BEAUCLAIR

JULY 2026: A NEW BENCHMARK FOR UNDERSTANDING GB'S HIGH STREETS

BEAUCLAIR'S NEW HIGH STREET INDEX OF OVER 500 RETAIL AREAS SHOWS THAT SHOPPERS ARE REACTING TO COST OF LIVING PRESSURES BY "STAYING LOCAL."

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

In the week that the government announced new policies designed to restore Britain's high streets and "bring town centres back to life," we have reached an exciting new chapter in our ability to measure retail activity in the nations' town and city centres. For the first time, the Beauclair High Street Index can now provide data on over 500 retail areas in town and city centres across Great Britain, providing an unparalleled view of high street performance at both a national and local level.

Beauclair continues to track sales performance across 10 key sectors, but the expanded dataset now also enables us to understand how performance varies according to the scale and function of different high streets. Using the town classification developed by the Geographic Data Service[1], centres have been grouped into three classes: Regional Centres, Major Town Centres and Town Centres[2].

The inaugural results for July 2026 reveal a clear divergence in performance. While July sales across the 500 GB high streets declined by -2.9% year on year, the scale of the contraction varied significantly by centre class. The sharpest decline was recorded in Major Town Centres (-4.4%), followed by Regional Centres (-2.9%). By contrast, sales in the smallest category, Town Centres, fell by just -1.3%.

Importantly, this is not simply a July phenomenon. Town Centres have consistently outperformed the two larger high street classes throughout 2026. For the year to date, January to July, sales in Town Centres are down by an average of just -1.6%, compared with -3.7% in Regional Centres and -3.5% in Major Town Centres.

The consistency of this pattern is particularly striking. Sales in Town Centres compared to the same month in the previous year fell by more than -2% in only two months of 2026 – March and April. In contrast, annual declines exceeded -2% in Regional Centres in every month except January, and in every month in Major Town Centres.

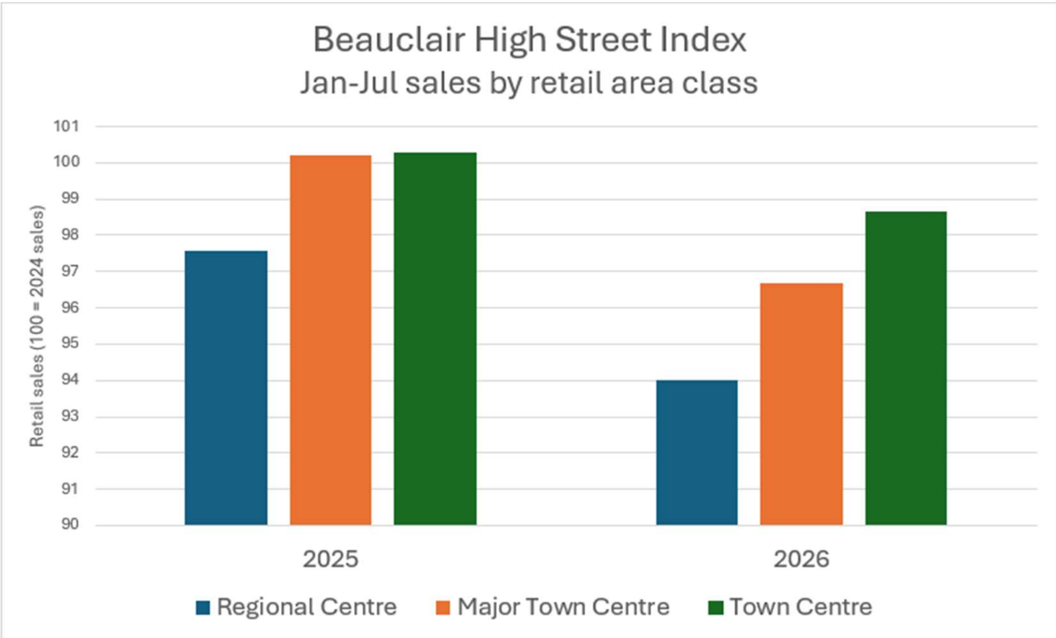
So, what is happening on GB's high streets?

The data points towards a continuing "stay local" consumer trend. For many years, footfall data has shown that when household finances come under pressure, consumers tend to gravitate towards their more local high streets. These centres are generally easier and cheaper to access, with lower transport and parking costs – factors that become increasingly important when household budgets are constrained.

The Beauclair High Street Index suggests that this behaviour remains firmly in evidence. With many households continuing to face financial pressures, consumers appear to be prioritising convenience and proximity, favouring their local high street over larger centres where a visit can involve greater travel and additional costs.

The changing composition of high street expenditure may also be reinforcing this trend. Food & Drink now accounts for 26% of total town and city centre sales, compared with 19% for Fashion, making it an increasingly important driver of high street activity. The growing role of Food & Drink creates more opportunities for consumers to spend locally, particularly when eating and drinking are increasingly integrated into everyday trips rather than being associated solely with destination visits.

The data supports this hypothesis. In July, Food & Drink's contribution to non-Grocery sales in Town Centres was virtually identical to that in Major Town Centres, although still at around two-thirds of the level recorded in Regional Centres. This suggests that smaller centres are increasingly benefiting from the shift towards experience-led, convenience-based local spending. The emerging picture is therefore clear: in a constrained consumer environment, smaller, more local high streets appear to be proving more resilient than their larger counterparts.



Our High Street Index is based on data from 500+ major retail areas as defined by the Geographic Data Service

[1] The Geographic Data Service is part of Smart Data Research UK and is based at UCL, the University of Liverpool, the University of Oxford and the University of Edinburgh.

[2] High Street classifications are based on the number and density of retail premises and the ranking of the centre within its respective local area.