

BRC – KPMG RETAIL SALES MONITOR

APRIL 2023

COVERING FOUR WEEKS 2ND – 29TH APRIL 2023

EASTER BRINGS GROWTH DESPITE POOR WEATHER

<i>% CHANGE YEAR-ON-YEAR</i>		TOTAL	LIKE-FOR-LIKE
UK RETAIL SALES	▲	+5.1%	+5.2%
FOOD (3-MTH)	▲	+9.8%	+10.0%
NON-FOOD (3-MTH)	▼	+1.2%	+0.8%
NON-FOOD – STORE (3-MTH)	▼	+3.9%	+3.3%
NON-FOOD – ONLINE	▼	-3.6%	N/A

EXECUTIVE SUMMARY: 1-MINUTE READ

The third consecutive month at broadly the same level of growth, once again at 5.1% on a Total basis, highlights the stagnation seen in the retail industry in spring this year. On its own, this result would ordinarily be seen as another strong performance, but as the country remains in an inflation driven cost of living crisis, the growth rate contradicts the underlying fact that the amount of goods sold across the piste are continuing to fall year on year.

Improved tourism levels have had a positive impact in April, particularly in the Easter school holidays, which benefitted central London and Edinburgh the most. This contributed to the strong sales in Jewellery & Watches and cosmetics, with the former rising to the top of the growth rankings table for the month.





Helen Dickinson OBE, Chief Executive | British Retail Consortium

“While retail sales grew in April, overall inflation meant volumes were down for both food and non-food as customers continued to adjust spending habits. Clothing sales underperformed as the poor weather left customers thinking twice before decking out their summer wardrobe. Meanwhile, a boost to overseas tourism over Easter helped jewellery, watches and cosmetics.

“Retailers hope sales will improve over the warmer summer months, especially as consumer confidence stabilises and inflation begins to ease. However, they continue to face huge cost pressures from a tight labour market, high energy prices, and other rising input costs, with many retailers reporting lower profits this year as a result. Government needs to ensure that any additional regulatory cost burdens are kept to a minimum as these add to inflation.”



Paul Martin, UK Head of Retail | KPMG

“Retail sales held steady in April with 5% growth on last year, but against a background of higher inflation year-on-year, masking how much is actually healthy growth for the sector.

“It was a mixed bag for the high street, with sales of footwear, food and jewellery performing strongly whilst more categories slipped into negative territory as clothing and computing continued to witness declining sales. Online retailers continued to feel the pressure in April, with both sales growth and penetration rates falling as the market rebalances after the pandemic and consumers choose to bargain hunt in store.

“Consumer demand has so far been fairly resilient to the twin drags of high inflation and high interest rates, but as government energy support comes to an end for many, savings start to dwindle and other household bills rise, it is likely that the next few months will continue to be challenging as the consumer tank empties. Much hinges on whether soaring food inflation can be brought under control enough to allow consumers to comfortably start spending again on non-essential items.

“Retailers will be hoping that the Coronation, coupled with a month full of bank holidays and inflation levels starting to head in the right direction, will boost consumer confidence significantly enough to start to see real, profitable growth.”

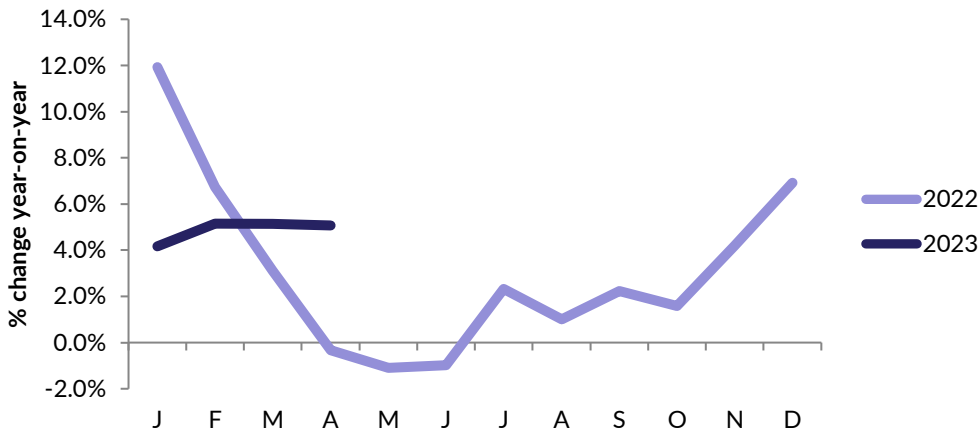


Food & Drink sector performance | Susan Barratt, CEO | IGD

“Food and drink sales in April continued the same trajectory seen in recent months; volume sales were negative and value sales were positive, driven by ongoing inflation. In response, retailers have been stepping up their support to shoppers, with further high-profile innovation and investment in loyalty schemes in April, providing access to better prices.

“Despite the continued doom and gloom, IGD’s Shopper Confidence Index improved a little in April. Trust in the food and consumer goods industry saw a notable improvement, especially around availability, with 65% trusting the industry to maintain good availability compared to 58% the previous month. Despite rising costs, our data shows shoppers continue to prioritise health and sustainability. Some 87% of shoppers say they are trying to eat more healthily (88% April ‘22), and 79% claiming the impact on the environment was important to them when choosing what food or grocery product to buy (80% April ‘22).”

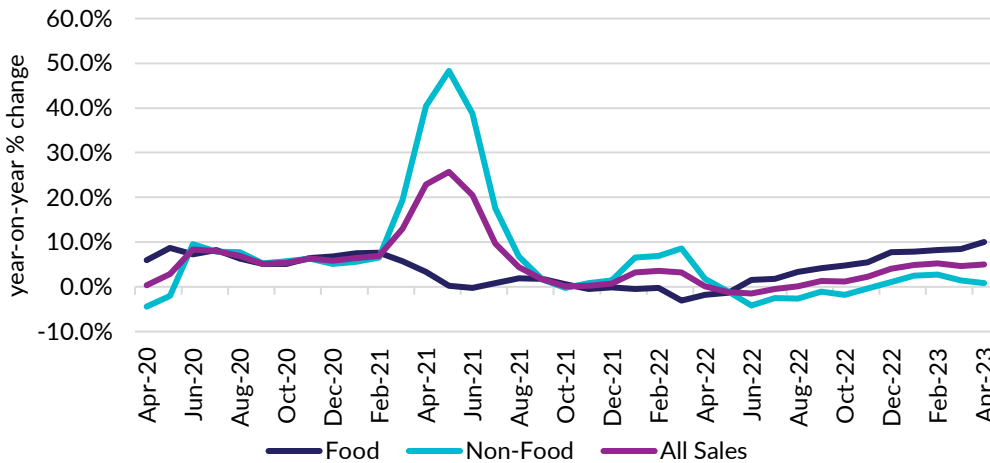
MONTHLY GROWTH OF TOTAL RETAIL SALES



	LFL	TOTAL
Apr 2023	5.2%	5.1%
Apr 2022	-1.7%	-0.3%
Mar 2023	4.9%	5.1%
3m average	5.0%	5.1%
12m average	2.7%	3.0%

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

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

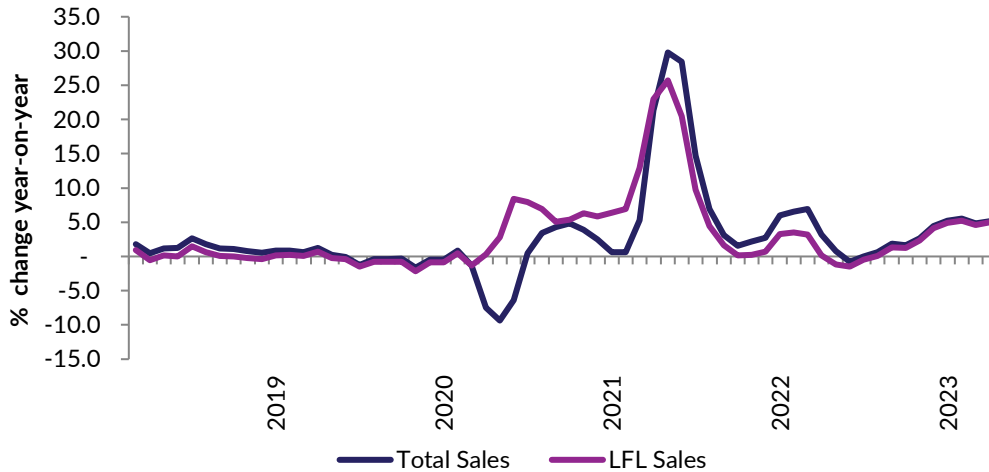


3-MONTH AVERAGE	LFL	TOTAL
Food	10.0%	9.8%
Non-food	0.8%	1.2%
All Sales	5.0%	5.1%

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

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



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

OVERVIEW

The third consecutive month at broadly the same level of growth, once again at 5.1% on a Total basis, highlights the stagnation seen in the retail industry in spring this year. On its own, this result would ordinarily be seen as another strong performance, but as the country remains in an inflation driven cost of living crisis, the growth rate contradicts the underlying fact that the amount of goods sold across the piste are continuing to fall year on year.

Food inflation is showing no signs of easing in the near term, with the BRC-Nielsen Shop Price Index showing a rate of 15.7% year on year in April, which is yet another record breaking rate. This naturally drove Food sales value growth to new heights as well, reaching 9.8% for the three months to April, which is the highest ever for this measure. However, it was not merely inflation that drove Food spending in April, as the Easter weekend is a culinary highlight of the year, when people get together with family and friends to celebrate the holiday. Despite the ever increasing prices, people were reluctant to restrict their indulgence in higher quality food for the main event, but then tightened their belts, where possible, for the rest of the month.

The ever increasing portion of consumer spending power being drawn to more essential goods, such as food, is having a continuing impact on the more discretionary side of retail as the year goes on. Non-Food sales growth overall has seen a steady slowing so far in 2023, with April not reversing the trend. In the three months to April, Non-Food slowed to 1.2% on a Total basis year on year, which was the lowest since November. The Easter holidays played an important role in the month's sales patterns for the categories that make up Non-Food overall, as they are a favourite time of year for home improvements, entertaining children and updating wardrobes. DIY & gardening goods sold well over that time, as there was a short spell of good weather, which encouraged people to get out into the garden in the spring. Toys & nursery goods were also said to have performed well at that time. However, the big disappointment of the month came in the Clothing category, as without a prolonged improvement in the weather, consumers remained reluctant to spend on the spring and summer ranges. Retailers in this sphere need clear skies in May, hopefully in conjunction with the two remaining bank holidays, to kick-start spending on the summer fashions.

Improved tourism levels had a positive impact in April, particularly in the Easter school holidays, which benefitted central London and Edinburgh the most. This contributed to the strong sales in Jewellery & Watches and cosmetics, with the former rising to the top of the growth rankings table for the month.

James Hardiman, Senior Analyst

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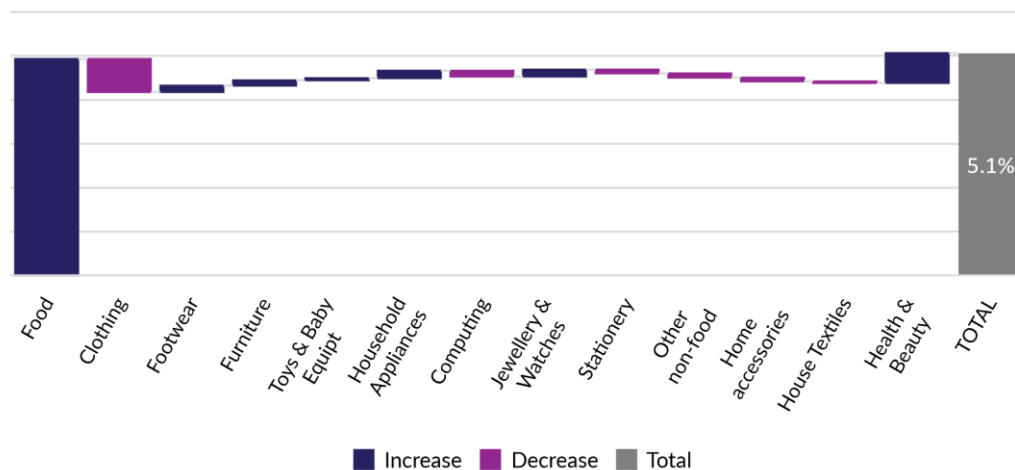
Covering the four weeks 2 – 29 April 2023

PERFORMANCE BY CATEGORY

CATEGORY	UP / DOWN APR-23		RANKINGS (TOTAL SALES)				
	LFL	TOT	APR-23	MAR-23	APR-22	3M AVG	12M AVG
Jewellery & Watches	▲	▲	1	7	1	4	4
Food	▲	▲	2	2	5	1	3
Health and Beauty	▲	▲	3	3	4	2	2
Household Appliances	▲	▲	4	1	8	3	6
Footwear	▲	▲	5	4	2	5	1
Toys & Baby Equipment	▲	▲	6	10	6	7	7
Furniture	▲	▲	7	5	13	6	9
Other Non-Food	▼	▼	8	13	10	11	11
House Textiles	▼	▼	9	8	9	9	8
Home Accessories	▼	▼	10	11	12	12	12
Stationery	▼	▼	11	9	7	8	10
Clothing	▼	▼	12	6	3	10	5
Computing	▼	▼	13	12	11	13	13

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

APR: CONTRIBUTION TO TOTAL SALES GROWTH BY CATEGORY



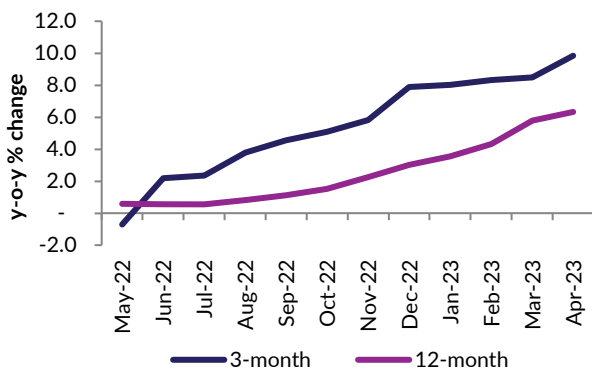
Source: BRC-KMG RSM (Includes Food data from IGD); in this chart, purple blocks represent negative contributions

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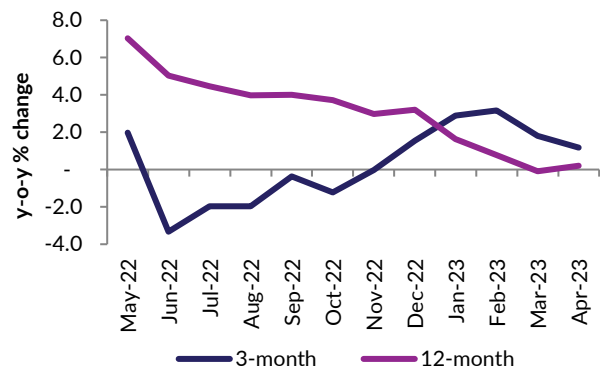
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FOOD

TOTAL SALES ROLLING AVERAGE GROWTH: FOOD



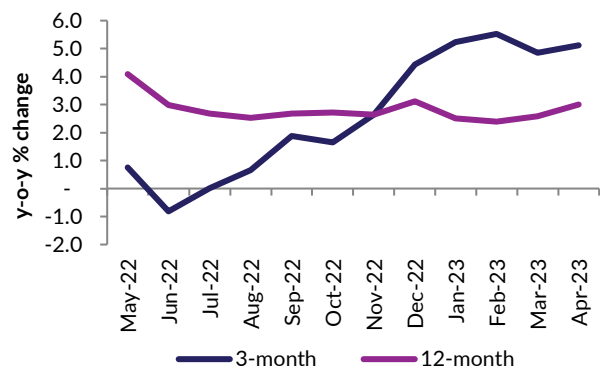
TOTAL SALES ROLLING AVERAGE GROWTH: NON-FOOD



FOOD

Growth in the Food category continued to accelerate during April, driven by the impact of high inflation in the UK grocery market. In the 3-month period February to April, Food sales grew 9.8% compared with the same period last year. While this is the highest rate of growth recorded since the start of the series, volumes remain down, with all growth coming from the increase in food prices. Sales peaked during the first week of the month, boosted by family gatherings over the Easter weekend. Food price inflation continued to rise in April, reaching a record-high of 15.7%, up from 15.0% in the previous month, according to the BRC NielsenIQ Shop Price Index.

TOTAL SALES ROLLING AVERAGE GROWTH: UK



Sales peaked during the first week of April, boosted by family gatherings over Easter



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CLOTHING

CLOTHING: UK TOTAL SALES CHANGE



CLOTHING: ONLINE PENETRATION RATE



CLOTHING: ONLINE SALES CHANGE



CLOTHING: STORES SALES CHANGE



THE MONTH OVERALL

During April the Clothing category fell into decline, resulting in the weakest year-on-year performance recorded in over two years. With the weather remaining unseasonably cool last month, there was said to have been weak demand for summer ranges, including dresses, shorts and T-shirts. On a positive note, formalwear, including men's tailoring and women's trousers, was reported to have seen increased demand as more people return to office-based working. Childrenswear, Womenswear and Menswear all recorded a year-on-year decline, although the latter category saw the lowest decrease compared with April last year.

THE MONTH BY CHANNEL

For the seventh consecutive month, the Online Clothing category recorded a year-on-year decline, with the April decrease steepening compared with the previous month. Since November 2022 In-store sales have recorded positive annual growth, however, April saw a return to negative territory with sales in decline compared with the same month last year. The Online penetration rate decreased by 0.5 percentage points from the same month last year, to 42.0% in April.



Demand for formalwear was said to have been boosted by a return to office working

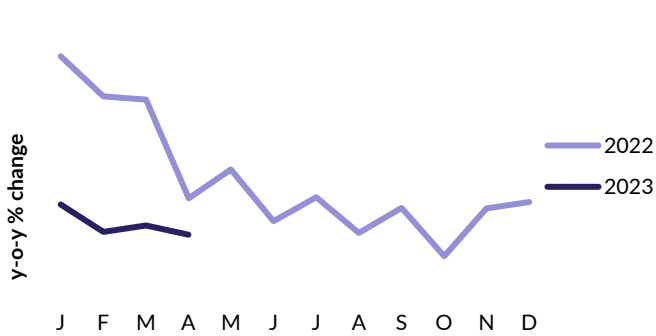


BRC – KPMG RETAIL SALES MONITOR APRIL 2023

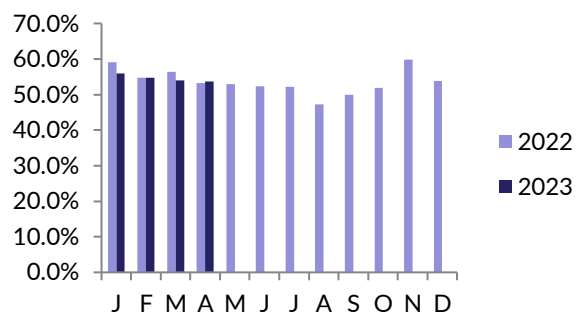
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FOOTWEAR

FOOTWEAR: UK TOTAL SALES CHANGE



FOOTWEAR: ONLINE PENETRATION RATE



FOOTWEAR: ONLINE SALES CHANGE



FOOTWEAR: STORES SALES CHANGE



THE MONTH OVERALL

While Men’s ranges continued to drive overall sales in the Footwear category during April, growth slowed to the lowest rate recorded since October last year. The unsettled weather did little to boost sales of summer footwear, with seasonal ranges, including sandals and athletic shoes, said to have seen weak demand. Women’s and Children’s ranges remain the weakest performing categories, although demand for school shoes was said to have improved towards the end of the Easter holidays. Some retailers reported strong demand for formal and dress shoes, most likely boosted by planning for summer events and more people returning to the office.

THE MONTH BY CHANNEL

Following a flat performance in March, the Online Footwear category returned to growth during April, when compared with the same month last year. While In-store sales slowed to the lowest level recorded in over 2 years, some retailers reported an increase in consumers shifting from browsers into buyers. The Online penetration rate increased by 0.6 percentage points from the same month last year, to 53.8% in April.



The unsettled weather had a negative impact on sales of summer footwear



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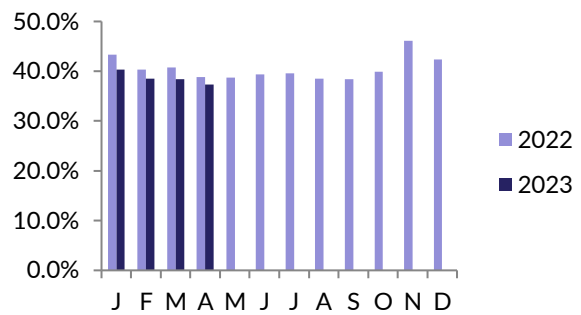
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HEALTH & BEAUTY

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



THE MONTH OVERALL

Health & Beauty remained in third place in the RSM category rankings in April, with year-on-year growth accelerating from the previous month. Within Beauty, there was said to be continued strong demand for make-up and fragrance in April, while hand creams and sun protection products also performed well, despite the lack of sunshine. Hair styling devices continue to see strong demand, according to some retailers in this category.

THE MONTH BY CHANNEL

While Online sales remained in growth for the third consecutive month, the performance over recent months is less impressive when taking into account the growth comes off the back of a double-digit declines in the same period last year. In-store sales remained in positive territory, with annual growth accelerating compared with the previous month. The Online penetration rate decreased by 0.7 percentage points from the same month last year, to 14.3% in April.



Make-up and fragrances were said to have seen strong demand

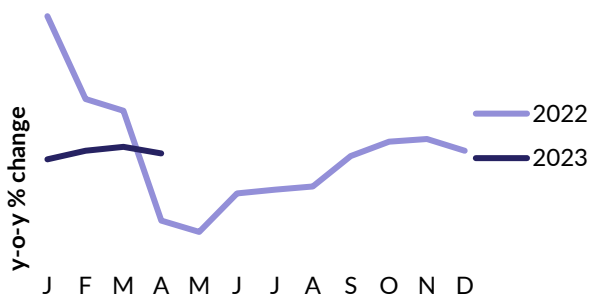


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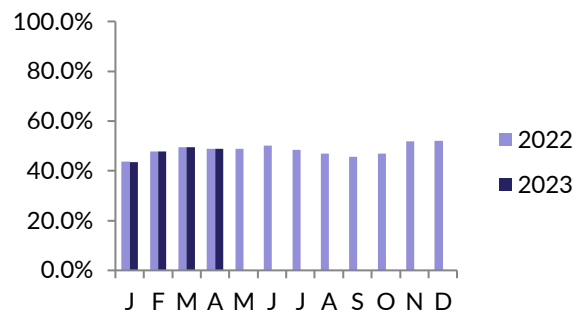
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FURNITURE

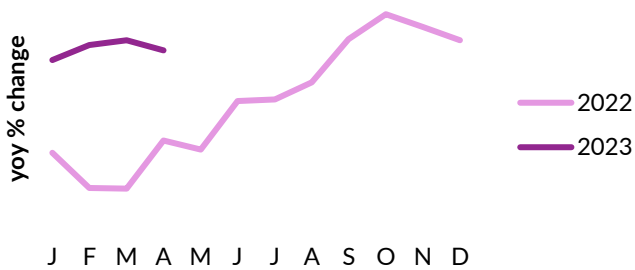
FURNITURE: UK TOTAL SALES CHANGE



FURNITURE: ONLINE PENETRATION RATE



FURNITURE: ONLINE SALES CHANGE



FURNITURE: STORES SALES CHANGE



THE MONTH OVERALL

Following an acceleration in year-on-year growth during March, growth decelerated in April, reaching the lowest level recorded since January this year. With consumers continuing to feel the impact from the cost-of-living crisis, there remains a slowdown in demand for higher ticket items, including beds, bedroom furniture and sofas. However, there was said to have been a lift in demand for living room and dining furniture in April. The GfK Consumer Confidence Major Purchase Index grew 5 points from the previous month, reaching -28 in April. This is 32 points lower than the same month last year.

THE MONTH BY CHANNEL

Online sales remained in growth during April, but slowed from the previous month, resulting in the weakest year-on-year performance recorded since January. In-store sales recorded a similar trend, with annual growth decelerating from the previous month. Despite the unseasonably cool weather, there was said to have been some improvement in online demand for garden furniture in April, while in-store sales of sofas picked up marginally, according to some retailers. The Online penetration rate in the Furniture category remained unchanged from the same month last year, at 48.8% in April.



Demand for garden furniture improved, despite the cooler weather

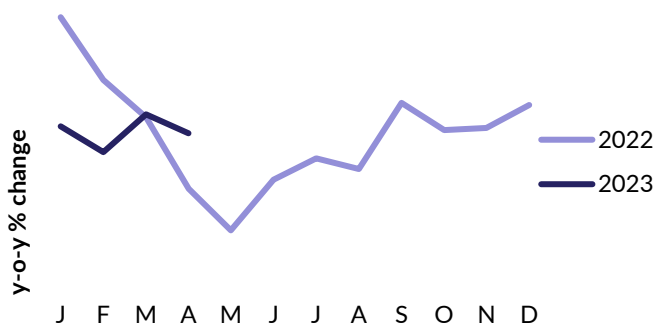


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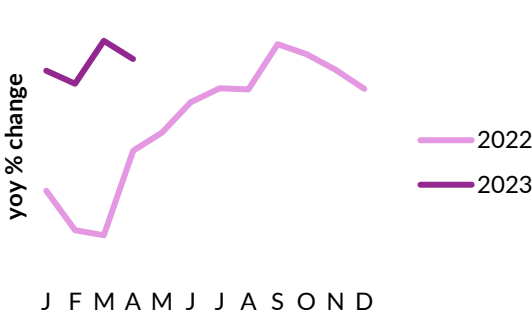
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HOME ACCESSORIES

HOME ACCESSORIES: UK TOTAL SALES CHANGE



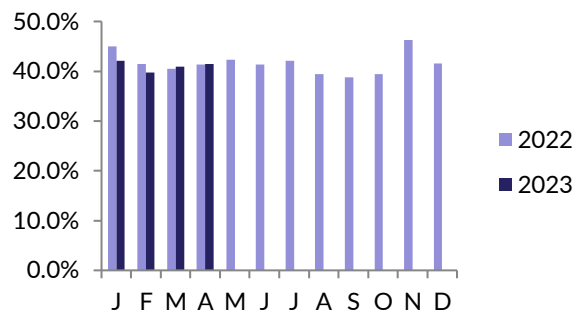
HOME ACCESSORIES: ONLINE SALES CHANGE



THE MONTH OVERALL

The declining trajectory observed in the Home Accessories category over recent months continued in April, with the year-on-year decrease steepening from the previous month. There was said to have been weaker demand for bathroom and utility products, together with saucepans and pots.

HOME ACCESSORIES: ONLINE PENETRATION RATE



HOME ACCESSORIES: STORES SALES CHANGE



THE MONTH BY CHANNEL

In line with the overall performance in the Home Accessories category, the decline in Online sales steepened during April. For the second time this year, In-store sales recorded a year-on-year decline, although the decrease was less steep than the rate observed in February. The Online penetration rate decreased by 1.0 percentage point from the same month last year, to 25.2% in April.



The Online penetration rate fell 1.0 percentage point from April last year, to 25.2%



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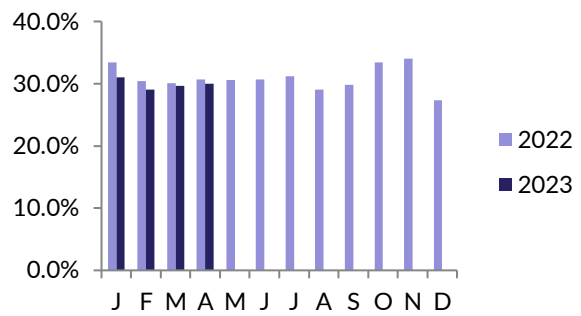
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HOUSE TEXTILES

HOUSE TEXTILES: UK TOTAL SALES CHANGE



HOUSE TEXTILES: ONLINE PENETRATION RATE



HOUSE TEXTILES: ONLINE SALES CHANGE



HOUSE TEXTILES: STORES SALES CHANGE



THE MONTH OVERALL

Following a return to annual growth in March for the first time this year, the House Textiles category fell back into decline during April, resulting in the weakest performance in the category year-to-date. As previously reported, sales of warmer, energy-saving textiles appear to be slowing down, while there was said to have been increased demand for bed linen last month.

THE MONTH BY CHANNEL

The Online Home Textiles category also fell back into decline in April, following a return to positive territory during March, for the first time this year. After seven consecutive months of annual growth for In-store sales, the channel also recorded a decline compared with April last year. The Online penetration rate remained unchanged from the same month last year, at 41.4% in April.



There was said to have been increased demand for bed linen in April



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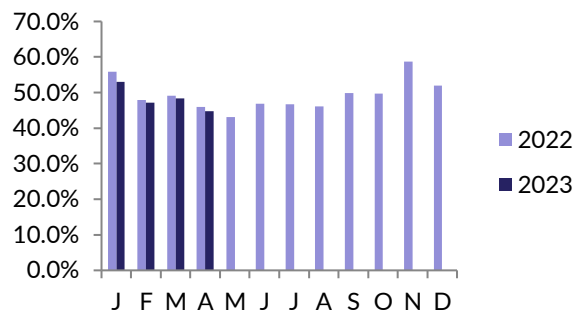
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TOYS & BABY EQUIPMENT

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



THE MONTH OVERALL

The Easter holidays benefitted the category significantly this year, with Toys & Baby Equipment’s growth rate more than doubling from the previous month. While outdoor toys performed well at the beginning of the holiday when the weather was at its best, indoor toys took over as the clouds and rain returned. Nursery goods, on the other hand, were said to sell well throughout the month, as the segment continues its resurgence seen since the end of last year.

THE MONTH BY CHANNEL

Online, the category returned to growth for the first time since January, as the poor weather in comparison to last year kept people away from the stores with their children, particularly over the Easter holidays. That being said, In-store sales also improved in April, as discounts helped to boost demand. The Online penetration rate decreased by 1.2 percentage points from the same point last year, to 44.8% in April.



Nursery goods were said to sell well throughout the month



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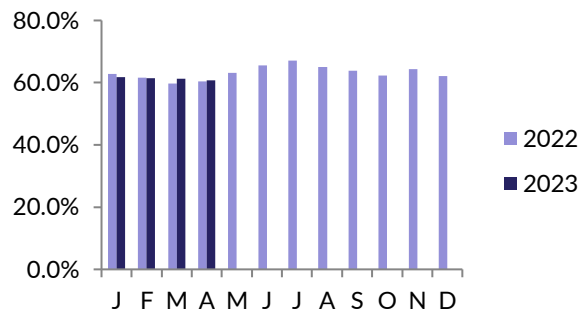
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HOUSEHOLD APPLIANCES

HOUSEHOLD APPLIANCES: UK TOTAL SALES CHANGE



HOUSEHOLD APPLIANCES: ONLINE PENETRATION RATE



HOUSEHOLD APPLIANCES: ONLINE SALES CHANGE



HOUSEHOLD APPLIANCES: STORES SALES CHANGE



THE MONTH OVERALL

While the growth rate for the category slowed considerably from the previous month, in April Household Appliances sold well, once again. However, it was not enough to keep the category at the top of the rankings table, as it fell to fourth place for the month. Smaller items were said to lead the way once again in April, with the strong sales of energy saving goods maintaining their popularity for yet another month. It was not all plain sailing for larger goods, however, in contrast to earlier in the year people were more reluctant to open their wallets this time.

THE MONTH BY CHANNEL

The category failed to keep pace with its recent high seen online in March, but remained firmly in positive territory for the sixth consecutive month. In-store sales remained in growth for yet another month, at broadly the same rate for the second month in a row. The Online penetration rate increased by 0.3 percentage points from April 2022, to 60.7% this year.



Energy saving goods maintaining their popularity for yet another month



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COMPUTING

COMPUTING: UK TOTAL SALES CHANGE



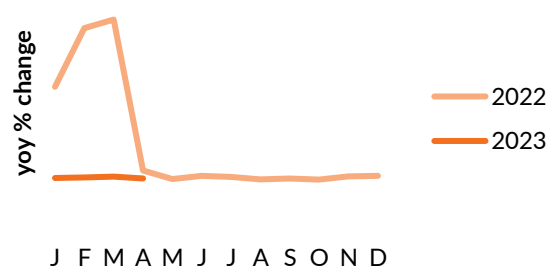
COMPUTING: ONLINE PENETRATION RATE



COMPUTING: ONLINE SALES CHANGE



COMPUTING: STORES SALES CHANGE



THE MONTH OVERALL

April marked the unenviable record of two full years since the category last saw any growth. The recent trajectory of improving performance with every passing month was definitely reversed in April, with Computing falling significantly further into decline, with the steepest rate since January. Although people are moving ever more towards office based working once again, any updates to people's laptops for work will now be returning to business purchases and away from retail.

THE MONTH BY CHANNEL

Online sales fell further into decline in April in line with the category overall, with the channel's steepest falling rate since January. In-store sales also followed suit in the month, falling into decline for the first time since February. The Online penetration rate fell by 1 percentage point from the same point last year, to 66.1% this time around, but the category remained the one with the highest proportion of sales made online, yet again.



The recent trajectory of improving performance with every passing month reversed in April



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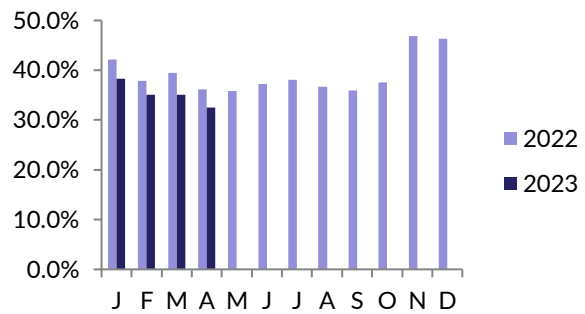
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OTHER NON-FOOD

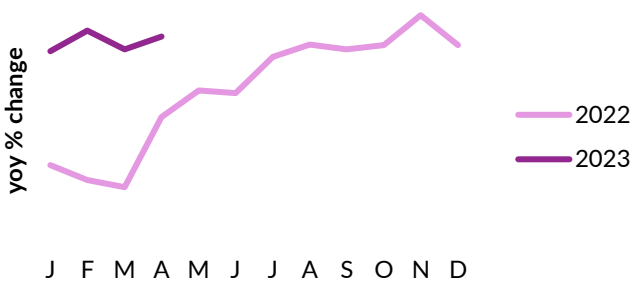
OTHER NON-FOOD**: UK TOTAL SALES CHANGE



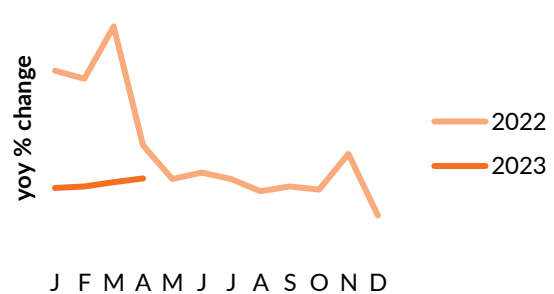
OTHER NON-FOOD**: ONLINE PENETRATION RATE



OTHER NON-FOOD**: ONLINE SALES CHANGE



OTHER NON-FOOD**: STORES SALES CHANGE



THE MONTH OVERALL

In April Other Non-Food sales improved considerably from the decline seen in March, but just missed making it back into growth. The spring weather at the beginning of the Easter holidays helped to drive demand for Gardening goods, albeit briefly. However, this was counteracted by the slump in travel goods, that had been popular in previous months.

“ The spring weather at the beginning of the Easter holidays helped to drive demand for Gardening goods ”

** 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 BY CHANNEL

Online sales continued to suffer for Other Non-Food, with the category now seeing a decline for the twenty-fifth consecutive month. In-store, the category’s improving trend continued once again, rising to its best growth rate since November. The Online penetration rate decreased by 3.6 percentage points from last year, to 32.6% in April.

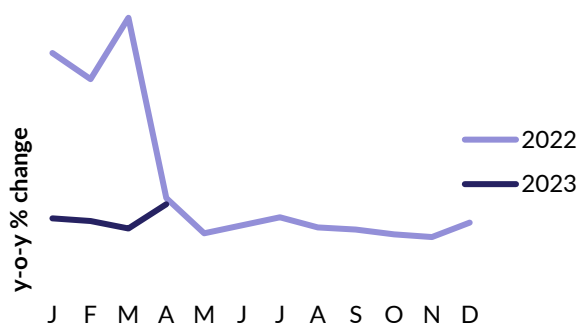
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OTHER NON-FOOD

Includes in particular:

Jewellery & Watches



Jewellery & Watches rose to the top of the growth rankings table in April, with particularly strong sales seen in the final two weeks of the month. Retailers in this sphere largely attributed this to stronger tourism levels in comparison to the same point last year, with central London and Edinburgh reportedly being the best performing regions of the country.

Electricals & Electronics

Audio & video equipment continued its poor run of form for yet another month, as the segment is still falling foul of its strong performances during earlier in the pandemic. Wearable tech, particularly in the fitness area, were said to see demand throughout the month, as people focussed on their health ahead of the summer.

Leisure Goods, Gaming, Books, CDs & DVDs

In line with the segment's recent impressive sales, Gaming was said to see strong demand, once again. This was mostly driven by the continued improvements in gaming console stock levels, but also in board games, as people were forced to entertain children indoors during the poorer spells of weather in the Easter holidays. Books were also said to sell well throughout the period, in contrast to their recent trajectory.

DEPARTMENT STORES

The brief spell of good weather at the beginning of the Easter holidays was said to drive attention towards Department Stores, as people were able to go to the shops as a family during the school break. However, it was not all good news for these retailers, as average sales values were said to wane from that seen earlier in the year. Increased tourism levels also helped those located in the more popular destination cities.

BRC – KPMG RETAIL SALES MONITOR APRIL 2023

Covering the four weeks 2 – 29 April 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		
June	6.7	10.4	-1.3	-1.0		
July	4.7	6.4	1.6	2.3		
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-Apr average	19.2	16.0	2.0	5.2	4.7	4.9
Jan-Dec average	8.9	9.9	1.8	3.1	n/a	n/a

Source: BRC-KPMG RSM (Includes Food data from IGD); Note (1) From April 2020, the LFL guidance was to exclude stores that were forced to close temporarily due to COVID-19 measures.

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
Feb – Apr 22	-1.8	1.8	0.1	-1.3	6.9	3.2
Mar – May	-1.3	-1.0	-1.1	-0.7	2.0	0.7
Apr – Jun	1.6	-4.2	-1.5	2.2	-3.3	-0.8
May – Jul	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

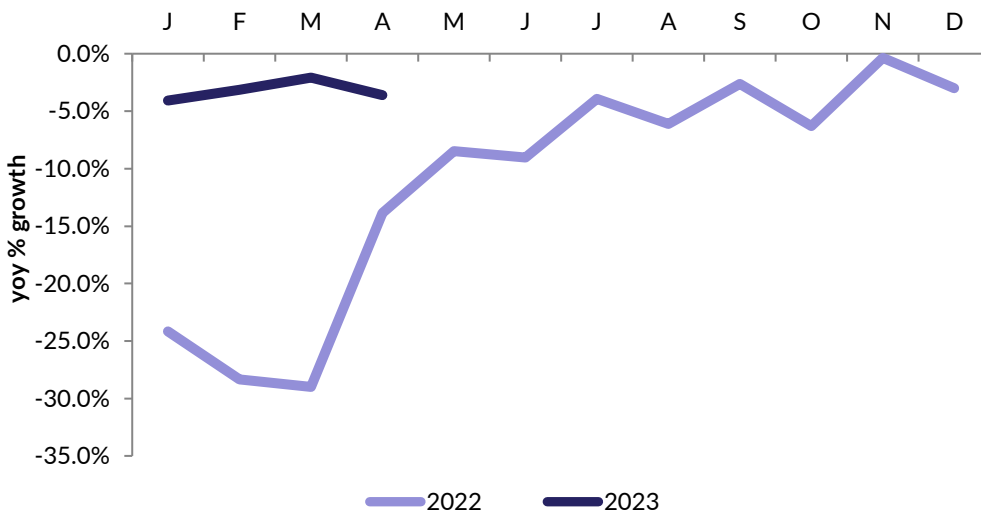
Source: BRC-KPMG RSM (Includes Food data from IGD)

(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 APRIL 2023

Covering the four weeks 2 – 29 April 2023

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

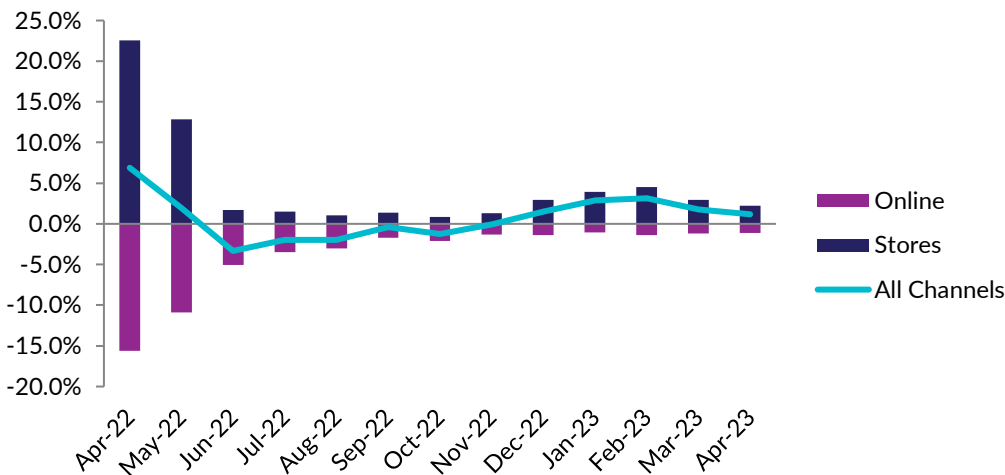


NON-FOOD GROWTH	ONLINE*	UK TOTAL
Apr 2023	-3.6%	n/d
Apr 2022	-13.9%	n/d
Mar 2023	-2.1%	n/d
3m avg	-2.9%	1.2%
12m avg	-4.4%	0.2%

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



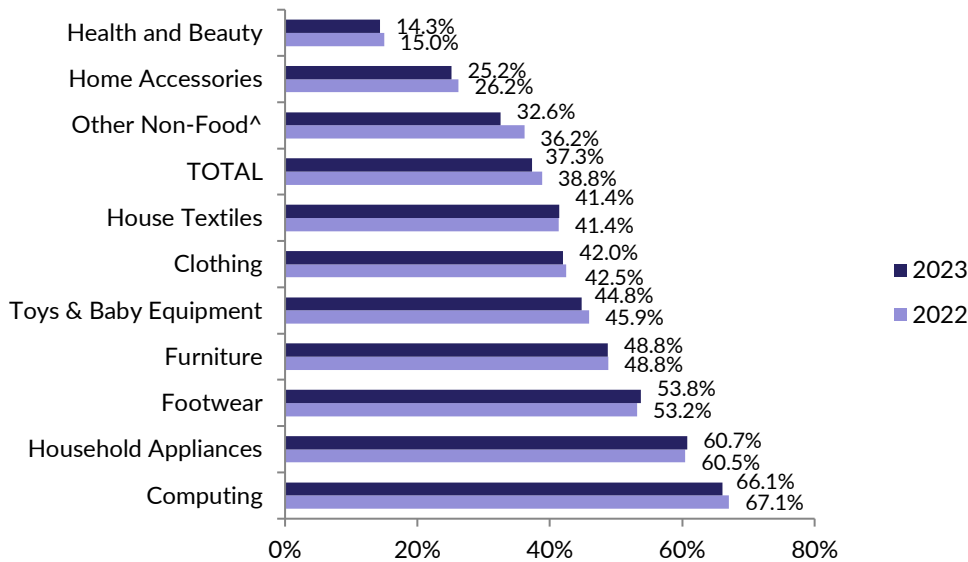
NON-FOOD IN-STORE % CHANGE YEAR-ON-YEAR		
	LFL	TOTAL
Feb - Apr 23	3.3%	3.9%
Feb - Apr 22	45.8%	59.3%
Jan - Mar 23	4.6%	5.2%
12m avg	2.8%	3.6%

Source: BRC-KPMG RSM

BRC – KPMG RETAIL SALES MONITOR APRIL 2023

Covering the four weeks 2 – 29 April 2023

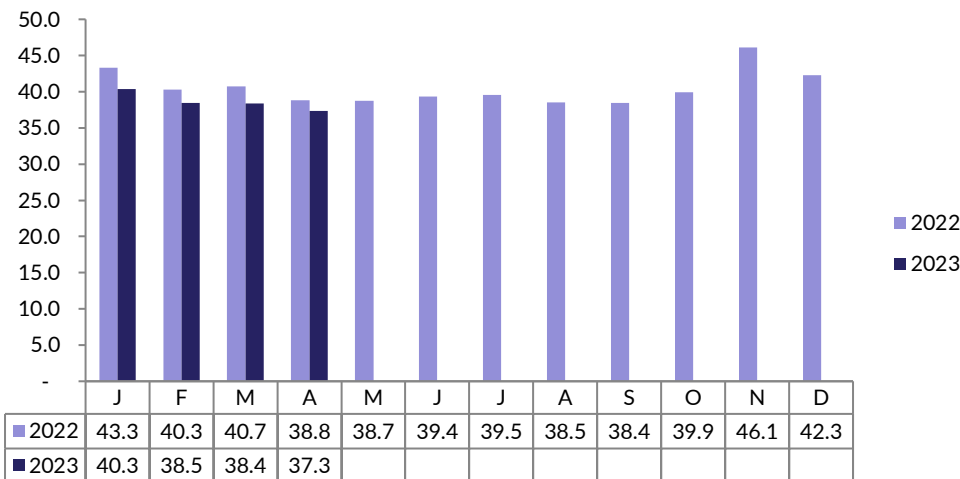
APR: ONLINE PENETRATION RANKINGS BY CATEGORY



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	
Apr 2023	37.3%
Apr 2022	38.8%
Mar 2023	38.4%
3m average	38.1%
12m average	39.8%

Source: BRC-KPMG RSM

BRC – KPMG RETAIL SALES MONITOR APRIL 2023

Covering the four weeks 2 – 29 April 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
Apr 2022	-13.9	-24.1	38.8	40.0	-6.9	-15.6
May	-8.5	-18.0	38.7	39.5	-4.1	-10.9
Jun	-9.1	-10.3	39.4	39.0	-4.4	-5.1
Jul	-3.9	-7.3	39.5	39.2	-1.7	-3.5
Aug	-6.1	-6.6	38.5	39.1	-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

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
Apr 2022	59.3%	45.8%
May	31.5%	24.1%
Jun	2.2%	0.6%
Jul	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%

Source: BRC-KPMG Retail Sales Monitor

BRC – KPMG RETAIL SALES MONITOR APRIL 2023

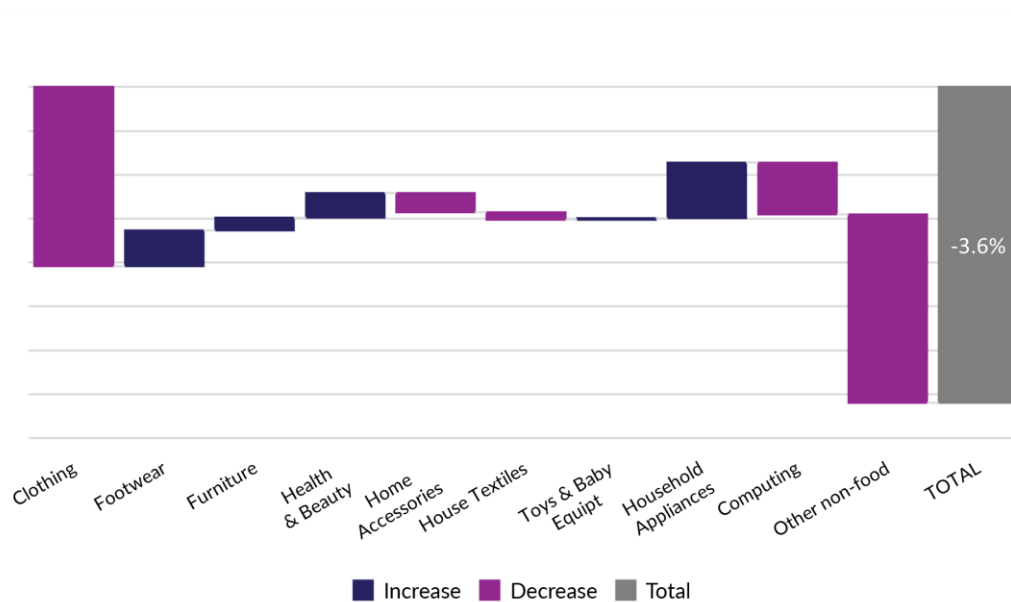
Covering the four weeks 2 – 29 April 2023

SECTOR PERFORMANCE: ONLINE SALES GROWTH

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

Source: BRC-KPMG RSM

APR: CONTRIBUTION TO NON-FOOD ONLINE SALES GROWTH BY CATEGORY



Source: BRC-KPMG RSM

BRC – KPMG RETAIL SALES MONITOR APRIL 2023

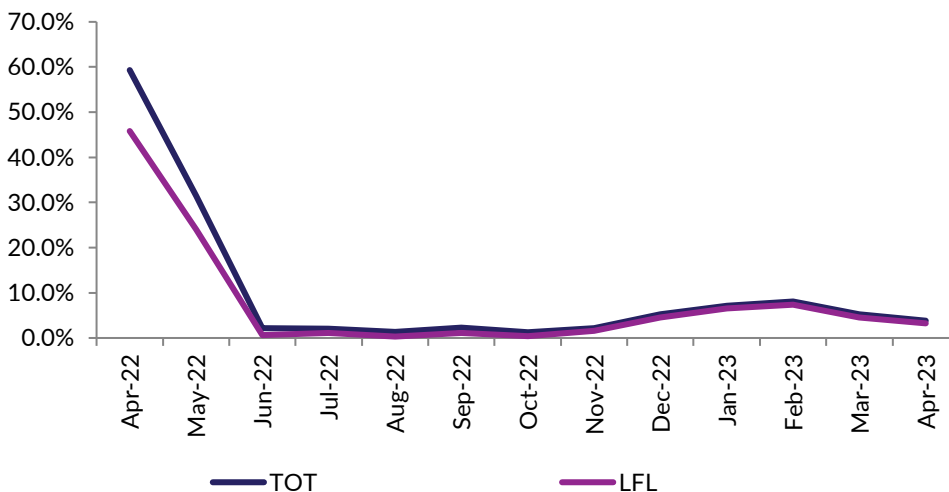
Covering the four weeks 2 – 29 April 2023

SECTOR PERFORMANCE: STORE TOTAL SALES GROWTH

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

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 APRIL 2023

Covering the four weeks 2 – 29 April 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 APRIL 2023

Covering the four weeks 2 – 29 April 2023

MEDIA ENQUIRIES

British Retail Consortium

The Form Rooms,
22 Tower Street,
London WC2H 9NS

T 020 7854 8900

W www.brc.org.uk

Tom Holder

Media Relations Officer

T 0207 854 8924

M 0777 52382432

E tom.holder@brc.org.uk

KPMG

15 Canada Square
London
E14 5GL

T 020 7311 1000

W www.kpmg.co.uk

Emma Murray

PR Manager

T 0207 694 6506

M 07920 870 623

E emma.murray@kpmg.co.uk

IGD

Grange Lane
Letchmore Heath
Watford,
WD25 8GD

T 01923 857141

W www.igd.com

Laura John,

Corporate Communications Manager

T 01923 851986

M 07453 018505

E Laura.John@igd.com

The May 2023 Monitor, covering the four weeks 30 April – 27 May 2023, will be released at 00.01am on Tuesday 6 June 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.

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BRC – KPMG RETAIL SALES MONITOR APRIL 2023

Covering the four weeks 2 – 29 April 2023

British Retail Consortium

The Form Rooms, 22 Tower Street,
London WC2H 9NS

T 020 7854 8900

W www.brc.org.uk

AUTHORS

James Hardiman,
Senior Analyst

T 0207 854 8970

E James.Hardiman@brc.org.uk

Tina Spooner,
Strategic Insight Manager

T 0207 854 8960

E Tina.Spooner@brc.org.uk

EDITOR

Kris Hamer,
Insight Director

M: +44 (0)7557 231 991

E kris.hamer@brc.org.uk



**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,
please contact:

Tina Spooner
0207 854 8960

tina.spooner@brc.org.uk