FEBRUARY 2026 TOWN & CITY CENTRE BEAUCLAIR INSIGHTS

SALES ACROSS GB TOWNS AND CITIES FELL BY -4% YEAR-ON-YEAR IN FEBRUARY 2026, A SHARPER DECLINE THAN JANUARY'S -0.7% DECREASE.

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

Sales across GB towns and cities fell by –4.0% year-on-year in February 2026, a sharper decline than January's -0.7% decrease, despite little change in underlying economic conditions. Persistent heavy rainfall throughout the month, which discourages consumers to make trips to town centres, is likely to have been a key contributor to the weaker performance.

There were noticeable year on year drops in both customers (-4.2%) and transactions (-5.7%) and, whilst the average transaction value rose (+1.8%), the increase was modest, suggesting ongoing consumer caution regarding spending.

All five key sectors - those sectors that account for 86% of total sales - recorded drops in sales from February 2025 with the most significant declines in Food & Drink (-5.0%), Fashion (-4.2%) and General Retail (-3.2%). Grocery and Health & Beauty were the most resilient (-2.0% and -0.7%).

Whilst Health & Beauty fared best in overall sales terms with a modest drop of -0.7% from February 2026, this sector recorded drops in customers and transactions that were equivalent to Fashion and Food & Drink (-6.8% and -6.5%). The key differentiator was its stronger average transaction value (ATV) (+6.3%), outperforming Food & Drink (+3.9%) and Fashion (+2.4%).

The sector's higher ATV likely reflects a combination of customers seeking premium products and early year price increases – particularly in services such as beauty treatments, gyms, and wellness offerings which are part of the Health & Beauty sector. As a result, average revenue per customer for Health & Beauty rose by +6.6%, significantly ahead of Food & Drink (+1.5%) and Fashion (+0.9%). This suggests that while it is a discretionary purchase, Health & Beauty remains a relatively non-negotiable spending category for many consumers.

GB Benchmark - February 2026

Sector	Sales vs Feb 2025	Transactions vs Feb 2025	Customers vs Feb 2025	ATV vs Feb 2025	ATV
All Sectors	-4.0%	-5.7%	-4.2%	+1.8%	£18.59
Fashion	-4.2%	-6.5%	-5.1%	+2.4%	£37.05
Food & Drink	-5.0%	-8.6%	-6.4%	+3.9%	£13.93
General Retail	-3.2%	-5.0%	-4.4%	+1.9%	£15.13
Grocery	-2.0%	-4.0%	-2.8%	+2.1%	£15.57
Health & Beauty	-0.7%	-6.5%	-6.8%	+6.3%	£28.23

GB Benchmark - YTD February 2026

Sector	YTD Sales vs Feb 2025	YTD Transactions vs Feb 2025	YTD Customers vs Feb 2025	YTD ATV vs Feb 2025	ATV
All Sectors	-2.2%	-4.5%	-3.0%	+2.4%	£18.63
Fashion	-2.7%	-4.5%	-3.5%	+2.0%	£36.19
Food & Drink	-2.0%	-6.1%	-4.2%	+4.4%	£13.62
General Retail	-2.8%	-4.6%	-3.4%	+1.9%	£15.37
Grocery	-1.8%	-3.9%	-2.0%	+2.2%	£15.70
Health & Beauty	-0.4%	-6.4%	-6.1%	+6.4%	£28.25

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