BDO

4 September 2026

HIGH STREET SALES TRACKER

August monthly review
Five weeks to 30 August 2026

Top temperatures pile heat on the high street

STORE
+3.6% August 2025: +5.2%

NON-STORE
+2.3% August 2025: +6.6%

TOTAL (ALL CATEGORIES)
+2.2% August 2025: +3.9%

- Total like-for-like (LFL) sales in August rose at a less-than-inflation +2.2%, from a base of +3.9% for the same month last year. Store sales were up +3.6% from a base of +5.2% and non-store sales grew +2.3% from a base of +6.6% in August 2025.
- Weekly total LFL sales growth remained under the 2025 baseline throughout the entire month and only crept above the rate of inflation in weeks 2 and 4. The best weekly performance was in week 4, where total LFLs rose +3.34% against a baseline of +3.35% in August 2025. The lowest weekly growth was in week 3, where total LFL sales were up +2.15% against a baseline of +2.65%.
- Store sales growth beat CPI inflation in weeks 2,3 and 4 but only exceeded August 2025 baseline levels in week 3 when it peaked at +5.07% against +3.51% last year. Meanwhile non-store LFLs outperformed inflation in weeks 1, 2 and 5, and overtook last year's baseline in weeks 2 (at +4.76%, versus +3.38% in 2025) and 5 (+4.11% versus +2.99%).
- Footfall saw minimal growth throughout the month, peaking at +2.1% in week 2 and falling to +0.1% in week 4. High street visits were the biggest drag on growth, with footfall dropping -0.6% in week 3 and -2.0% in week 4. In contrast, retail parks saw a healthy +5.2% growth in week 1 although visits had fallen to 0.0% by week 5.
- A fourth heatwave in what has become the hottest UK summer on record will have tested shoppers' appetite for high street sojourns, with thunderstorms and humidity doing little to encourage footfall in late August. Online, searing temperatures may have sustained demand for cooling, outdoor and summer lines, but overall retailers will be glad the scorching summer is coming to an end.
- August is traditionally a good month for retail, with positive total LFLs in eight of the past ten years and an average LFL of +5.0%. This month's total LFL growth of less than half the ten-year average is the sixth monthly total to underperform last year's benchmark.
- Inflation was on the rise again, with the Consumer Prices Index (CPI) rising +2.9% in the 12 months to July 2026, up from +2.6% in June. On a monthly basis, CPI increased +0.3% in July 2026, compared to +0.1% in the same month a year ago.
- The arrival of a new prime minister helped drive the UK GfK Consumer Confidence Index to -14, its highest level in two years, from -17 in July. The survey's Major Purchase Index was up even further, rising five points to -7.
- But how long households will see this as a good time to make major purchases is open to question. The cost of living is set to grow as energy bills that have already risen 25% since February climb a further 4% to a three-year high, when a new default tariff cap kicks in this October. Analyst firm Cornwall Insight is forecasting a further 9% increase in energy bills come January 2027.
- According to the latest BRC-NIQ Shop Price Monitor, shop price inflation also hit a two-year high in August due to price increases for chocolate, sweets and coffee. The monitor registered a +1.5% year-on-year increase, compared to a rise of just +0.9% in July.
- Yes, there was growth in August, but not the kind most retailers will have been hoping for. Below inflation, below last year and below the ten-year average, this was another lacklustre month in what has so far been an overwhelmingly lacklustre year. And despite a new face at Number Ten there is little to suggest headwinds will die down in the months to come.

LFL Growth (%)	Week 1 (w/e 02/08)	Week 2 (w/e 09/08)	Week 3 (w/e 16/08)	Week 4 (w/e 23/08)	Week 5 (w/e 30/08)	Total Aug 2026
Lifestyle	-2.92	0.38	-0.93	-1.47	7.80	0.5
Fashion	0.85	-0.84	2.10	4.38	-1.67	1.0
Homeware	25.10	27.67	12.67	21.10	4.90	20.3
Store	2.80	4.27	5.07	3.82	1.75	3.6
Non-store	4.22	4.76	-2.01	0.77	4.11	2.3
Total (all categories)	2.47	3.18	2.15	3.34	2.70	2.2

LIFESTYLE

+0.5% August 2025: +2.0%

- Lifestyle LFL sales were up +0.5% in August, compared to a baseline of +2.0% in the same month last year.
- In-store sales increased +0.5% while non-store sales shrank -5.2%, from a baseline of +2.4% and +3.8% respectively in August 2025.
- Store sales got off to a poor start with a -3.77% contraction in week 1, then slowly increased to +3.30% growth by week 5. Non-store lifestyle sales growth had an even rockier month, starting out at -1.44% in week 1 then dropping week by week to hit -13.55% in week 4 before rebounding to +8.19% in the last week of the period.

FASHION

+1.0% August 2025: +4.4%

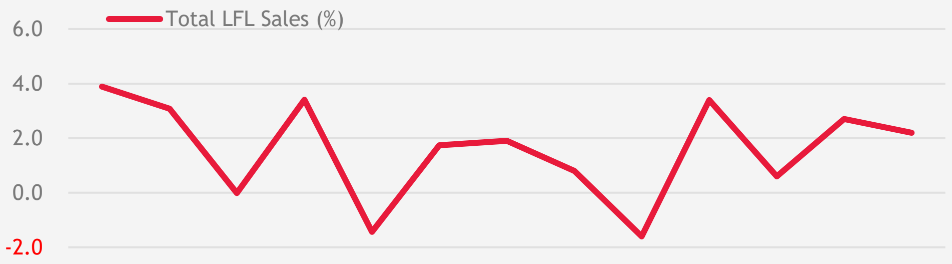
- Fashion LFL sales increased +1.0% versus +4.4% in August 2025.
- Store-based fashion sales were up +5.4% while non-store sales remained stagnant at 0.0%. This compares to +5.8% for store and +8.2% for non-store sales growth in August 2025.
- In-store fashion sales managed to achieve healthy growth for most of the month, peaking at +8.88% in week 3, but ended up falling to -0.11% in week 5. In non-store it was the opposite picture, with only one week—week 4—seeing above-inflation sales growth of +7.05%, and a low of -4.37% in week 2.

HOMEWARES

+20.3% August 2025: +15.7%

- Homewares LFL sales grew +20.3% this month, beating growth of +15.7% in August 2025.
- Homeware store sales grew +11.7% over the month, compared to +16.4% in August 2025. Non-store sales were up +39.0% this month, compared to a baseline of +5.7% in August 2025.
- Non-store homewares sales did well throughout the first four weeks of the month, hitting +47.90% in week 1 and +48.00% in week 2. Store sales growth was also lively for most of the period, with a high of +18.45% in week 2, but dropped to -0.10% in week 4.

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 Springboard who are a leading provider of automated visitor counting and retail sales analysis.

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