

HIGH STREET SALES TRACKER

June monthly review
Five weeks to 29 June 2025

STORE
 **+0.6%**
June 2024 **+1.8%**

NON-STORE
 **+4.3%**
June 2024 **+9.8%**

TOTAL
 **+0.5%**
June 2024 **+3.2%**

Sales Wilt During June Heatwave

- ▶ Total like-for-like (LFL) sales in June were flat, nudging up just +0.5%, from a positive base of +3.2% for the same month last year. Store sales were also flat, up +0.6% from a positive base of +1.8% for the same month last year. Non-store sales were more encouraging, up +4.3% from a positive base of +9.8% for the same month last year.
- ▶ In the first week of June, LFL sales grew by +1.05% from a base of +1.14% for the same week last year which included the Spring bank holiday and the summer half term break. In week two sales increased by +1.82% from a base of +4.68% for the same week in 2024. In week three, sales grew by +3.85% from a positive base of +2.67% for the corresponding week in 2024. In week four - during which much of Britain basked in the heat of a heatwave and parts of south-east England were warmer than Spain - LFL sales nudged up just 0.08% from a positive base of +3.92% for the same week last year. In June's final week, LFL sales fell -3.52% from a base of +6.41% for the same week last year.
- ▶ Footfall was depressed in all but the third week of June when, buoyed by a sharp increase in traffic to high streets, which increased +3.0%, footfall overall ticked up by +0.8%. Throughout much of the month, retail parks enjoyed good growth, potentially driven by the attraction of open air, drivable destinations at the expense of places more accessible on foot or by public transport.
- ▶ June was unusually warm and dry across much of the UK, with persistent high pressure bringing extended sunshine, especially in southern and eastern regions. In contrast, the same period last year was cooler, wetter, and cloudier, particularly in the north and west, with frequent Atlantic fronts disrupting conditions.
- ▶ This month's result represents a muted return to growth. However, the result is well below inflation and highlights the widening divergence between bricks-and-mortar and e-commerce retail. The strength of store homewares sales and non-store fashion sales indicates that the warm weather drove much of this month's activity.
- ▶ While fashion was the best performing category this month - likely due to spending on summer clothing - consumers appear to have chosen e-commerce over bricks-and-mortar stores. This underscores the struggle facing high street retailers when weighed against the convenience of next day delivery and easy one-click returns.
- ▶ GDP is estimated to have grown by 0.7% in the three months to April 2025, reflecting continued but cautious recovery. The main driver of economic growth was the services sector. CPI inflation eased slightly to 3.4% in May, still above the Bank of England's 2.0% target, prompting the MPC to hold the base rate at 4.25%. The main contributor to upward pressure on inflation came from food, furniture and household goods. Consumer confidence improved modestly in June largely driven by improved perceptions of the general economic outlook, as personal financial sentiment remained unchanged suggesting that consumers remain cautious when it comes to discretionary spending. This is borne out by the recent CBI Distributive Survey results, which reported a ninth straight month of falling retail volumes and a downbeat sentiment amongst retailers.
- ▶ This month's result highlights the agility of e-commerce retailers to take advantage of changing weather conditions. For bricks-and-mortar retailers, this underscores the need for intelligent strategic investment and agility in order to manage costs and attract consumers.

TOTAL LIKE-FOR-LIKE RESULTS FROM 2024-2025

LFL Growth %	Week 1 (w/e 01/06)	Week 2 (w/e 08/06)	Week 3 (w/e 15/06)	Week 4 (w/e 22/06)	Week 5 (w/e 29/06)	Total June
Lifestyle	3.62	3.43	-0.08	-1.56	-4.24	0.3
Fashion	-1.44	0.74	5.58	2.84	-3.39	0.8
Homeware	3.26	1.29	8.04	-6.59	-1.92	0.8
Store	1.81	1.60	3.49	-1.88	-2.08	0.6
Non-store	2.82	6.42	10.97	4.68	-3.39	4.3
Total	1.05	1.82	3.85	0.08	-3.52	0.5

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



LIFESTYLE

+0.3%

June 2024: **+7.5%**

- ▶ Lifestyle total LFLs ticked up +0.3% against a base of +7.5% for the same month last year.
- ▶ In-store sales grew by +1.1% in June and non-store sales fell by -3.1% from bases of +7.7% and +12.8% respectively for the same month last year.
- ▶ Total lifestyle LFL sales were positive in the first two weeks of June, but fell into negative territory in the latter half of the month. Non-store sales were negative throughout the month. Store sales were strongest in week one, rising +5.13% from a base of +7.43% for the same month in 2024.



FASHION

+0.8%

June 2024: **+0.9%**

- ▶ Fashion total LFLs nudged up +0.8% against a base of +0.9% for the same month last year.
- ▶ In-store sales fell by -0.2% in June and non-store sales grew by +10.0 from bases of -6.7% and +9.9% respectively for the same month last year.
- ▶ Total fashion LFLs were negative in the first and final weeks of the month, pulled down by poor store sales. Non-store sales were strong throughout June. In week three, non-store LFL sales rose by +21.43% from a strong base of +15.33% for the same week last year.

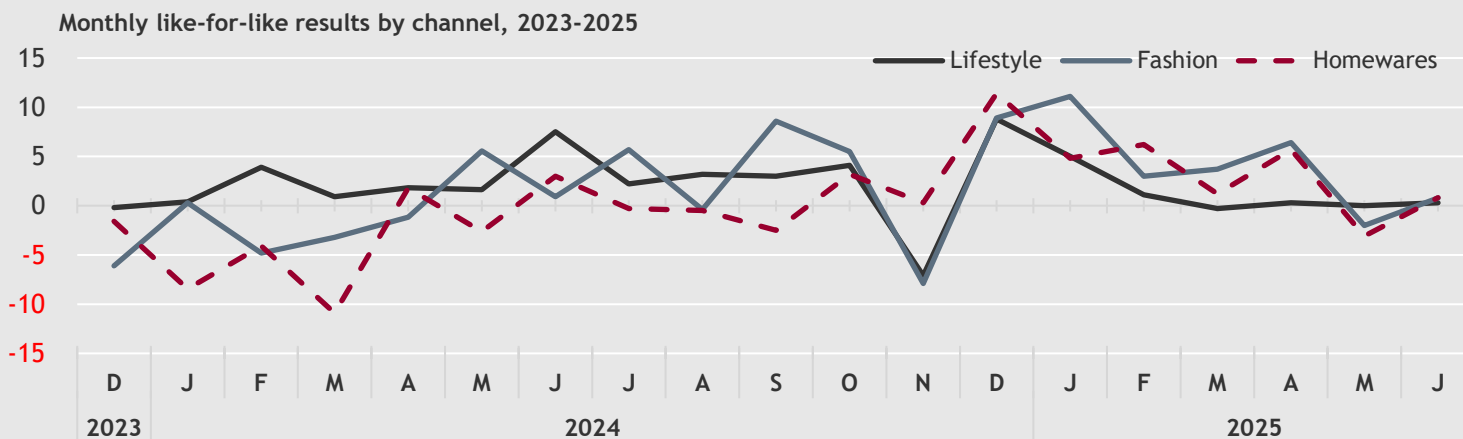
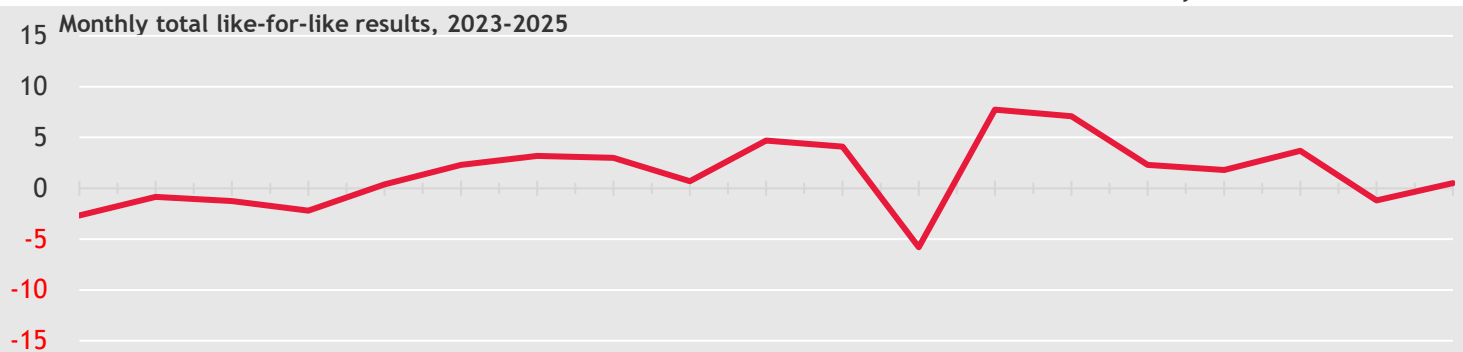


HOMEWARES

+0.8%

June 2024: **+3.0%**

- ▶ Homewares total LFLs increased just +0.8% against a base of +3.0% for the same month last year.
- ▶ In-store sales grew by +2.3% in June and non-store sales fell by -7.6% from bases of +9.2% and -8.3% respectively for the same month last year.
- ▶ Total homewares sales were positive in the first three weeks of June, before dipping into negative territory in the final weeks. Week three saw good growth for both store and non-store sales, up +8.97% and +9.70% from bases of +11.80% and +1.00% for the same week last year.



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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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