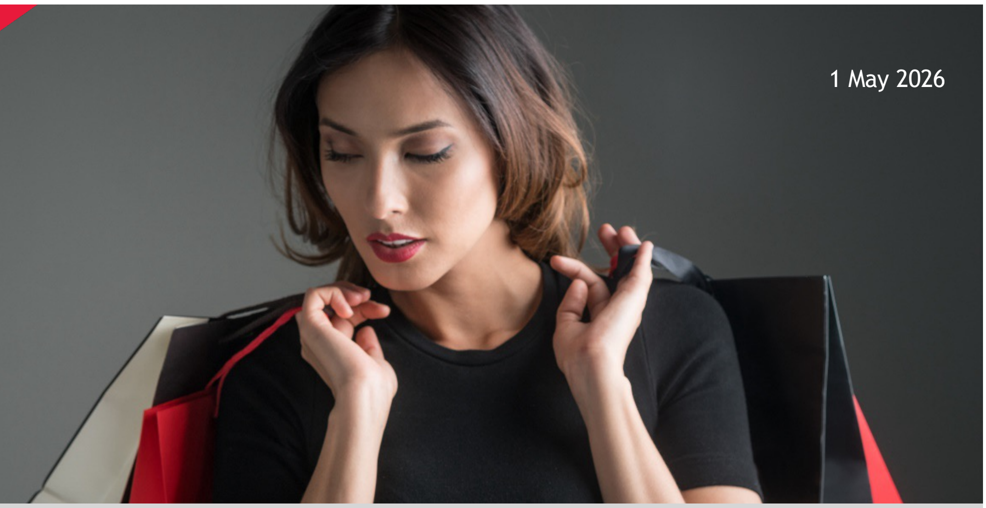
BDO

1 May 2026



HIGH STREET SALES TRACKER

April monthly review
Four weeks to 26 April 2026

STORE	NON-STORE	TOTAL
-1.8%	**+3.6%**	**-1.6%**
April 2025: +2.3%	April 2025: +5.6%	April 2025: +3.7%

Nightmare on High Street

- Total like-for-like (LFL) sales in April fell -1.6% from a base of +3.7% for the same month last year. Store sales were down -1.8% from a base of +2.3% and non-store sales grew +3.6% compared to +5.6% in April 2025.
- Total LFL sales plummeted -10.19% in week 1, compared to growth of +6.17% last year. Sales were still down, at -4.43%, in week 2, moving to +1.20% in week 3 and +4.42% in week 4. The picture contrasts strongly with last year, where weeks 2 and 3 came in at +6.78% and +7.80%, respectively, and sales only dipped in week 4, to -3.65%.
- Store and particularly non-store sales started off slow this month, with LFL rates of -0.24% and -13.53% respectively in week 1. Non-store sales recovered thereafter, peaking at +15.41% in week 3. Store sales, however, remained in negative territory to a low of -6.83% in week 3 before rebounding to +4.59% week 4. Non-store fashion posted the worst weekly figures this month, dropping to -21.26% in week 1.
- Shoppers put off by storms earlier this year were given a brief reprieve with fewer showers than usual at the start of April and Kew Gardens registering 26.6°C during one of the hottest days in the last 80 years. Normal spring weather was back in later weeks.
- Early April sunshine did little to encourage shopping visits, with footfall down -1.8% in week 1, -0.8% in week 2 and -2.8% in week 3. Only in the last week did footfall rates turn positive, and then by just +1.7% and mostly thanks to a +4.3% bump in high street visits. It was the only week in the month that high street footfall was up, however, and retail parks also saw three out of four weeks of negative numbers.
- This is the eighth consecutive month of falling sales volumes as growth rates remain below inflation. And it is an indication of how desperate things are getting for UK retailers that you must go back to 2020 for the last time monthly total LFL sales were negative in April. Excluding COVID, this is the worst April in a decade—and in 2016, shoppers stayed home due to a spate of severe snowstorms, contrasting with mild weather this month. Non-store fashion, growing +1.4%, saved the month from being a complete washout—but this increase was still under the rate of inflation.
- The Consumer Prices Index including owner occupiers' housing costs (CPIH) continues to rise, up +3.4% in the 12 months to March 2026. The CPI was also up, +3.3% in the 12 months to March, following a +3.0% rise in February. While clothing prices went down, this was more than offset by fuel price increases linked to the closure of the Strait of Hormuz.
- Retail sales rose +1.6% in the first quarter of 2026 compared to the last quarter of 2025, according to the Office for National Statistics. But British Retail Consortium boss Helen Dickinson has warned in an interview that red tape is weighing heavily on retailers.
- Consumer confidence is now at its lowest in more than two years, based on the UK GfK Consumer Confidence Index. The index fell from -21 in March to -25 in April, the biggest fall in a year.
- There is no sugarcoating the outlook for retail. With no signs of a resolution to the Iran crisis, the International Monetary Fund announced this month that the UK would feel the impact of higher fuel prices more keenly than any other major economy. It cut its forecast for UK economic growth to just +0.8% this year, down from +1.3% in January.

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

LFL Growth %	Week 1 (w/e 05/04)	Week 2 (w/e 12/04)	Week 3 (w/e 19/04)	Week 4 (w/e 26/04)	Total April 2026
Lifestyle	-4.18	-9.53	-3.79	+5.99	-3.3%
Fashion	-14.09	-0.80%	+5.06%	+1.82%	-1.4%
Homeware	-8.03%	-9.80%	-4.07%	+15.87%	-0.8%
Store	-0.24%	-4.03%	-6.83%	+4.59%	-1.8%
Non-store	-13.53%	+2.53%	+15.41%	+7.48%	+3.6%
Total	-10.19%	-4.43%	+1.20%	+4.42%	-1.60%

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

LIFESTYLE

-3.3%

April 2025: +0.3%

- Lifestyle LFL sales dropped -3.3% this month, from a positive base of +0.3% for the same month last year.
- In-store sales were down -2.5% and non-store sales dropped -1.4%, from -1.2% and +5.0% respectively over the same period in 2025.
- Lifestyle sales only really enjoyed one week of above-inflation growth this month, hitting +4.12% in store and +4.94% in non-store outlets in week 4. Non-store sales suffered particularly at the start of the month, registering a -14.06% contraction in week 1.

FASHION

-1.4%

April 2025: +6.4%

- Fashion LFL sales were down -1.4%, way below the +6.4% that retailers enjoyed in March 2025.
- Non-store sales managed a below-inflation increase of +1.4% in April, while store sales were down -0.8%. Both were significantly below April 2025 levels.
- Non-store fashion sales were missing in action at the start of the month, at -21.26% in week 1. Things recovered thereafter, peaking at +18.18% in week 3. Store sales remained in negative territory for the first three weeks of the month, recovering to +4.70% in week 4.

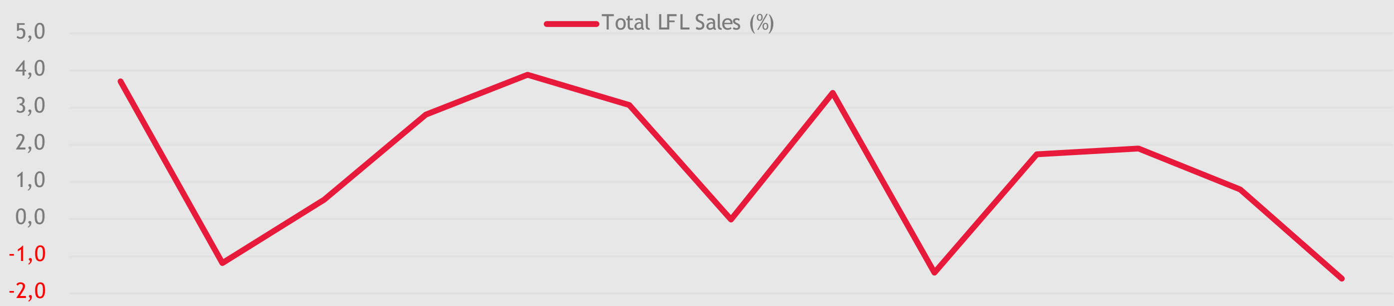
HOMEWARES

-0.8%

April 2025: +5.7%

- Homewares LFL sales fell -0.8% this month, compared to growth of +5.7% in March last year.
- Non-store sales were up +20.8%, compared to -12.2% in the same week last year. Store sales were down -9.9%, versus +0.9% in 2025.
- April saw a marked difference between store sales, which were negative for the first three weeks and dropped as far as -23.85% in week 3, and non-store figures, which were positive and rising throughout the month and peaked at +31.75% 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:

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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.