BEAUCLAIR

JULY 2025 TOWN & CITY CENTRE BEAUCLAIR INSIGHTS

JULY DELIVERED BETTER NEWS THAN PREVIOUS MONTHS FOR TOWNS AND CITIES WITH SALES ONLY MARGINALLY BELOW JULY 2024, AND OVER A THIRD OF TOWNS AND CITIES ACROSS GB RECORDING HIGHER SALES THAN LAST YEAR According to **Diane Wehrle, of Rendle Intelligence and Insights & Beauclair's Brand Ambassador.**

July delivered some better news than previous months for GB towns and cities, with sales just -1.4% lower than in July 2024. This was a much-improved result from June 2025, when town and city centre sales declined annually by -8.5%, and also from July 2024 when sales were -9.3% below July 2023. Further cause for optimism is provided by the fact that sales increased annually during July in over a third of towns and cities in the GB benchmark.

Underlying the stronger sales performance in towns and cities were improvements from June in all three metrics of transactions, customers and ATV. Further optimism is provided by the fact that the number of customers making purchases during July 2025 was just -0.9% below July 2024 - the smallest annual drop in this metric since May 2024.

At least part of the driver for the stronger sales performance is likely to have been the warm weather; two heatwaves during July 2025 will have made many outdoor environments more appealing for customers than in July 2024 when there were cooler than average temperatures and unsettled conditions.

Five sectors account for 85% of total town and city centre sales (Fashion, Food & Drink, General retail, Grocery and Health & Beauty). Sales in each of these sectors during July 2025 remained lower than during July 2024, however, the performance of each of these improved during July from June 2025. In addition, the average transaction value (ATV) in four of the five sectors rose from last year, indicating that those who did make purchases spent more per transaction. General Retail was the only sector with a drop in its ATV from last year (-1.7%), which could be a consequence of price reductions within a sector that is highly price competitive.

Health & Beauty was the strongest performing sector with sales flat on July 2024, followed by Grocery with sales just -0.8% lower than during July 2024. Sales in the Fashion and Food & Drink sectors improved significantly between June and July 2025 (from -10.8% to -3.2% in Fashion and from -10.5% to -1.8% in Food & Drink). However, the fact that sales in these two sectors still remained lower than during July 2024 is indicative of ongoing consumer cautiousness in terms of spending on what are largely discretionary purchases.

GB Benchmark – July 2025

sector	Sales vs Jul 2024	Transactions vs Jul 2024	Customers vs Jul 2024	ATV vs Jul 2024	ATV
All Sectors	-1.4%	-2.3%	-0.9%	+0.9%	£18.34
Fashion	-3.2%	-3.8%	-1.5%	+0.6%	£36.31
Food & Drink	-1.8%	-5.6%	-0.8%	+4.0%	£13.60
General Retail	-2.6%	-1.0%	-2.1%	-1.7%	£15.76
Grocery	-0.8%	-0.9%	+0.7%	+0.2%	£14.70
Health & Beauty	+0.0%	-3.9%	-1.9%	+4.1%	£26.69

GB Benchmark – YTD July 2025

sector	YTD Sales vs Jul 2024	YTD Transactions vs Jul 2024	YTD Customers vs Jul 2024	YTD ATV vs Jul 2024	YTD ATV
All Sectors	-3.0%	-4.2%	-3.4%	+1.2%	£18.39
Fashion	-5.0%	-4.4%	-3.8%	-0.6%	£37.29
Food & Drink	-2.5%	-5.1%	-3.4%	+2.7%	£13.38
General Retail	-1.1%	-1.9%	-3.1%	+0.8%	£16.01
Grocery	-2.5%	-2.0%	-1.5%	-0.5%	£15.02
Health & Beauty	-1.5%	-4.3%	-3.2%	+3.0%	£26.35

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