

HIGH STREET SALES ACROSS GB WERE UNDER PRESSURE DURING SEPTEMBER 2026, BUT SMALLER TOWN CENTRES CONTINUED TO SHOW RESILIENCE

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

Sales across GB towns and cities remained under pressure in September 2026, declining -3.8% year-on-year. This marked a deterioration from August's -2.7% decline and more than doubled the rate of decline recorded in September 2025 (-1.8%).

The downturn reflected weaker consumer activity, with the number of customers making purchases falling -3.7% and transaction volumes down -3.3% year-on-year. This was consistent with wider footfall trends, with Sensormatic reporting a -3% decline in high street footfall during September.

Fashion drives the downturn

A key factor behind the scale of the decline was the broad-based weakness across all five key sectors, which together account for almost 90% of high street sales. Fashion recorded the steepest fall, down -10.5%, followed by General Retail (-4.6%), Health & Beauty (-4.5%), Food & Drink (-3.3%) and Grocery (-1.2%).

Fashion's disproportionate influence on overall sales is critical to understanding the result. With an average transaction value (ATV) of £42.56 – more than double that of any other key sector – its sharp decline had an outsized impact on total sales performance.

Weather is also likely to have played a significant role. As Beauclair's analysis of heatwave trading has demonstrated, high street retail is highly sensitive to weather conditions. Following the heatwave in August, September was predominantly warm and sunny, potentially delaying demand for autumn fashion. Fashion's decline reflected not only fewer customers and transactions (-3.7% and -3.3%), but also a slight fall in the average transaction value (-0.6%), likely influenced by some retailers discounting summer stock ahead of the autumn season.

Smaller town centres outperform larger destinations

Despite the challenging overall picture, September's results revealed a clear source of resilience amongst smaller towns, with Town Centres once again outperforming Major Town Centres and Regional Centres. Indeed, this has been the ongoing trend for nearly two years. While sales across GB towns and cities fell year on year by -3.8% during September 2026, the decline was limited to -1.6% in Town Centres, compared with -5.8% in Major Town Centres and -4.3% in Regional Centres.

This resilience reflects both the nature of local shopping trips and the composition of Town Centre sales. Fashion now accounts for just 9% of total sales in Town Centres, compared with 18% in Major Town Centres and 17% in Regional Centres. Together, Fashion and General Retail contribute only 17% of Town Centre sales, against 27% in Major Town Centres and 25% in Regional Centres. The lower exposure to these more discretionary categories – particularly Fashion – continued to help shield smaller centres from September's downturn.

Local spending supports Food & Drink and Grocery

Food & Drink performance during September provided further evidence of the strength of local spending. Although the sector represents a smaller share of sales in Town Centres (18%) than in Major Town Centres (23%) and Regional Centres (39%), its performance was notably more resilient. Food & Drink sales declined by just -1.1% in Town Centres during September 2026, compared with -4.4% in Major Town Centres and -4.0% in Regional Centres.

This challenges the assumption that hospitality performance is driven primarily by larger destinations. September's results suggest that consumers continued to spend on Food & Drink closer to home, supporting the role of smaller centres as destinations for everyday social and leisure activity.

Grocery provided an equally important foundation. Accounting for 40% of Town Centre sales, the sector was virtually flat year-on-year, declining by just -0.3% during September 2026. This stable performance underlines the value of a consistent local customer base, generating regular visits and helping sustain demand for other town centre businesses, including hospitality.

The September 2026 data reinforces a clear distinction in high street performance: centres more exposed to discretionary Fashion and General Retail faced the greatest pressure, while smaller town centres benefited from a stronger mix of essential spending and more resilient local trips. In a challenging trading environment, this combination continues to provide a valuable source of stability for GB's smaller high streets.

GB Benchmark - Sept 2026

Sector	Sales vs Sep25	Transactions vs Sep25	Customers vs Sep25	ATV vs Sep25	ATV
All Sectors	-3.8%	-3.3%	-3.7%	-0.6%	£18.84
Fashion	-10.5%	-6.6%	-6.7%	-4.2%	£42.56
Food & Drink	-3.3%	-5.1%	-5.1%	+1.8%	£14.68
General Retail	-4.6%	-4.5%	-3.7%	-0.0%	£19.15
Grocery	-1.2%	-0.1%	-1.1%	-1.1%	£16.21
Health & Beauty	-4.5%	-7.0%	-6.0%	+2.6%	£30.43

GB Benchmark - YTD Sept 2026

Sector	Sales YTD vs Sep25	Transactions YTD vs Sep25	Customers YTD vs Sep25	ATV YTD vs Sep25	ATV YTD
All Sectors	-2.5%	-3.2%	-3.0%	+0.7%	£19.17
Fashion	-5.0%	-4.0%	-4.5%	-1.0%	£42.74
Food & Drink	-2.8%	-4.6%	-4.5%	+1.8%	£15.05
General Retail	-2.8%	-5.5%	-4.7%	+2.8%	£19.07
Grocery	-0.2%	-0.7%	-1.4%	+0.5%	£16.66
Health & Beauty	-2.5%	-5.8%	-5.0%	+3.6%	£30.08

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