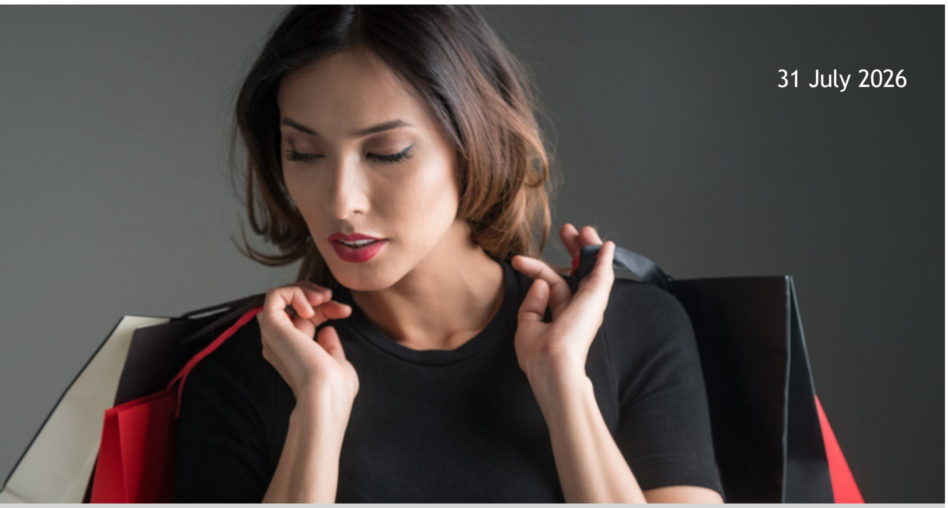
BDO

31 July 2026

HIGH STREET SALES TRACKER

July monthly review
Four weeks to 26 July 2026



STORE	NON-STORE	TOTAL
+3.8%	+3.3%	+2.7%
July 2025: +0.8%	July 2025: +8.3%	July 2025: +2.8%

A Month of Two Halves

- Total like-for-like (LFL) sales in July were up just over the rate of inflation, at +2.7%, from a base of +2.8% for the same month last year. Store sales were up +3.8% from a base of +0.8% and non-store sales grew +3.3% from a base of +8.3% in July 2025.
- Weekly total LFL sales increased throughout July, up +5.33% in week 1, +6.37% in week 2, +1.75% in week 3 and +0.08% in week 4, compared to a base of +11.66%, +1.47%. +2.30% and -2.69% in the same weeks of 2025.
- Store sales got off to a strong start, with growth of +7.25% in week 1, and outperformed last year throughout the month, yet still ended with below-inflation growth of just +0.09%. In non-store it was a similar picture, starting strong at +8.95% in week 1 then declining week on week to -0.07% by week 4, albeit with somewhat less volatility than the same period in 2025.
- July was not a particularly good month for footfall overall, with shifts ranging from -1.2% in week 2 to +1.1% in week 3. Retail parks appeared be benefit the most from visits, with growth in every week of the month peaking at 2.4% in week 4. High street figures were the most volatile, ranging from -3.3% in week 2 to 2.0% in week 3.
- July saw the south of the country baking in the third heatwave so far this year. Extreme temperatures often deter high street visits, but this month's highs were limited to the south of England and were not as searing as those seen in May and June. Continuing warm weather is likely to have driven sales of cooling products, cold drinks, barbecue accessories, summer clothing, sun protection and antihistamines for those affected by pollen.
- This month's total LFL is way below the +7.19% average for July over the last decade, although it is important to note that growth rates for the month have varied widely over the past 10 years.
- Inflationary pressures have eased off somewhat, with the Consumer Prices Index (CPI) increasing +2.6% in the 12 months to June 2026, down from +2.8% in May. On a monthly basis, CPI rose by +0.1% in June 2026, compared with a rise of +0.3% in June 2025. Transport, and food and non-alcoholic beverages made the largest downward contributions to the monthly change in CPI annual rates, according to the Office for National Statistics.
- Government analysis of independent forecasts paints a mildly encouraging picture, gross domestic product growth rising to +1.0% and the Labour Force Survey unemployment rate falling to +5.3% in July.
- The UK GfK Consumer Confidence Index rose to -17 in July 2026 from -23 in June, the highest level since January and the largest monthly improvement since November 2023. The figure was above market expectations of -21, driven by the new prime minister, hopes for Middle East, summer weather and the World Cup.
- Summer sales and good weather often combine to make July a bountiful period for retail, and this month's performance has been undeniably welcome given the pain experienced so far in 2026. The month also saw Andy Burnham arriving at Downing Street with promise to tackle the cost-of-living crisis, with analyst firm Cornwall Insight already predicting a +5.0% VAT cut on electricity could save around £44 on a typical dual-fuel energy bill. But renewed Middle East tensions are muddying the outlook for August.

TOTAL WEEKLY & MONTHLY LIKE-FOR-LIKE RESULTS, JULY 2026

LFL Growth	Week 1 (w/e 05/07)	Week 2 (w/e 12/07)	Week 3 (w/e 19/07)	Week 4 (w/e 26/07)	Total July 2026
Lifestyle	+5.55%	+8.65%	+3.09%	-2.15%	+3.7%
Fashion	+4.41%	+5.28%	+3.31%	+4.74%	+4.5%
Homeware	+9.10%	+3.87%	-12.90%	-15.55%	-3.0%
Store	+7.25%	+4.71%	+3.36%	+0.09%	+3.8%
Non-store	+8.95%	+3.13%	+1.52%	-0.07%	+3.3%
Total	+5.33%	+6.37%	+1.75%	+0.08%	+2.7%

As of January 2018, fashion, homewares and lifestyle figures represent combined in-store and non-store totals for that category.

LIFESTYLE

+3.7%

July 2025: +0.7%

- Lifestyle LFL sales were up +3.7% this month from a base of +0.7% in July last year.
- In-store sales increased +0.3%, from a base of zero last year, and non-store sales were up +8.4%, from +3.9% in July 2025.
- Following the overall retail trend, store-based lifestyle sales declined steadily over the month from a strong start. Non-store sales started the month with outstanding +17.68% growth in week 1, falling in weeks 2 and 3 then recovering to +8.04% in the final week.

FASHION

+4.5%

July 2025: +3.6%

- Fashion LFL sales were up +4.5% compared to +3.6% in July 2025.
- Store sales grew +8.2% while non-store sales were down by -0.3%. This compares to +1.3% for store and +10.1% for non-store sales in July 2025.
- Store sales growth remained at healthy levels throughout the month, peaking at +9.32% in week 2 and falling to +6.93% in week 4. Non-store sales, on the other hand, failed to beat inflation, with a high of just +1.95% in week 1 and a low of -2.23% in week 3. Non-store sales ended July with a -1.30% contraction.

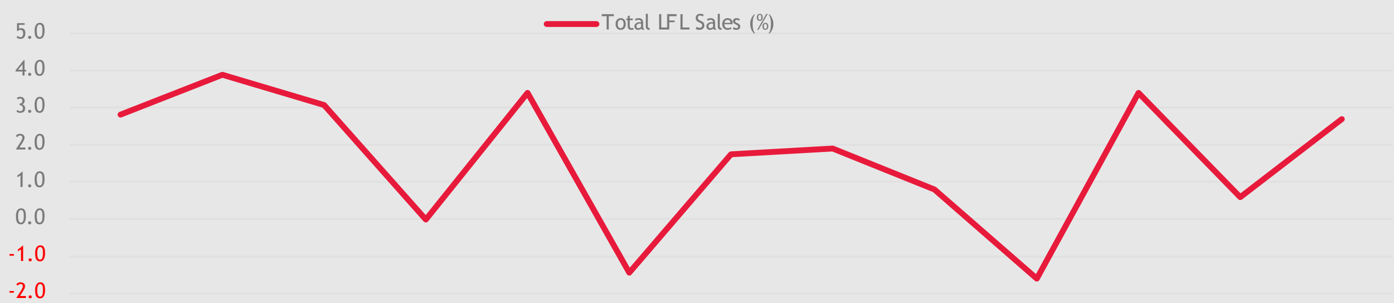
HOMEWARES

-3.0%

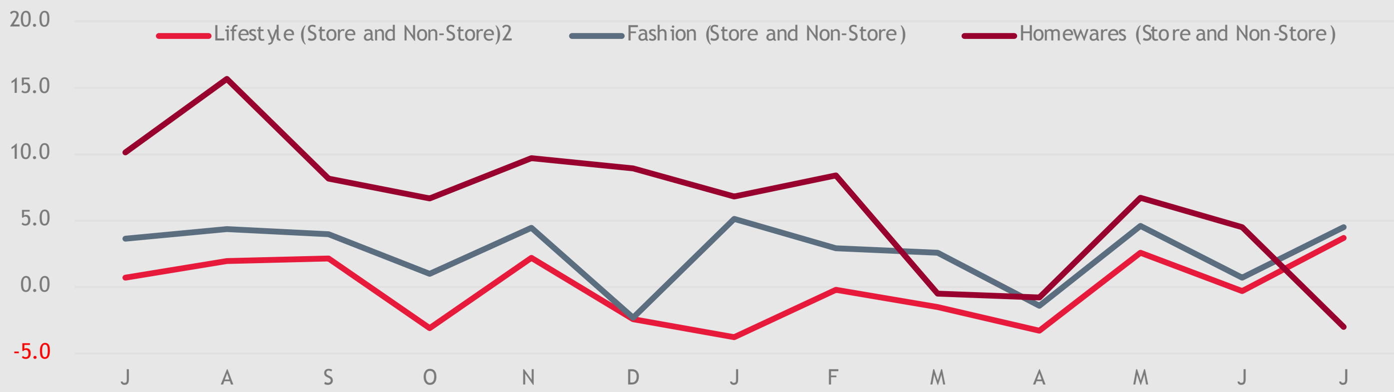
July 2025: +10.1%

- Homewares LFL sales shrank -3.0% this month, from a base of +10.1% in the same period a year ago.
- Store and non-store figures both performed badly this July, shrinking -4.1% and -5.7%, respectively, from a base of +0.4% and -0.1% in July 2025.
- A strong start to the month, with growth of +9.10% in week 1, was swamped by shrinking sales figures in week 3 (-12.90%) and week 4 (-15.55%). Non-store sales were particularly hard hit at the end of the month, declining -27.50% in week 4.

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



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



For more information please contact:

e: HighStreetSalesTracker@bdo.co.uk

The High Street Sales Tracker outlines weekly like-for-like sales changes of retailers with c10,000 individual stores across **Fashion:** accessories, clothing, footwear. **Lifestyle:** general household goods, gifts, health and beauty, leisure goods. **Homewares:** cookware, furniture and 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 Springboard who are a leading provider of automated visitor counting and retail sales analysis.