

HIGH STREET SALES TRACKER

October monthly review
Four weeks to 25 October 2026

October bounce brings autumn joy to retailers

STORE
 +2.2% Oct 2025: +1.1%

NON-STORE
 +10.1% Oct 2025: +0.4%

TOTAL (ALL CATEGORIES)
 +4.6% Oct 2025: -0.02%

- Total like-for-like (LFL) sales were up a welcome +4.6% in October, from a base of -0.02% for the same month last year. Store sales were up +2.2% from a base of +1.1%, while non-store sales rocketed up +10.1% from a modest base of +0.4% in October 2025.
- This October saw the highest average weekly total (store and non-store) sales growth rates of any month since January 2025, starting at +5.92% in week 1 and dropping to a low of +5.10% before rebounding to +6.85% by week 4. For comparison, sales growth in October 2025 ranged from -3.67% in week 1 to +3.41% in week 3.
- Monthly store sales growth of +2.2% was above the October 2025 baseline of +1.1% but still below the level of inflation. Non-store sales, however, had an outstanding month with +10.1% growth, far exceeding the 2025 baseline of +0.4%. This was the best October non-store sales growth result in half a decade, following a +15.7% rise seen this month in 2021. Week 2 was particularly busy this year, with non-store sales growth of +17.23%

- Footfall wavered throughout October, according to the Springboard index, ranging from growth of +4.3% in week 1 to a -5.7% decrease in week 4. The swings were most accentuated in the high street, ranging from +5.4% in week 1 down to -9.3% in week 4, and least pronounced in shopping centres (going from +3.3% in week 1 to -3.8% in week 4), which points to the impact of weather patterns during the month.
- As reflected in footfall, the month kicked off with unusually warm weather before shifting to more autumnal conditions. Week 3 saw some milder weather before storms began battering parts of the country in week 4. The stormy second half of the month may have driven some shoppers to buy online instead of risking the high street.
- Thanks to non-store sales growth this ended up being the best October for UK retailers since 2021, when the store and non-store total hit +19.9%. It has been the second-best October for sales growth in the last decade.
- The Consumer Prices Index (CPI) is still on the up, rising to +3.6% in the 12 months to September 2026 against a +3.1% uplift in August. On a monthly basis, CPI was up +0.4% in September 2026, versus little change in the same month last year.
- This year's welcome October sales growth came against a backdrop of falling retail sales volumes in September, based on figures from the Office for National Statistics. Sales volumes rose over the three months to September but fell following a rise in August, it said.
- The GfK Consumer Confidence index, which had been climbing steadily since June, took an 11-point dive in October to -24, the lowest monthly level this year bar April and the sharpest monthly decline since April 2020. Willingness to make major purchases fell to its lowest level in more than two years, GfK said.
- Shop price inflation hit a two-year peak in October, with the rate for non-food retail items increasing +1.7% in October versus +0.8% in September. The British Retail Consortium warned of limited capacity for retailers to continue absorbing the "huge wave" of high energy and transport costs.
- October's sales growth will have provided a welcome respite from the lacklustre results seen so far this year. The question now is whether Budget measures on business rates, employment costs, cost-of-living support and other areas will compensate for a macroeconomic outlook that still leaves little room for cheer this Golden Quarter.

LFL Growth (%)	Week 1 (w/e 4/10)	Week 2 (w/e 11/10)	Week 3 (w/e 18/10)	Week 4 (w/e 25/10)	Total Oct 2026
Lifestyle	17.48	3.54	1.68	4.74	6.9
Fashion	-0.26	4.84	6.43	6.73	4.3
Homewares	-4.00	13.70	11.30	12.93	8.0
Store	3.08	1.18	2.28	2.22	2.2
Non-store	5.77	17.23	8.85	8.60	10.1
Total (all categories)	5.92	5.10	5.15	6.85	4.6



LIFESTYLE

+6.9% Oct 2025:
-3.1%

- ▶ Lifestyle LFL sales were up +6.9% this month from a base of -3.1% in the same month last year.
- ▶ In-store sales saw below-inflation growth of +2.2%, up from a negative base of -0.02% in October 2025, while non-store sales were up +4.3% from a baseline of -2.5% last year.
- ▶ Store and non-store sales both got off to a strong start, growing +7.99% and +18.60% respectively in week 1. This was followed by two weeks of negligible-to-negative growth and a slight uptick in week 4 across both categories. Week 1 was the only time store and non-store sales growth beat inflation, however.



FASHION

+4.3% Oct 2025:
+1.0%

- ▶ Fashion LFL sales grew +4.3% against a base of +1.0% in October 2025.
- ▶ Store-based fashion sales growth failed to beat inflation, at +2.1%, but was above the 2025 base of +1.5%. Non-store fashion sales saw healthy +9.0% growth, well above the +3.5% of last year.
- ▶ While store sales only crept above inflation in week 3, hitting +4.55%, non-store fashion had a roaring month with growth of +14.50% in week 2, +12.80% in week 3 and +11.64% in week 4. Week 1 was the only time when non-store sales failed to shine, with -2.13% growth.

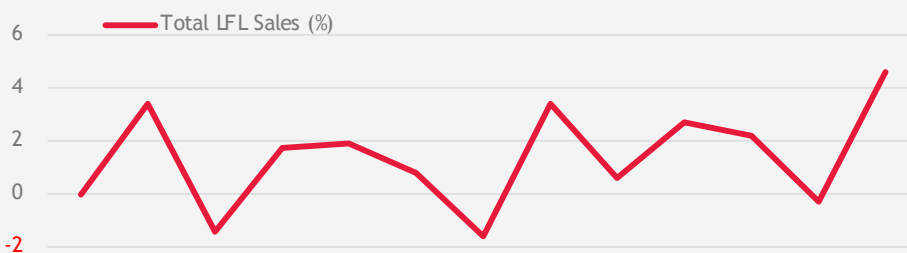


HOMEWARES

+8.0% Oct 2025:
+6.7%

- ▶ Homewares LFL sales growth hit +8.0% this month, from a base of +6.7% in October 2025.
- ▶ Homeware sales achieved an outstanding +23.3% growth in non-store outlets, while store sales failed to keep up with inflation, at +2.6%.
- ▶ Across store and non-store outlets there was an inauspicious start to the month, with store sales languishing -12.60% in week 1. Things then picked up across all outlets, with non-store sales soaring +56.50% in week 2 and store sales seeing a peak of +9.95% growth in week 3.

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 MRI Software, a leading provider of automated visitor counting and retail sales analysis.

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