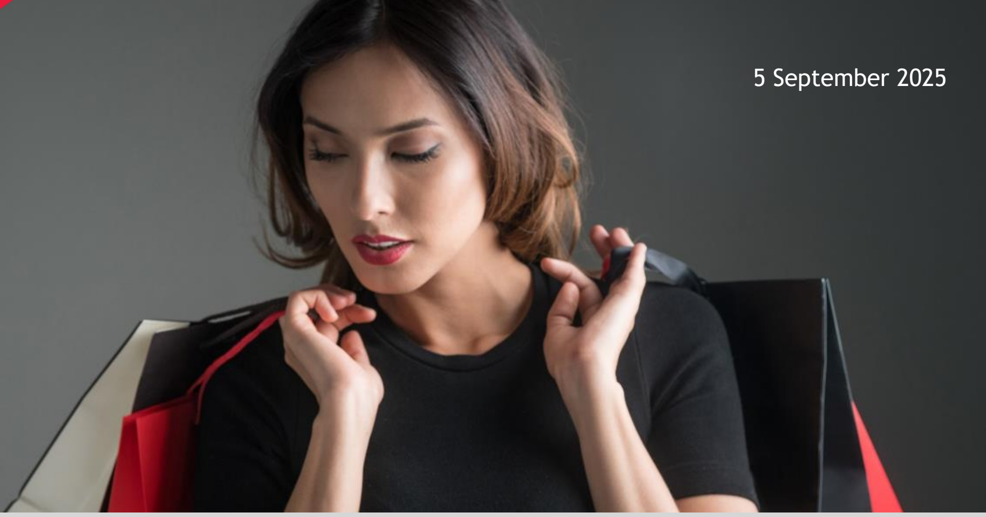
5 September 2025



HIGH STREET SALES TRACKER

August monthly review
Five weeks to 31 August 2025

STORE
+5.2%
August 2024 -0.7%

NON-STORE
+ 6.6%
August 2024 +3.1%

TOTAL
+3.9%
August 2024 +0.7%

Summer Sun Drives Above-Inflation Sales Growth

- Total like-for-like (LFL) sales in August rose +3.9% from a flat base of +0.7% for the same month last year. Store sales rose +5.2% from a negative base of -0.7% , while non-store sales increased by +6.6% from a healthy base of +3.1% for August 2024.
- LFL sales rose by +9.57% in the first week of August, from a base of -0.04% for the same week last year. In the second week of August, LFL sales grew by +4.23% from a base of +1.23% for the same week last year. In the third week of August, LFL sales increased by +2.65% from a base of +0.31% for the same week last year and then went up again in the fourth week (which culminated in the August bank holiday weekend) by +3.35% from a base of +1.76% for the same week last year. In the final week of August, which began with the August bank holiday, LFL sales grew +3.29% from a negative base of -1.79% for the corresponding week in 2024.
- This month, the UK saw its warmest summer on record, with persistent above-average temperatures, sunshine, four heatwaves, drought conditions, and minimal rainfall in much of England — even as Storm Floris delivered rain in early August. By contrast, August 2024 fell within the coolest UK summer since 2015, featuring below-average overall temperatures, variable regional weather and wetter conditions in the north and west.
- Footfall was mixed in August. The opening two weeks and penultimate week of the month saw footfall to UK shopping destinations grow overall, the third and final weeks of the month saw footfall tick down slightly. Buoyed by strong high street and shopping centre traffic, the second week of August saw the month's highest growth while the final week saw footfall tick south, pulled down by a sharp fall in high street traffic.
- This month's result represents the highest overall sales growth since January, and the strongest growth for in-store LFL sales since August 2023. Taken together, this month's is the first occasion since December 2024 when the store and non-store results all surpassed CPI inflation. In-store sales saw a welcome return to healthy growth, pushed by healthy fashion sales which returned their strongest total growth since April.
- UK GDP grew by 0.3% in Q2 2025, slowing from 0.7% in Q1, with growth driven by services and construction, while production declined. CPI inflation rose to 3.8% in July, up from 3.6% in June, largely due to higher transport and hospitality costs, a spike likely linked to seasonal travel demand coupled potentially with higher staffing costs across these sectors. Citing a weakening labour market and subdued growth, the Bank of England cut the base interest rate to 4.00%.
- Consumer confidence improved modestly in August though sentiment remains fragile. Business confidence, however, continued to soften, with more manufacturers expecting output to fall in the coming months. The CBI Distributive Trades Survey reported an eleventh consecutive month of falling retail volumes, though the pace of decline is expected to ease in September.
- Against a backdrop of elevated price inflation, economic momentum is fragile and confidence across households and businesses remains cautious and under strain. While this month's result marks a positive close to Summer and a welcome return to in-store growth, it remains to be seen whether this momentum can continue into retail's golden quarter.

TOTAL LIKE-FOR-LIKE RESULTS FROM 2024-2025

LFL Growth %	Week 1 (w/e 03/08)	Week 2 (w/e 10/08)	Week 3 (w/e 17/08)	Week 4 (w/e 24/08)	Week 5 (w/e 31/08)	Total August
Lifestyle	8.08%	4.70%	-1.43%	2.74%	-3.95%	2.0%
Fashion	10.46%	-0.57%	2.44%	3.69%	6.00%	4.4%
Homeware	9.80%	25.60%	20.13%	3.03%	14.53%	15.7%
Store	7.04%	7.03%	3.51%	4.64%	3.49%	5.2%
Non-store	14.09%	3.38%	4.38%	8.78%	2.99%	6.6%
Total	9.57%	4.23%	2.65%	3.35%	3.29%	3.9%

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

LIFESTYLE

+2.0%

August 2024: +3.2%

- Lifestyle LFL sales grew +2.0% this month from a base of +3.2% for the same month last year.
- In-store sales grew +2.4% while non-store sales grew +3.8% from bases of +2.6% and +3.2% respectively for August 2024.
- Lifestyle LFL sales were mixed in August. The month started positively, up +8.08% from a base of -0.53% for the same week last year, owing to healthy store and non-store sales. In contrast, the final week ended in negative territory, down -3.95% from a base of +7.08%, pulled down by negative store and non-store sales.

FASHION

+4.4%

August 2024: -0.4%

- Fashion LFL sales grew +4.4% this month from a negative base of -0.4% for the same month last year.
- In-store sales grew +5.8% while non-store sales grew +8.2% from bases of -4.0% and +3.8% respectively for August 2024.
- Fashion LFL sales were positive in all but the second week of August. Bouyed by double-digit non-store sales, the first week was the standout week of the month, up +10.46% from a positive base of +1.61% for the same week last year.

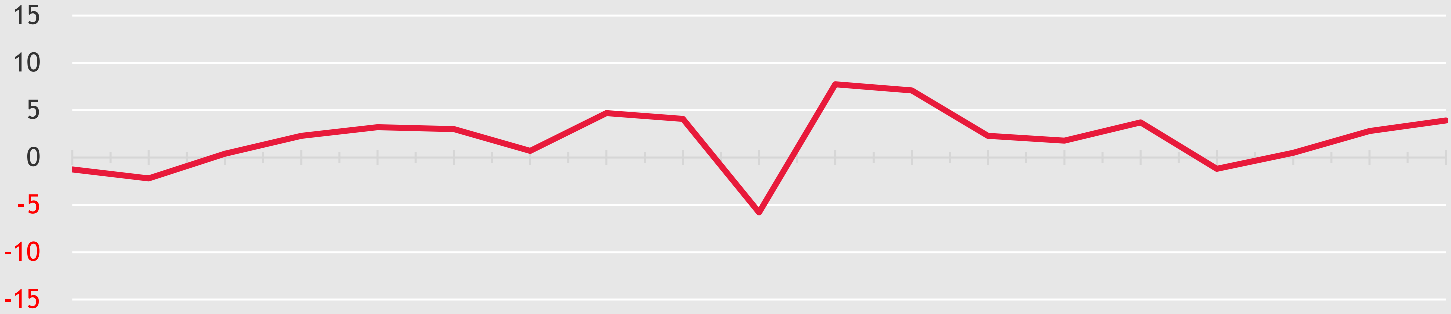
HOMEWARES

+15.7%

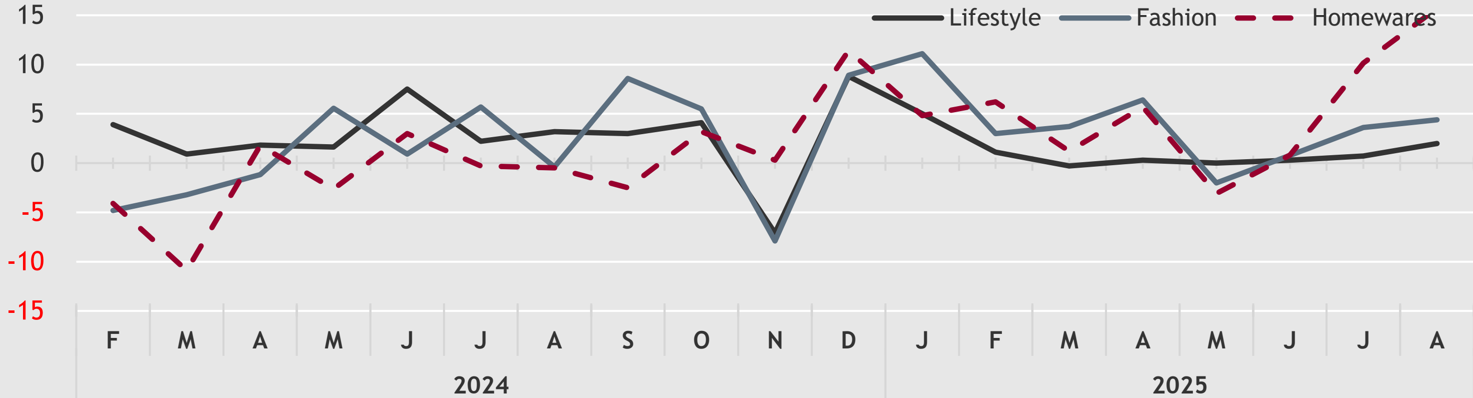
August 2024: -0.5%

- Homewares LFL sales grew +15.7% this month from a base of -0.5% for the same month last year.
- In-store sales grew +16.4% while non-store sales grew +5.7% from bases of +2.1% and -5.4% respectively for the same month last year.
- Total homewares sales were positive throughout August. While store sales enjoyed double-digit growth in the first three weeks of the month, the second week was the star-performance week of August for total homewares, up +25.60% from a base of +0.35%, propelled by double-digit store and non-store sales.

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



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



For more information please contact:

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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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