MARCH 2025 TOWN & CITY CENTRE BEAUCLAIR INSIGHTS

SALES IN TOWN AND CITIES DURING MARCH 2025 WERE IMPACTED BY THE MOVEMENT OF EASTER INTO APRIL THIS YEAR; BUT THIS SHOULD DELIVER OPPORTUNITIES FOR SALES UPLIFT IN APRIL AS A LATER EASTER IS TYPICALLY MORE BENEFICIAL FOR HIGH STREETS.

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

Sales in UK towns and cities declined annually by -4.6% in March, a reversal of the +1.1% increase in March 2024, however, Easter occurred in March last year which undoubtedly boosted sales in high streets. The positive impact of Easter on sales during March 2024 was evident from a +9.8% increase in Food & Drink sales as consumers made leisure driven trips into town centres in the lead up to and over the Easter weekend. In contrast, in March this year - with the absence of Easter to boost leisure spending - sales on Food & Drink declined by -6.3%.

On a positive note, however, of the five sectors that account for 85% of sales in towns and cities, sales in both the General Retail and Health & Beauty sectors rose annually in March this year (by +0.1% and +2.5% respectively). The result for Health & Beauty was particularly positive as it reversed a -2.9% decline in sales during March 2024, and for General Retail it continued the growth recorded last March of +2.9%.

As in previous months, the loss of sales in March this year was driven by fewer customers making purchases (a drop of -4% in customers and -5% in transactions). However, the ATV - the value of each transaction made - remained largely flat from March 2024 (+0.4%). This continues to demonstrate a polarisation amongst consumers, with the value of purchases amongst those who can spend remaining constant, whilst a significant proportion of customers continue to rein in their spending.

With Easter now firmly on the horizon, thoughts turn to what this may mean for UK towns and cities, and recent history of sales demonstrates that it should deliver a clear boost for sales. Sales during both Easter 2023 and Easter 2024 rose annually from the previous Easter (+6% in 2023 and +7% in 2024), and both bank holidays occurred earlier than Easter this year. Indeed over the last decade, high streets have typically fared better when Easter occurs later, often helped by more mild weather. With inflation now low and stable, and wage inflation consistently outpacing price inflation, it is anticipated that sales over the 2025 Easter weekend will continue to increase from Easter 2024 - with the main beneficiaries being Food & Drink, General Retail and Health & Beauty - all of which will deliver a much needed boost to sales during April.

sector	Sales vs Mar 2025	Customers vs Mar 2025	ATV vs Mar 2025	ATV
All Sectors	-4.6%	-4.0%	+0.4%	£18.36
Fashion	-2.7%	-2.8%	+1.7%	£37.98
Food & Drink	-6.3%	-5.0%	+1.6%	£13.82
General Retail	+0.1%	-5.0%	+2.2%	£16.12
Grocery	-5.4%	-3.1%	-2.7%	£15.07
Health & Beauty	+2.5%	-2.9%	+6.5%	£27.10

GB Benchmark – YTD March 2025

sector	YTD Sales vs Mar 2025	YTD Customers vs Mar 2025	YTD ATV vs Mar 2025	YTD ATV
All Sectors	-4.2%	-5.7%	+2.0%	£18.18
Fashion	-4.2%	-4.7%	+1.1%	£36.52
Food & Drink	-4.2%	-4.3%	+2.6%	£13.48
General Retail	-2.2%	-4.1%	+1.5%	£15.79
Grocery	-3.9%	-3.5%	-0.3%	£15.07
Health & Beauty	-0.9%	-4.1%	+4.8%	£26.85

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