## APRIL 2026: BEAUCLAIR TOWN & CITY CENTRE INSIGHTS

## AN EARLY EASTER AND A DROP IN CONSUMER CONFIDENCE DUE TO THE MIDDLE EAST CONFLICT PUT APRIL SALES UNDER PRESSURE

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

Sales across GB towns and cities fell by -4.9% year-on-year in April 2026. While still disappointing, this marked a clear improvement on the steeper -8.2% annual decline recorded in March. However, trading conditions remained challenging, with almost nine in ten towns and cities (89%) reporting lower sales year-on-year, and more than a third (38%) experiencing declines of more than -5%.

The timing of Easter this year significantly weakened April's trading performance. With Easter falling in the first week of the month, much of the crucial pre-Easter spending took place in March, reducing the usual bank holiday boost for town and city centres. This came at a time when consumer confidence was already under pressure from rising fuel costs linked to the conflict in the Middle East. Reflecting this, the GfK Consumer Confidence Index fell to -25 in April – its lowest level since October 2023.

April's annual decline was also magnified by a particularly strong comparison with April 2025, when sales dipped by only -0.1%. Last year, Easter fell later in April, ensuring more pre-Easter spending remained within the month rather than shifting into March as it did this year.

The fall in sales was driven by weaker customer activity, with shopper numbers down -4.6% and transactions falling -6.0%. Average transaction values rose slightly by +1.1%, partially offsetting the decline.

All ten retail and leisure sectors recorded lower sales than a year earlier, underlining the widespread impact of cautious consumer spending. Five sectors account for 86% of all town and city centre sales. Of these, the sharpest declines were in General Retail (-7.8%) and Fashion (-7.0%), followed by Food & Drink (-5.1%). Sales in both Grocery and Health & Beauty declined by -3.4% in April, but the underlying trends told very different stories. Customer numbers in Grocery dipped by a modest -3.6%, compared with a much sharper -7% fall in Health & Beauty. However, Health & Beauty benefited from significantly higher spending, with average transaction values rising by +5.1% – the strongest increase across all five key sectors – while Grocery transaction values edged down by -0.3%.

Despite the challenging backdrop, sectors typically boosted by Easter and the bank holiday period proved more resilient. Entertainment sales were almost flat (-0.2%), while Household – including DIY, furniture and gardening – declined by just -1.2%. Transport, including car parking and petrol, fell by -1.6%. However, their positive impact on overall performance was limited, as these sectors collectively account for only 10% of total town and city centre sales.

| Sector | Sales vs Apr 2025 | Transactions vs Apr 2025 | Customers vs Apr 2025 | ATV vs Apr 2025 | ATV |
|---|---|---|---|---|---|
| All Sectors | -4.9% | -6.0% | -4.6% | +1.1% | £18.95 |
| Fashion | -7.0% | -8.6% | -7.9% | +1.7% | £38.49 |
| Food & Drink | -5.1% | -5.9% | -4.2% | +0.8% | £13.49 |
| General Retail | -7.8% | -9.2% | -7.9% | +1.5% | £15.89 |
| Grocery | -3.4% | -3.1% | -3.6% | -0.3% | £15.44 |
| Health & Beauty | -3.4% | -8.1% | -7.0% | +5.1% | £27.67 |

| Sector | Sales YTD vs Apr 2025 | Transactions YTD vs Apr 2025 | Customers YTD vs Apr 2025 | ATV YTD vs Apr 2025 | ATV |
|---|---|---|---|---|---|
| All Sectors | -4.2% | -5.4% | -3.8% | +1.3% | £18.67 |
| Fashion | -5.4% | -6.8% | -6.0% | +1.6% | £37.43 |
| Food & Drink | -5.0% | -6.5% | -4.6% | +1.6% | £13.54 |
| General Retail | -5.0% | -6.1% | -5.1% | +1.2% | £15.39 |
| Grocery | -2.3% | -3.3% | -2.8% | +1.1% | £15.50 |
| Health & Beauty | -2.2% | -7.4% | -6.6% | +5.6% | £27.95 |

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