

MARCH 2026: BEAUCLAIR TOWN & CITY CENTRE INSIGHTS

SALES ACROSS THE GB BENCHMARK DROPPED NOTABLY DURING MARCH 2026, PARTLY DUE TO CONFLICT IN THE MIDDLE EAST BUT ALSO AS A RESULT OF A CALENDAR EFFECT

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

Sales across GB towns and cities fell by -8.2% year on year in March 2026—more than double February's -4.0% decline and the steepest drop since June 2025.

This downward trend was partly fueled by consumer apprehension regarding rising prices, particularly fuel, in the wake of ongoing conflict in the Middle East. Such concerns have directly impacted consumer confidence and willingness to spend. The decline was driven primarily by fewer transactions and customers (continuing a multi-year trend), but it was also compounded by a flat average transaction value (+0.1%). With inflation running at 3%, this suggests that during March fewer consumers shopped, and those who did spent less in real terms.

That said, sentiment alone does not explain the full extent of the fall. A significant share of the year-on-year decline reflects a calendar effect: March 2026 included four Saturdays, compared with five Saturdays in March 2025. Saturdays consistently deliver the highest share of weekly sales in towns and cities—around 25% of the GB benchmark total, versus 11% to 17% on each of the other six days—so the mismatch in trading days inevitably pulled down the monthly comparison. A similar effect contributed to the sharp decline recorded in June 2025.

Sales fell across all five key sectors that together account for 86% of total spend: Fashion, Food & Drink, General Retail, Grocery, and Health & Beauty. The calendar effect is visible in the sector performance. Fashion and Food & Drink—both more reliant on Saturday sales—posted the largest declines (down -8.9% and -11.0% respectively). By contrast, Grocery and Health & Beauty, where spending is spread more evenly across the week, saw smaller drops (down -5.8% and -6.2%). General Retail, which more closely resembles Fashion in its trading pattern, fell by -7.9%.

GB Benchmark – March 2026

Sector	Sales vs Mar 2025	Transactions vs Mar 2025	Customers vs Mar 2025	ATV vs Mar 2025	ATV
All Sectors	-8.2%	-8.3%	-7.6%	+0.1%	£18.53
Fashion	-8.9%	-9.8%	-9.9%	+1.0%	£38.60
Food & Drink	-11.0%	-10.1%	-8.9%	-1.0%	£13.63
General Retail	-7.9%	-6.5%	-6.7%	-1.5%	£15.11
Grocery	-5.8%	-5.4%	-5.4%	-0.4%	£15.24
Health & Beauty	-6.2%	-10.4%	-9.4%	+4.7%	£27.92

GB Benchmark – YTD March 2026

Sector	Sales YTD vs Mar 2025	Transactions YTD vs Mar 2025	Customers YTD vs Mar 2025	ATV YTD vs Mar 2025	ATV
All Sectors	-4.3%	-5.6%	-4.6%	+1.4%	£18.55
Fashion	-5.2%	-6.4%	-5.9%	+1.3%	£36.97
Food & Drink	-5.3%	-7.3%	-5.7%	+2.2%	£13.65
General Retail	-4.3%	-5.2%	-4.5%	+0.9%	£15.32
Grocery	-3.0%	-4.0%	-3.2%	+1.0%	£15.40
Health & Beauty	-2.3%	-7.7%	-7.3%	+5.8%	£28.13

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