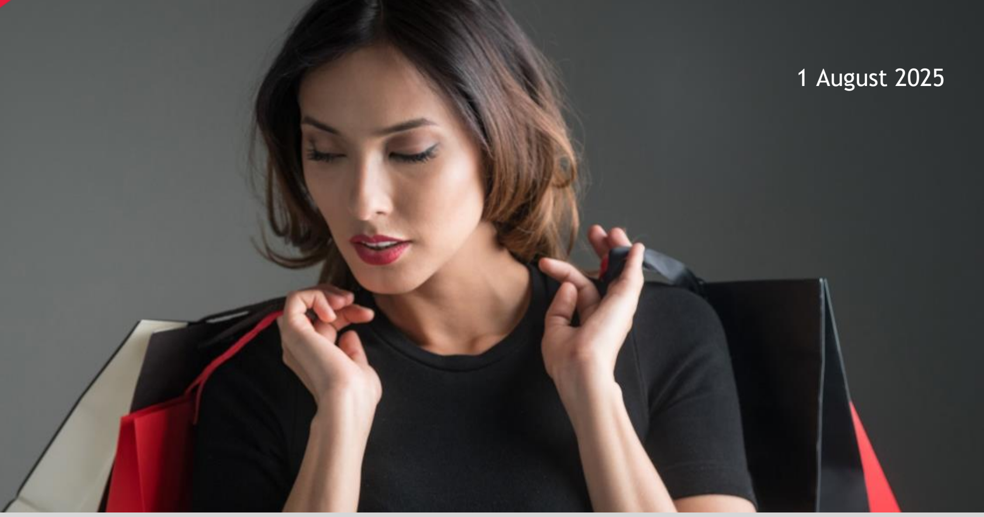
1 August 2025



HIGH STREET SALES TRACKER

July monthly review
Four weeks to 27 July 2025

STORE
+0.8%
July 2024 +1.1%

NON-STORE
+8.3%
July 2024 +8.7%

TOTAL
+2.8%
July 2024 +3.0%

Summer Fashion Shopping Drives Below-Inflation Sales Growth

- Total like-for-like (LFL) sales in rose +2.8% from a positive base of +3.0% for the same month last year. Store sales ticked up +0.8% from a base of +1.1%, while non-store sales grew +8.3% from a strong base of +8.7% for July last year.
- In the first week of July, LFL sales climbed by +11.66% from a base of +2.71% for the same week last year. In week two, LFL sales rose by +1.47% from a base of +3.19% for the same week in the previous year. In July's penultimate week, LFL sales grew by +2.30% from a base of +5.18% for the same week last year. In the final week of the month, LFL sales fell by -2.69%, pulled down by negative fashion LFL sales across by store and non-store channels, from a positive base of +2.97% for the same week in 2024.
- This month, the UK experienced a notably warm and dry spell, with England—especially the southeast—facing drought conditions and multiple water use restrictions, while Scotland and Northern Ireland saw more typical rainfall. In contrast, the same period in 2024 was cooler and wetter overall, with fewer extreme heat events. Overall, this July was hotter, highlighting a significant year-on-year shift toward hotter, drier summer conditions in southern regions.
- Footfall grew in the first two weeks of July, before nudging down in the latter two weeks of the month. In week one, which included the hottest day of the year so far, footfall rose by +3.68% driven by healthy high street and retail park traffic. Week two saw footfall grow by +2.3%. In the final weeks of the month foot traffic ticked down by -0.1% and -0.8% respectively, pulled down by a fall in high street traffic. The positive outcomes in footfall in weeks one and two grew from negative bases for the same weeks last year.
- This month's result marks the second consecutive positive outcome in terms of total LFL sales, and the highest result since April. While positive, this month's total LFL and in-store sales are far below inflation, whereas non-store sales, boosted by double-digit growth in fashion sales and a welcome return to growth for the lifestyle category, recorded the channel's strongest growth since January.
- UK GDP growth remains subdued, with underlying activity showing signs of weakness amid a loosening labour market. CPI inflation edged up slightly to 3.6% in June, from 3.4% in May, remaining above the Bank of England's 2% target. Upwards pressure on inflation came from food, non-alcoholic beverages and fuel, all of which speak to rising basic living costs which contributes to wider consumer apprehension and caution. In response, the Bank held the base rate steady at 4.25% in June, citing ongoing disinflation but persistent inflationary risks. The CBI Distributive Trades Survey reported a tenth straight month of declining sales volumes, with retailers citing elevated labour costs and economic uncertainty as key pressures on demand. Recent consumer confidence results point to anxiousness and caution amongst the public, with a gloomy view on the UK prospects of the UK economy over the year ahead. Together, these indicators suggest that while inflationary pressures persist, underlying economic momentum remains fragile, with consumer demand still under strain.
- Against a backdrop of rising food inflation and economic uncertainty, this month's result highlights again the structural challenges facing high street bricks and mortar retailers.

TOTAL LIKE-FOR-LIKE RESULTS FROM 2024-2025

LFL Growth %	Week 1 (w/e 06/07)	Week 2 (w/e 13/07)	Week 3 (w/e 20/07)	Week 4 (w/e 27/07)	Total July
Lifestyle	1.06	2.74	-0.83	-0.10	0.7
Fashion	18.47	-0.66	1.68	-6.56	3.6
Homeware	5.09	7.77	18.70	11.47	10.1
Store	4.28	-1.68	1.70	-1.27	0.8
Non-store	15.56	14.06	6.53	-3.09	8.3
Total	11.66	1.47	2.30	-2.69	2.8

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

LIFESTYLE

+0.7%

July 2024: +2.2%

- Lifestyle LFL sales nudged up +0.7% from a base of +2.2% for the same month last year.
- In-store sales were flat at +0.0% while non-store sales grew by +3.9%, from bases of +2.0% and +2.2% respectively for July 2024.
- Lifestyle LFL sales were positive in the first half of July, before ticking into negative territory in the final weeks of the month. Week two saw the strongest growth in sales, up +2.74% from a negative base of -1.40% for July 2024, driven by non-store sales which grew +16.67% from a base of -6.05%.

FASHION

+3.6%

July 2024: +5.7%

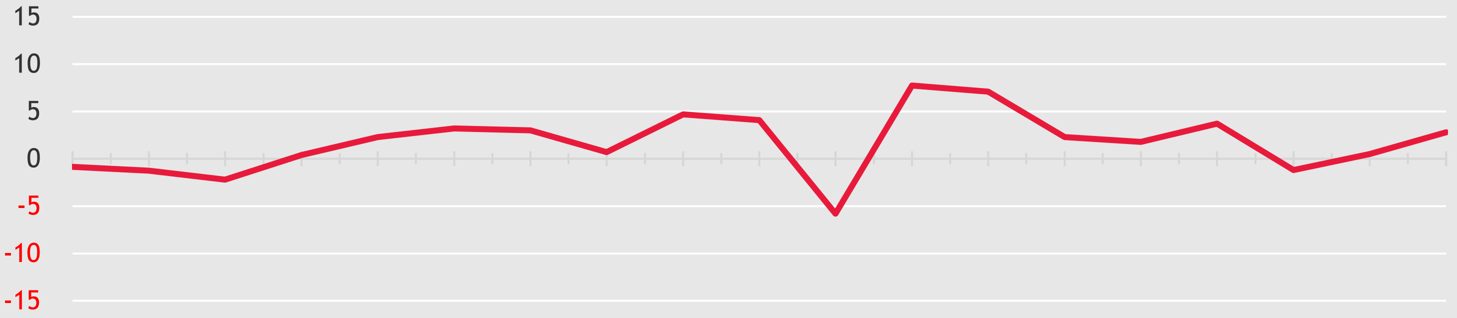
- Fashion LFL sales grew +3.6% from a base of +5.7% for the same month last year.
- In-store sales grew by +1.3% while non-store sales grew by +10.1%, from bases of +0.4% and +13.7% respectively for the same month in 2024.
- Fashion LFL sales were positive in two weeks of July. Week one saw the strongest growth in fashion sales, driven by double-digit growth in non-store sales, which increased +28.98% from a base of +3.05 for the same week last year. The final week of the month saw a fall in both store and non-store sales, causing total fashion sales to fall -6.56% from a base of +7.54%.

HOMEWARES

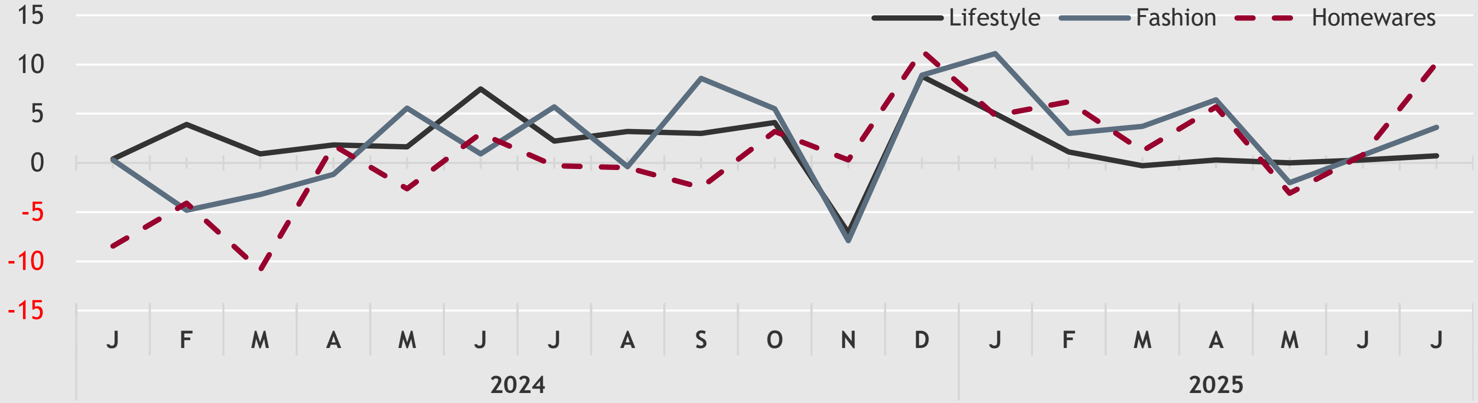
+10.1%

July 2024: -0.3%

- Homewares LFL sales grew +10.1% from a negative base of -0.3% for the same month last year.
- In-store sales ticked up +0.4% from a flat base of +0.02% while non-store sales nudged down by -0.1% from a low base of -0.2% for the same month last year.
- Total homewares LFL sales were positive throughout July. Week three saw the highest growth of the month, growing +18.70% from a base of +0.85% for the same month last year. Total sales saw double-digit growth in the final week of July also, growing +11.47% from a negative base of -4.91%.



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



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

For more information please contact:

e: HighStreetSalesTracker@bdo.co.uk

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.

www.bdo.co.uk