# BRC – KPMG RETAIL SALES MONITOR

# JULY 2023

## COVERING FOUR WEEKS 2ND – 29TH JULY 2023

# SUMMER RAIN DAMPENS DEMAND

| *% CHANGE YEAR-ON-YEAR* | | TOTAL | LIKE-FOR-LIKE |
|---|---|---|---|
| UK RETAIL SALES | ▼ | +1.5% | +1.8% |
| FOOD *(3-MTH)* | ▼ | +8.4% | +8.7% |
| NON-FOOD *(3-MTH)* | ▼ | -0.5% | -0.8% |
| NON-FOOD – STORE *(3-MTH)* | ▼ | +1.2% | +0.8% |
| NON-FOOD – ONLINE | ▼ | -6.9% | N/A |

**Helen Dickinson OBE, Chief Executive |** British Retail Consortium

"The slowing pace of retail price inflation fed through into slower sales this July. Spend was further depressed by the damp weather, which did no favours to sales of clothing, and other seasonal goods. Online spending was down again year on year as the post covid trend back to stores continued, leading to the lowest proportion of non-food sales online since the pandemic began.

"While consumer confidence is generally improving, it remains below longer term levels. And with last week's rise in interest rates pushing mortgage rates up ever higher, the Government must get a handle on the economy, offering a solution to languishing GDP growth in a way that supports both households and businesses. Only by creating the economic conditions for future growth, will we see a meaningful improvement in the outlook."

**Paul Martin, UK Head of Retail |** KPMG

"As the storm clouds came out, shoppers retreated, with like for like sales growth a dismal 1.5% up in July. Furniture and food & drink were the best sellers, whilst the wet weather meant no need to restock summer wardrobes, with all categories of clothing falling into negative sales territory, in what is usually a busy month for clothing retailers. Online sales continued to slide, falling nearly 7% year on year, with just a handful of categories such as furniture, health and beauty performing well.

"We are starting to see a big rise in the number of promotions that retailers are putting in place in order to get shoppers through the door, as they battle to keep market share. Price conscious consumers are shopping more carefully, more aware of where bargains can be found and what they are getting for their money – which is biting hard into retail margins and profitability. UK consumers have been hugely resilient throughout the cost-of-living crisis, but stubbornly high inflation coupled with rapidly rising interest rates will test their ability and willingness to keep on spending for the rest of this year.

"Both consumers and retailers are finding that they are having to get used to doing more with less as conditions remain incredibly challenging."

**Food & Drink sector performance | Sarah Bradbury, CEO |** IGD

"Food and drink sales continued to grow in July, although the rate of growth was the lowest since January. Sales growth was driven by inflation as volumes remained in negative territory, in part due to the unseasonably wet weather, especially compared to last July's heatwave.

"Although IGD's Shopper Confidence Index increased for the fourth month running, confidence remains low. Shoppers are feeling less pessimistic about their personal finances, but they aren't yet feeling optimistic; fewer people are experiencing rising energy bills (51% compared to 68% in Jul'22) and fewer shoppers expect to be financially worse off in the year ahead (37% compared to 50% in Jul '22). Furthermore, fewer shoppers are concerned about food price rises with 68% expecting them to get more expensive in the next 12 months compared to 89% last July."
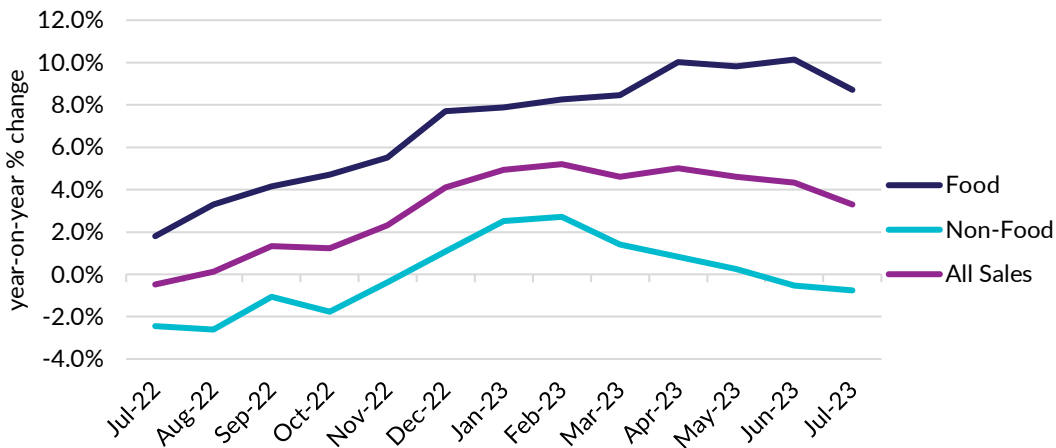
## MONTHLY GROWTH OF TOTAL RETAIL SALES
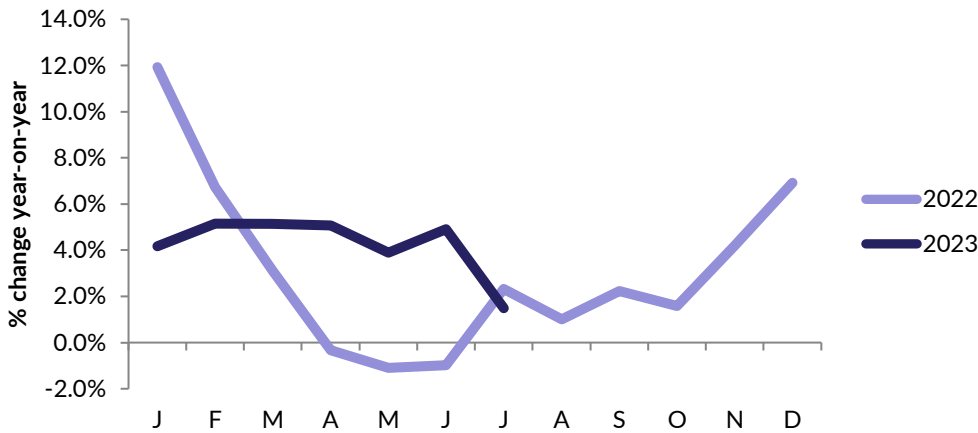


| | LFL | TOTAL |
|---|---|---|
| **Jul 2023** | 1.8% | 1.5% |
| **Jul 2022** | 1.6% | 2.3% |
| **Jun 2023** | 4.2% | 4.9% |
| **3m average** | 3.3% | 3.5% |
| **12m average** | 3.6% | 3.9% |

**Source:** BRC-KPMG RSM (Includes Food data from IGD)

## LIKE-FOR-LIKE SALES:
## 3-MONTH AVERAGE % CHANGE YEAR-ON-YEAR



| 3-MONTH AVERAGE | LFL | TOTAL |
|---|---|---|
| **Food** | 8.7% | 8.4% |
| **Non-food** | -0.8% | -0.5% |
| **All Sales** | 3.3% | 3.5% |

**Source**: BRC-KPMG RSM (Includes Food data from IGD)

Note: Like-for-like has been measured EXCLUDING temporarily closed stores due to COVID-19 but including Online sales

## OVERVIEW

Retail sales growth collapsed in July, falling to 1.5% year-on-year, which was by some distance the worst result of the year so far. When comparing this result with the average of 4.7% for the first six months of the year, it is clear how much sales in the UK have been impacted by the ongoing annualising of the inflationary cycle that began last year and the unseasonably poor weather in the height of summer. The fact that the inflation rate in the country was running at 7.6% in July highlights how far volumes are falling across the industry.

Food sales growth slowed to its lowest level since October for a single month, with the three-month average falling to 8.4%. While food price inflation did continue to fall in July, as according to our BRC-NielsenIQ Shop Price Index it fell to 13.4%, it remains significantly above the sales growth rate, further evidence of falling volumes in this category. Last year's performance also played an important role in the growth rate seen this time around, as July 2022 was full of sunny days including the record-setting 40°C day in the second week of the month. In July this year the weather was far more dreary, with a considerable amount of rain limiting the opportunities for barbecues in comparison.

Spending on the more discretionary Non-Food categories was also severely hampered by the downturn in the weather, with that side of consumer spending falling into decline for the month for the first time since October. The three-month average fell to a decline of 0.5%. Within Non-Food, the fashion categories that had up until this point in the year had been performing relatively well fell into significant declines as people were not in the market for summer clothing in the rain. Women's and Children's Clothing was said to see a steeper decline in demand than for Men's, as several retailers reported having to move more of their summer ranges into their discounted offer than they had hoped in order to generate sales and reduce stock levels. That being said, clothing options for beach holidays, such as bikinis and swimming shorts, were said to be in demand as temperatures soared on the continent. This time last year saw the arrival of the perennial spike in Household Appliances sales, due to people rushing out to the shops to buy fans and air-conditioning units to stave off the worst effects of the heat, which was not replicated this year and led to the category slumping to last place in the rankings.

On a more positive note, traditionally when spending shifts away from fashion due to a downturn in the weather, consumers turn towards homewares to make the most of more time spent indoors. There was some evidence of this happening in July, with a number of retailers commenting that their Home Accessories and House Textiles offerings were seeing more demand. However, this should not be overstated, as across the board it was nowhere near strong enough to provide adequate compensation for the fall in the categories that typically see strong sales in the summer.

**James Hardiman, Senior Analyst**

## JUL: CONTRIBUTION TO TOTAL SALES GROWTH BY CATEGORY
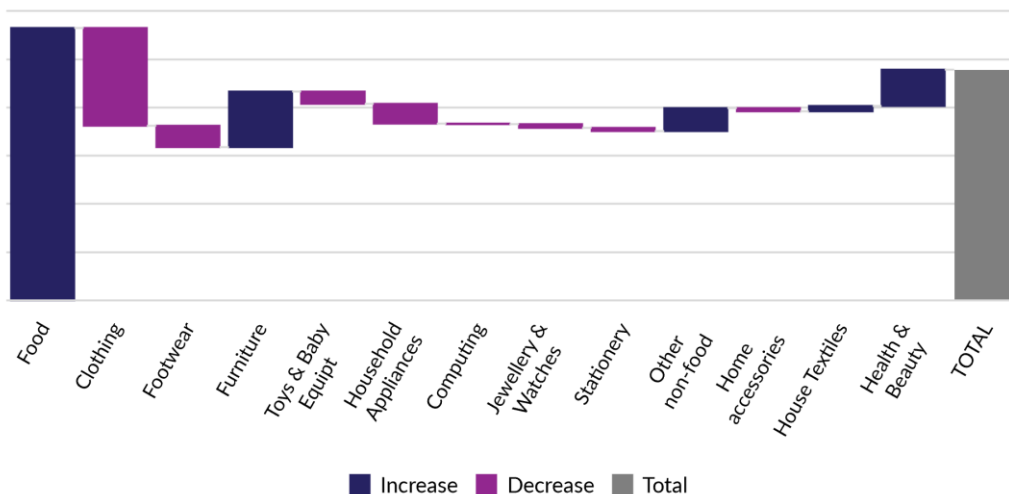


**Source:** BRC-KMG RSM (Includes Food data from IGD); in this chart, purple blocks represent negative contributions

# BRC – KPMG RETAIL SALES MONITOR JULY 2023

Covering the four weeks 2 – 29 July 2023

**Detailed weekly data by category is available only to retailers that contribute sales data to the Retail Sales Monitor.**

If you would like to participate in the Retail Sales Monitor, please contact:

Tina Spooner
0207 854 8960
tina.spooner@brc.org.uk

# BRC – KPMG RETAIL SALES MONITOR JULY 2023

Covering the four weeks 2 – 29 July 2023

## MONTHLY RETAIL SALES:
## % CHANGE YEAR-ON-YEAR

| MONTH | 2021 | | 2022 | | 2023 | |
|---|---|---|---|---|---|---|
| | LFL (1) | TOTAL | LFL | TOTAL | LFL | TOTAL |
| January | 7.1 | -1.3 | 8.1 | 11.9 | 3.9 | 4.2 |
| February | 9.5 | 1.0 | 2.7 | 6.7 | 4.9 | 5.2 |
| March | 20.3 | 13.9 | -0.4 | 3.1 | 4.9 | 5.1 |
| April | 39.6 | 51.1 | -1.7 | -0.3 | 5.2 | 5.1 |
| May | 18.5 | 28.4 | -1.5 | -1.1 | 3.7 | 3.9 |
| June | 6.7 | 10.4 | -1.3 | -1.0 | 4.2 | 4.9 |
| July | 4.7 | 6.4 | 1.6 | 2.3 | 1.8 | 1.5 |
| August | 1.5 | 3.0 | 0.5 | 1.0 | | |
| September | -0.6 | 0.6 | 1.8 | 2.2 | | |
| October | -0.2 | 1.3 | 1.2 | 1.6 | | |
| November | 1.8 | 5.0 | 4.1 | 4.2 | | |
| December | 0.6 | 2.1 | 6.5 | 6.9 | | |
| Jan-Jul average | 15.1 | 15.5 | 0.9 | 3.0 | 4.1 | 4.3 |
| Jan-Dec average | 8.9 | 9.9 | 1.8 | 3.1 | n/a | n/a |

**Source:** BRC-KPMG RSM (Includes Food data from IGD)

## FOOD/NON-FOOD QUARTERLY ANALYSIS:
## 3-MONTH AVERAGE % CHANGE YEAR-ON-YEAR

| 3-MONTH AVERAGE | LIKE-FOR-LIKE (1) | | | TOTAL | | |
|---|---|---|---|---|---|---|
| | Food | Non-Food | All Sales | Food | Non-Food | All Sales |
| May – Jul 22 | 1.8 | -2.5 | -0.5 | 2.3 | -2.0 | 0.0 |
| Jun – Aug | 3.3 | -2.6 | 0.1 | 3.8 | -2.0 | 0.7 |
| Jul - Sep | 4.2 | -1.1 | 1.3 | 4.6 | -0.4 | 1.9 |
| Aug – Oct | 4.7 | -1.8 | 1.2 | 5.1 | -1.2 | 1.7 |
| Sep – Nov | 5.5 | -0.4 | 2.3 | 5.8 | 0.0 | 2.6 |
| Oct – Dec | 7.7 | 1.1 | 4.1 | 7.9 | 1.5 | 4.4 |
| Nov 22 – Jan 23 | 7.9 | 2.5 | 4.9 | 8.0 | 2.9 | 5.2 |
| Dec 22 – Feb 23 | 8.2 | 2.7 | 5.2 | 8.3 | 3.2 | 5.5 |
| Jan - Mar | 8.5 | 1.4 | 4.6 | 8.5 | 1.8 | 4.8 |
| Feb - Apr | 10.0 | 0.8 | 5.0 | 9.8 | 1.2 | 5.1 |
| Mar - May | 9.8 | 0.2 | 4.6 | 9.6 | 0.5 | 4.7 |
| Apr - Jun | 10.1 | -0.5 | 4.3 | 9.8 | 0.3 | 4.6 |
| May – Jul | 8.7 | -0.8 | 3.3 | 8.4 | -0.5 | 3.5 |

**Source:** BRC-KPMG RSM (Includes Food data from IGD)

(1) From April 2020, the LFL guidance was to exclude stores that were forced to close temporarily due to COVID-19 measures.

# BRC – KPMG RETAIL SALES MONITOR JULY 2023

Covering the four weeks 2 – 29 July 2023
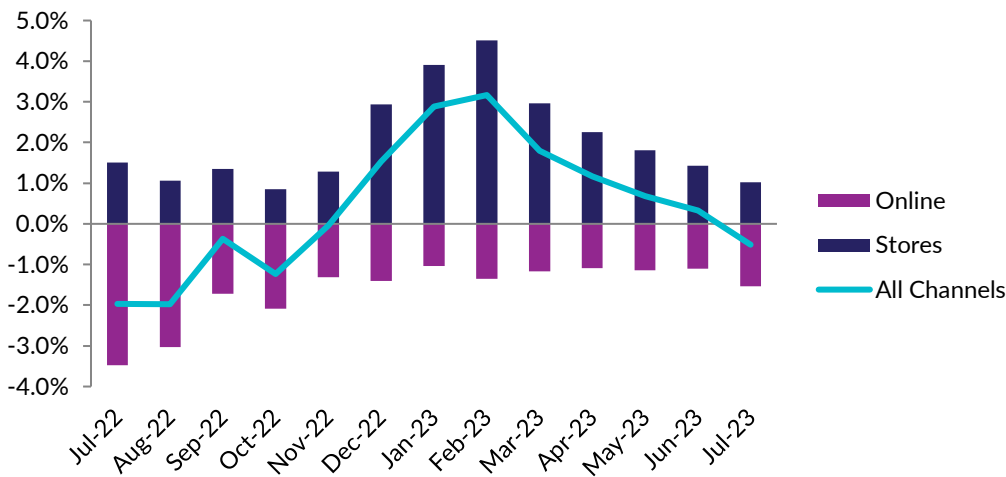
## ONLINE SALES GROWTH (NON-FOOD):
## % CHANGE YEAR-ON-YEAR
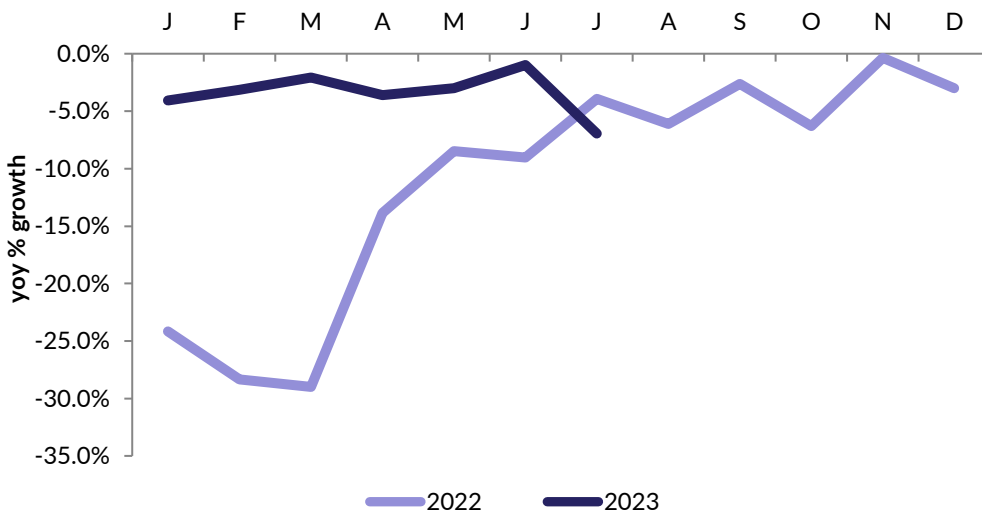


| NON-FOOD GROWTH | ONLINE* | UK TOTAL |
|---|---|---|
| Jul 2023 | -6.9% | n/d |
| Jul 2022 | -3.9% | n/d |
| Jun 2023 | -1.0% | n/d |
| 3m avg | -3.4% | -0.5% |
| 12m avg | -3.4% | 0.6% |

n/d: cannot be disclosed

**Source:** BRC-KPMG RSM: **Online:** online sales of non-food goods (including mail and phone orders

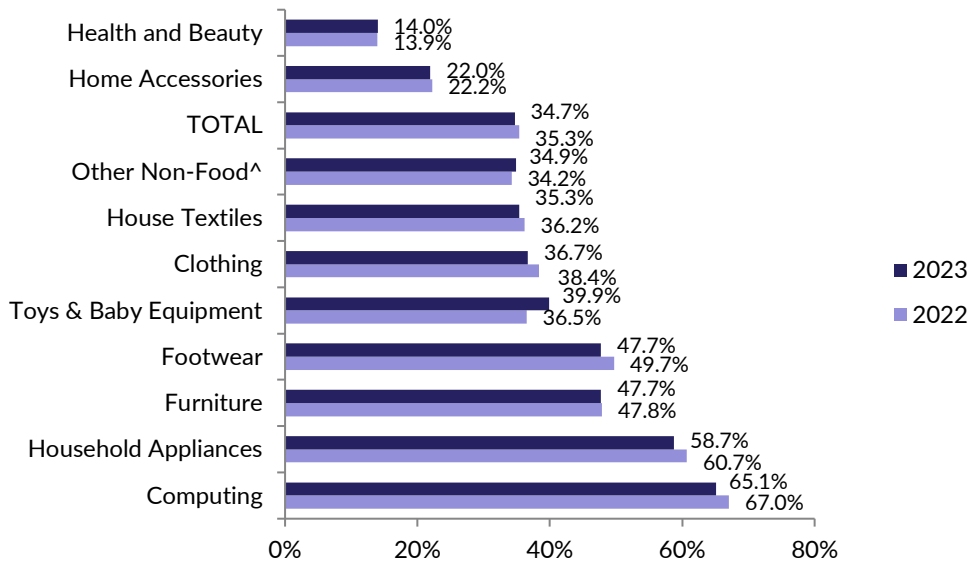## 3-MONTH AVERAGE: CONTRIBUTION TO NON-FOOD SALES GROWTH BY CHANNEL
## % CHANGE YEAR-ON-YEAR



| NON-FOOD IN-STORE % CHANGE YEAR-ON-YEAR | | |
|---|---|---|
| | LFL | TOTAL |
| May - Jul 23 | 0.8% | 1.2% |
| May - Jul 22 | 1.2% | 2.0% |
| Apr - Jun 23 | 0.6% | 2.0% |
| 12m avg | 2.7% | 3.4% |

**Source:** BRC-KPMG RSM

# BRC – KPMG RETAIL SALES MONITOR JULY 2023

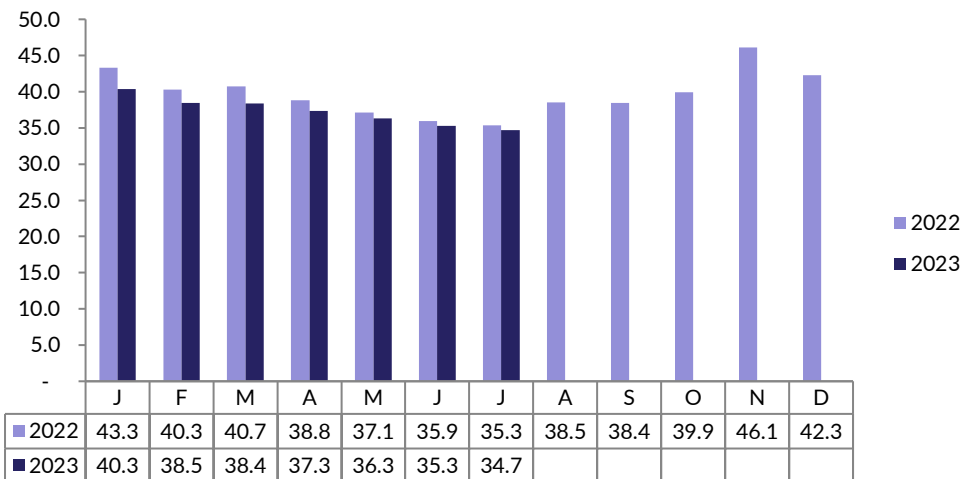Covering the four weeks 2 – 29 July 2023

## JUL: ONLINE PENETRATION RANKINGS BY CATEGORY



**Source:** BRC-KPMG RSM

**Note:** Online sales in the Monitor include all distance sales, notably mail and phone orders

## TOTAL NON-FOOD SALES: WEIGHTED ONLINE PENETRATION



|      | J    | F    | M    | A    | M    | J    | J    | A    | S    | O    | N    | D    |
|------|------|------|------|------|------|------|------|------|------|------|------|------|
| 2022 | 43.3 | 40.3 | 40.7 | 38.8 | 37.1 | 35.9 | 35.3 | 38.5 | 38.4 | 39.9 | 46.1 | 42.3 |
| 2023 | 40.3 | 38.5 | 38.4 | 37.3 | 36.3 | 35.3 | 34.7 |      |      |      |      |      |

| NON-FOOD ONLINE PENETRATION RATE ONLINE AS % OF TOTAL | |
|---|---|
| **Jul 2023** | 34.7% |
| **Jul 2022** | 35.3% |
| **Jun 2023** | 35.3% |
| **3m average** | 35.4% |
| **12m average** | 38.8% |

**Source:** BRC-KPMG RSM

# BRC – KPMG RETAIL SALES MONITOR JULY 2023

Covering the four weeks 2 – 29 July 2023

## NON-FOOD ONLINE RETAIL SALES

| MONTH | TOTAL GROWTH % CHANGE YOY | | ONLINE PENETRATION AS % OF TOTAL SALES | | CONTRIBUTION TO TOTAL NON-FOOD GROWTH (PERCENTAGE POINT) | |
|---|---|---|---|---|---|---|
| | MONTHLY* | 3M AVERAGE* | MONTHLY | 3M AVERAGE | MONTHLY | 3M AVERAGE |
| Jul 2022 | -3.9 | -7.3 | 39.5 | 37.4 | -1.7 | -3.5 |
| Aug | -6.1 | -6.6 | 38.5 | 37.8 | -2.7 | -3.0 |
| Sep | -2.6 | -4.1 | 38.4 | 38.8 | -1.0 | -1.7 |
| Oct | -6.3 | -4.8 | 39.9 | 38.9 | -2.9 | -2.1 |
| Nov | -0.4 | -3.1 | 46.1 | 41.3 | -0.2 | -1.3 |
| Dec | -3.0 | -3.2 | 42.3 | 42.8 | -1.2 | -1.4 |
| Jan 2023 | -3.6 | -2.4 | 41.8 | 43.3 | -1.5 | -1.0 |
| Feb | -3.1 | -3.2 | 38.5 | 41.0 | -1.2 | -1.3 |
| Mar | -2.1 | -3.0 | 38.4 | 39.0 | -0.7 | -1.2 |
| Apr | -3.6 | -2.9 | 37.3 | 38.1 | -1.4 | -1.1 |
| May | -3.0 | -2.8 | 36.3 | 37.4 | 0.0 | -0.7 |
| Jun | -1.0 | -2.4 | 35.3 | 36.2 | -0.6 | -1.1 |
| Jul | -6.9 | -3.4 | 34.7 | 35.4 | -2.9 | -1.5 |

**Source:** BRC-KPMG Retail Sales Monitor. * 2020 ws a 53-week year in the ONS calendar: as a result of the extra week in January 2020, the comparable 2019 performances cited here may differ from those published last year, due to the one-week shift in the comparison

## NON-FOOD STORE THREE-MONTH AVERAGE RETAIL SALES YEAR-ON-YEAR CHANGE

| THREE MONTHS ENDING | TOTAL % CHANGE YOY | LFL % CHANGE YOY |
|---|---|---|
| Jul 2022 | 2.0% | 1.2% |
| Aug | 1.4% | 0.3% |
| Sep | 2.2% | 1.1% |
| Oct | 1.3% | 0.4% |
| Nov | 2.2% | 1.6% |
| Dec | 5.3% | 4.5% |
| Jan 2023 | 7.2% | 6.5% |
| Feb | 8.1% | 7.3% |
| Mar | 5.2% | 4.6% |
| Apr | 3.9% | 3.3% |
| May | 2.7% | 2.2% |
| Jun | 2.0% | 0.6% |
| Jul | 1.2% | 0.8% |

**Source:** BRC-KPMG Retail Sales Monitor
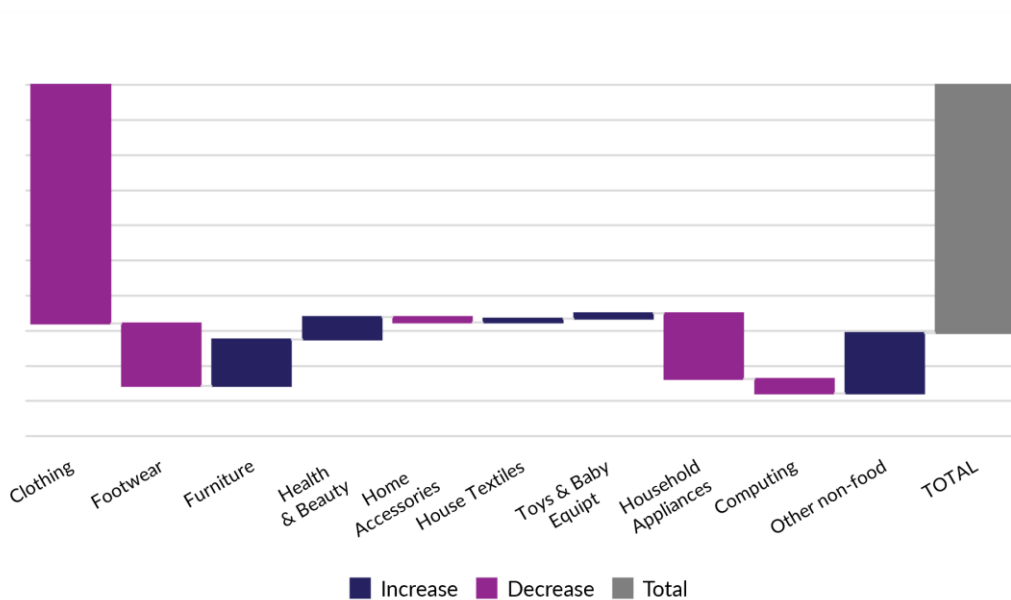
# BRC – KPMG RETAIL SALES MONITOR JULY 2023

Covering the four weeks 2 – 29 July 2023

## SECTOR PERFORMANCE: ONLINE SALES GROWTH

| CATEGORY | SALES UP / DOWN JUL 2023 | GROWTH RANKINGS | | | | |
|---|---|---|---|---|---|---|
| | | JUL 2023 | JUN 2023 | JUL 2022 | 3M AVG | 12M AVG |
| Furniture | ▲ | 1 | 7 | 9 | 3 | 2 |
| Health & Beauty | ▲ | 2 | 2 | 3 | 1 | 3 |
| Other Non-Food | ▲ | 3 | 10 | 8 | 7 | 9 |
| House Textiles | ▲ | 4 | 5 | 7 | 5 | 5 |
| Toys & Baby Equipment | ▲ | 5 | 6 | 5 | 4 | 6 |
| Home Accessories | ▼ | 6 | 8 | 10 | 9 | 10 |
| Computing | ▼ | 7 | 9 | 6 | 10 | 8 |
| Footwear | ▼ | 8 | 3 | 1 | 6 | 4 |
| Clothing | ▼ | 9 | 4 | 2 | 8 | 7 |
| Household Appliances | ▼ | 10 | 1 | 4 | 2 | 1 |

**Source:** BRC-KPMG RSM

## JUL: CONTRIBUTION TO NON-FOOD ONLINE SALES GROWTH BY CATEGORY



■ Increase   ■ Decrease   ■ Total

**Source:** BRC-KPMG RSM
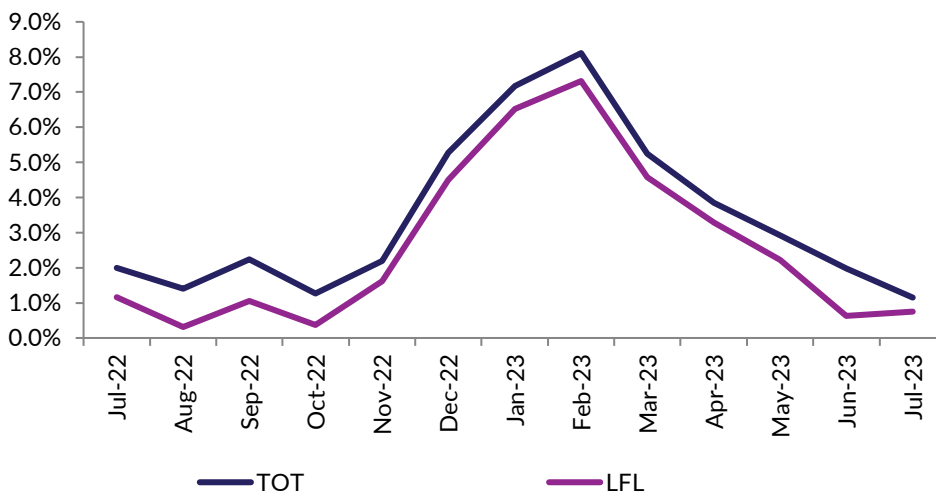
# BRC – KPMG RETAIL SALES MONITOR JULY 2023

Covering the four weeks 2 – 29 July 2023

## SECTOR PERFORMANCE: STORE TOTAL SALES GROWTH

| CATEGORY | SALES UP / DOWN JUL 2023 | GROWTH RANKINGS | | | | |
|---|---|---|---|---|---|---|
| | | JUL 2023 | JUN 2023 | JUL 2022 | 3M AVG | 12M AVG |
| Furniture | ▲ | 1 | 10 | 10 | 6 | 8 |
| House Textiles | ▲ | 2 | 6 | 9 | 7 | 7 |
| Computing | ▲ | 3 | 7 | 6 | 5 | 10 |
| Health & Beauty | ▲ | 4 | 1 | 2 | 1 | 2 |
| Other Non-Food | ▼ | 5 | 8 | 4 | 8 | 5 |
| Home Accessories | ▼ | 6 | 9 | 8 | 9 | 9 |
| Footwear | ▼ | 7 | 2 | 1 | 2 | 1 |
| Household Appliances | ▼ | 8 | 3 | 5 | 3 | 3 |
| Clothing | ▼ | 9 | 4 | 3 | 4 | 4 |
| Toys & Baby Equipment | ▼ | 10 | 5 | 7 | 10 | 6 |

**Source:** BRC-KPMG RSM

## NON-FOOD STORE THREE-MONTH AVERAGE RETAIL SALES YEAR-ON-YEAR CHANGE (%)



**Source:** BRC-KPMG RSM

# BRC – KPMG RETAIL SALES MONITOR JULY 2023

Covering the four weeks 2 – 29 July 2023

## NOTES

The BRC-KPMG Retail Sales Monitor measures changes in the actual value (including VAT) of retail sales, excluding automotive fuel. The Monitor measures the value of spending and hence does not adjust for price or VAT changes. If prices are rising, sales volumes will increase by less than sales values. In times of price deflation, sales volumes will increase by more than sales values.

Retailers report the value of their sales for the current period and the equivalent period a year ago. These figures are reported both in total and on a 'like-for-like' basis. Total sales growth is the percentage change in the value of all sales compared to the same period a year earlier. The total sales measure is used to assess market level trends in retail sales. It is a guide to the growth of the whole retail industry, or how much consumers in total are spending in retail – retail spending represents approximately one-third of consumer spending. It is this measure that is often used by economists. Many retailers include distance sales as a component of total sales.

'Like-for-like' sales growth (LFL) is the percentage change in the value of comparable sales compared to the same period a year earlier. It excludes any spending in stores that opened or closed in the intervening year, thus stripping out the effect on sales of changes in floorspace. Many retailers include distance sales as a component of like-for-like comparable sales. The like-for-like measure is often used by retailers, the city and analysts to assess the performance of individual companies, retail sectors and the industry overall, without the distorting effect of changes in floorspace.

**From April 2020**, the LFL guidance was to exclude stores that were forced to close temporarily due to **COVID-19** measures from both the current period and the equivalent period a year ago. Online was considered open all the time. The majority of retailers could comply but some couldn't exclude temporarily closed stores from their LFL figures.

Online (including mail order and phone) sales of non-food are transactions which take place over the internet, or via mail order or phone. Online sales growth is the percentage change in the value of online sales compared to those in the same period a year earlier. It is a guide to the growth of sales made by these non-store channels. It should be noted that online sales are still a small proportion of total UK retail sales.

Penetration is the proportion of sales attributed to the online channel (including mail order and phone). Penetrations are calculated category by category as online sales submitted by participating retailers relative to total sales those retailers submit to the BRC-KPMG Retail Sales Monitor. Participants who do not sell online (or through non-store channels) are included but participants who do sell online but do not submit their online sales are excluded.

The responses provided by retailers within each sales category are weighted (based on weightings derived from the ONS Family Spending survey) to reflect the contribution of each category to total retail sales, thus making it representative of UK retail sales as a whole. Category weightings for Online and In-Store growth and contribution to growth are derived from the UK weightings. The methodology used for weightings is revised from time to time. Because the figures compare sales each month with the comparable period last year, a seasonal adjustment is not made. However, changes in the timing of Bank Holidays and Easter can create distortions, which should be considered in the interpretation of the data.

As well as receiving sales value direct from the retailers in the scheme the BRC-KPMG Retail Sales Monitor also receives food and drink sales value data from the IGD's Market Track Scheme.

In its role as sponsor of the BRC-KPMG Retail Sales Monitor, KPMG is responsible for the aggregation of the retail sales data provided by the retailers on a weekly basis. This data consists of the relevant current week's sales data and comparative sales figures for the same period in the prior year. The aggregation has been performed by KPMG on data for periods following 2 April 2000 and equivalent prior periods. The accuracy of the data is entirely the responsibility of the retailers providing it. The sponsorship role has been performed by KPMG since 10 April 2000 and the same for the aggregation of comparative sales figures for the period from 2 April 2000 it is not responsible for the aggregation of any data included in this Monitor relating to any period prior to 2 April 2000.

The commentary from KPMG is intended to be of general interest to readers but is not advice or a recommendation and should not be relied upon without first taking professional advice. Anyone choosing to rely on it does so at his or her own risk. To the fullest extent permitted by law, KPMG will accept no responsibility or liability in connection with its sponsorship of the Monitor and its aggregation work to any party other than the BRC.

# BRC – KPMG RETAIL SALES MONITOR JULY 2023

Covering the four weeks 2 – 29 July 2023

## MEDIA ENQUIRIES

The August 2023 Monitor, covering the four weeks 30 July – 26 August 2023, will be released at 00.01am on Tuesday 5 September 2023. The data is collected and collated for the BRC by KPMG.

The British Retail Consortium (BRC) is the UK's leading retail trade association. It represents the full range of retailers, large and small, multiples and independents, food and non-food, online and store based.

### SPONSORED AND ADMINISTERED BY

KPMG LLP, a UK limited liability partnership, operates from 22 offices across the UK with approximately 16,300 partners and staff.  The UK firm recorded a revenue of £2.338 billion in the year ended 30 September 2018. KPMG is a global network of professional firms providing Audit, Tax, and Advisory services. It operates in 154 countries and has 200,000 professionals working in member firms around the world. The independent member firms of the KPMG network are affiliated with KPMG International Cooperative ("KPMG International"), a Swiss entity.  Each KPMG firm is a legally distinct and separate entity and describes itself as such.

### FOOD DATA SUPPLIED BY

IGD is an education and training charity for the food and grocery industry that undertakes research for the benefit of the public. Our in-depth understanding of shoppers, retailing and supply chains is supported by our knowledge of broader topics affecting the industry – health, nutrition, sustainability and economics among them. This gives us unparalleled insight that can help identify opportunities to improve performance and tackle business challenges. Our reach is global, with experts based in the UK, Singapore and North America. We invest the net income we make from selling our expertise back into our charitable activities.

# BRC – KPMG RETAIL SALES MONITOR JULY 2023

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**Detailed weekly data by category**
**is available to retailers who contribute to the monitor:**

If you would like to participate in the Retail Sales Monitor,
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