

HIGH STREET SALES TRACKER

October monthly review
Four weeks to 26 October 2025



STORE

+1.1%

October 2024 **+1.7%**



NON-STORE

+0.4%

October 2024 **+9.1%**



TOTAL

-0.02%

October 2024 **+4.1%**

Golden Quarter Opens with Poor Retail Sales Growth

- ▶ Total like-for-like (LFL) sales in October ticked down by just -0.02% from a positive base of +4.1% for the same month last year. Store sales nudged up by +1.1% from a base of +1.7%, while non-store sales were flat, up just +0.4% from a healthy base of +9.1% for October 2024.
- ▶ In the first week of October, LFL sales declined by -3.67% from a base of +10.86%. In the second week of the month, LFL sales increased by +1.32% from a base of +8.44%. In the penultimate week of October, LFL sales rose by +3.41% from a base of +2.81%. In the final week of the month, which coincided with school half-term holidays across much of the UK, LFL sales fell -1.96% from a negative base of -3.72% for the same week in 2024.
- ▶ October saw cooler-than-average temperatures and frequent rainfall, particularly across southern and western regions, driven by a succession of Atlantic weather systems. Northern Scotland remained relatively dry and sunny, offering brief respite from the unsettled conditions. By contrast, the same period in 2024 was more stable, with near-seasonal temperatures and moderate rainfall. After early flooding in the south, conditions improved markedly, while the north and west saw typical autumnal showers without prolonged wet spells.
- ▶ Footfall was down year-on-year in all but the second week of October. In week two, despite the weather being noticeably cooler across much of the UK than in previous weeks, overall footfall grew, driven by moderate growth in high street traffic. The final week of October saw a steep drop in footfall, with traffic falling across all destinations. This was driven by an -8.1% fall in high street traffic, perhaps partially due to school half-term holidays in parts of the UK.
- ▶ This month's unwelcome negative result follows three consecutive months of growth and is a poor start to the retail Golden Quarter.
- ▶ The UK economy remains subdued, with inflation persistent and growth slowing, prompting cautious signals from the Bank of England. GDP growth slowed to an estimated 0.3% in Q2 2025, down from 0.7% in Q1, reflecting weak demand and softening labour market conditions. CPI inflation rose to 3.8% in September, driven by wage pressures and seasonal increases in services costs, particularly transport and hospitality. While price growth of discretionary goods - clothing, household goods and furniture remains low (at 0.5% and 0.4% respectively), food inflation remains stubbornly high, potentially impinging on both consumer sentiment and appetite for non-essential spending.
- ▶ The Bank of England held the base rate at 4.00%, though a minority of MPC members favoured a cut to 3.75%, citing progress on disinflation and easing pay growth. Consumer confidence edged up, but household spending remains cautious amid economic uncertainty. Employment indicators softened, with hiring intentions weakening and vacancies declining. Business sentiment remains fragile, especially in manufacturing, where output expectations have deteriorated. The Bank signalled a measured approach to future rate cuts, balancing inflation risks against faltering growth. Outlooks for 2026 suggest a gradual recovery, though global uncertainty and domestic fiscal pressures may temper momentum.
- ▶ As the Golden Quarter enters its second month, retailers will be looking to competitive discounting and promotional sales to motivate spending - and more importantly - repeat spending to drive revenues. They will also be hoping for some relief from overhead costs in the forthcoming budget.

TOTAL LIKE-FOR-LIKE RESULTS FROM 2024-2025

LFL Growth %	Week 1 (w/e 05/10)	Week 2 (w/e 12/10)	Week 3 (w/e 19/10)	Week 4 (w/e 26/10)	Total October
Lifestyle	-0.02%	-2.43%	-1.98%	-8.60	-3.1
Fashion	-6.58%	2.49%	5.67%	0.48	1.0
Homeware	-3.43%	8.53%	14.25%	10.50	6.7
Store	0.52%	0.82%	4.66%	-2.10	1.1
Non-store	-7.33%	4.43%	4.40%	-1.40	0.4
Total	-3.67%	1.32%	3.41%	-1.96	-0.0

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



LIFESTYLE

-3.1%

October 2024: **+4.1%**

- ▶ Lifestyle LFL sales fell -3.1% this month from a base of +4.1% for the same month last year.
- ▶ In-store sales ticked down -0.02% while non-store sales fell -2.49% from bases of +3.3% and +5.6% respectively for October 2024.
- ▶ Pulled down by poor non-store sales, Lifestyle total LFLs were negative throughout October. The month's nadir fell in October's final week, in which total lifestyle sales fell -8.60% from a negative base of -0.88% for the same week last year.



FASHION

+1.0%

October 2024: **+5.5%**

- ▶ Fashion sales grew +1.0% this month from a base of +5.5% for the same month last year.
- ▶ In-store sales ticked up +1.5% while non-store sales grew +3.5% from bases of +0.5% and +9.3% respectively for October 2024.
- ▶ Fashion total LFL sales were negative in the first week of October, but positive for the remainder of the month. Week three saw the month's strongest LFL sales result for the category, driven by a combination of strong store and non-store sales, which rose +6.05% and +9.29% respectively from bases of -0.86% and -0.80% for the same month last year.



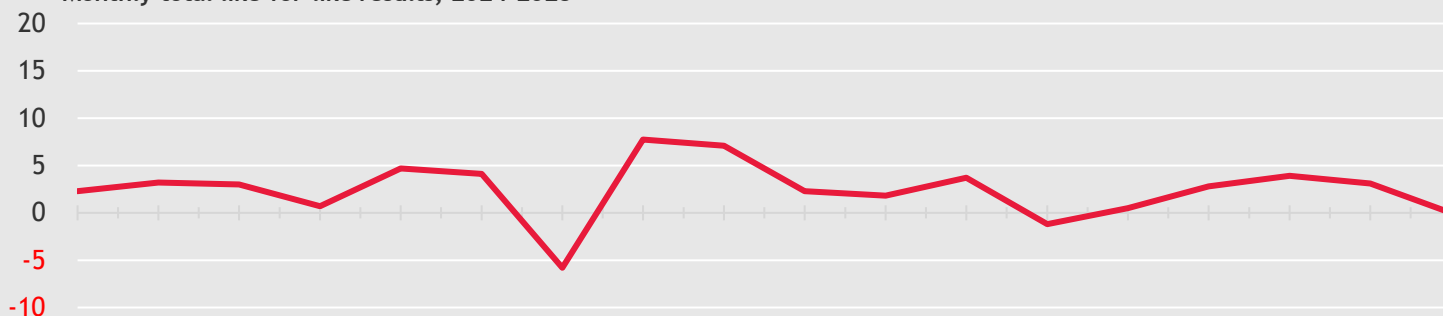
HOMEWARES

+6.7%

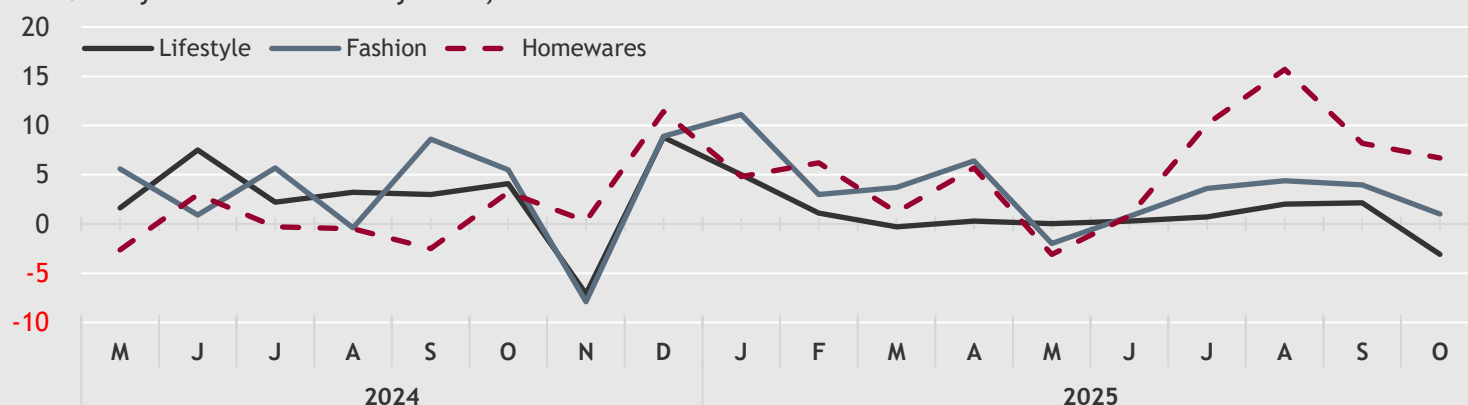
October 2024: **+3.2%**

- ▶ Homewares sales grew +6.7% this month from a base of +3.2% for the same month last year.
- ▶ In-store sales grew by +5.2% while non-store sales fell -2.5% from bases of +1.1% and +3.3% respectively for October 2024.
- ▶ Homewares total sales were positive in all but the first week of the month, in which LFL sales fell -3.43% from a base of +6.73% for the same week last year. Owing to double-digit store LFL sales growth, the last two weeks were particularly strong. The final week is notable for double-digit growth across both store and non-store channels.

Monthly total like-for-like results, 2024-2025



Monthly like-for-like results by sector, 2024-2025



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The High Street Sales Tracker outlines weekly like-for-like sales changes of some 80 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.

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