

HIGH STREET SALES TRACKER

September monthly review
Four weeks to 27 September 2026

Slack September fails to lift retail fortunes

STORE
 **+0.7%** Sep 2025:
+3.7%

NON-STORE
 **-1.1%** Sep 2025:
+3.1%

TOTAL (ALL CATEGORIES)
 **-0.3%** Sep 2025:
+3.1%

- Total like-for-like (LFL) sales growth stood at -0.3% in September, from a base of +3.1% for the same month last year. Store sales moved to +0.7% from a base of +3.7% and non-store sales were at -1.1% from a base of +3.1% in September 2025.
- Continuing the trend seen during much of this year, weekly total LFL sales growth remained below the 2025 baseline throughout the month, with a below-inflation high of +1.07% in week 2 (against a baseline of +1.54% last year) and a low of -3.69% in week 4 (versus a baseline of -0.91%).
- Store sales growth outdid the 2025 baseline in just one week of the month, week 2, standing at +2.20% against +0.49% for the same period a year ago. But unlike last year, when growth recovered after a week 2 dip, store LFLs decreased consistently week by week this September. Non-store LFLs were also below 2025 levels for three of the four weeks of the month, and week 4's level of -5.66% against a baseline of -6.75% in 2025 hardly counts as a win for the UK's beleaguered retail sector.

- The Springboard footfall index reflected September's decreasing store figures, ranging from +1.3% in week 1 to -0.4% by week 4. The high street and retail park indices were somewhat erratic, with peaks of +2.7% in week 2 and +2.4% in week 1, respectively. Shopping centre footfall was uniformly lacklustre, achieving no more than +1.3% in week 1 and languishing at -1.2% by week 4.
- The month started and ended with wet, unsettled weather, although in general conditions were calmer than 2025's stormy September. The end of summer heatwaves does not seem to have favoured footfall particularly. Nor does it appear to have prompted autumn fashion sales alongside back-to-school spending.
- Pandemic swings aside, combined store and non-store LFLs in September have tended to hover near zero in recent years since we started analysing the data in its current form. Gains of +4.7% in 2024 and +3.1% in 2025 set a high bar that 2026 has failed to surpass.
- The Consumer Prices Index (CPI) has continued to rise, to +3.1% in the 12 months to August 2026 compared with a +2.9% increase in July. On a monthly basis, CPI was at +0.5% in August 2026 against +0.3% in the same month last year.
- Office for National Statistics figures show retail volumes growing year on year through August 2026, by +2.7%. But there is evidence elsewhere that volumes may not be translating into margins. The British Retail Consortium this week noted shop price inflation had fallen to +1.4% year on year as retailers compete on price.
- Consumer confidence has also been rising, up one point to -13 in September to its highest level since August 2024. Some other indicators are similarly up, although research firm GfK has cautioned that its Consumer Confidence Index is still firmly in negative territory.
- This month the OECD cut its 2026 UK inflation forecast from +3.7% to +3.1% while elevating its prediction for economic growth to +1.1%, compared with +0.9% in June. But the forecast for next year's growth was cut from +1.1% to +1.0%.
- Tentative improvements to consumer sentiment and the economic outlook must be set against continuing cost pressures from an Iran conflict that shows no immediate signs of resolution. The cost of living will remain a concern as winter energy bills begin to bite, potentially sapping shoppers' appetite for purchases as the golden quarter approaches.

LFL Growth (%)	Week 1 (w/e 06/09)	Week 2 (w/e 13/09)	Week 3 (w/e 20/09)	Week 4 (w/e 27/09)	Total Sep 2026
Lifestyle	0.30	-0.10	1.32	1.91	0.8
Fashion	0.81	1.33	0.82	-6.87	-0.7
Homewares	-14.70	9.60	-9.40	-16.70	-7.8
Store	3.27	2.20	1.22	-4.71	0.7
Non-store	-0.77	0.31	1.05	-5.66	-1.1
Total (all categories)	-0.10	1.07	0.59	-3.69	-0.3



LIFESTYLE

+0.8% Sep 2025:
+2.2%

- ▶ Lifestyle LFL sales were at +0.8% in September, against a baseline of +2.2% in the same month last year.
- ▶ In-store sales growth stood at +1.6% while non-store sales registered -2.3% from a baseline of +0.2% and +1.3% respectively in September 2025.
- ▶ Store sales growth did modestly well throughout most of the month, ranging from +5.36% in week 1 to -4.26% in week 4. The picture for non-store sales growth was bleaker with only one week of positive (but below-inflation) figures: +1.79% in week 2, against a baseline of +2.61%. Week 3 saw -6.88% growth.



FASHION

-0.7% Sep 2025:
+4.0%

- ▶ Fashion LFL sales stood at -0.7% versus +4.0% in September 2025.
- ▶ Store-based fashion sales growth stood at just +0.1% while non-store outlets achieved +1.3%. Both figures were well below the 2025 baseline of +6.4% for store and +4.3% for non-store fashion sales growth.
- ▶ Non-store fashion sales saw a brief surge of +10.24% growth in week 3 amid an otherwise unremarkable four weeks that ended with a growth level of -6.38%. Store fashion sales growth fell week by week during September, starting at +6.22% in week 1 and ending at -5.46% by week 4.

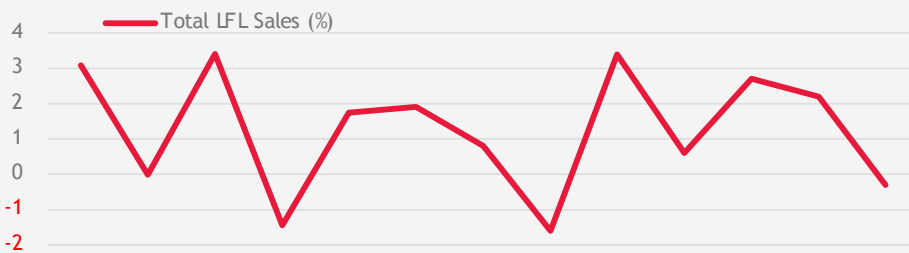


HOMEWARES

-7.8% Sep 2025:
+8.2%

- ▶ Homewares LFL sales growth stood at -7.8% this month, from a baseline of +8.2% in September 2025.
- ▶ Homeware sales growth was negative across both store and non-store categories, with the former posting -4.1% and the latter down to -18.8%.
- ▶ Non-store homewares weekly sales data were so scarce for most of September that there was barely enough for a valid analysis. Only in week 3 did data confirm a -12.40% growth rate. Store sales kicked off at -19.80% in week 1 but were at -2.00% in the last week of September.

Monthly total like-for-like results, 2025 to 2026



Monthly like-for-like results by sector, 2025 to 2026



The High Street Sales Tracker outlines weekly like-for-like sales changes of retailers across in-store and online sales covering: **Fashion:** accessories, clothing, footwear. **Lifestyle:** general household goods, gifts, health and beauty, leisure goods. **Homewares:** cookware, furniture, floor coverings, lighting, linen and textiles. **Non-store:** mail order, online and other non-store channels. Total like-for-likes include store and non-store sales. Any footfall figures quoted are provided by MRI Software, a leading provider of automated visitor counting and retail sales analysis.

What are the benefits of becoming a contributor?

- ▶ Gather real-time weekly benchmarking against retail peers
- ▶ Receive exclusive in-depth analysis reports to stay ahead of competitors
- ▶ Receive tailored thought leadership and access to relevant roundtable events.

For more information or interest in becoming a contributor please contact:

HighStreetSalesTracker@bdo.co.uk

This publication has been carefully prepared, but it has been written in general terms and should be seen as containing broad statements only.

This publication should not be used or relied upon to cover specific situations, and you should not act, or refrain from acting, upon the information contained in this publication without obtaining specific professional advice. Please contact BDO LLP to discuss these matters in the context of your particular circumstances. BDO LLP, its partners, employees and agents do not accept or assume any responsibility or duty of care in respect of any use of or reliance on this publication and will deny any liability for any loss arising from any action taken or not taken or decision made by anyone in reliance on this publication or any part of it. Any use of this publication or reliance on it for any purpose or in any context is therefore at your own risk, without any right of recourse against BDO LLP or any of its partners, employees or agents. BDO LLP, a UK limited liability partnership registered in England and Wales under number OC305127, is a member of BDO International Limited, a UK company limited by guarantee, and forms part of the international BDO network of independent member firms. A list of members' names is open to inspection at our registered office, 55 Baker Street, London W1U 7EU. BDO LLP is authorised and regulated by the Financial Conduct Authority to conduct investment business.

BDO is the brand name of the BDO network and for each of the BDO member firms.

BDO Northern Ireland, a partnership formed in and under the laws of Northern Ireland, is licensed to operate within the international BDO network of independent member firms.

Copyright © BDO LLP, October 2026. All rights reserved. Published in the UK.

www.bdo.co.uk

BDO