

STRONG RETAIL SALES DESPITE COMPETITION

2020 was a turbulent year in which much of retail bounced between being open and closed, significantly impacting sales and the ability to make meaningful comparisons. In this context, **all 2021 figures are compared with 2019** (pre-pandemic). This means our 2021 figures are predominantly year-on-two-years (Yo2Y), rather than year-on-year (YoY) in this report, unless otherwise specified.

Covering the four weeks 2 – 29 May 2021

Strictly Embargoed until 00.01 hrs – Tuesday 8th June 2021

MAY: LIKE-FOR-LIKE RETAIL SALES

% change 2-yr

23.7%

In May, UK retail sales increased 23.7% on a Like-for-like basis from May 2019, when they had decreased 3.0% from the preceding year. Online sales play a far greater role in LFL, so has increased the growth rate significantly.

MAY: TOTAL RETAIL SALES

% change 2-yr

10.0%

On a Total basis, sales increased by 10.0% in May, against a decline of 2.7% in May 2019. This is above the 3-month average growth of 8.5%.

FEB – MAY: NON-FOOD LFL IN-STORE GROWTH

% change 2-yr

27.1%

Over the three months to May, In-Store sales of Non-Food items declined 16.7% on a Total and increased 27.1% on a Like-for-like basis. This is worse than the 2019 Total average decline of 3.1%. For May, the like-for-like excluding temporarily closed stores saw growth.

FEB – MAY: TOTAL FOOD

% change 2-yr

9.8%

Over the three months to May, Food sales increased 10.2% on a Like-for-like basis and 9.8% on a Total basis. This is higher than the 2019 Total average growth of 1.4%. For the month of May, Food was in growth year-on-year.

FEB – MAY: TOTAL NON-FOOD

% change 2-yr

7.5%

Over the three-months to May, Non-Food retail sales increased by 38.0% on a like-for-like basis and 7.5% on a Total basis. This is above the 2019 Total average decline of 1.3%. For the month of May, Non-Food was in growth year-on-year.

MAY: NON-FOOD ONLINE GROWTH

% change 2-yr

39.1%

Online Non-Food sales increased by 39.1% in May, against a growth of 1.5% in May 2019. This is below the 3-mth average of 64.4%. Non-Food Online penetration rate decreased from 61.5% in May 2020 to 39.8% this May.



BRC – KPMG RETAIL SALES MONITOR MAY 2021

Covering the four weeks 2 – 29 May 2021



Helen Dickinson OBE, Chief Executive | British Retail Consortium

“Retail sales were buoyant in May thanks to the reopening of hospitality, coupled with the afterglow of non-essential retail’s own return. Pent-up demand for the instore shopping experience, as well as the first signs of summer weather, helped retail to the strongest sales growth of the pandemic. Furniture and Homeware sales continued to perform well as consumers were able to see and feel items instore, while Clothing and Footwear saw their second consecutive month of growth due to the warmer weather and easing of social restrictions. There is a growing sense of consumer confidence, boosted not only by the widespread uptake of vaccinations and testing, but also retailers’ own significant investment in safety measures.

“Large cities have been hardest hit by the pandemic, with so many people still working from home and footfall remaining considerably down as shoppers increasingly choose to shop local. Now is the time to consider what our future high streets and town centres will look like a decade from now. We must adapt to these changes, not only to build back better but also to build forward. With vacancy rates still rising in many parts of the country, we must reimagine how we integrate residential and commercial property, allowing us to build stronger local communities that encompass leisure, retail, services, and homes. This will require retailers, property developers and local government to work together and plan city centres that cater to these changing demands and truly innovate the high street model.”



Don Williams, Retail Partner | KPMG

“The rain in May failed to dampen consumer demand and shoppers continued to return to the high street. Clothing retailers were the biggest beneficiaries of pent up demand, clocking up increases of over 100% as an easing of restrictions saw stores reopen and social events slowly come back on the agenda. Consumers also splurged on new jewellery, footwear and home accessories, with sales registering triple digit growth against last year, when lockdown measures were in place. Although some spend has migrated to high street, there was still high penetration of online spending in May reinforcing the view that the pandemic has seen a step up in online activity as some consumers maintain their use of this channel out of habit and choice and some remain nervous about venturing back into stores.

“Retailers now face an interesting few months as they assess how they best entice their customers back to stores and what the right blend of offline and online will be as spending patterns settle in a post Covid world. With the prospect of the full lifting of Covid restrictions coming into force this month, there will be increased competition for share of wallet as consumers focus on those leisure and hospitality activities that have been denied to them due to lockdown. It is a summer that starts with cautious optimism for many retailers, who will be hoping that the continued success of the vaccine roll-out and an improving economy will offer scope to spark a big surge in consumer spending.”



Food & Drink sector performance | Susan Barratt, CEO | IGD

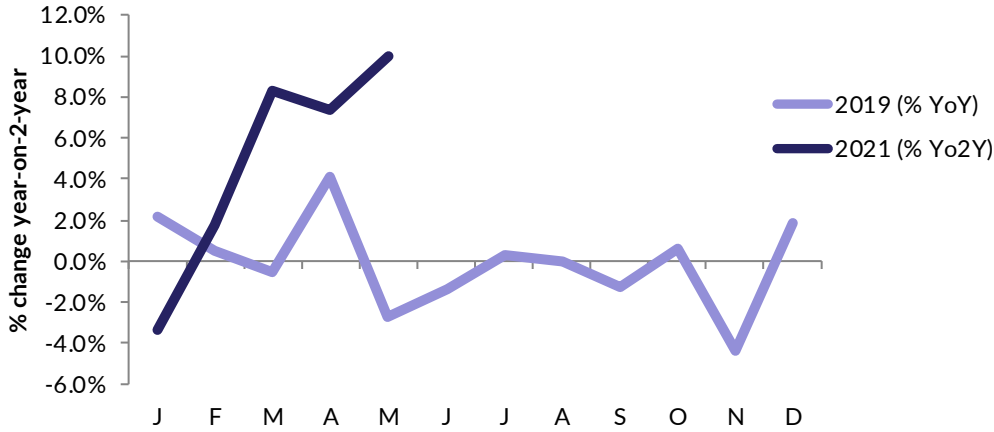
“A combination of the long-awaited improvement in the weather, the late bank holiday, and the Champions League final, all served to deliver a boost to food and drink sales at the end of May. Despite this, food and drink sales throughout the month faced persistently high comparatives with 2020, when we were in the first national lockdown. While its unlikely performance will exceed, or even match 2020 for months to come, sales are still significantly elevated compared to 2019, suggesting that food and drink continues to benefit from an ongoing ‘pandemic effect’.

“IGD’s Shopper Confidence Index remains strong, with further lockdown restrictions easing and two bank holiday weekends contributing to a positive outlook for shoppers. Financial confidence is helping to maintain these stronger levels, with fewer than one in five shoppers (19%) expecting to be worse off in the year ahead, which is a record low.”

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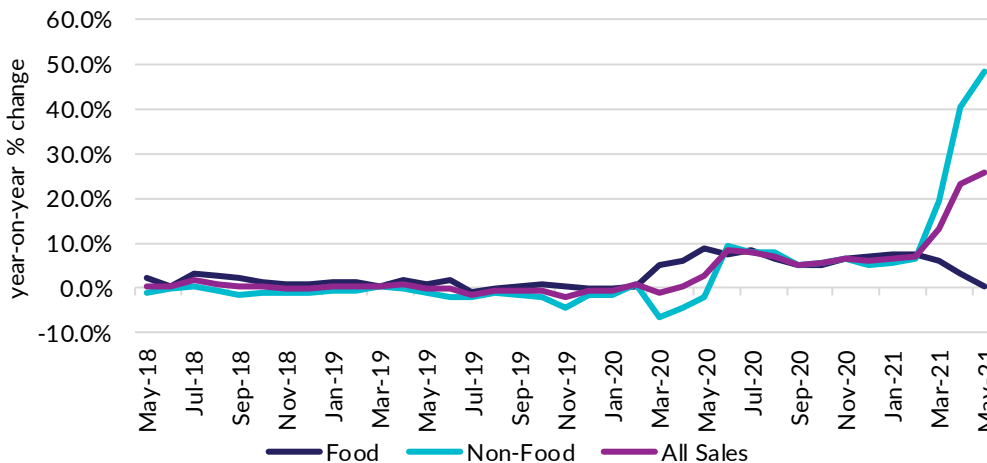
MONTHLY 2-YEAR GROWTH OF TOTAL RETAIL SALES



2-YEAR	LFL	TOTAL
May 2021	23.7%	10.0%
May 2019	-3.0%	-2.7%
Apr 2021	46.3%	7.3%
3m average	24.8%	8.5%

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

LIKE-FOR-LIKE SALES: 3-MONTH AVERAGE % CHANGE YEAR-ON-YEAR (1-YEAR)



3-MONTH AVERAGE	LFL (2-YR)	TOTAL (2-YR)
Food	10.2%	9.8%
Non-food	38.0%	7.5%
All Sales	24.8%	8.5%

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



BRC – KPMG RETAIL SALES MONITOR MAY 2021

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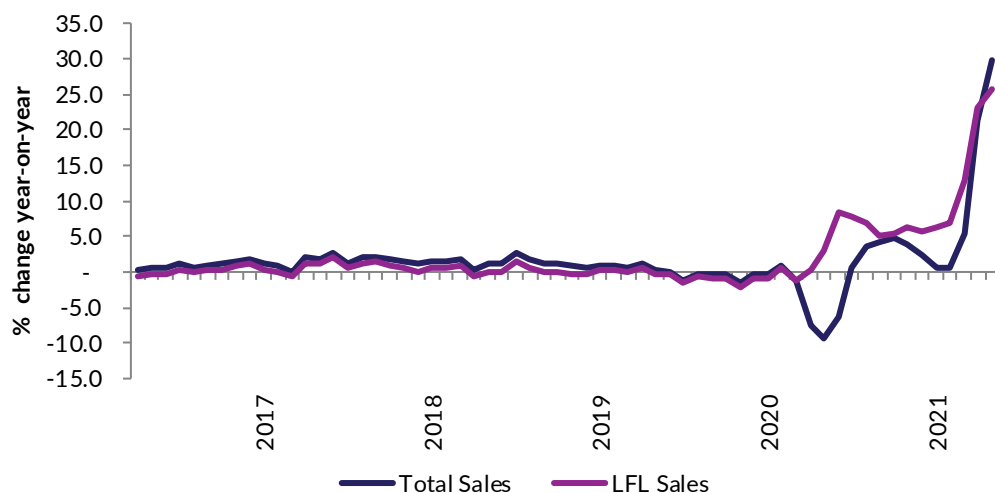
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BRC – KPMG RETAIL SALES MONITOR MAY 2021

Covering the four weeks 2 – 29 May 2021

3M ROLLING AVERAGE YEAR-ON-YEAR GROWTH OVER FIVE YEARS



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

OVERVIEW

As we are annualising against the depths of the coronavirus crisis period in April 2020, analysing year on year figures has proved challenging, as the comparable conditions from last year are not a representative basis point. Therefore, the headline rates in this report are calculated comparing this month's performance against the same month from 2019.

Growth accelerated on a two-year Total basis, with growth of 10.0% in May, up from 7.3% in April. This was an encouraging result, given the return of the hospitality industry that was in competition for a significant amount of discretionary spending from shopping. However, despite providing a distraction for consumers, the reopening of cafes, pubs and restaurants also gave people more reason to venture out of their homes, which boosted footfall across high streets and other shopping locations across the country.

The main effect of hospitality's return was for Food spending, but growth accelerated in the month, thanks to the long-awaited good weather to arrive just in time for the final May bank holiday weekend. On a three-month basis, Food growth slowed to 9.8% despite the strong month's performance, as the category is in a weaker position compared to the lockdown months. On the other side of the consumer spending equation, Non-Food performed well in May with growth of 7.5% on a three-month basis, up from 2.4% in April.

Within Non-Food, the categories to make the most of the running in May were, once again, those focussed on home improvements, with Furniture at the top of the growth rankings table for the second consecutive month. Despite the fashion categories remaining towards the lower end of the rankings table in May, both Clothing and Footwear saw growth for the second month in a row, thanks largely to May being the first full month of people being able to meet up with friends and family to socialise. Many took the opportunity to update their wardrobes to make the most of the opportunity to get out of the house.

As May was the first full month of the return of stores, it is now easier to assess the ongoing effects of consumer confidence in online retailing. The proportion of spending Online has certainly reduced from the highs seen last year, but remains significantly higher than that seen pre-crisis at 39.8% in the month.

James Hardiman, Analyst

BRC - KPMG RETAIL SALES MONITOR MAY 2021

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FOOD SALES: 3-MONTH AVERAGE



NON-FOOD SALES: 3-MONTH AVERAGE



Source: BRC-KPMG RSM

BRC – KPMG RETAIL SALES MONITOR MAY 2021

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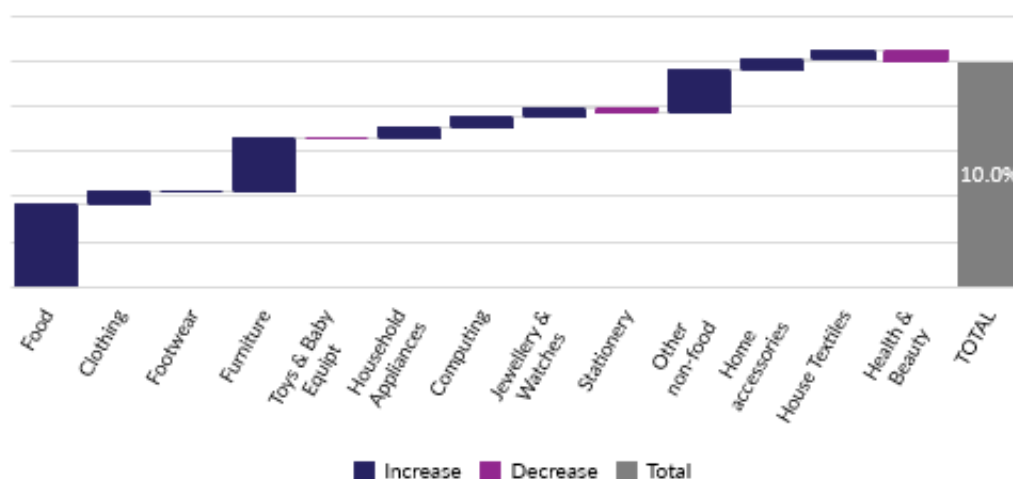
PERFORMANCE BY CATEGORY (2-YEAR TOTAL SALES)

By James Hardiman, Analyst

CATEGORY	UP / DOWN MAY-21		RANKINGS(TOTAL SALES)			
	LFL	TOT	MAY-21	APR-21	MAY-19	3M AVG
Furniture	▲	▲	1	1	10	3
Computing	▲	▲	2	2	1	1
Jewellery & Watches	▲	▲	3	10	13	12
Household Appliances	▲	▲	4	3	3	4
Home Accessories	▲	▲	5	5	6	5
House Textiles	▲	▲	6	6	7	7
Other Non-Food	▲	▲	7	4	2	2
Food	▲	▲	8	8	5	6
Clothing	▲	▲	9	7	11	9
Footwear	▲	▲	10	9	12	10
Toys & Baby Equipment	▲	▼	11	11	4	8
Health and Beauty	▼	▼	12	12	9	13
Stationery	▲	▼	13	13	8	11

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

MAY: CONTRIBUTION TO TOTAL SALES GROWTH BY CATEGORY (2-YEAR)



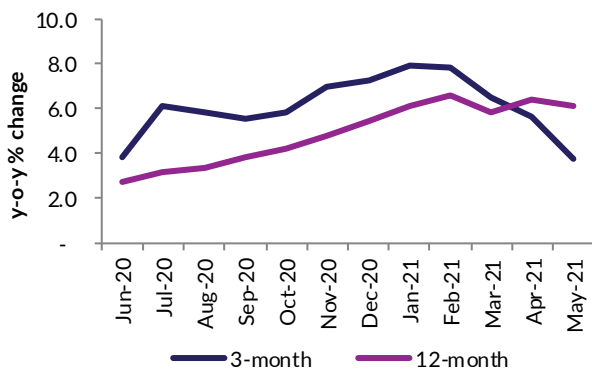
Source: BRC-KMG RSM (Includes Food data from IGD); in this chart, purple blocks represent negative contributions

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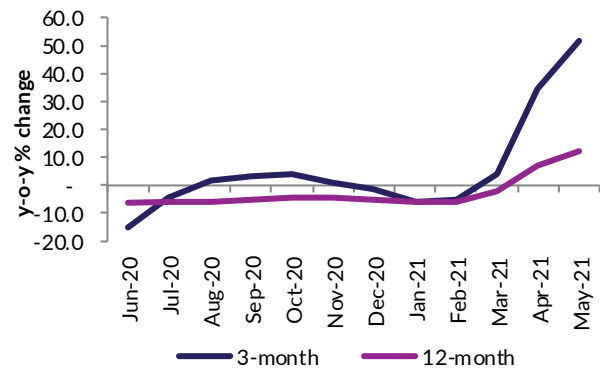
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FOOD

TOTAL SALES ROLLING AVERAGE GROWTH: FOOD



TOTAL SALES ROLLING AVERAGE GROWTH: NON-FOOD

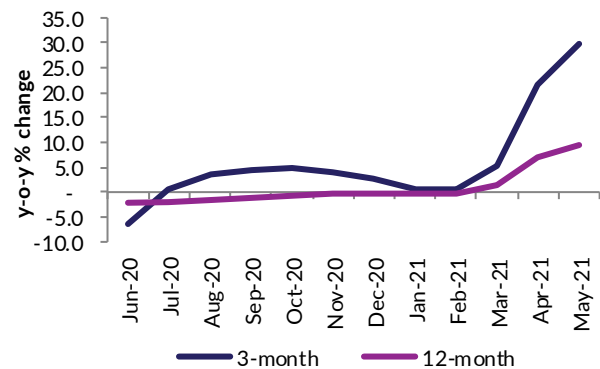


FOOD

During May, we continued to observe a slowdown in Food growth on an annual basis, with the three-month average reaching 3.8%. This compares with 5.7% average annual growth recorded in the period February to April this year. May saw the first full month of hospitality trading, following the easing of lockdown restrictions and, with many venues reporting a huge rise in bookings, this may have been a contributing factor to the slowdown in Food growth.

Looking at the sector performance compared with 2019, we have also observed a slowdown in the three-month average performance to 9.8%, down from 10.3% average growth in the period February to April, on a 2-year basis.

TOTAL SALES ROLLING AVERAGE GROWTH: UK



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Three-month average growth rates continue to slow, both on an annual and 2-year basis.

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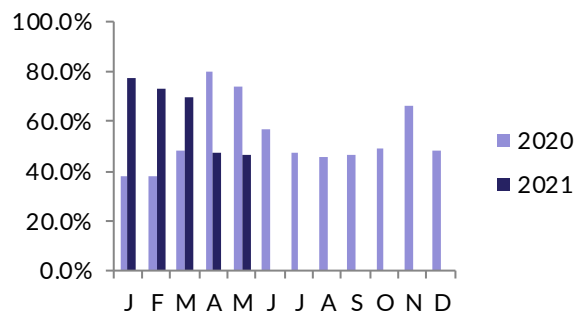
Covering the four weeks 2 – 29 May 2021

CLOTHING

CLOTHING: UK TOTAL SALES CHANGE



CLOTHING: ONLINE PENETRATION RATE



CLOTHING: ONLINE SALES CHANGE



CLOTHING: STORES SALES CHANGE (2-YR)



THE MONTH OVERALL

Clothing sales continued in positive territory in May (on a 2-year basis), growth slowed from the previous month when the easing of lockdown restrictions saw pent-up demand for adult clothing, in particular sales of outerwear and knitwear. The unseasonably wet weather during May resulted in less demand for summer clothing, with reports of disappointing sales of spring and summer clothing ranges. There was also evidence of 'belt tightening' towards the end of the month, likely due to consumers slowing down their spending after the initial excitement of returning to the shops when the lockdown restrictions were eased.

THE MONTH BY CHANNEL

The growth trend in Online Clothing sales continued in May, with strong double-digit growth, on a 2-year annual basis. However, the May performance slowed from the previous month's growth by just over 10 percentage points. Online sales of casualwear reportedly continued to drive the sector performance during May, and although formalwear sales are yet to pick up, there were reports of a shift towards browsing and searching in this category. The Online Penetration rate fell by 27.2 percentage points from May last year, to 46.6% this time.



There was a shift towards browsing and searching for formalwear online during May, perhaps as consumers plan for weddings and formal events over the summer

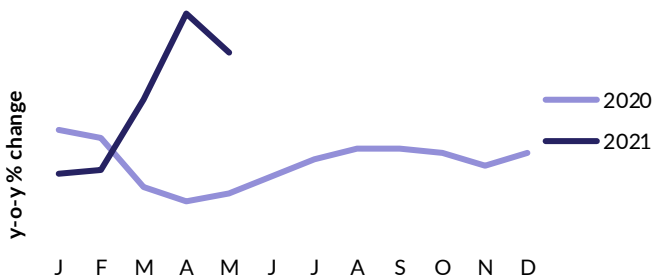


BRC – KPMG RETAIL SALES MONITOR MAY 2021

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FOOTWEAR

FOOTWEAR: UKTOTALSALES CHANGE



FOOTWEAR: ONLINE PENETRATION RATE



FOOTWEAR: ONLINE SALES CHANGE



FOOTWEAR: STORES SALES CHANGE (2-YR)



THE MONTH OVERALL

In line with the trend observed during April, sales of Footwear rose marginally (on a 2-year basis) in May. While sales of children’s shoes remained strong, not surprisingly, sales of summer-related footwear performed less well, due to the challenges with the unseasonably wet weather. In addition, the lack of holidays abroad for most people has weakened demand for summer footwear. Although some merchants reported a decline in footfall, consumers were focused on buying footwear – not just browsing – resulting in strong store conversions during May.

THE MONTH BY CHANNEL

Online Footwear sales remained strong during May (on a 2-year basis), especially when compared with the same month in 2019 when sales fell into negative territory. There were reports of lower conversion rates with more browsing than purchasing compared with the trends observed during lockdown. The Footwear Online Penetration rate declined by 26.8 percentage points from May last year, to 55.9% this year.

“Lack of holidays for most people and the unseasonably wet weather weakened demand for summer-related footwear”

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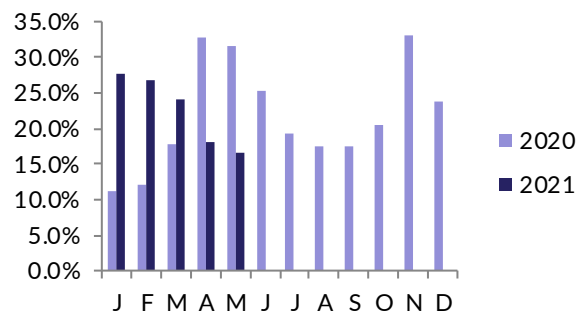
Covering the four weeks 2 – 29 May 2021

HEALTH & BEAUTY

HEALTH AND BEAUTY: UK TOTAL SALES CHANGE



HEALTH AND BEAUTY: ONLINE PENETRATION RATE



HEALTH AND BEAUTY: ONLINE SALES CHANGE



HEALTH AND BEAUTY: STORES SALES CHANGE (2-YR)



THE MONTH OVERALL

In line with the trend observed year-to-date, the Health & Beauty category recorded a Yo2Y decline in sales during May. However, the decrease in sales during May was less steep than the average decline recorded in Q1 2021, when compared with the same period in 2019. Within beauty, sales of gifts and bath & body products were reportedly strong, while products that fared less well during the month include make-up, haircare and fragrances.

THE MONTH BY CHANNEL

Online Health & Beauty sales continued to decline during May on a year-on-year basis, while growth compared with May 2019 remains significantly up on the average growth rates recorded in 2019. The Online Penetration rate recorded a decline of 14.9 percentage points to 16.6% during May.



Total sales continued to decline in May, compared with pre-pandemic levels



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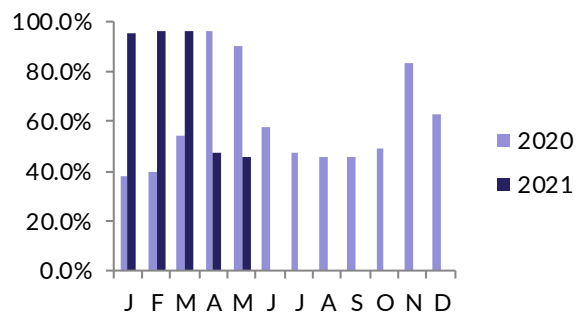
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FURNITURE

FURNITURE: UK TOTAL SALES CHANGE



FURNITURE: ONLINE PENETRATION RATE



FURNITURE: ONLINE SALES CHANGE



FURNITURE: STORES SALES CHANGE (2-YR)



THE MONTH OVERALL

In line with the trend observed during April, the Furniture category continued to see a boost during May, driven by sales of beds and sofas due to pent-up demand, and the need for consumers to touch and feel these items in stores. The May Yo2Y growth exceeded the performance recorded in the previous month and is worth noting it is on the back of the strongest monthly annual growth recorded during 2019.

THE MONTH BY CHANNEL

The Online Penetration rate in the Furniture category fell by 45.1 percentage points in May, reaching an average rate of 45.4%. This is down slightly from the rate recorded in the previous month but higher than the overall average rate recorded in 2019 of 38%.



Strong sales of sofas and beds continued to drive sales in this category during May



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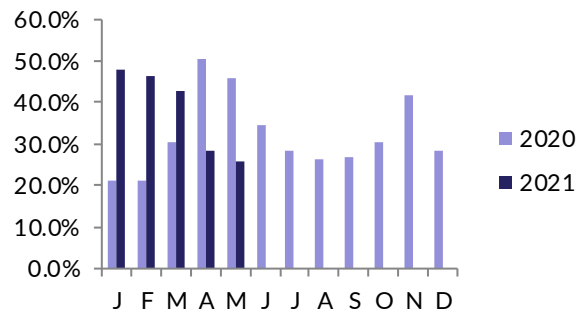
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HOME ACCESSORIES

HOME ACCESSORIES: UK TOTAL SALES CHANGE



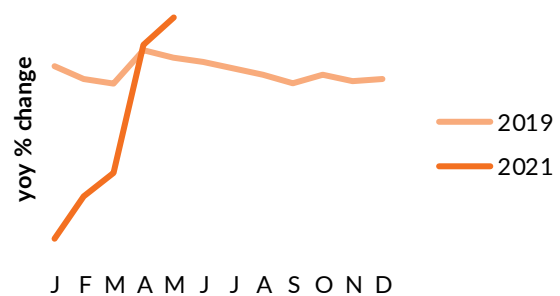
HOME ACCESSORIES: ONLINE PENETRATION RATE



HOME ACCESSORIES: ONLINE SALES CHANGE



HOME ACCESSORIES: STORES SALES CHANGE (2-YR)



THE MONTH OVERALL

Growth in Home Accessories accelerated during May, with the performance up significantly compared with the same month in 2019. Retailers reported a mixed performance in this category, with some seeing strong sales of bedroom accessories, while living room accessories fared less well during the month.

THE MONTH BY CHANNEL

For the first time since November 2019, online sales of Home Accessories fell into negative territory during May (YoY), however, this is on the back of a very strong performance in the same month last year when sales surged during the first lockdown. On a 2-year basis, the May performance is significantly up on growth levels recorded before the Covid-19 pandemic hit. For the fourth consecutive month, the Home Accessories Online Penetration rate fell during May, reaching 26.1%. This is down 19.8 percentage points compared with the same month last year.

“The Online Penetration rate continued to decline during May, the fourth consecutive month of decline

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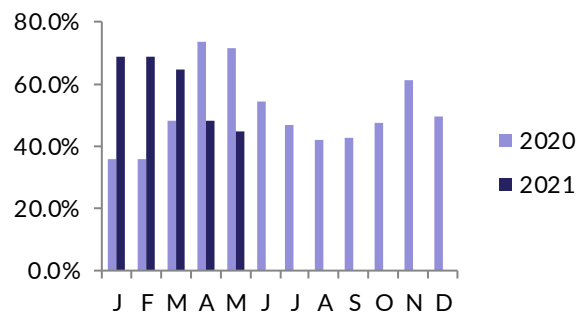
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HOUSE TEXTILES

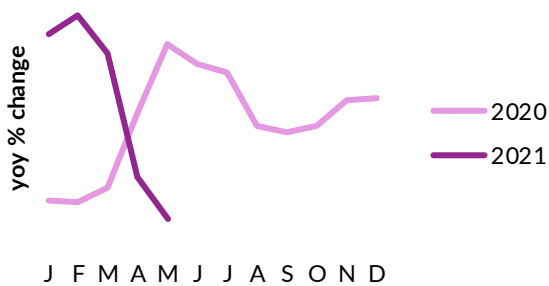
HOUSE TEXTILES: UK TOTAL SALES CHANGE



HOUSE TEXTILES: ONLINE PENETRATION RATE



HOUSE TEXTILES: ONLINE SALES CHANGE



HOUSE TEXTILES: STORES SALES CHANGE (2-YR)



THE MONTH OVERALL

During May we observed the continuing trend of a strong Yo2Y performance in House Textiles, resulting in solid double-digit growth for the first time this year, when compared with May 2019. The May performance is significantly ahead of the overall average rate recorded during 2019, when this category saw an overall annual decline in sales.

THE MONTH BY CHANNEL

For the first time since February 2020, online sales in this category recorded negative growth during May, when compared with the same month in 2020. In line with the trend observed during April, the Online Penetration rate fell 26.5 percentage points from May last year, to 44.6% this time.



The overall performance in May was significantly ahead of the overall average growth rate recorded in 2019



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TOYS & BABY EQUIPMENT

TOYS & BABY EQUIPMENT: UK TOTAL SALES CHANGE



TOYS & BABY EQUIPMENT: ONLINE PENETRATION RATE



TOYS & BABY EQUIPMENT: ONLINE SALES CHANGE



TOYS & BABY EQUIPMENT: STORES SALES CHANGE (2-YR)



THE MONTH OVERALL

The category continued its upward trajectory in May, but didn't quite make it into growth in comparison to the levels of spending seen last year, when children needed to be entertained during the first lockdown. However, it was not the performance of Toys that made the difference for the category in May, but that of Baby and Nursery Equipment, which was reportedly in high demand. It was said that this could be the beginning of the effects from the much-vaunted 'lockdown baby-boom' last year.

THE MONTH BY CHANNEL

As May was the first complete month of the year with stores fully reopen, it is hardly surprising that the category continued its recovery. However, from the level seen during the more normal period in 2019, the category was still slightly behind. Also, Online the category naturally failed to keep pace with the strong growth seen during the same period last year, but on a two-year basis was in growth. The Online Penetration rate decreased by 20.9 percentage points from last year, to 50.3% in May.



Baby and Nursery Equipment was reportedly in high demand



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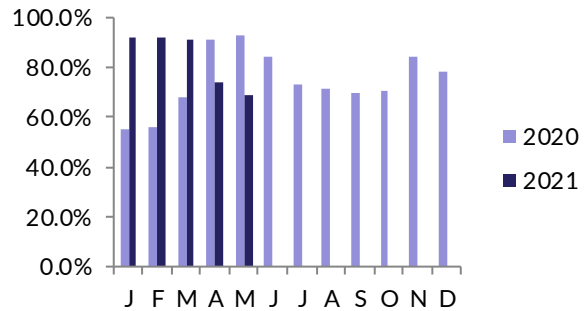
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HOUSEHOLD APPLIANCES

HOUSEHOLD APPLIANCES: UK TOTAL SALES CHANGE



HOUSEHOLD APPLIANCES: ONLINE PENETRATION RATE



HOUSEHOLD APPLIANCES: ONLINE SALES CHANGE



HOUSEHOLD APPLIANCES: STORES SALES CHANGE (2-YR)



THE MONTH OVERALL

Household Appliances slowed from the record-setting growth rate seen in the previous month, but remained in significantly positive territory in May. It was reported that larger items, particularly white goods, that performed the strongest during the month. However, the performance of white goods was also partly a result of the stock issues seen during the same period last year, which hampered sales then. Smaller items struggled during the month, but this was also as much a function of last year's strong performance as this year's demand, as last year consumers were driven to make living under lockdown conditions as convenient as possible.

THE MONTH BY CHANNEL

The downturn for Online Household Appliances sales continued in May, resulting in the channel falling into decline. However, on a two-year basis the category performance was still above the levels seen pre-crisis in 2019. In-store sales continued to recover on a two-year basis, but remained in decline against 2019 levels. The Online Penetration rate decreased by 23.4 percentage points from the same point last year, to 69.2% in May.



White goods performed the strongest during the month



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COMPUTING

COMPUTING: UK TOTAL SALES CHANGE



COMPUTING: ONLINE PENETRATION RATE



COMPUTING: ONLINE SALES CHANGE



COMPUTING: STORES SALES CHANGE (2-YR)



THE MONTH OVERALL

Computing fell back into decline on a one-year basis in May. This is, of course, largely due to the strong growth recorded at the same point last year, while the country was under lockdown conditions. Demand for laptops was reported by a variety of retailers to wane during the month, whereas peripherals were still performing reasonably well. On a two-year basis, however, the category overall was still trading significantly higher than the previous 'normal' levels of 2019.

THE MONTH BY CHANNEL

The first full month of the year with stores fully opened saw the category return to similar levels of performance as that seen pre-pandemic. Although, seeing as the channel was not in growth overall in 2019, this was not as impressive as it seems. Online, the category fell further into decline in May, but remained in growth on a two-year basis. The Online Penetration rate decreased by 25.5 percentage points from last year, to 71.4% in May.



Demand for laptops was reported to wane during the month

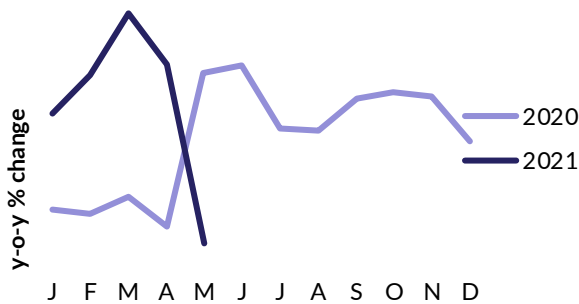


BRC – KPMG RETAIL SALES MONITOR MAY 2021

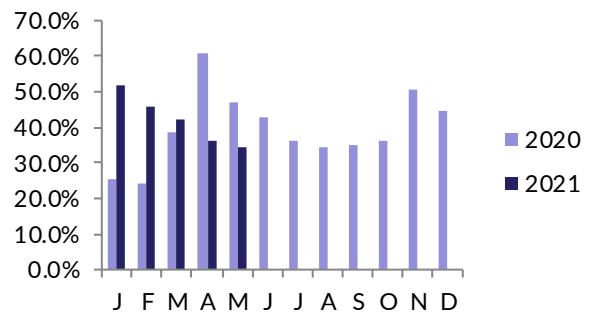
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OTHER NON-FOOD

OTHER NON-FOOD**: UK TOTAL SALES CHANGE



OTHER NON-FOOD**: ONLINE PENETRATION RATE



OTHER NON-FOOD**: ONLINE SALES CHANGE



OTHER NON-FOOD**: STORES SALES CHANGE (2-YR)



** Note: The Online penetration rates, Online sales and Stores sales graphs include Jewellery & Watches and Stationery. The UK Total sales graph excludes Jewellery & Watches and Stationery.

THE MONTH OVERALL

The category fell into decline for the first time since April 2020, on a yearly basis. However, it remained above the levels of performance seen at the same point pre-pandemic. Despite the overall negative result for the month, the demand for Gaming and accompanying TVs was said to continue, once again.



The demand for Gaming and accompanying TVs was said to continue once again



THE MONTH BY CHANNEL

In-store sales continued their recovery from pre-pandemic levels of spending, with May broadly flat on the same point in 2019. The improved availability of key stock in the category counteracted the cool down in the release of pent-up demand for others post-reopening. The Online Penetration rate decreased by 12.8 percentage points from the same point last year, to 34.4% in May.

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OTHER NON-FOOD

Includes in particular:

Jewellery & Watches



The return of stores to the retail landscape has clearly had a considerable effect on Jewellery & Watches, which traditionally rely on a more personal experience. There was also quite a bit of pent-up demand in the market from the lockdown period at the beginning of the year, as even on a two-year basis the category performed well.

Electricals & Electronics

Gaming consoles were said to perform well during the month. However, this was attributed more to the timing of stock availability rather than a change in consumer behaviour. This has been the pattern for their sales since the latest consoles were released last year. TVs also performed well as a spill-over from Gaming, as the latest models are the perfect accompaniment to make the most of the experience.

Leisure Goods, Gaming, Books, CDs & DVDs

With consumers still reluctant to make travel plans for the summer, luggage was said to underperform, but this is hardly a surprising result. Sports equipment was also reportedly seeing lacklustre demand, although this was more down to the poorer than average weather conditions in comparison to the same period in the last two years.

DEPARTMENT STORES

As May was the first full month for Department Stores to allow customers through their doors once again, they continued to reap the benefits of the pent-up demand built up during the lockdown months earlier in the year. Fashion items were said to see the strongest resurgence, as consumers were once again allowed to socialise, with the return of indoor hospitality. Larger Department Stores also benefitted from this effect, as they offer dining facilities for their customers. Every silver lining has a cloud, however, as the Department Stores located in large city centres continued to underperform. This was, in part, due to the lack of office workers in their vicinity and also the lack of tourism activity which is unlikely to change any time soon.

BRC - KPMG RETAIL SALES MONITOR MAY 2021

Covering the four weeks 2 - 29 May 2021

MONTHLY RETAIL SALES: % CHANGE YEAR-ON-YEAR (2021 IS YEAR-ON-2-YEAR)

MONTH	2019 (YOY)		2020 (YOY)		2021 (YO2Y)	
	LFL	TOTAL	LFL	TOTAL	LFL	TOTAL
January	1.8	2.2	0.0	0.4	2.3	-3.4
February	-0.1	0.5	-0.4	0.1	1.2	1.7
March	-1.1	-0.5	-3.5	-4.3	8.4	8.3
April	3.7	4.1	5.7	-19.1	46.3	7.3
May	-3.0	-2.7	7.9	-5.9	23.7	10.0
June	-1.6	-1.3	10.9	3.4	.	.
July	0.1	0.3	4.3	3.2	.	.
August	-0.5	0.0	4.7	3.9	.	.
September	-1.7	-1.3	6.1	5.6	.	.
October	0.1	0.6	5.2	4.9	.	.
November	-4.9	-4.4	7.7	0.9	.	.
December	1.7	1.9	4.8	1.8	.	.
Jan-Apr average	0.2	0.7	1.6	-5.4	16.0	5.0
Jan-Dec average	-0.5	-0.1	4.4	-0.3	n/a	n/a

Source: BRC-KPMGRSM (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
Mar - May 20	8.7	-2.1	2.8	5.6	-21.8	-9.4
Apr - Jun	7.3	9.5	8.4	3.8	-15.0	-6.4
May - Jul 20	8.2	7.9	7.9	6.1	-4.3	0.4
Jun - Aug 20	6.3	7.7	7.0	5.9	1.4	3.5
Jul - Sep	5.1	5.2	5.1	5.6	3.2	4.3
Aug - Oct	5.2	5.7	5.4	5.8	4.0	4.9
Sep - Nov	6.4	6.4	6.3	7.0	1.3	3.9
Oct-Dec	6.8	5.1	5.8	7.3	-1.5	2.5
Nov 20 - Jan 21	7.5	5.6	6.4	7.9	-5.6	0.6
Dec 20 - Feb 21	7.6	6.6	7.0	7.9	-5.5	0.6
Jan - Mar 21	5.7	19.5	12.9	6.6	4.2	5.3
Feb - Apr	3.3	40.4	23.0	5.7	34.6	21.4
Mar - May	0.2	48.3	25.7	3.8	51.6	29.8

Source: BRC-KPMGRSM (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 MAY 2021

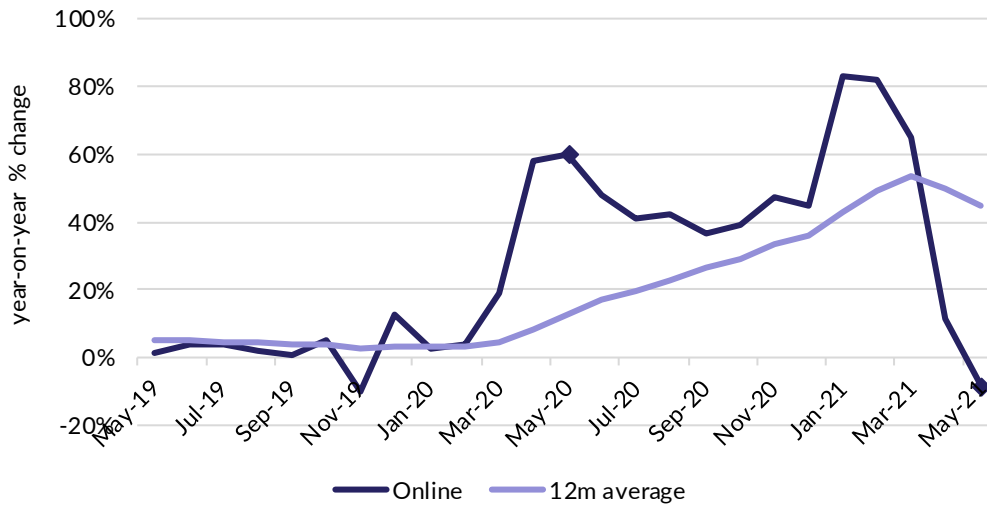
Covering the four weeks 2 - 29 May 2021

ONLINE VERSUS STORE DATA

BRC - KPMG RETAIL SALES MONITOR MAY 2021

Covering the four weeks 2 - 29 May 2021

ONLINE SALES GROWTH (NON-FOOD): % CHANGE YEAR-ON-YEAR

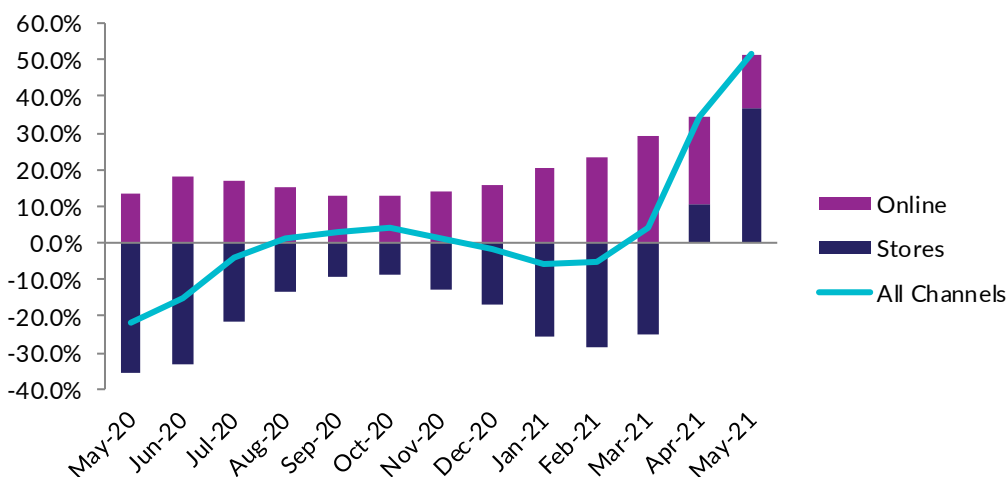


NON-FOOD GROWTH	ONLINE*	UK TOTAL
May 2021	-8.1%	n/d
May 2020	60.2%	n/d
Apr 2021	11.3%	n/d
3m avg	25.8%	51.6%
12m avg	44.7%	12.2%

n/d: cannot be disclosed

Source: BRC-KPMGRSM: 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
Mar - May 21	104.9%	120.8%
Mar - May 20	-21.9%	-50.3%
Feb - Apr 21	65.3%	63.1%
12m avg	16.0%	11.4%

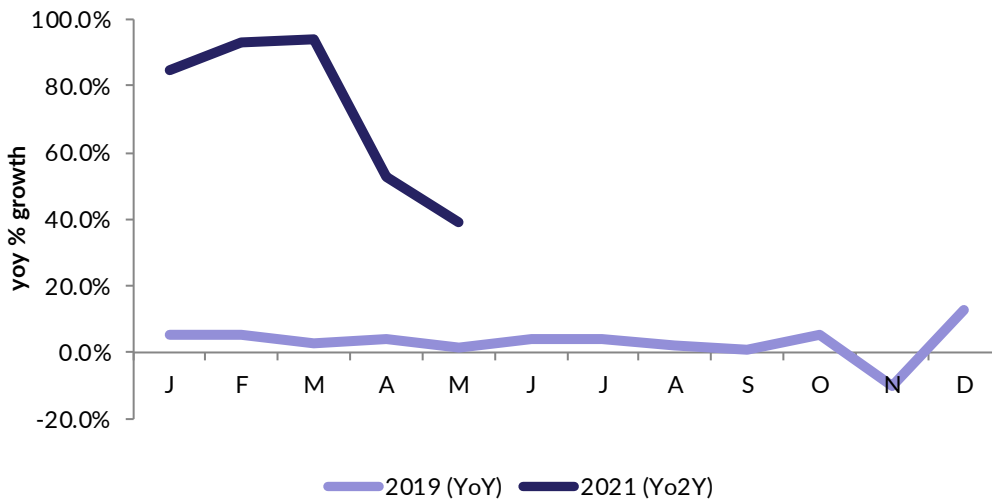
Source: BRC-KPMGRSM

BRC - KPMG RETAIL SALES MONITOR MAY 2021

Covering the four weeks 2 - 29 May 2021

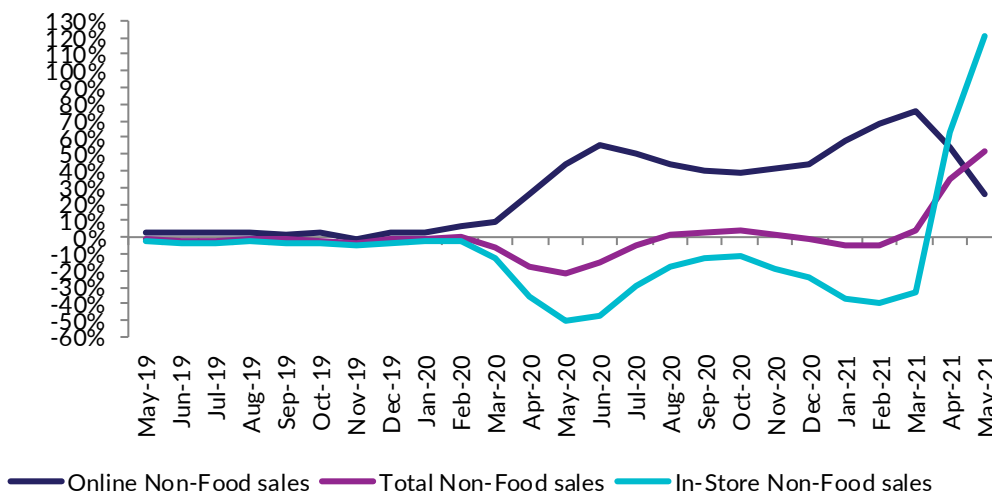
BRC-KPMG NON-FOOD RETAIL SALES YEAR-ON-YEAR GROWTH:

MONTHLY GROWTH OF ONLINE NON-FOOD RETAIL SALES (2021 2-YEAR % CHANGE)



Source: BRC-KPMG RSM

3M ROLLING AVERAGE GROWTH OF NON-FOOD SALES

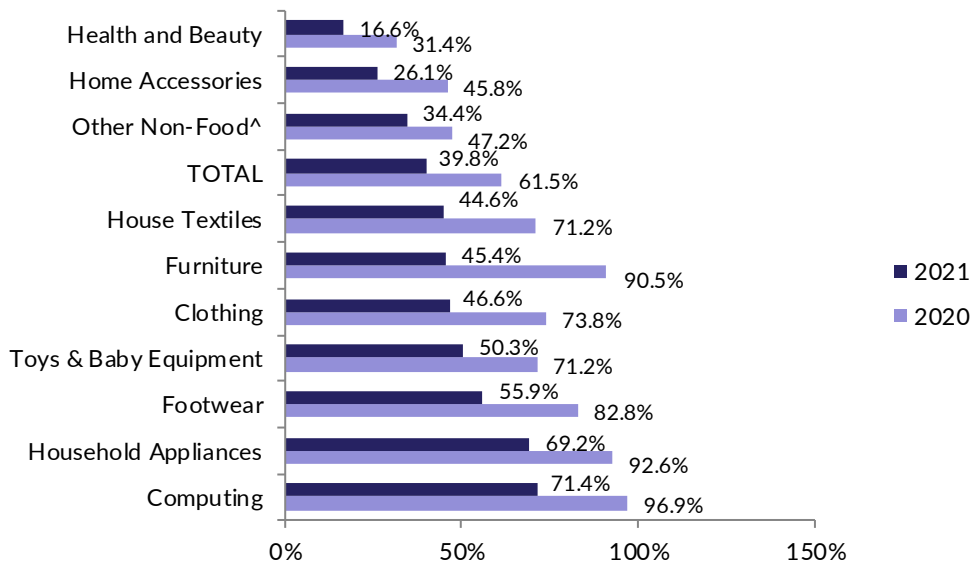


Source: BRC-KPMG RSM

BRC - KPMG RETAIL SALES MONITOR MAY 2021

Covering the four weeks 2 - 29 May 2021

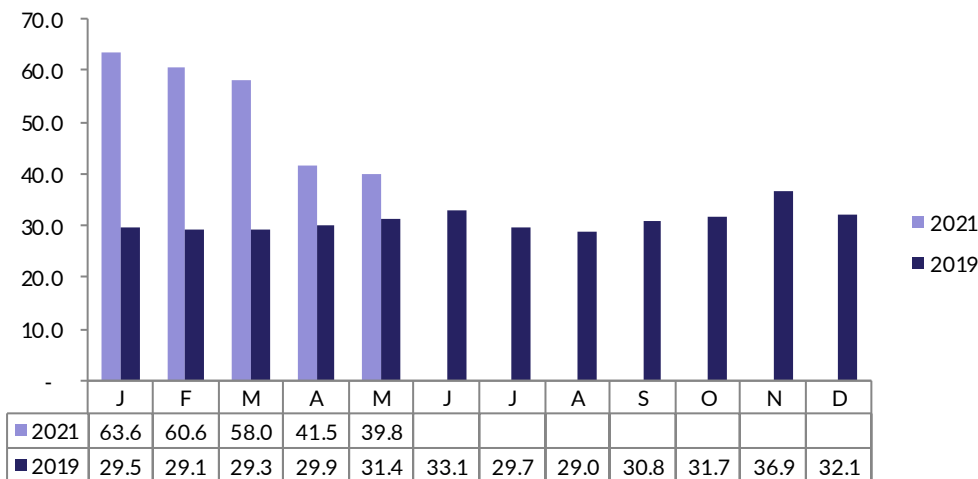
MAY: ONLINE PENETRATION RANKINGS BY CATEGORY



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



NON-FOOD ONLINE PENETRATION RATE ONLINE AS % OF TOTAL	
May 2021	39.8%
May 2020	61.5%
Apr 2021	41.5%
3m average	47.3%
12m average	48.8%

Source: BRC-KPMG RSM

BRC - KPMG RETAIL SALES MONITOR MAY 2021

Covering the four weeks 2 - 29 May 2021

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
May 2020	60.2	43.5	61.5	56.7	20.3	13.7
Jun	48.2	54.9	50.5	59.5	17.9	18.4
Jul	41.0	49.7	42.0	51.3	12.9	17.1
Aug	42.4	44.2	39.3	44.5	13.4	15.0
Sep	36.7	39.7	40.1	40.4	12.0	12.7
Oct	39.0	39.2	42.3	40.5	13.0	12.8
Nov	47.2	40.6	59.3	46.7	18.0	14.2
Dec 2020	44.8	43.8	47.8	49.7	15.7	15.6
Jan 2021	83.0	57.3	63.6	56.2	28.4	20.3
Feb	82.2	68.1	60.6	56.6	27.2	23.1
Mar	64.7	75.7	58.0	60.5	31.4	29.2
Apr	11.3	53.6	41.5	53.7	11.5	24.0
May	-8.1	25.8	39.8	47.3	-3.4	14.6

Source: BRC-KPMG Retail Sales Monitor. * 2020 was 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
May 2020	-50.3%	-21.9%
Jun	-46.8%	-11.3%
Jul	-29.3%	-11.3%
Aug	-17.8%	-8.5%
Sep	-12.3%	-9.5%
Oct	-11.4%	-9.0%
Nov	-18.6%	-10.8%
Dec 2020	-24.7%	-14.4%
Jan 2021	-36.5%	-19.8%
Feb	-38.9%	-21.4%
Mar	-33.1%	-9.2%
Apr	63.1%	65.3%
May	120.8%	104.9%

Source: BRC-KPMG Retail Sales Monitor

BRC – KPMG RETAIL SALES MONITOR MAY 2021

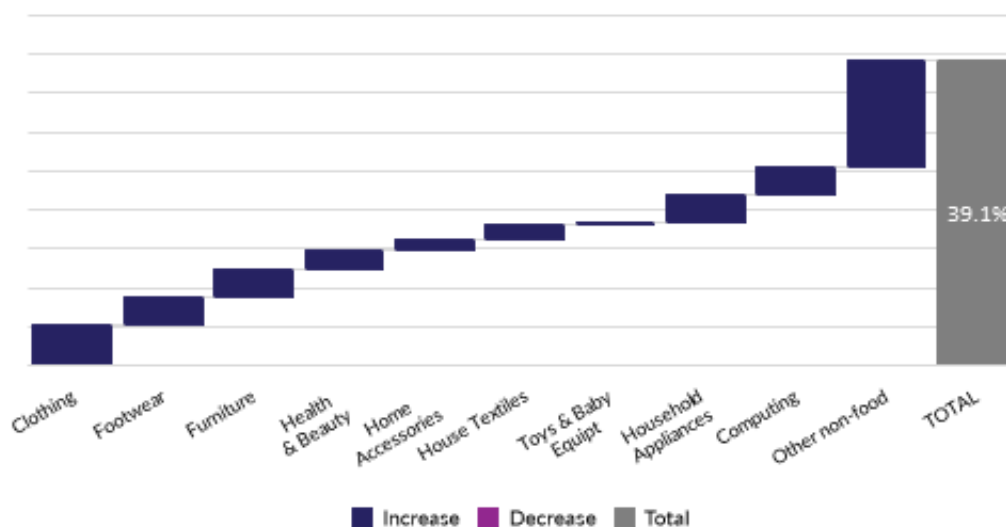
Covering the four weeks 2 – 29 May 2021

SECTOR PERFORMANCE: ONLINE SALES GROWTH (2-YEAR TOTAL SALES)

CATEGORY	SALES UP / DOWN MAY 2021	GROWTH RANKINGS			
		MAY 2021	APR 2021	MAY 2020	3M AVG
Furniture	▲	1	4	8	1
House Textiles	▲	2	7	5	6
Computing	▲	3	1	1	2
Home Accessories	▲	4	2	3	4
Household Appliances	▲	5	5	6	5
Other Non-Food	▲	6	3	2	3
Footwear	▲	7	8	10	8
Health & Beauty	▲	8	6	4	7
Clothing	▲	9	9	9	9
Toys & Baby Equipment	▲	10	10	7	10

Source: BRC-KPMG RSM

MAY: CONTRIBUTION TO NON-FOOD ONLINE SALES GROWTH (2-YR) BY CATEGORY



Source: BRC-KPMG RSM

BRC - KPMG RETAIL SALES MONITOR MAY 2021

Covering the four weeks 2 - 29 May 2021

SECTOR PERFORMANCE: STORE TOTAL SALES GROWTH (2-YEAR TOTAL SALES)

CATEGORY	SALES UP / DOWN MAY 2021	GROWTH RANKINGS			
		MAY 2021	APR 2021	MAY 2020	3M AVG
Furniture	▲	1	1	8	3
Home Accessories	▲	2	2	3	1
House Textiles	▲	3	4	5	4
Other Non-Food	▼	4	3	1	2
Toys & Baby Equipment	▼	5	7	2	6
Computing	▼	6	9	10	10
Household Appliances	▼	7	10	7	8
Clothing	▼	8	5	6	7
Health & Beauty	▼	9	6	4	5
Footwear	▼	10	8	9	9

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 MAY 2021

Covering the four weeks 2 – 29 May 2021

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 MAY 2021

Covering the four weeks 2 – 29 May 2021

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The June 2021 Monitor, covering the five weeks 30 May – 3 July 2021, will be released at 00.01am on Tuesday 13 July 2021. 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.

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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 MAY 2021

Covering the four weeks 2 – 29 May 2021

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is available to retailers who contribute to the monitor:**

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