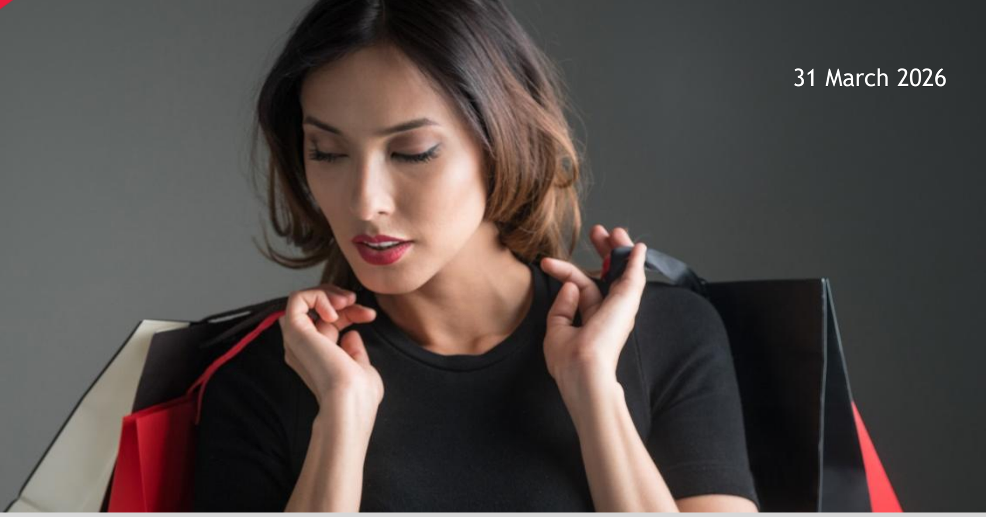
BDO

31 March 2026



HIGH STREET SALES TRACKER

March monthly review
Five weeks to 29 March 2026

STORE	NON-STORE	TOTAL
-0.1%	+4.8%	+0.8%
March 2025: +0.3%	March 2025: +6.1%	March 2025: +1.8%

Sales Stall as Fuel Costs Bite

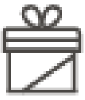
- Total like-for-like (LFL) sales in March increased just +0.8%, well under inflation, from a base of +1.8% for the same month last year. Store sales were down -0.1% from a base of +0.3% and non-store sales grew +4.8% compared to +6.1% in March 2025.
- The first week of March saw total LFL sales up +3.20% compared to -6.89% last year. In week 2, total sales were up +9.85% from a base of -7.43% in 2025. But in the third week of March, this surge in total LFL sales began to falter with +3.46% growth compared to +4.18% for the same period in 2025. Weeks 4 and 5 saw falls of -3.04% and -7.74%, respectively, from a positive base of +10.00% and +10.74% in the same weeks last year.
- Store and non-store sales both got off to a strong start this month, buoyed by rocketing figures for fashion especially. In week 2, for instance, non-store fashion outlets saw a peak of +25.15 LFL sales, from a base of +3.04% in the same week of 2025. But the mood soured in week 3 and turned definitively thereafter, with all store and non-store categories seeing sales activity below 2025 levels in weeks 4 and 5.
- March began and ended with negative footfall figures across all locations, although there were brighter spots at some points during the month. In week 4, for example, footfall was up +3.3% overall and 4.2% in the high street. Encouraging, yes, but not nearly enough to offset falls of -5.4% and -7.7%, respectively, in week 5.
- A relatively dry and bright start to March likely helped the sales figures seen in the first half of the month, while colder-than-usual weather coincided with the fall in activity seen towards the end of the period.
- A strong start to the month somewhat favoured the sales results for March and may have given rise initially to a measure of optimism, but there is no getting away from what appears to be a deepening crisis for UK retail. Week 5 was one of the worst-performing weeks in some time and total growth remains stubbornly below inflation, with monthly figures for most store and non-store categories below the levels seen in March 2025.
- The Consumer Prices Index including owner occupiers' housing costs (CPIH) rose by +3.2% in the 12 months to February 2026, while the CPI alone was up +3.0%, both unchanged from the 12 months to January. Clothing made the largest upward contribution to the monthly change in both CPIH and CPI annual rates, according to the Office of National Statistics. Retail sales were down -0.4% in February, it said.
- March was marked by a worsening global economic outlook from the ongoing war in Iran. Iran's fuel blockade saw retail price inflation going from +1.1% in February to +1.2% in March, according to the British Retail Consortium.
- A fear of rising costs is dampening spending intentions, with the UK GfK Consumer Confidence Index dropping from -16 in January to -21 in March, the lowest level since April last year.
- With no end in sight, the Iran conflict has added serious complications to what was already an uncertain outlook for UK retail. The analyst firm Cornwall Insight is now forecasting a default tariff cap of £1,929 a year for energy bills in a typical dual-fuel household from July, an +18% rise from this April. Against this backdrop of rising costs, drawing shoppers out for Easter will be a tough job indeed.

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

LFL Growth %	Week 1 (w/e 01/03)	Week 2 (w/e 08/03)	Week 3 (w/e 15/03)	Week 4 (w/e 22/03)	Week 5 (w/e 29/03)	Total March 2026
Lifestyle	0.77	7.23	6.95	-6.31	-14.19	-1.5
Fashion	3.45	12.33	2.27	-1.22	-4.05	+2.6
Homeware	13.20	-0.70	-2.70	-3.63	-4.93	-0.5
Store	0.65	2.73	2.86	-0.35	-6.52	-0.1
Non-store	12.64	18.70	7.29	-5.61	-8.02	+4.8
Total	3.20	9.85	3.46	-3.04	-7.74	+0.8

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

LIFESTYLE



-1.5%

March 2025: -0.3%

- Lifestyle LFL sales dropped -1.5% this month, from a negative base of -0.3% for the same month last year.
- In-store sales were down -1.9% but non-store sales lifted +0.7%, from +0.7% and +6.6% respectively over the same period in 2025.
- Non-store lifestyle sales roared into life in the early part of the month, hitting +15.55% in week 2. But these gains were practically wiped out in weeks 4 and 5, with the month ending at -17.26%. Store sales, while less volatile, peaked at +6.64% in week 3 then fell to -8.16%.

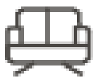
FASHION

+2.6%

March 2025: +3.7%

- Fashion LFL sales were up a welcome +2.6% but remained below the +3.7% seen in March 2025.
- Store sales rose by +0.9%, compared to +1.5% in 2025, while non-store sales were up +6.4% from a base of +5.5% in March 2025.
- Mirroring the general trend, fashion sales peaked early in the month and tended to fall from week 3 onwards. Store sales hit +4.51% in week 2, while the non-store figure topped +25.15%. By week 5, stores had fallen to -5.58% on a LFL basis, while non-store sales were at -5.17%.

HOMEWARES

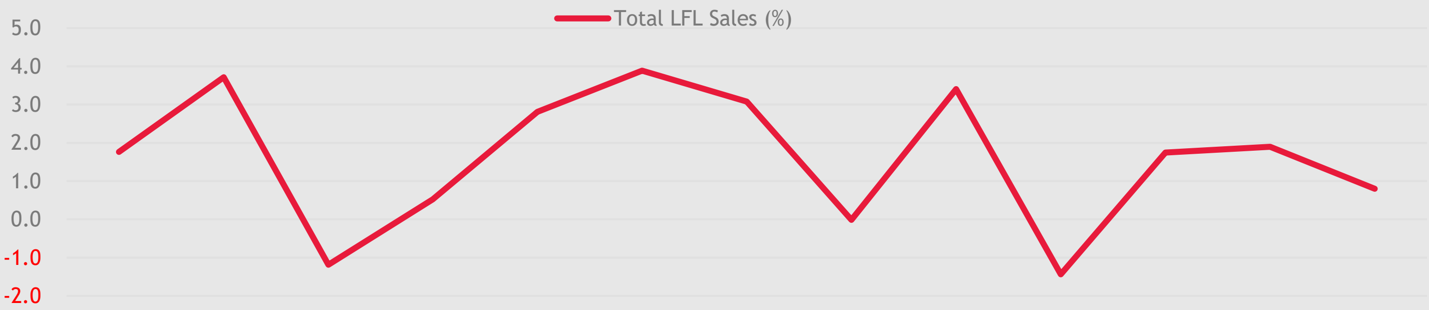


-0.5%

March 2025: +1.2%

- Homewares LFL sales fell -0.5% this month, compared to growth of +1.2% in March last year.
- Non-store sales were up +10.1%, compared to -4.0% in the same week last year. Store sales grew +0.6%, versus -2.8% in 2025. (These positive figures are not reflected in the overall score because of companies contributing to both store and non-store data.)
- Weekly homewares sales got off to a strong start, at +13.20% in week 1, but then declined to -4.93 by the last week of the period.

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 mid-tier 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.