%	-3.8%	+1.4%	£18.42
Fashion	-5.6%	-4.5%	-1.0%	£37.56
Food & Drink	-3.1%	-4.0%	+2.2%	£13.34
General Retail	-1.0%	-3.1%	+1.3%	£16.06
Grocery	-2.4%	-1.8%	-0.1%	£15.01
Health & Beauty	-2.0%	-3.8%	+3.1%	£26.49

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