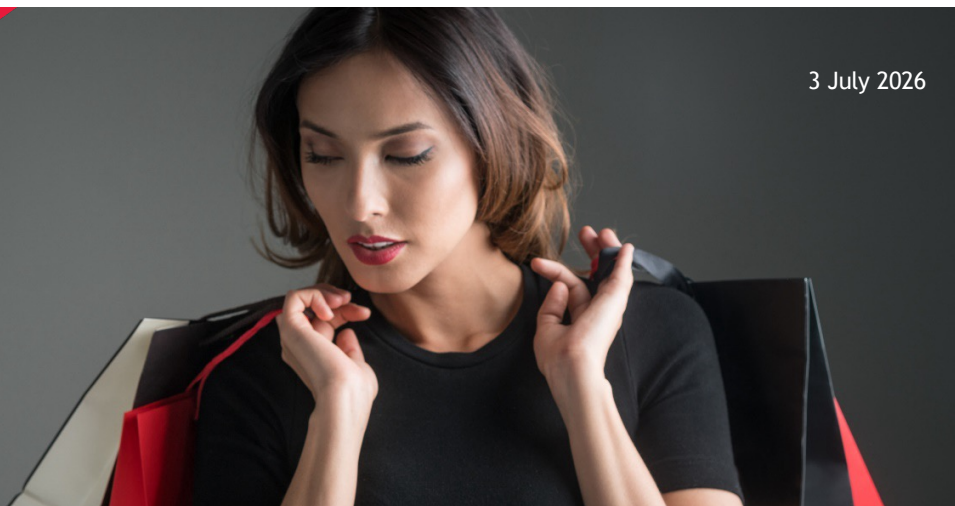


HIGH STREET SALES TRACKER

June monthly review
Four weeks to 28 June 2026



STORE



+1.4%

June 2025: +0.6%

NON-STORE



+6.9%

June 2025: +4.3%

TOTAL



+0.6%

June 2025: +0.5%

Penalty for Retail as Shoppers Turn to Soccer

- ▶ Total like-for-like (LFL) sales in June were up less than the rate of inflation, at +0.6%, from a base of +0.5% for the same month last year. Store sales were up +1.4% from a base of +0.6% and non-store sales grew +6.9% from a base of +4.3% in June 2025.
- ▶ Weekly total LFL sales zigzagged throughout June, starting at +2.59% in week 1, up from +1.82% for the same week in 2025, then diving to -7.81% in week 2, the second-lowest level so far this year, from a base of +3.85% a year ago. Total LFLs rebounded to +8.23% in week 3, from a base of +0.08%, then settled at +0.04% in week 4, compared to -3.52% a year ago.
- ▶ Store sales ranged from -7.62% in week 2 to +10.40% in week 3, from a base of +3.49% and -1.88% in the same weeks last year. In non-store, the range was even wider, going from -4.15% in week 2 to +18.45% in week 3, from a base of +10.97% and +4.68%. Store sales ended the month down -2.50% while non-store sales were up +10.96%.
- ▶ Footfall figures show shoppers largely stayed at home in the second week of June, with only retail parks seeing a +1.1% uplift. Retail parks saw positive footfall throughout the month, but on the high street the opposite was the case, with rates not exceeding -1.3% in week 3 and down at -6.6% in week 2. For shopping centres, it was a mixed picture.
- ▶ June 2026 will be remembered as a month when a severe heatwave sent temperature records tumbling but for retailers the lure of good weather was likely cancelled out by World Cup viewing. With England and Scotland opening matches coinciding with the week of lowest sales, it seems most Britons chose footie over shops while enjoying the sunshine.
- ▶ This month's total LFL is comparable to that of June 2025 but remains far below the +8.8% average for the month seen so far this decade. The results are a sobering reminder that above-inflation growth remains tough this year despite the encouraging results seen in May.
- ▶ The Consumer Prices Index (CPI) rose by +2.8% in the 12 months to May 2026, unchanged from the 12 months to April. On a monthly basis, CPI rose by +0.2% in May 2026, the same rate as in May 2025.
- ▶ A shaky peace deal over the Strait of Hormuz promises to dampen inflationary trends but analyst firm Cornwall Insight warns that household energy costs could remain high with a default tariff cap due to rise in July. Meanwhile retail sales tracked by the Office for National Statistics showed a mere +0.4% rise in the three months to May 2026, compared to the three months to February.
- ▶ The UK GfK Consumer Confidence Index held steady at -23 in June 2026, slightly above market expectations of -24 but unchanged from May. Despite the stable headline reading, GfK Consumer Insights Director Neil Bellamy warned that confidence is weakening beneath the surface as political uncertainty weighs on households.
- ▶ It's been a month of two halves, to steal a phrase. Hot (if not too-hot) weather and good news in the Middle East may have encouraged a measure of retail spending, but shoppers remain wary of continuing macroeconomic strife and have been distracted by the beautiful game. The result has been a good month for non-store sales, while store and overall results have fallen back into the lacklustre groove seen before May. July could see yet another new prime minister taking over the UK economy—but will it be enough to revive Retail's flagging fortunes?

TOTAL WEEKLY & MONTHLY LIKE-FOR-LIKE RESULTS, JUNE 2026

LFL Growth	Week 1 (w/e 07/06)	Week 2 (w/e 14/06)	Week 3 (w/e 21/06)	Week 4 (w/e 28/06)	Total June 2026
Lifestyle	-1.80%	-10.78%	+15.53%	-5.28%	-0.3%
Fashion	+1.85%	-4.13%	+2.07%	+4.20%	+0.7%
Homeware	+17.30%	-18.00%	+15.43%	+1.10%	+4.5%
Store	+4.99%	-7.62%	+10.40%	-2.50%	+1.4%
Non-store	+2.62%	-4.15%	+18.45%	+10.96%	+6.9%
Total	+2.59%	-7.81%	+8.23	+0.04%	+0.6%

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

LIFESTYLE



-0.3%

June 2025: +0.3%

- ▶ Lifestyle LFL sales were down -0.3% this month, compared to +0.3% in the same month last year.
- ▶ In-store sales increased +0.5% and non-store sales were up +10.2%, from +1.1% and -3.1% respectively in June 2025.
- ▶ Store sales saw a +19.49% bump in week 3 but remained well below inflation for the rest of the month, falling as far as -13.33% in week 2. Non-store lifestyle had a better month, dropping to -0.89% in week 2 but otherwise rising above inflation, hitting +26.07% in week 3 and staying above levels seen in June 2025.

FASHION



+0.7%

June 2025: +0.8%

- ▶ Fashion LFL sales were up +0.7% compared to +0.8 in June 2025.
- ▶ Store sales also grew +0.7% while non-store sales were up by an inflation-beating +3.5%. This compares to -0.2% for store and +10.0% for non-store sales in June 2025.
- ▶ Non-store sales contracted in the first half of June, wallowing at -3.53% in week 1 and -2.97% in week 2 before exploding to +10.91% and +10.88% in weeks 3 and 4. In contrast, store sales oscillated across a narrower range, from +6.60% in week 1 to -4.63% in week 2.

HOMEWARES

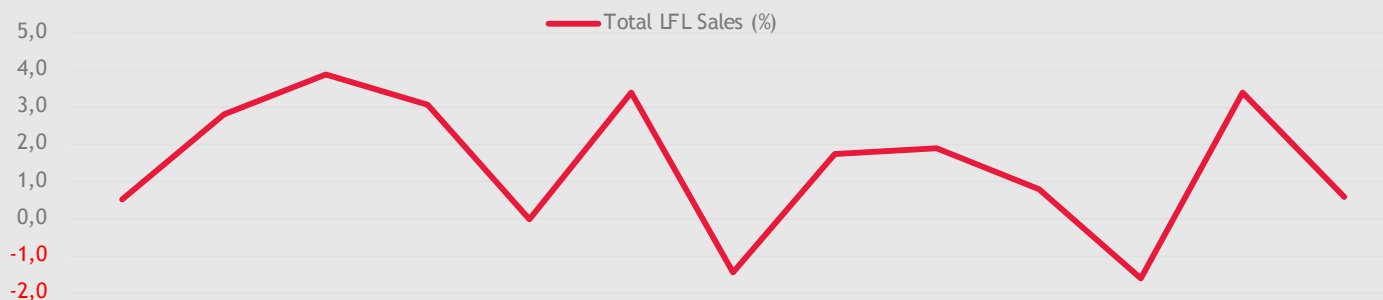


+4.5%

June 2025: +0.8%

- ▶ Homewares LFL sales were up +4.5% this month, from a base of +0.8% a year ago.
- ▶ Store sales achieved +9.9% growth over the month, compared to +2.3% in June 2025. Non-store sales fell -1.9% this year, still an improvement on the -7.6% drop seen in June 2025.
- ▶ Store and non-store homeware sales ranged from +17.30% in week 1 to -18.00% in week 2. Overall, sales in this category were more volatile this month than in June 2025, when they ranged from +8.04% at the middle of the month to -6.59% the following week.

Monthly total like-for-like results, 2025 to 2026



Monthly like-for-like results by sector, 2025 to 2026



For more information please contact:

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