

AUGUST 2025 TOWN & CITY CENTRE BEAUCLAIR INSIGHTS

SALES IN GB TOWNS AND CITIES FELL BACK ONCE AGAIN DURING AUGUST, DECLINING BY -4.8% FROM AUGUST 2024, VERSUS A MORE MODEST ANNUAL DROP OF -1.4% DURING JULY 2025. HOWEVER, DESPITE THE HEADLINE RESULT BEING LESS FAVOURABLE, THERE REMAIN REASONS FOR OPTIMISM. According to **Diane Wehrle, of Rendle Intelligence and Insights & Beauclair's Brand Ambassador.**

During August 2025 the number of customers making purchases was virtually flat (-0.9% from August 2024), showing that towns and cities were continuing to attract customers. The challenge is then to maximise spending per customer. Interestingly, around a third of all towns and cities in the GB benchmark recorded an annual increase in sales during August, and 15% recorded a drop in sales of less than -2%.

The weak link for town and city centre sales during August was the number of transactions made by customers, which declined by -5.4% from August 2024, even though the average transaction value rose marginally (+0.6% from August 2024). This indicates that consumers were being cautious regarding their spending by restricting the number of purchases they made during the month. This reflects ongoing weak consumer confidence as measured by GFK; its Consumer Confidence index improved marginally in August from July (-17 from -19) but remains noticeably lower than the index score in August 2024 (-13).

The impact of a reduction in the number of transactions during August 2025 highlights the necessity for towns and cities to track spending. It is clear that business viability isn't wholly dependent on visitor numbers or even on customer numbers, but is strongly impacted by consumers' buying behaviour, e.g. how many purchases they make and the value of each purchase.

A further - and equally important - dimension to sales in towns and cities is the performance of individual sectors. Five key sectors account for 85% of spending in towns and cities (Fashion, Food & Drink, General Retail, Grocery and Health & Beauty), and sales declined annually during August in four of these five sectors. Only Health & Beauty recorded a positive result versus August 2024 (+0.1%), which was underpinned by a significant increase in the ATV (+9.2%).

With August comprising the bank holiday weekend and the period immediately preceding the return to school, it was expected that sales would increase from July, which is exactly what occurred. Total sales rose by +1.4% from July, with three key sectors performing particularly strongly versus July 2025; Household and Food & Drink (+15.1% and +5.4%) and the Fashion sector (+6.2%). The Household sector - which includes DIY and garden furniture stores - and Food & Drink would have both benefited from the warm (but not too hot) sunny weather throughout August and over the bank holiday weekend.

Sector	Sales vs Aug 24	Transactions vs Aug24	Customers vs Aug 24	ATV vs Aug 24	ATV
All Sectors	-4.8%	-5.4%	-0.9%	+0.6%	£18.67
Fashion	-4.6%	-3.3%	-2.4%	-1.3%	£37.13
Food & Drink	-2.2%	-5.1%	-1.6%	+3.0%	£13.69
General Retail	-7.6%	-5.8%	-3.6%	-1.9%	£15.75
Grocery	-3.0%	-3.5%	-1.1%	+0.5%	£15.14
Health & Beauty	+0.1%	-8.3%	-6.7%	+9.2%	£26.72

Sector	YTD Sales vs Aug 24	YTD Transactions vs Aug24	YTD Customers vs Aug 24	YTD ATV vs Aug 24	YTD ATV
All Sectors	-2.9%	-4.2%	-3.1%	+1.3%	£18.43
Fashion	-5.0%	-4.2%	-3.8%	-0.8%	£37.25
Food & Drink	-2.2%	-4.4%	-2.7%	+2.3%	£13.38
General Retail	-2.2%	-2.2%	-3.0%	+0.0%	£15.92
Grocery	-2.1%	-2.0%	-0.9%	-0.1%	£14.98
Health & Beauty	-0.9%	-5.1%	-3.9%	+4.4%	£26.61

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