

JANUARY 2026 TOWN & CITY CENTRE BEAUCLAIR INSIGHTS

January 2026 delivered some good news for GB towns and cities, with sales just -0.7% below January 2025.

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

However, underlying this improved result is the ongoing challenge of fewer customers (-2.2%) and transactions (-3.1%) that are being offset by an increase in the Average Transaction Value (ATV, +2.5%). ATV measures the average value of each purchase, and this will be influenced by inflationary pressures.

Sales declined in four of the five key sectors that account for 86% of total sales, but the annual drops were modest, ranging from just -0.4% in Health & Beauty to -3.0% in General Retail. Food & Drink (+0.7%) and Health & Beauty (-0.4%) performed best out of the five key sectors. Whilst both customers and transactions in Food & Drink and Health & Beauty declined, they each recorded the highest increases in ATV (+5.0% and +7.0%, respectively). The rise in Food & Drink sales rose by is the first annual rise in this sector since October 2025 when sales remained flat from October 2024.

The fact that both customers and transactions declined during January 2026 - as they have done each month since March 2024 - demonstrates the ongoing challenge for towns and cities in strengthening their sales. It is therefore critical for towns and cities to have a comprehensive understanding of which sectors are most resilient and those that need the greatest support.

Notwithstanding this, the extent of the challenge varies from place to place, with a significant proportion of towns and cities recording positive results during January 2026; 46% of the GB benchmark reported an annual increase in sales, 36% reported an annual increase in customers and 26% reported an increase in transactions.

Sector	Sales vs Jan 2025	Transactions vs Jan 2025	Customers vs Jan 2025	ATV vs Jan 2025	ATV
All Sectors	-0.7%	-3.1%	-2.2%	+2.5%	£18.43
Fashion	-1.3%	-2.9%	-1.9%	+1.6%	£35.32
Food & Drink	+0.7%	-4.1%	-2.0%	+5.0%	£13.32
General Retail	-3.0%	-4.4%	-2.1%	+1.5%	£15.57
Grocery	-1.9%	-3.5%	-0.9%	+1.6%	£15.77
Health & Beauty	-0.4%	-6.9%	-5.5%	+7.0%	£28.50

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