

DECEMBER 2025 TOWN & CITY CENTRE BEAUCLAIR INSIGHTS

Sales declined during December 2025 in GB towns and cities, but the results delivered further evidence of the growing importance to consumers of socialising and experience.

According to Diane Wehrle, of Rendle Intelligence and Insights & Beauclair's Brand Ambassador.

Sales in GB towns and cities declined by -3.6% from December 2025, and, whilst this was disappointing, it wasn't unexpected given the evident cautiousness of consumers during the previous two months of Q4 2025. If a glimmer of positivity can be identified, it is that the -3.6% drop from 2024 during December was significantly lower than the -7% drop in sales during November. This indicates that a proportion of consumers returned to the high street in the run up to Christmas, evidenced by a month on month increase in sales from November to December of +25.8%, compared with an increase of just +7.7% from October to November.

At the same time, however, the drop of -3.6% during December this year followed a year-on-year decrease of -7.5% in December 2024, resulting in a cumulative two-year decline in sales in high streets during this key trading month of -10.9%. This is the largest two-year cumulative drop since June when sales were -11.2% below the 2023 level.

The drop in sales during December was wholly driven by a reduction in customers making purchases (-4.3%) and the number of transactions made (-5.9%). However, the average transaction value rose (+2.4%) suggesting that those who did make purchases spent a greater amount. Whilst this was positive, it is still below the latest CPI inflation figure of just over 3%, although this does vary from sector to sector (in November the CPI inflation figure for Clothing and Footwear stood at -0.6% but just over 4% for restaurants/cafes etc.

Greater insight into the drivers of sales - and therefore of consumer spending habits - are revealed by examining the results for the five key sectors which account for 85% of sales in towns and cities. Sales in all five sectors (Fashion, Food & Drink, General Retail, Grocery and Health & Beauty) declined from December 2024, but the drops in Food & Drink and Grocery sales were far more modest than in the other three sectors (-2.3% and -2.9% respectively). In contrast Fashion sales declined by -9.1%, General Retail by -9% and Health & Beauty by -8.2%.

The drop in the number of customers in both the Food & Drink and Grocery sectors (-3.9% and -3.0% respectively) was less than half that in the other three key sectors which averaged 6.8%. Furthermore, the average drop from December 2024 in transaction numbers across the three key sectors of Fashion, General Retail and Health & Beauty averaged -8.4%, whilst Food & Drink transactions dropped by only -1.9% and Grocery by -6.1%.

GB Benchmark – December 2025

Sector	Sales vs Dec 2024	Transactions vs Dec 2024	Customers vs Dec 2024	ATV vs Dec 2024	ATV
All Sectors	-3.6%	-5.9%	-4.3%	+2.4%	£21.31
Fashion	-9.1%	-8.8%	-6.1%	-0.3%	£40.43
Food & Drink	-2.3%	-1.9%	-3.9%	-0.5%	£14.60
General Retail	-9.0%	-8.7%	-6.1%	-0.3%	£18.13
Grocery	-2.9%	-6.1%	-3.0%	+3.4%	£18.65
Health & Beauty	-8.2%	-7.8%	-8.2%	-0.4%	£28.76

GB Benchmark – YTD December 2025

Sector	YTD Sales vs Dec 2024	YTD Transactions vs Dec 2024	YTD Customers vs Dec 2024	YTD ATV vs Dec 2024	YTD ATV
All Sectors	-3.3%	-4.6%	-3.3%	+1.4%	£18.89
Fashion	-5.3%	-4.6%	-4.0%	-0.7%	£38.04
Food & Drink	-2.5%	-4.7%	-3.2%	+2.3%	£13.54
General Retail	-5.2%	-4.2%	-4.0%	-1.0%	£16.33
Grocery	-2.1%	-3.1%	-1.6%	+1.0%	£15.47
Health & Beauty	-1.7%	-5.6%	-4.7%	+4.2%	£27.28

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