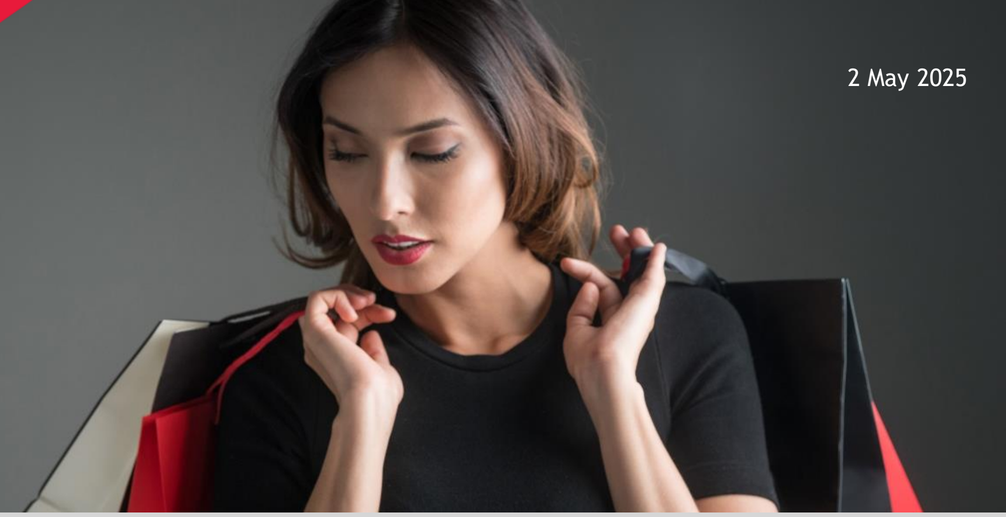
2 May 2025

HIGH STREET SALES TRACKER



April monthly review
Four weeks to 27 April 2025

STORE
+2.3%
April 2024 -1.7%

NON-STORE
+5.6%
April 2024 +8.2%

TOTAL
+3.7%
April 2024 +0.4%

Warm Weather and Easter Boost Produces Best Month Since January

- Total like-for-like (LFL) sales in April grew +3.7%, from a positive base of +0.4% for April last year. Store sales turned positive for the fourth month in 2025, up +2.3%, offsetting a negative base of -1.7%, while non-store sales increased by +5.6% from a positive base of +8.2% for the same month last year.
- In the first week of April, LFL sales grew +6.17% from a base of +3.74% for the same week in 2024, which last year included the Easter Monday bank holiday and coincided with school holidays across much of the UK. In week two, which this year and last year included school holidays across much of the UK, total LFL sales increased +6.78% from a base of +3.24% for the same week last year. In the third week of April, which this year included school holidays for many schools, and culminated in the Easter weekend, LFL sales grew by +7.80% from a base of +0.55%. In the final week of April, which this year included the Easter Monday bank holiday, LFL sales fell into negative territory for the first time in seven weeks, down -3.65% from a base of -6.13% for the same week last year.
- This month was notably warm and dry across much of the UK, with temperatures reaching up to 27°C in southern England and Scotland enjoying its sunniest April on record. In contrast, the same period in 2024 was marked by wet and dull conditions, with the UK recording its sixth wettest April since 1836.
- April's clement weather, together with the school holidays and the Easter long weekend may have contributed to a healthy growth in footfall, albeit from mostly negative bases for the same weeks last year. The second and third weeks of the month, which coincided with school holidays across much of country returned the month's strongest growth.
- This month's result marks the fifth consecutive positive month for total, store and non-store LFL sales. At a channel level, however, the figures are a reminder that retail growth is being underpinned by strong non-store sales, as store total LFL sales growth has been at below inflation levels in every month of 2025.
- Recent economic and demographic surveys suggest that the UK economy faces significant challenges. While GDP is estimated to have grown by 0.5% in February, growth is projected to slow to 0.8% in 2025, down from earlier forecasts, due to global trade tensions and domestic uncertainties. Inflation (as measured by CPI) remains elevated, but lower than expected. Prices were estimated to have grown 2.6% in the twelve months to March 2025, down from 2.8% in February. However, CPI is projected to remain above the Bank of England's target throughout 2025.
- Against a backdrop of economic uncertainty coupled with lower-than-expected inflation, The Bank of England is expected to cut the UK base rate in May, a move that has been anticipated by many mortgage lenders. The base rate currently stands at 4.5%. Consumer confidence has plummeted. According to one survey, UK consumer confidence is at its lowest level since 1978, with 75% of respondents anticipating worsening economic conditions. Other surveys showed steep drops in confidence across all indicators, with particularly sharp falls in optimism for the year ahead.
- Notably, sales in the final week of April fell sharply, possibly indicating consumer fatigue from both the ongoing high costs of living and the Easter spending splurge. Taken together with the poor consumer confidence levels reported by multiple reports indicate a period of economic contraction and heightened uncertainty, which could herald a further shock for the embattled UK retail sector.

TOTAL LIKE-FOR-LIKE RESULTS FROM 2024-2025

LFL Growth %	Week 1 (w/e 06/04)	Week 2 (w/e 13/04)	Week 3 (w/e 20/04)	Week 4 (w/e 27/04)	Total April
Lifestyle	5.92	-3.87	6.49	-6.67	0.3
Fashion	3.51	13.76	7.37	0.80	6.4
Homeware	21.67	5.68	13.52	-18.03	5.7
Store	4.05	0.02	8.77	-3.53	2.3
Non-store	2.78	16.38	7.11	-4.14	5.6
Total	6.17	6.78	7.80	-3.65	3.7

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

LIFESTYLE

+0.3%

April 2024: +1.8%

- Lifestyle total LFLs ticked up +0.3% from a positive base of +1.8% for the same month last year.
- In-store lifestyle sales fell by -1.2% in April, while non-store sales grew by +5.0% from bases of +3.4% and +5.8% respectively for the same month last year.
- Lifestyle LFL sales were positive in the first and third weeks of April. In week three store sales grew +5.48% from a base of +0.91%. Non-store sales, were notable in week one, growing +7.50% from a very strong base of +25.90% for the same week in 2024.

FASHION

+6.4%

April 2024: -1.2%

- Fashion total LFLs grew +6.4%, offsetting a negative base of -1.2% for the same month last year.
- In-store sales grew by +5.2%, failing to offset a negative base of -8.3% for April last year, while non-store sales increased by +10.2% from a positive base of +7.1% for the same month last year.
- Fashion was the strongest performing category in April, owing to good store and non-store sales. Non-store sales enjoyed double-digit growth in weeks two and three, up +22.65% and +14.33% from bases of +4.34% and +2.72% for the same weeks in 2024.

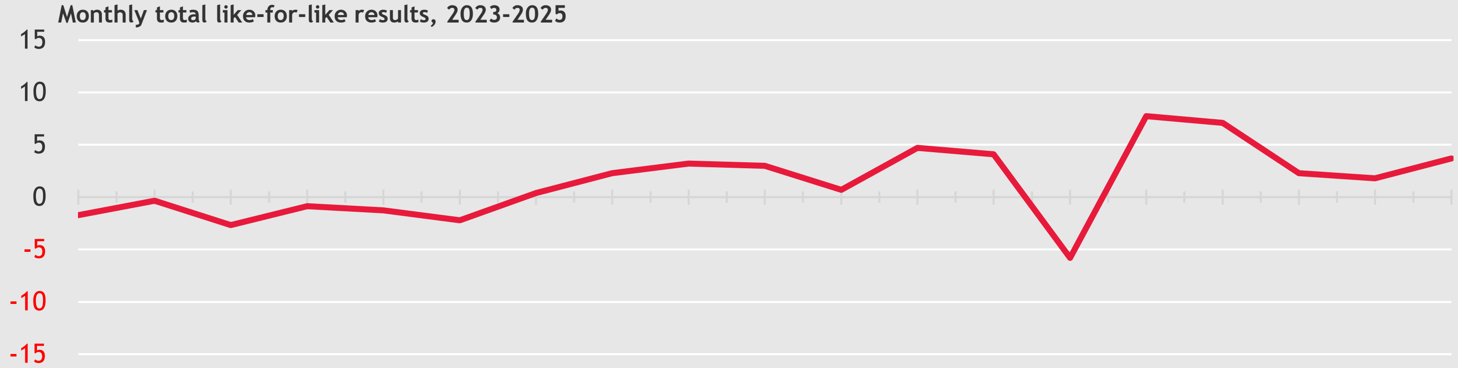
HOMEWARES

+5.7%

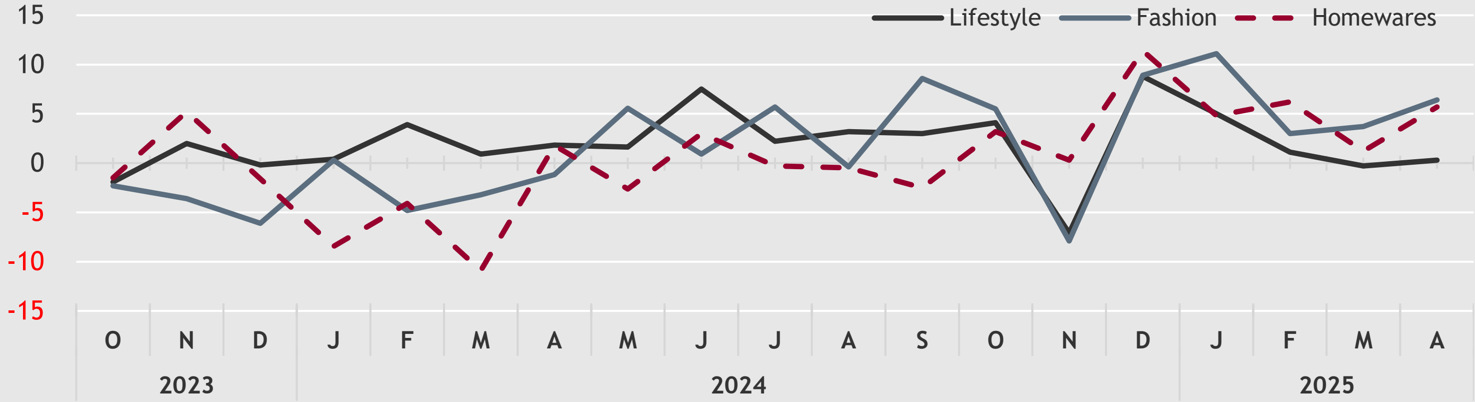
April 2024: +1.8%

- Homewares total LFLs grew +5.7% from a positive base of +1.8% for the same month last year.
- In-store sales ticked up +0.9% in April, failing to offset a negative base of -1.5% for the same month last year. Non-store sales plunged back into negative territory, falling by –12.2% from a positive base of +6.8% for the same month last year.
- Positive sales in the first three weeks of the month were interrupted by a sharp fall in week four, in which sales fell -18.03% from a base of +0.89% for the same week last year.

Monthly total like-for-like results, 2023-2025



Monthly like-for-like results by sector, 2023-2025



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