



UK Consumer Quarterly report

GDP
0.8%

GDP rose by 0.8% in Q1 2022 on the previous quarter.

Average Spend
£567

The average amount spent per week per household in Q4 2021 was £567.

Household Savings Ratio
6.8%

The Household Savings Ratio dropped to 6.8% in Q4 2021 from a revised 7.5% in the previous quarter.

Consumer Spending
0.6%

Consumer spending rose by 0.6% in Q1 2022.

London
£652

The average amount spent per week per household in Q4 2021 was highest in London at £652.

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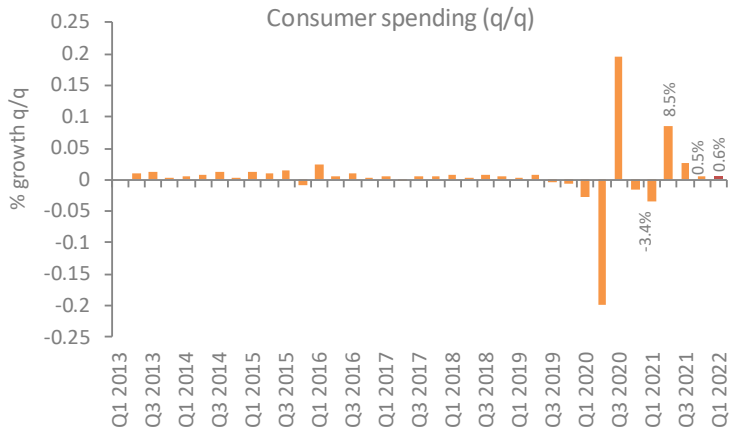
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SOME SECTIONS OMITTED





Quarterly rise in consumer spending broadly unchanged in Q1



Source: ONS

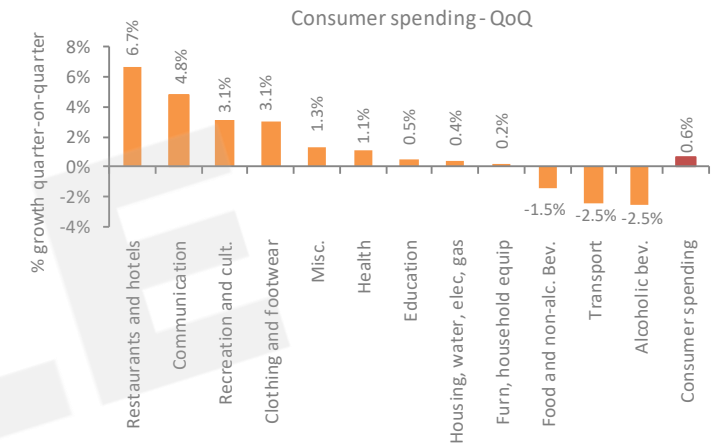
Consumer Spending

- Consumer spending rose by 0.6% QoQ in Q1 2022. Consumption remained above last year's fourth quarter reading by 8.1%.
- On an annual basis, consumer spending increased by a punchy 12.6% Q1 2022 against Covid disruptions a year ago.

Drivers of spending

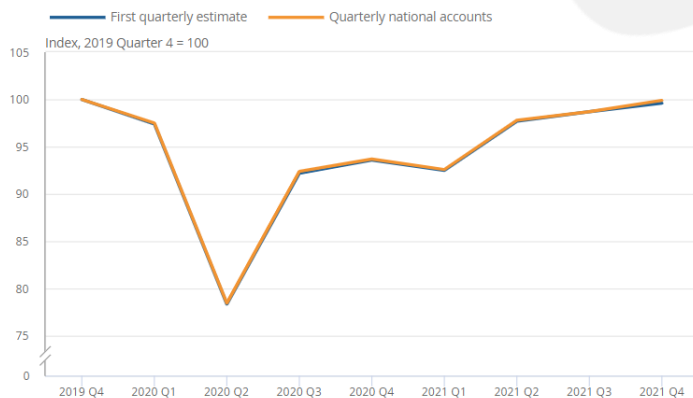
- Restaurants and hotels (+6.7%), Recreation & Culture (+3.1%) and Clothing & Footwear (+3.1%) recorded notable rises on a quarterly basis.
- Elsewhere, spending on Transport (-2.5%), Alcoholic Beverages (-1.3%) and Food & non-Alcoholic Beverages (-1.5%), all contracted QoQ.

Spending on Restaurants & Hotels remains strong



Source: ONS

GDP growth increases in first quarter



Source: ONS

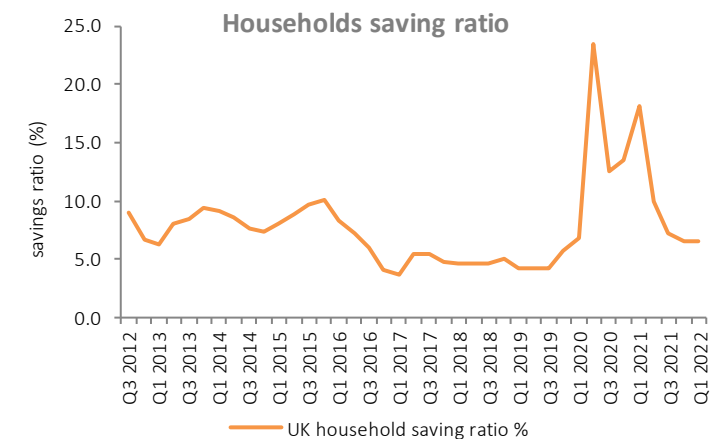
Gross Domestic Product

- UK GDP increased by 0.8% quarter-on-quarter in Q1 2022.
- The level of GDP is now 0.7% below where it was pre-coronavirus (COVID-19) at Quarter 4 2019.
- The largest contributors to the increase in Q1 2022 were information and communication, and transport and storage.

Households savings

- The household saving ratio was unchanged at 6.8% in Q1 2022.
- Households' gross disposable income grew by 1.5% on the previous quarter with the previous quarter, with wages and salaries showing a 2.4% increase on Q4 2021.
- Household final consumption expenditure rose by 2.3% from the previous quarter.

UK households saving ratio stabilises



Source: ONS

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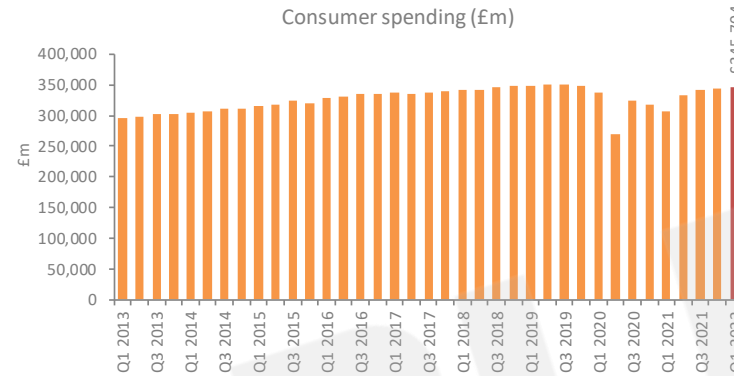
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Total Consumer Spending – Q1 2022

- Consumer spending rose by 0.6% QoQ in Q1 2022. Consumption remained above last year's fourth quarter reading by 8.1%.
- Restaurants and hotels (+6.7%), Recreation & Culture (+3.1%) and Clothing & Footwear (+3.1%) recorded notable rises on a quarterly basis.
- Elsewhere, spending on Transport (-2.5%), Alcoholic Beverages (-1.3%) and Food & non-Alcoholic Beverages (-1.5%), all contracted QoQ.
- On an annual basis, consumer spending increased by a punchy 12.6% Q1 2022 against Covid disruptions a year ago.
- Restaurants & Hotels (+115.1%), Transport (+39.8%) and Clothing & Footwear (+13.9%) were standout performances on an annual basis.

Outlook

- Spending is under significant pressure amid the cost of living crisis. The combination of 40-year high inflation, surging energy prices, rising interest rates and dwindling budgets has seen consumers adopt recessionary behaviours such as trading down to own-label products and shopping little and often.
- Least affluent households continue to be the hardest hit, however, our own analysis shows that most affluent households are also being impacted, experiencing a decline in their disposable incomes.
- Resultantly, spending intentions have weakened considerably, with no positive changes expected in coming months. Our recent shopper sentiment data shows that over half (57%) of consumers said they would spend less on non-essential goods over the next quarter - the weakest figure since October 2017.



Source: ONS, Retail Economic analysis

Q1 2022	£m	Growth q/q	Growth y/y
Consumer spending	£345,704	0.6%	12.6%
Food and non-alc. Beverages	£27,942	-1.5%	-8.4%
Alcoholic beverages	£12,221	-2.5%	-6.9%
Clothing and footwear	£18,086	3.1%	13.9%
Housing, water, elec, gas	£89,500	0.4%	-0.5%
Furniture, household equip	£18,754	0.2%	-0.3%
Health	£5,821	1.1%	7.2%
Transport	£39,615	-2.5%	39.8%
Communication	£7,390	4.8%	8.7%
Recreation and culture	£36,270	3.1%	8.0%
Education	£8,442	0.5%	6.0%
Restaurants and hotels	£36,473	6.7%	115.1%
Misc.	£44,027	1.3%	12.3%

Source: ONS, Retail Economic analysis

Consumer Spending

£346bn

Consumer spending amounted to £345.7bn in Q1 2022

Consumer Spending

0.6%

Consumer spending rose by 0.6% in Q1 2022 on the previous quarter

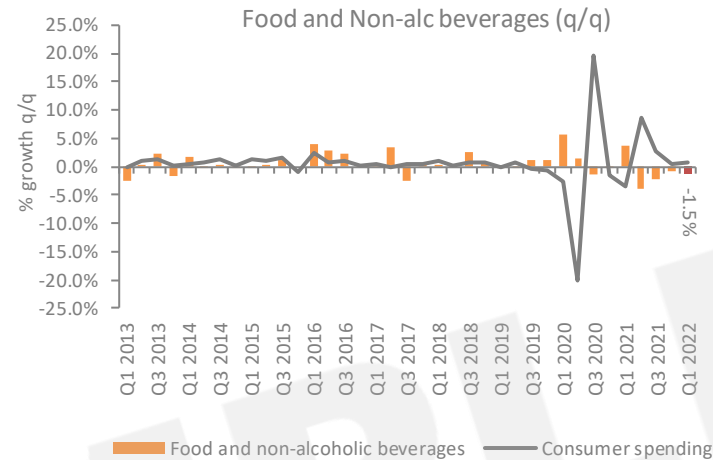
Least affluent households continue to be the hardest hit, however, our own analysis shows that most affluent households are also being impacted, experiencing a decline in their disposable incomes.

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Consumer Spending:

Food and Non-Alcoholic Beverages – Q1 2022

- Consumer expenditure on food and non-alcoholic beverages fell by 1.5% on the previous quarter, totalling to £27,942m in Q1 2022. Spending also decline 8.4% compared to the same quarter a year ago.
- On a quarterly basis, spending on the following categories all fell at their respective rates in Q4 2021: Food (-0.8%), Breads & Cereals (-0.4%), Meat (-0.4%), Fish (-3.2%), Milk, Cheese & Eggs (-1.5%), Fruit (-0.8%), Vegetables (-0.7%), Coffee, Tea & Cocoa (-1.8%), Non-alcoholic beverages (-1.8%), Mineral Water and soft drinks (-1.8) and Other foods (-0.2%).
- While, consumption of Oils and Fats rose by 1.1% in Q4 2021 when compared to the previous quarter.
- The average household spent £60 per week during Q1 2022. The proportion of Household expenditure on this sector fell on the previous quarter to c.8.1%.
- The most affluent households spent on average £90 per week, almost three times greater than the least affluent households (£31).
- Average households in the South East spent the most with consumer spending at £64 per week, compared with £51 in the North East.



Source: ONS, Retail Economic analysis

Q1 2022	£m	Growth q/q	Growth y/y
Food and non-alcoholic beverages	£27,942	-1.5%	-8.4%
Food	£25,068	-1.5%	-8.8%
Breads and cereals	£5,070	-1.6%	-1.0%
Meat	£4,766	-2.3%	-10.1%
Fish	£1,134	-1.1%	-17.2%
Milk, cheese and eggs	£2,925	-0.7%	-7.1%
Oils and fats	£718	-4.8%	-12.3%
Fruit	£2,541	-0.9%	-8.2%
Vegetables	£3,736	-3.0%	-11.4%
Sugar and sweet products	£3,054	0.7%	-11.5%
Other food	£1,124	0.2%	-13.1%
Non-alcoholic beverages	£2,874	-1.1%	-4.9%
Coffee, tea and cocoa	£684	-3.7%	-12.6%
Mineral water and soft drinks	£2,190	-0.3%	-2.2%

Source: ONS, Retail Economic analysis

Quarterly Growth

-1.5%

Spending on Food and Non Alcoholic Beverages in Q1 2022 declined by 1.5% on the previous quarter

Consumer Spend

£28bn

The total spent on Food and Non-Alcoholic Beverages in Q1 2022 was £27,942m

The most affluent households spent on average £90 per week, almost three times greater than the least affluent households (£31).

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Executive Summary

The clothing and footwear sector has shown a steady recovery in 2023, with total spending reaching £12.5 billion, up from £12.1 billion in 2022. This represents a 3.4% increase in real terms. The sector's performance is supported by a combination of factors, including a strong retail environment, a focus on value for money, and a growing emphasis on sustainability and ethical sourcing. The online channel continues to be a key driver of growth, with a significant portion of sales now taking place through digital platforms. The sector's resilience is evident in its ability to maintain a positive growth trajectory despite global economic challenges.



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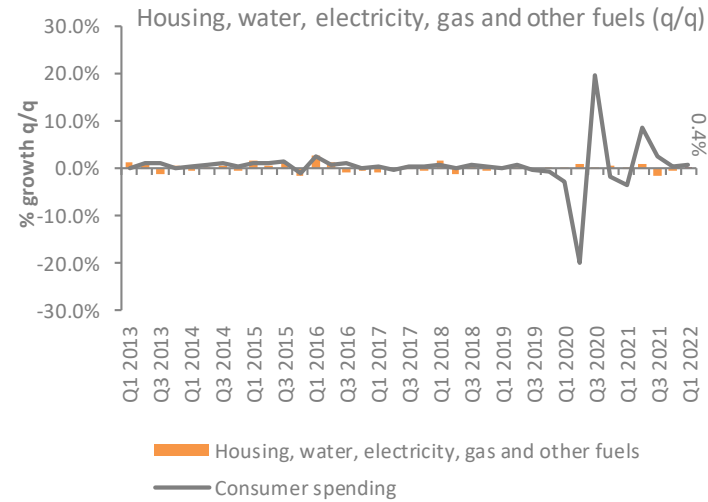
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Consumer Spending: Housing, Water, Electricity, Gas and other fuels – Q1 2022

- Total spending on Housing, Water, Electricity, Gas & other fuels marginally rose by 0.4% in Q1 2022 compared to the previous quarter with total expenditure rising to £89,500m.
- On an annual basis, spending fell by 0.5% with all but one category recording a decline.
- Most sub-categories within this sector recorded a quarterly rise with Actual Rentals paid by Tenants and Imputed Rentals for Owner-Occupiers rising by 0.2% and 0.3% respectively.
- Elsewhere, spending on Electricity, Gas and Other Fuels rose by 2.0% QoQ.
- Average households spent £76.54 per week on this category in Q1 2022.
- The average London household spent approximately £125 per week on Housing while households in Northern Ireland and the North East spent an average of £54.
- In terms of income decile, the most affluent households spent £102 per week, compared with the least affluent which spent just £51 per week.



Source: ONS, Retail Economic analysis

Q1 2022	£m	Growth q/q	Growth y/y
Housing, water, electricity, gas and other fuels	£89,500	0.4%	-0.5%
Actual Rentals Paid By Tenants	£21,596	0.2%	-0.6%
Imputed rentals for owner-occupiers	£55,987	0.3%	0.7%
Mats For Maintenance & Repair Of Dwellings	£1,053	-1.1%	-3.9%
Water Supply & Miscellaneous Services	£2,710	0.4%	-1.4%
Electricity, Gas & Other Fuels	£8,077	2.0%	-7.0%

Source: ONS, Retail Economic analysis

Quarterly Growth

0.4%

Spending on Housing, Water, Electricity, Gas and Other Fuels rose by 0.4% in Q1 2022

Consumer Spend

£90bn

The total spent on Housing, Water, Electricity, Gas and Other Fuels in Q1 2022 was £89,500m

On an annual basis, spending fell by 0.5% with all but one category recording a decline.

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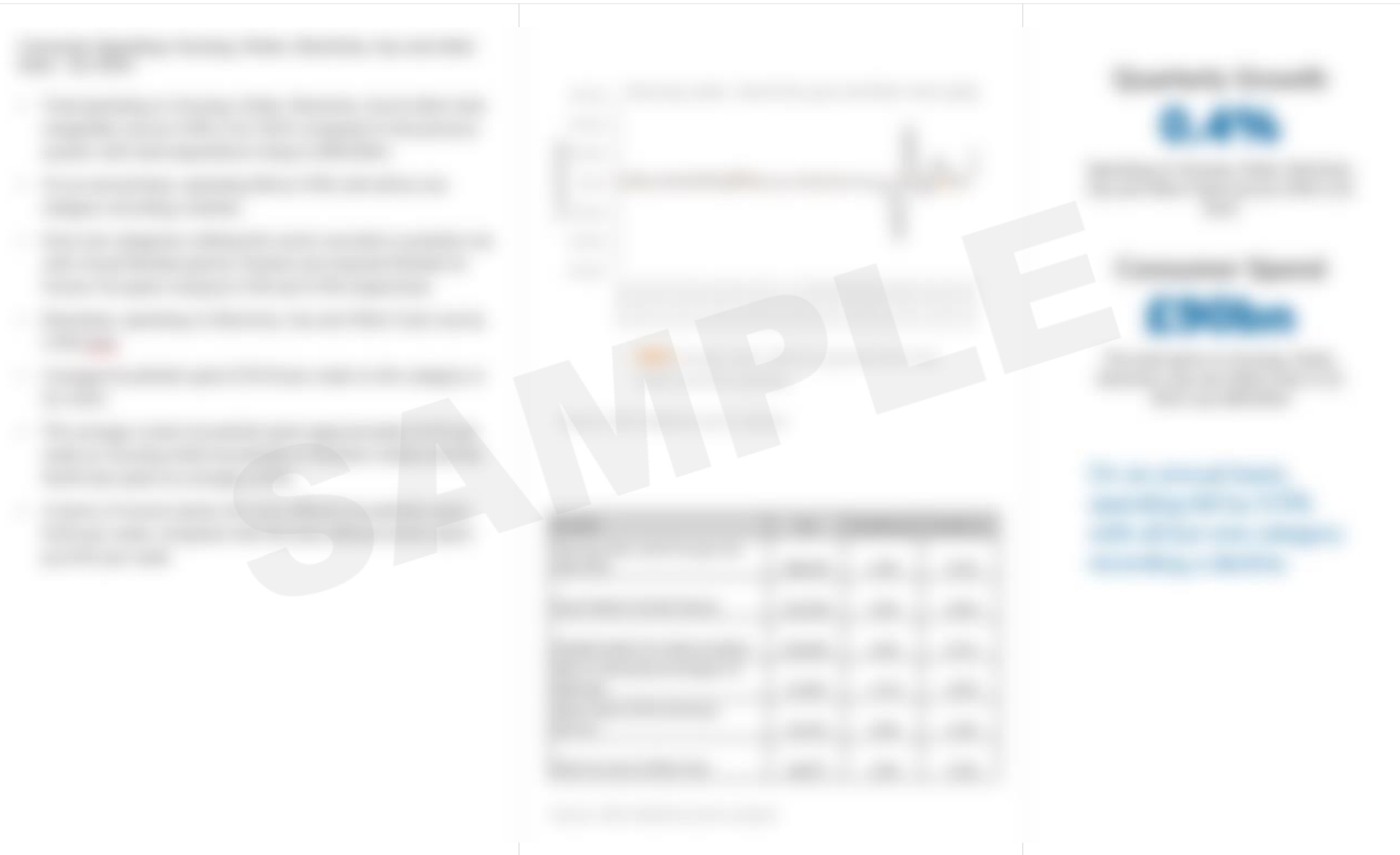
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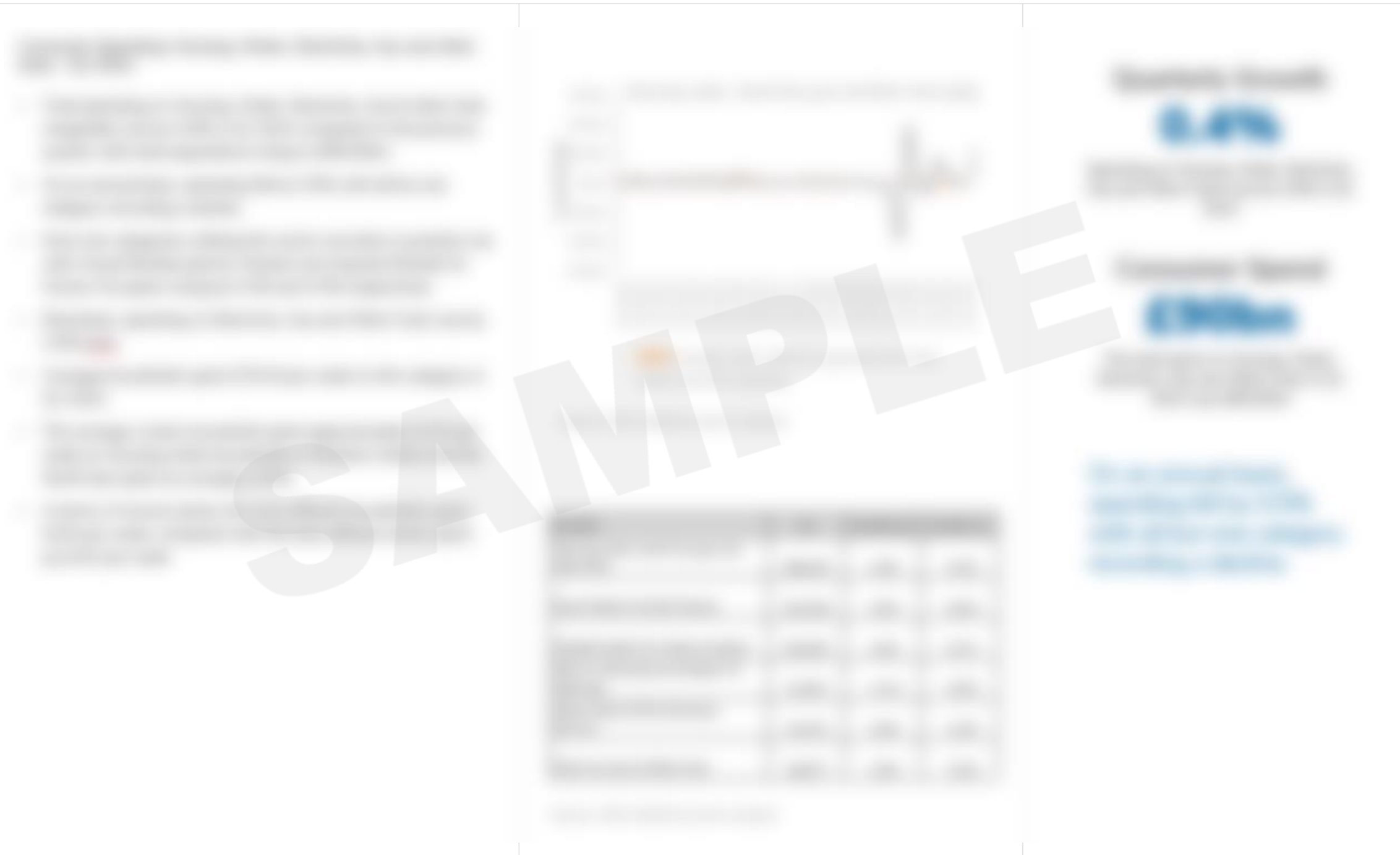
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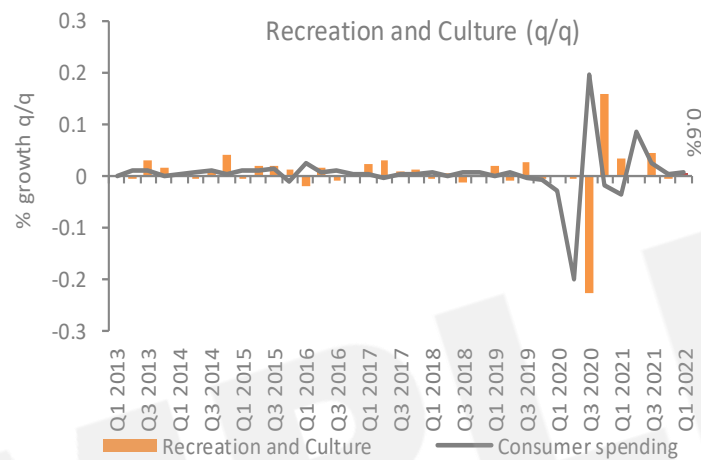
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Consumer Spending: Recreation and Culture – Q1 2022

- Consumer spending on Recreation & Culture rose by 3.1% in Q1 2022, bringing total expenditure of this category to £36,270m. On a yearly basis, spending rose by 8.0%.
- Audio-Visual, Photo & Information processing improved QoQ, rising by 6.7% in Q1 2022. It remained in negative territory on an annual basis, falling by 3.5% from a 6.3% decline a year ago.
- Spending on Recreational & Cultural Services rose by 3.8% on a quarterly basis, and surged by 23.8% YoY.
- Elsewhere, spending on Other Recreational Goods rose by 1.5% on a quarterly basis and by 3.2% YoY.
- The average households spent £93.21 per week on Recreation & Culture in Q1 2022. This accounts for c.10.5% of total consumer spending.
- The South East spent the most in the third quarter with an average of £90 per week. This was significantly stronger than the average household spend in Northern Ireland of £51 per week.
- In terms of household income decile, the most affluent households spent £162 per week on Recreation & Culture, this is seven times more than the least affluent households which spent just £23.



Source: ONS, Retail Economic analysis

Q1 2022	£m	Growth q/q	Growth y/y
Recreation and Culture	£36,270	3.1%	8.0%
Audio-Visual, Photo & Information Processing	£5,945	6.7%	-3.5%
Outdoor Recreation & Culture and other	£4,032	2.4%	9.4%
Other Recreational Goods	£11,383	1.5%	3.2%
Recreational & Cultural Services	£11,681	3.8%	23.8%
Newspapers, Books & Stationery	£3,229	1.3%	-1.7%

Source: ONS, Retail Economic analysis

Quarterly Growth

3.1%

Spending on Recreation & Culture in Q1 2022 rose by 3.1% on the previous quarter

Consumer Spend

£35bn

The total spending on Recreation & Culture in Q4 2021 was £35,172m

The South East spent the most in the third quarter with an average of £89 per week. This was significantly stronger than the average household spend in Northern Ireland of £51 per week.

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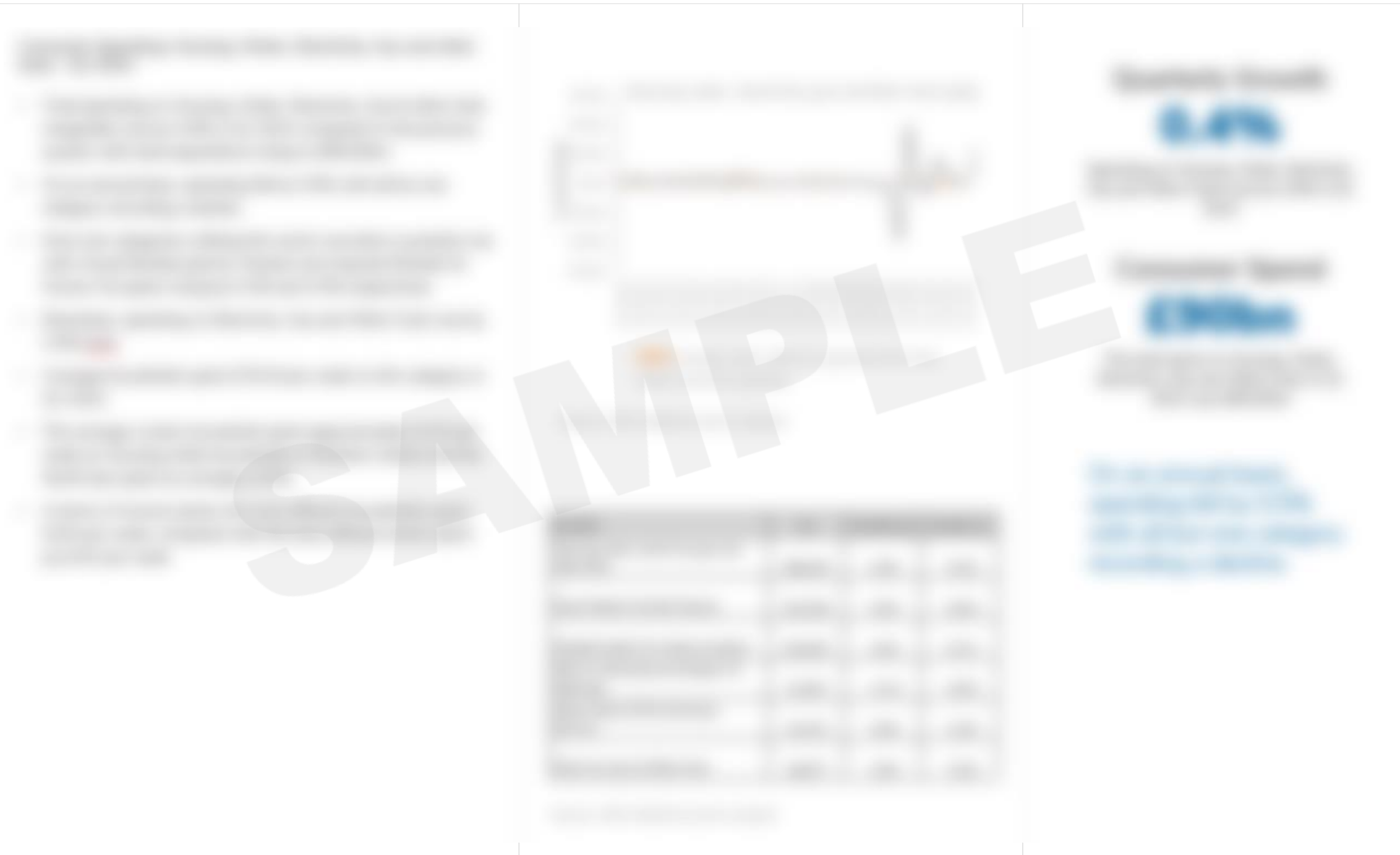
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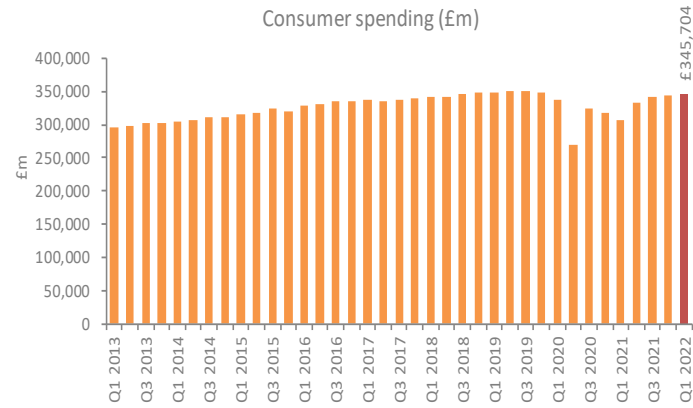
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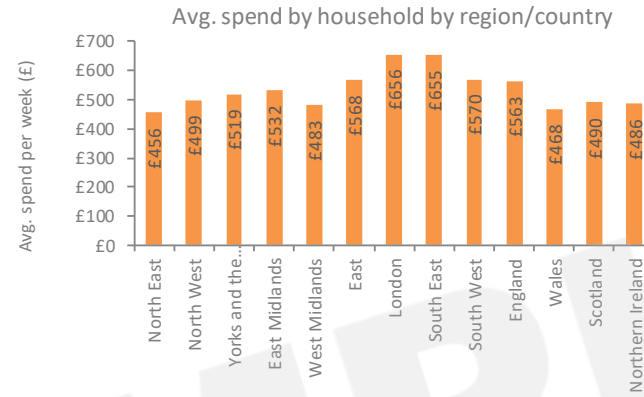


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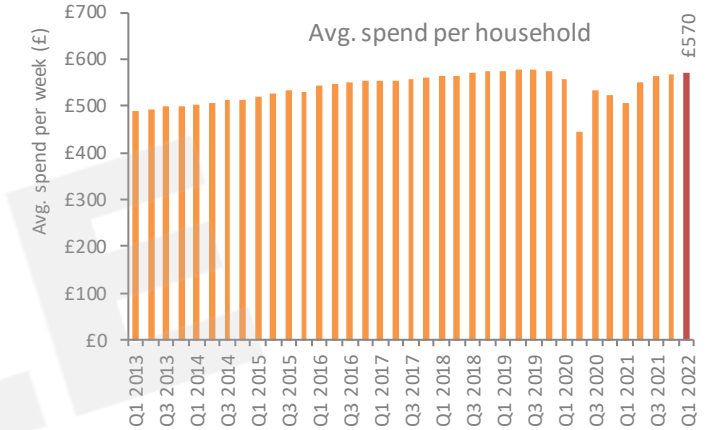
Consumer Spending – Q1 2022



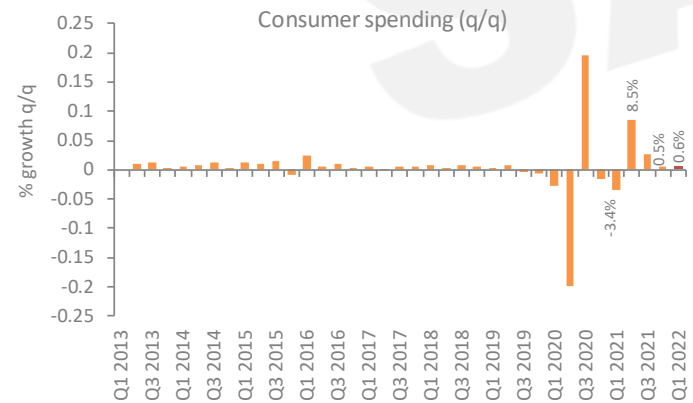
Consumer Spending by Region – Q1 2022



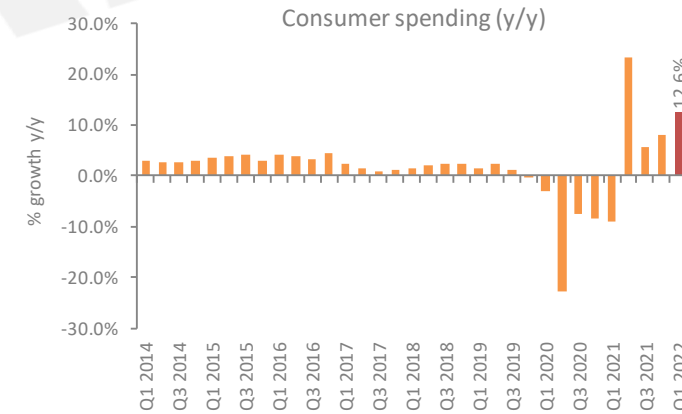
Average Consumer Spend per Household – Q1 2022



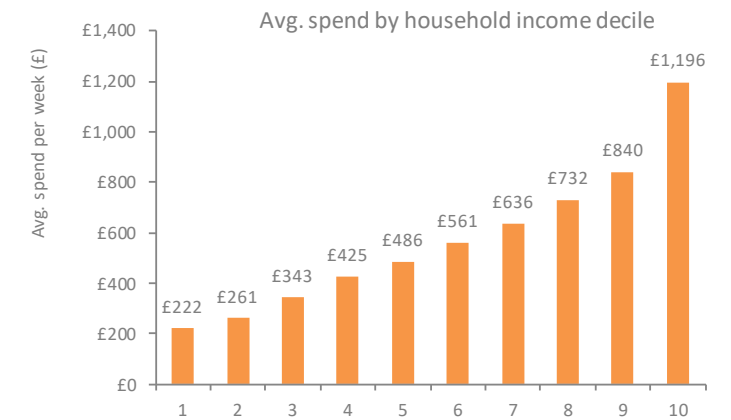
Consumer Spending, QoQ Growth – Q1 2022



Consumer Spending, YoY Growth – Q1 2022



Average Consumer spend by Income Decile – Q1 2022



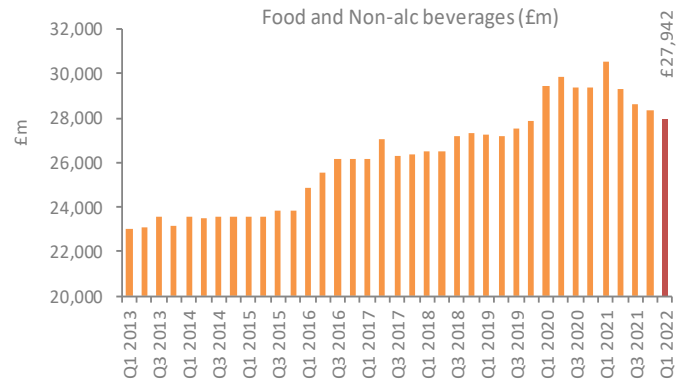
Source: ONS, Retail Economic analysis

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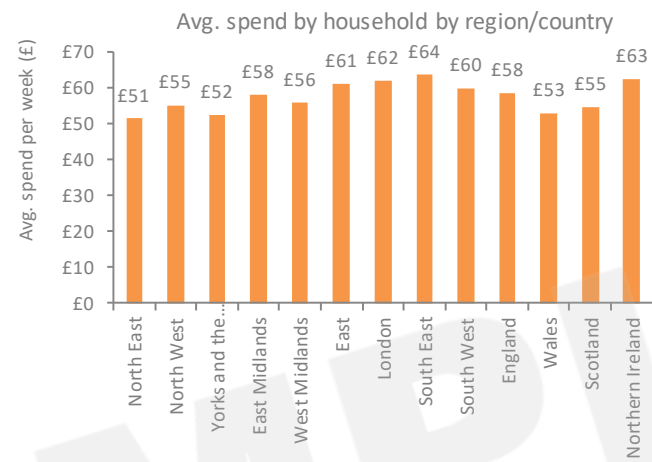


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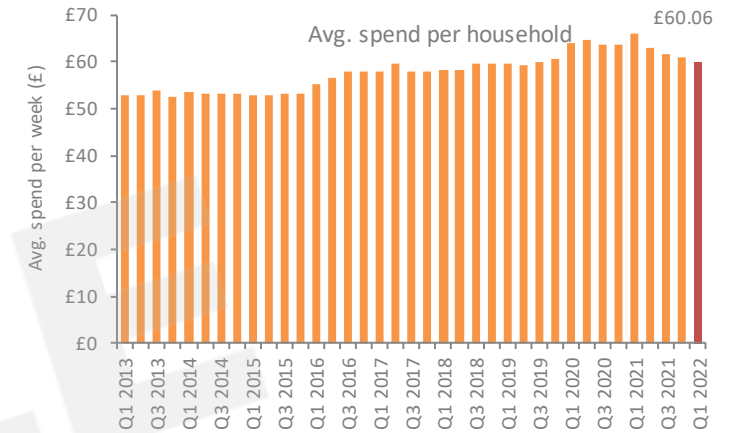
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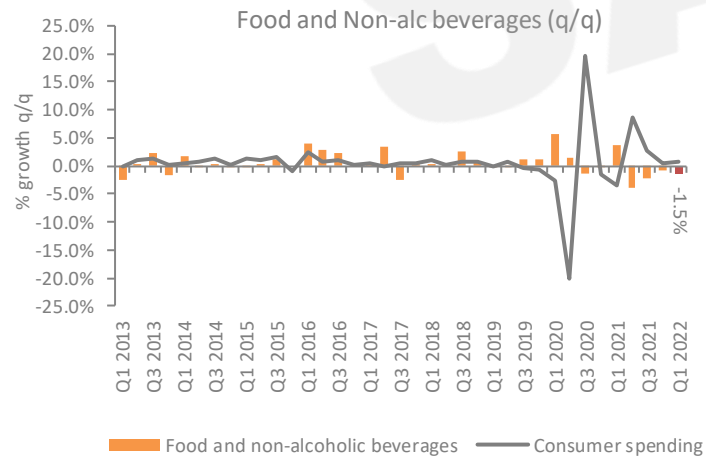
Consumer Spending by Region – Q1 2022



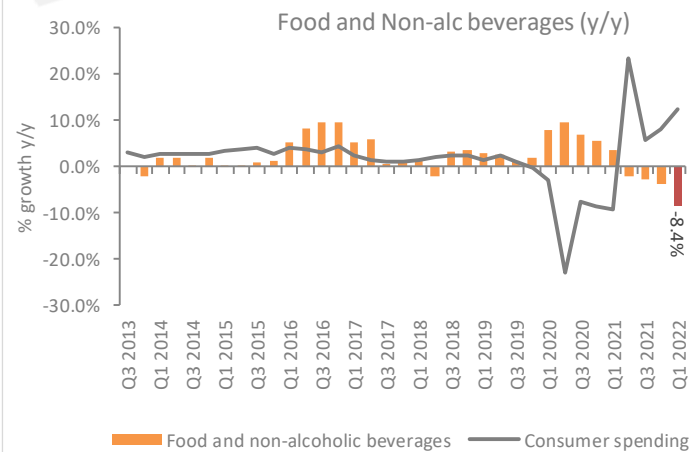
Average Consumer Spend per Household – Q1 2022



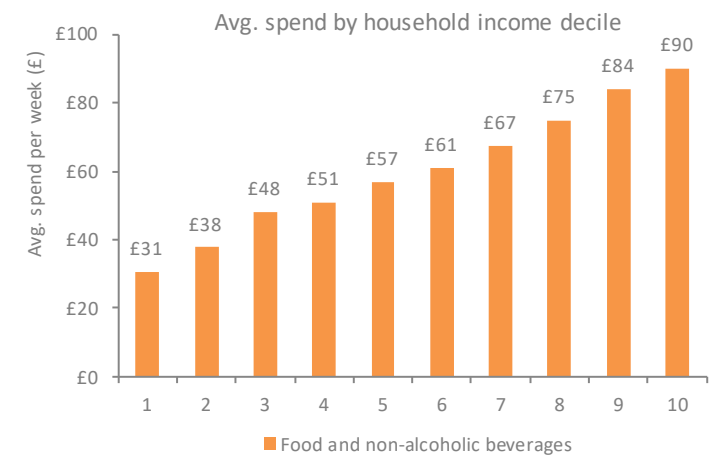
Consumer Spending, QoQ Growth – Q1 2022



Consumer Spending, YoY Growth – Q1 2022



Average Consumer spend by Income Decile – Q1 2022



Source: ONS, Retail Economic analysis

Source: ONS, Retail Economic analysis



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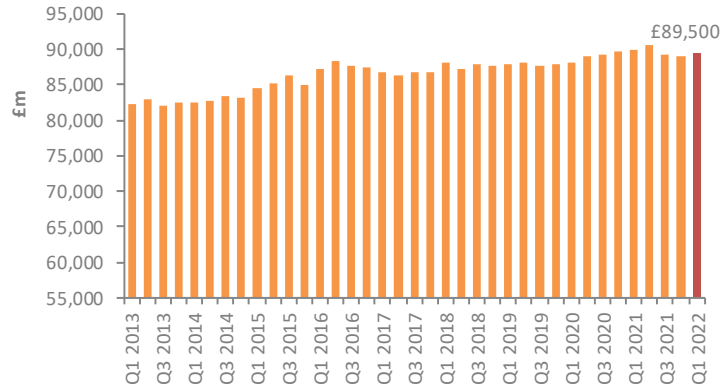
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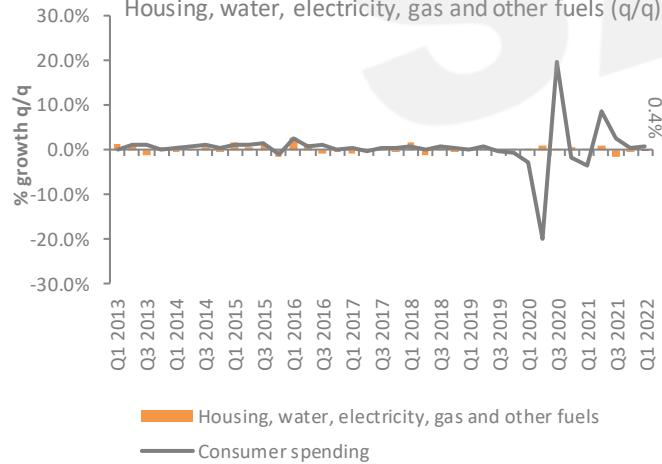
Consumer Spending – Q1 2022

Housing, water, electricity, gas and other fuels (£m)



Consumer Spending, QoQ Growth – Q1 2022

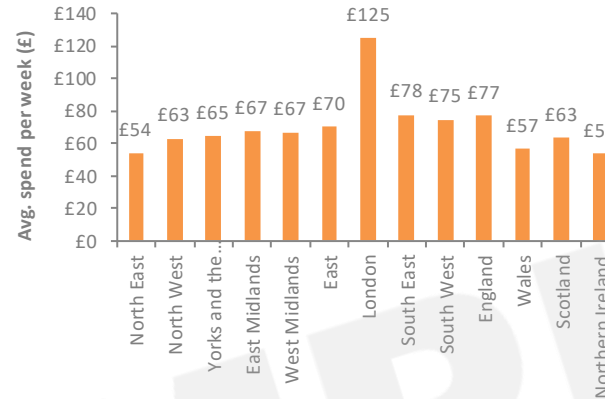
Housing, water, electricity, gas and other fuels (q/q)



Source: ONS, Retail Economic analysis

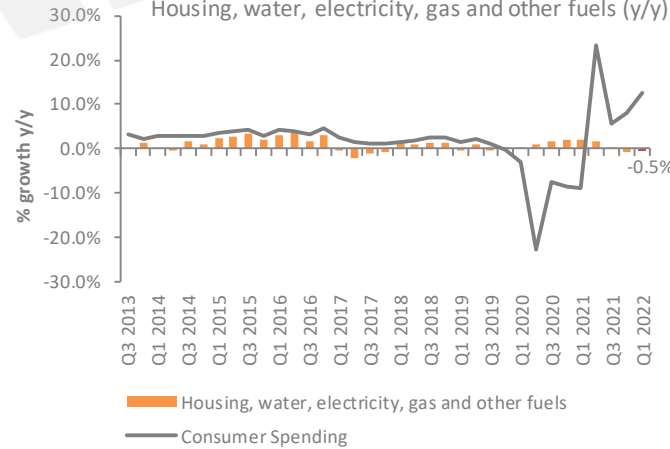
Consumer Spending by Region – Q1 2022

Avg. spend by household by region/country



Consumer Spending, YoY Growth – Q1 2022

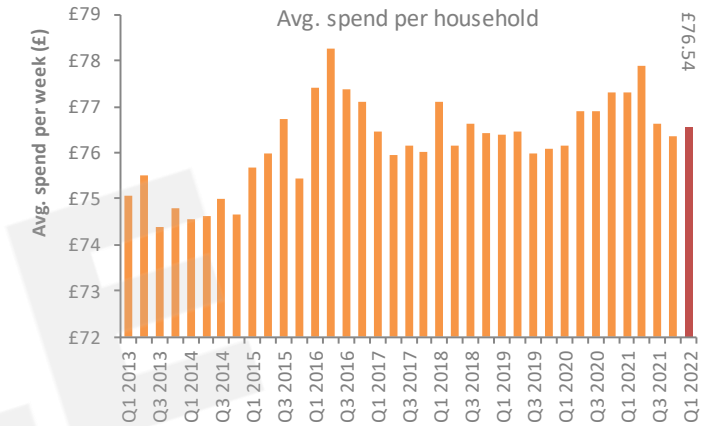
Housing, water, electricity, gas and other fuels (y/y)



Source: ONS, Retail Economic analysis

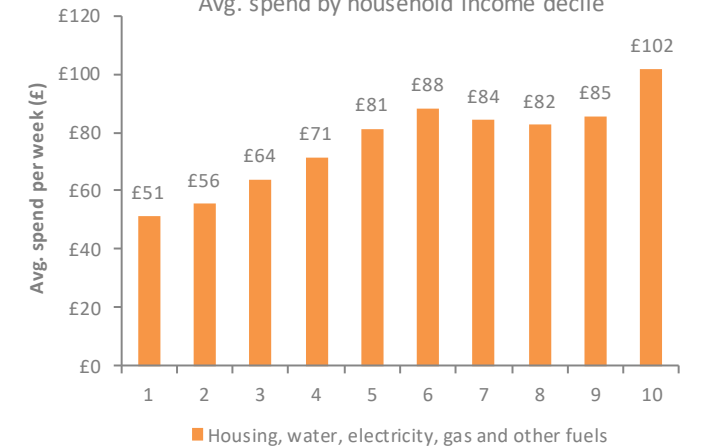
Average Consumer Spend per Household – Q1 2022

Avg. spend per household



Average Consumer spend by Income Decile – Q1 2022

Avg. spend by household income decile





Spending – Furnishings, Household Equipment & House Maintenance

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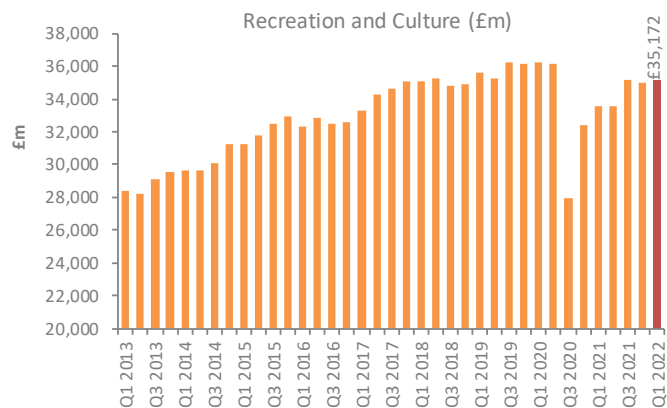
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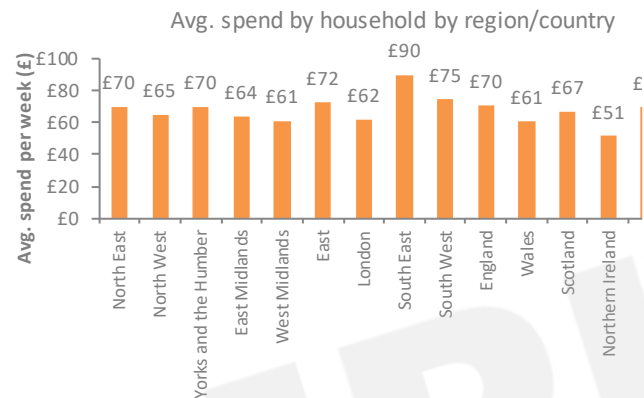


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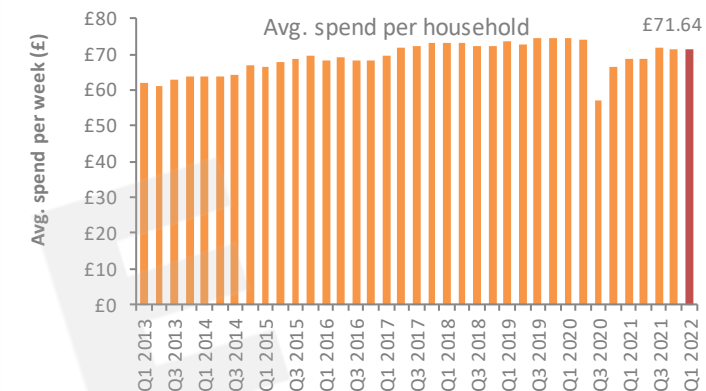
Consumer Spending – Q1 2022



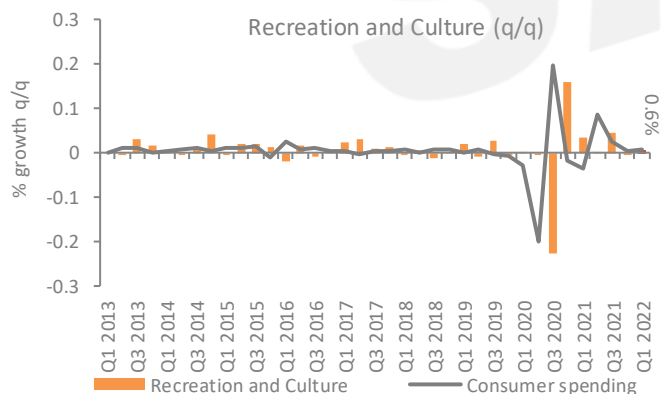
Consumer Spending by Region – Q1 2022



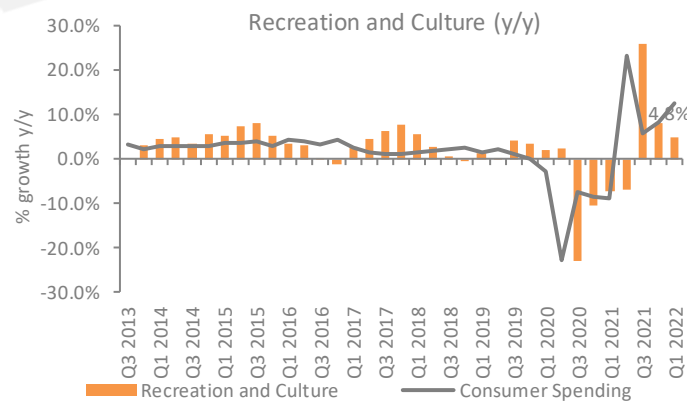
Average Consumer Spend per Household – Q1 2022



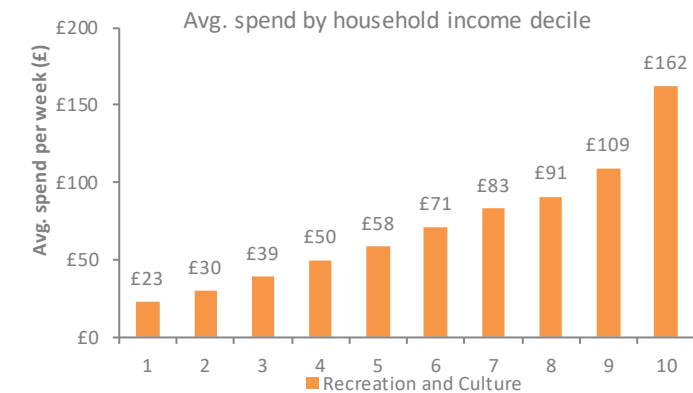
Consumer Spending, QoQ Growth – Q1 2022



Consumer Spending, YoY Growth – Q1 2022



Average Consumer spend by Income Decile – Q1 2022



Source: ONS, Retail Economic analysis

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We're trusted by world class corporations...



Sainsbury's
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sky

British
Land

...and we're frequently in the media

BBC

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Bloomberg



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Our core reports

UK Retail Sales

Monthly: covers a range of retail sales indices and category breakdowns including online retail sales, food, clothing, footwear, household goods, DIY, gardening, electricals & more. [More info >](#)

UK Online Retail

Monthly: covers a range of online retail sales indices and category breakdowns including online retail sales, online growth rates by sector, online penetration rates, forecasts and market size estimates. [More info >](#)

UK Retail Inflation

Monthly: covers a range of retail inflation indices and category breakdowns including food inflation, non-food inflation, clothing and footwear, household goods, food, DIY and gardening, consumer electricals, commodity prices, exchange rates and more. [More info >](#)

UK Consumer*

Quarterly: analyses a range of UK consumer spending indicators including housing market data, consumer confidence, consumer credit, household inflation, labour market statistics, wage growth, retail sales & more. [More info >](#)

UK Retail Economic Briefing

Monthly: analyses a range of macroeconomic indicators including GDP, consumer spending, inflation, labour market, commodity prices, exchange rates, monetary indicators, credit and lending market data, house prices, mortgage data, retail sales & more. [More info >](#)

UK Retail Industry Outlook*

Quarterly: provides a forward-looking critical retail analysis. Predictive forecasts and insightful narrative draw upon our econometric models to help you identify the key risks and future opportunities to drive your strategic planning. [More info >](#)

Executive Report

Monthly: provides a succinct one-page summary ideal for senior management and meeting notes; concise need-to-know retail data for the month which includes a mix of the major economic indicators and retail metrics. [More info >](#)

Food & Grocery

Food & Grocery retail sales index
Bespoke sector specific economic analysis
Food online sales and penetration rates
Market share data
Food inflation analysis and more. [More info >](#)

Clothing & Footwear

Clothing & Footwear retail sales index
Bespoke sector specific economic analysis
Clothing online sales and penetration rates
Consumer trends for online shopping
Spend on clothing by region and more. [More info >](#)

Homewares

Homewares retail sales index
Bespoke sector specific economic analysis
Homewares region spending data
Analysis of key economic drivers such as house moves, personal finances etc.
Weather data and more. [More info >](#)

Furniture & Flooring

Furniture & Flooring retail sales index
Bespoke sector specific economic analysis
Consumer trends for online shopping
Analysis of key economic drivers such as consumer confidence, credit and lending
Regional footfall statistics and more. [More info >](#)

DIY & Gardening

DIY & Gardening retail sales index
Bespoke sector specific economic analysis
DIY & Gardening region spending data
Analysis of key economic drivers such as weather data, 'improve not move' trends
Executive summary and more. [More info >](#)

Electricals

Electricals retail sales index
Bespoke sector specific economic analysis
Consumer trends for online shopping
Analysis of key economic drivers such as disposable income growth, product launches etc.
Electricals inflation and more. [More info >](#)

Health & Beauty

Health & Beauty retail sales index
Bespoke sector specific economic analysis
Health & Beauty shopper trends such as 'lipstick effect', own-brand cosmetics etc.
Impact of digital and social media
Household spend by region and more. [More info >](#)

Our services



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Our membership service is a completely tailored, holistic, retail intelligence package.



Thought Leadership Research

Be a thought leader and command authority within your field by publishing hard-hitting thought leadership research with us.



CEO Presentations

Get the personal touch and interact face-to-face with the CEO Retail Economics (City AM Analyst of the Year 2019 nominee).



Media, PR & Comms

Maximise impact and media traction for your projects and campaigns using our extensive industry expertise and well-established networks.



Data & Benchmarking

Using industry standard methodology and best practices, we provide bespoke proprietary data and benchmarking services allowing you to accurately measure and monitor performance.



Economic modelling

Better understand how your key industry variables affect your organisation: demography, socio-economic profiles, regional, sector, policy, industry and skills etc.



Advisory & Business planning

Accelerate and grow your business with intelligent planning, forecasting and risk management using our business advisory service.

About

Retail Economics is an independent economics research consultancy focusing exclusively on the UK retail and consumer industry. Our subscription service empowers you with a deeper understanding of the key economic drivers supporting the UK retail industry, providing a competitive edge needed to make critical business and investment decisions.

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