

MAY 2026: BEAUCLAIR TOWN & CITY CENTRE INSIGHTS

ONGOING FRAGILE CONSUMER CONFIDENCE CONTINUED TO DAMPEN SALES IN TOWNS AND CITIES, DESPITE MAY'S FAVOURABLE WEATHER

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

Despite the benefit of two bank holidays and prolonged hot sunny weather, sales in GB town and city centres declined by -4.5% year on year in May with sales increasing in just 11% of towns and cities. This represents a marked deterioration from May 2025, when sales were down -1.5% on the previous year with 41% of towns and cities recording increased sales. This highlights the continued fragility of consumer confidence, although the unusually hot weather early in the season may also have diverted spending away from traditional town and city centre destinations. Consequently, the three-month average decline for March to May 2026 widened to -5.9%, compared with -2.2% over the same period in 2025.

The underlying sales drivers present a consistent picture of weakening demand. Customer numbers fell by -4.8%, while transactions declined by -7.1%, indicating that not only were there fewer consumers, but each consumer was making fewer purchases. The average transaction value increased by +2.8%, suggesting a modest uplift in spend per purchase; however, this is likely to reflect ongoing inflationary pressures rather than stronger discretionary spending.

All five of the largest sectors, which together account for 86% of total town and city centre sales, recorded year-on-year declines in May. Leisure-related spending appears to have benefited marginally from the bank holiday weekends, with Food & Drink and Grocery experiencing the smallest reductions, at -3.0% and -1.2% respectively. Elsewhere, the downturn was more pronounced, with sales falling by -8.7% in Fashion, -6.4% in Health & Beauty, and -4.9% in General Retail.

Sector	Sales vs May 2025	Transactions vs May 2025	Customers vs May 2025	ATV vs May 2025	ATV
All Sectors	-4.5%	-7.1%	-4.8%	+2.8%	£19.45
Fashion	-8.7%	-8.2%	-7.5%	-0.5%	£39.24
Food & Drink	-3.0%	-4.9%	-4.2%	+1.9%	£13.79
General Retail	-4.9%	-11.0%	-7.0%	+6.8%	£16.59
Grocery	-1.2%	-3.3%	-4.0%	+2.2%	£15.79
Health & Beauty	-6.4%	-10.2%	-8.0%	+4.2%	£27.38

Sector	Sales YTD vs May 2025	Transactions YTD vs May 2025	Customers YTD vs May 2025	ATV YTD vs May 2025	ATV YTD
All Sectors	-4.1%	-5.6%	-4.1%	+1.5%	£18.81
Fashion	-5.8%	-6.8%	-6.3%	+1.1%	£37.86
Food & Drink	-4.4%	-6.1%	-4.6%	+1.8%	£13.61
General Retail	-5.4%	-7.0%	-5.4%	+1.8%	£15.61
Grocery	-1.9%	-2.9%	-3.3%	+1.0%	£15.53
Health & Beauty	-2.9%	-7.9%	-7.0%	+5.5%	£27.78

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