

JUNE 2026: BEAUCLAIR TOWN & CITY CENTRE INSIGHTS

SALES IN GB TOWNS AND CITIES CONTINUED TO STRUGGLE DURING JUNE 2026 DESPITE THE HEATWAVE

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

The exceptionally hot weather during June 2026 did not appear to benefit the trading performance of GB towns and cities, with total sales declining by -4.5% compared with June 2025. Although this represented an improvement on the -8.5% annual decline recorded a year earlier, sales remain -11.7% below June 2024 levels, highlighting that the pressures facing high streets are structural rather than short term.

As in recent months, weaker sales were driven primarily by falling shopper activity. Both the number of purchasing customers and the number of transactions declined year on year (-6.6% and -7.3%, respectively). The average transaction value increased by +3.1%, reflecting a combination of ongoing inflationary pressures and stronger spending on higher-value purchases among consumers with greater disposable income.

All five of the largest retail sectors—Fashion, Food & Drink, General Retail, Grocery, and Health & Beauty, which together account for 86% of total sales—recorded annual declines. However, Grocery (-2.9%) and Health & Beauty (-1.9%) proved more resilient than the market overall, while Fashion (-7.4%), General Retail (-6.7%) and Food & Drink (-5.3%) experienced the steepest falls.

There was, however, a modest sign of improvement in the geographical spread of sales growth. 15% of towns and cities recorded year-on-year sales increases in June 2026, up from 11% in May 2026. While the improvement was slight, it suggests that trading conditions strengthened marginally across a broader range of locations.

GB Benchmark - June 2026

Sector	Sales vs Jun 2025	Transactions vs Jun 2025	Customers vs Jun 2025	ATV vs Jun 2025	ATV
All Sectors	-4.5%	-7.3%	-6.6%	+3.1%	£18.84
Fashion	-7.4%	-5.7%	-5.4%	-1.9%	£37.55
Food & Drink	-5.3%	-7.6%	-6.5%	+2.6%	£13.41
General Retail	-6.7%	-11.0%	-8.6%	+4.8%	£16.13
Grocery	-2.9%	-2.4%	-3.9%	-0.5%	£15.01
Health & Beauty	-1.9%	-7.5%	-7.1%	+6.0%	£27.97

GB Benchmark - YTD June 2026

Sector	Sales YTD vs Jun 2025	Transactions YTD vs Jun 2025	Customers YTD vs Jun 2025	ATV YTD vs Jun 2025	ATV YTD
All Sectors	-4.0%	-5.8%	-4.6%	+1.9%	£18.79
Fashion	-5.9%	-6.5%	-6.1%	+0.6%	£37.84
Food & Drink	-4.1%	-6.3%	-5.0%	+2.4%	£13.65
General Retail	-5.6%	-7.6%	-5.8%	+2.2%	£15.69
Grocery	-2.1%	-3.1%	-2.9%	+1.0%	£15.48
Health & Beauty	-2.7%	-7.9%	-7.1%	+5.6%	£27.82

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