

# CLOTHING AND BACK TO SCHOOL SALES DRIVE AUGUST GROWTH

Covering the four weeks 1 – 28 August 2021

Strictly Embargoed until 00.01 hrs – Tuesday 7<sup>th</sup> September 2021

## AUG: LIKE-FOR-LIKE RETAIL SALES

% change year-on-year

# 1.5%

In August, UK retail sales increased 1.5% on a Like-for-like basis from August 2020, when they had increased 4.7% from the preceding year. In August, Like-for-like has been measured EXCLUDING temporarily closed stores but including Online sales.

## AUG: TOTAL RETAIL SALES

% change year-on-year

# 3.0%

On a Total basis, sales increased by 3.0% in August, against a growth of 3.9% in August 2020. This is below the 3-month average growth of 6.9% and the 12-month average growth of 10.3%.

## JUN – AUG: NON-FOOD LFL IN-STORE GROWTH

% change year-on-year

# 16.7%

Over the three months to August, In-Store sales of Non-Food items grew 23.7% on a Total basis and increased 16.7% on a Like-for-like basis. The Total growth was above the 12-month average of 21.7%.

## JUN – AUG: TOTAL FOOD

% change year-on-year

# 2.9%

Over the three months to August, Food sales increased 1.9% on a Like-for-like basis and increased 2.9% on a Total basis. This is below the 12-month Total average growth of 5.4%. For the month of August, Food was in growth year-on-year.

## JUN – AUG: TOTAL NON-FOOD

% change year-on-year

# 10.3%

Over the three-months to August, Non-Food retail sales increased by 6.8% on a like-for-like basis and 10.3% on a Total basis. This is below the 12-month Total average growth of 14.4%. For the month of August, Non-Food was in growth year-on-year.

## AUG: NON-FOOD ONLINE GROWTH

% change year-on-year

# -4.6%

Online Non-Food sales decreased by 4.6% in August, against a growth of 42.4% in August 2020. This is below the 3-mth average decline of 3.5%. Non-Food Online penetration rate decreased from 39.3% in August 2020 to 38.3% this August.



## BRC – KPMG RETAIL SALES MONITOR AUGUST 2021

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Covering the four weeks 1 – 28 August 2021

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

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“As the post-lockdown pent-up demand has mellowed, the growth in retail sales we have seen over the past few months slowed for August. Despite this, the month still saw growth above pre-pandemic levels, as rising consumer confidence and footfall levels led to a boost in in-store sales. With wedding season in full swing and many workers gradually returning to the office, formalwear was a strong performer. Additionally, the bank holiday weekend and back-to-school buzz contributed to the rise in non-food sales. While online sales have begun to slow, they were still high, demonstrating how the pandemic has shifted the digital-physical shopping balance.

“With demand waning, combined with a precarious economic backdrop and retailers grappling with higher costs across the supply chain, the number of shuttered stores in the UK will continue to rise. The current broken business rates system is yet another burden on retailers, and Government must support retailers and deliver on its promise in the business rates review to reduce the overall burden of tax to sustainable levels. Without such intervention, we could see many retail businesses shut shop, thousands of jobs lost, and the heart of our communities gone.”



**Don Williams, Retail Partner | KPMG**

“Much like the summer weather retail performance in August was mixed. Sales growth on the high street continued to slow, with footfall still below pre-pandemic levels and online sales took a retreat from the highs of last year, whilst some discretionary non-food categories continued their recovery.

“Overall, the high street saw 3% growth, dented by lower food sales growth of 1.9% as consumers enjoyed a fully re-opened hospitality sector. Online sales fell back by -2.5% compared to August 2020, though online penetration rates remained significantly above pre-pandemic levels, signalling the step up in online shopping is here to stay. Clothing, footwear and accessories continued their recovery with some healthy sales increases but from a much lower base, whilst technology and furniture/appliance categories suffered against very strong comparatives in 2020.

“With the retail recovery showing signs of slowing, the sector is expected to grow at a more muted rate as retailers face increasing challenges on a number of fronts. Inflation is expected to accelerate putting pressure on household spending, whilst retailers battle for share of wallet as consumers spend money on leisure, entertainment and travel. Staffing pressures remain and supply chain issues are being widely reported, with raw material shortages and challenges getting product into the UK and getting goods into customers' hands. This may feed into limited availability of certain products and the spectre of price rises remains.

“Retailers will be pinning their hopes on a more predictable normal with white collar workers returning to city centres in greater numbers from this month and a buoyant Christmas fuelled by some of the savings that consumers have made over the last 18 months of lockdown and restricted spending. Nonetheless, successful retailers will have to work very hard to ensure the right availability of the right product to satisfy the requirements of an ever more demanding customer.”



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

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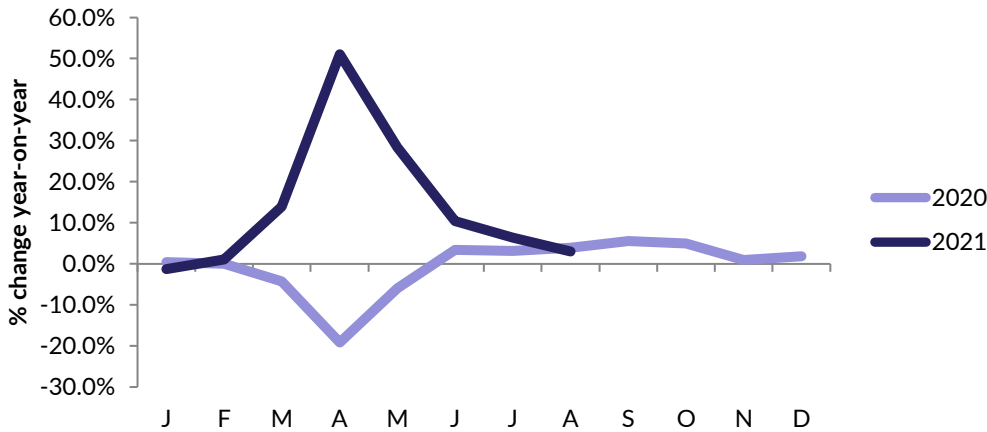
“Food and drink sales in August were broadly flat on 2020's performance, with some spending switching from retail back into the out-of-home sector. Despite sales being limited by the dull weather, they were supported by staycations and the late summer Bank Holiday, which helped sales show a small amount of growth.

“IGD's Shopper Confidence Index remained strong, continuing to hit one of the highest levels in the last five years. However, concern around inflation continues, with IGD's [ShopperVista](#) revealing that 79% of shoppers expect food and grocery prices to get more expensive in the year ahead, up from 75% in July '21. With much of the economy now open, more shoppers are changing what they spend their money on; some 73% have spent more on products and services in August, compared to 69% in June'21 and 31% are spending more on eating and drinking out, compared to 22% in June'21.”

## BRC – KPMG RETAIL SALES MONITOR AUGUST 2021

Covering the four weeks 1 – 28 August 2021

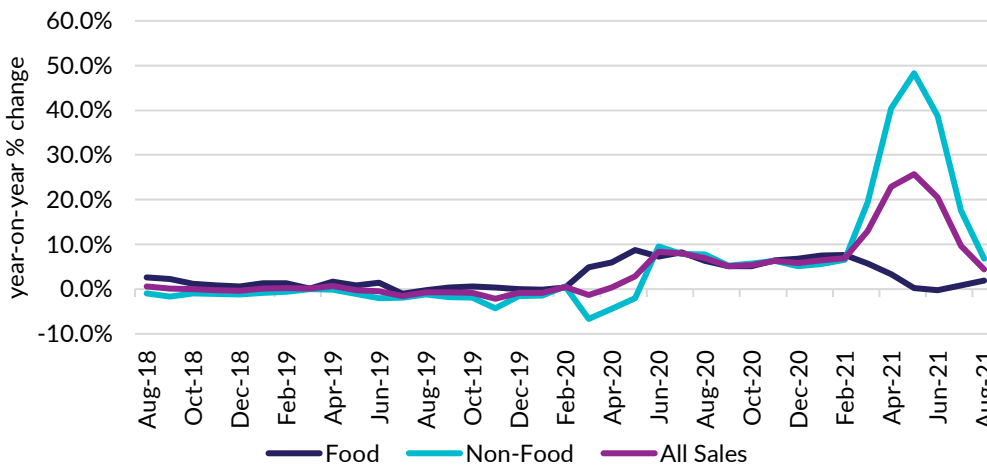
### MONTHLY GROWTH OF TOTAL RETAIL SALES



	LFL	TOTAL
Aug 2021	1.5%	3.0%
Aug 2020	4.7%	3.9%
Jul 2021	4.7%	6.4%
3m average	4.5%	6.9%
12m average	10.9%	10.3%

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	1.9%	2.9%
Non-food	6.8%	10.3%
All Sales	4.5%	6.9%

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 AUGUST 2021

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Covering the four weeks 1 – 28 August 2021

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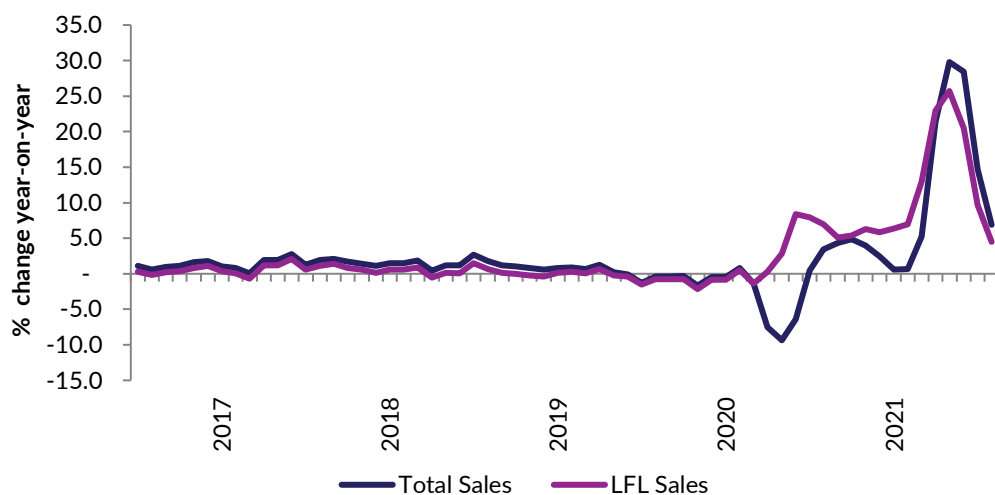
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## BRC – KPMG RETAIL SALES MONITOR AUGUST 2021

Covering the four weeks 1 – 28 August 2021

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



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

### OVERVIEW

As reported last month, now that we are comparing against the post-lockdown period from last summer, we are moving back towards analysing retail sales primarily on a year-on-year basis as stores were open both in this and last August. However, year-on-two-year comparisons are still useful in certain circumstances, which will be clearly signposted in this report.

Following the slowdown in retail sales growth recorded in July, the trend continued during August with total sales growing 3.0% on a year-on-year basis. This is the weakest year-on-year performance recorded since February this year and compares with a flat performance in August 2020. The three-month average growth from June to August reached just 6.9%, down from an average of 14.7% in the three-month period to July. While there are signs of 'normality' returning, retail growth rates continue to be higher than pre-pandemic levels, with last month's growth up 8.9% compared with August 2019. Growth in Non-Food also slowed during August, resulting in a three-month average rate of 10.3% on a Total basis.

It was reported that in-store sales were strong over the Bank Holiday weekend, with the cooler weather helping to boost sales as consumers ventured out to the shops, rather than spend time on leisure activities. The Clothing and Footwear categories were, once again, the strongest performers, with formalwear reportedly doing well during the month, especially mens suits, boosted by the return to office working and social events. Back to School sales were also strong, with signs of 'normal' trading patterns as sales peaked at the end of August.

Following a return to growth in online sales in July, during August sales fell back into decline falling 4.6% year-on-year. Conversely, it was reported that in-store footfall and sales picked up, boosted by Back-to-School purchases and the return of office workers. Looking at the performance of In-store sales growth on a 2-year basis, this was only marginally below the level recorded August 2019, another sign that 'normal' trading patterns are resuming.

Tina Spooner, Insight Project Specialist

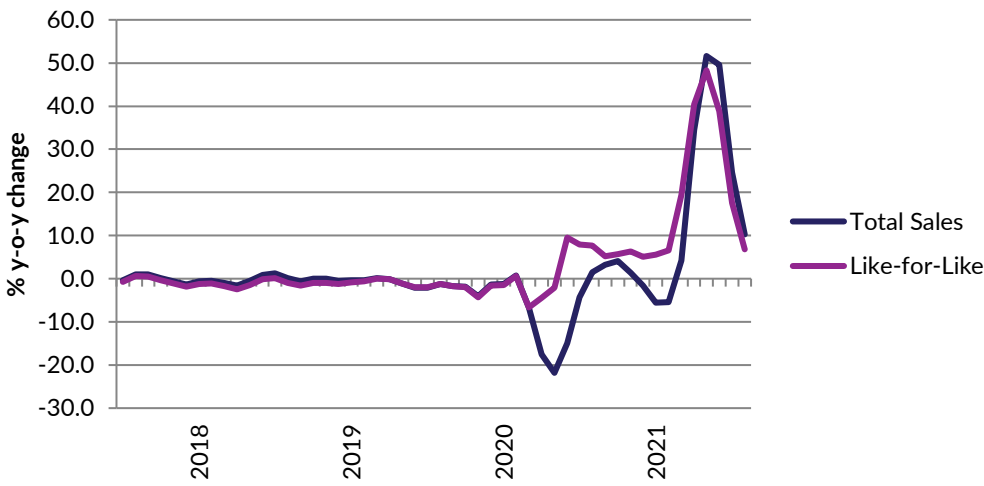
## BRC - KPMG RETAIL SALES MONITOR AUGUST 2021

Covering the four weeks 1 - 28 August 2021

### FOOD SALES: 3-MONTH AVERAGE



### NON-FOOD SALES: 3-MONTH AVERAGE



Source: BRC-KPMG RSM

## BRC – KPMG RETAIL SALES MONITOR AUGUST 2021

Covering the four weeks 1 – 28 August 2021

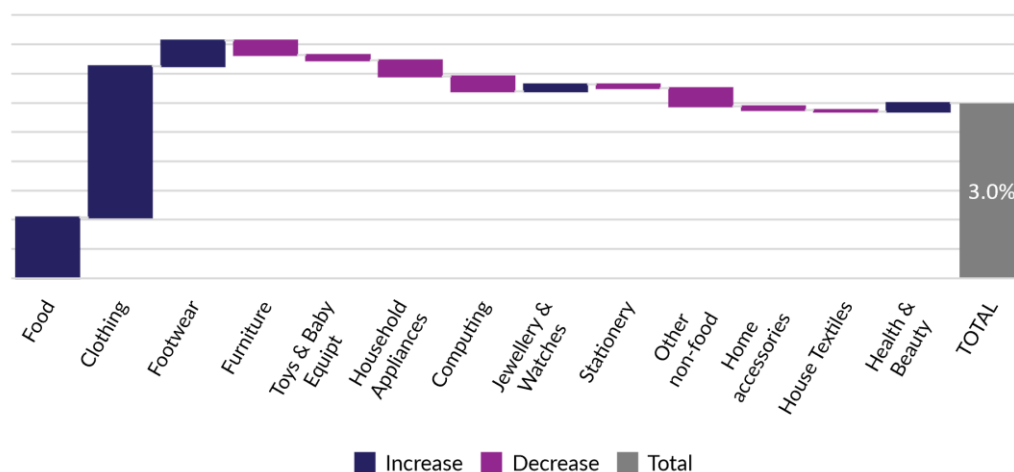
### PERFORMANCE BY CATEGORY

By Tina Spooner, Insight Project Specialist

CATEGORY	UP / DOWN AUG-20		RANKINGS (TOTAL SALES)				
	LFL	TOT	AUG-21	JUL-21	AUG-20	3M AVG	12M AVG
Clothing	▲	▲	1	1	11	1	3
Footwear	▲	▲	2	2	13	2	8
Jewellery & Watches	▲	▲	3	3	9	3	1
Food	▲	▲	4	4	7	5	10
Health and Beauty	▼	▲	5	5	10	4	11
Other Non-Food	▼	▼	6	7	3	6	4
House Textiles	▼	▼	7	9	6	8	7
Home Accessories	▼	▼	8	11	5	11	5
Furniture	▼	▼	9	12	4	7	2
Stationery	▼	▼	10	8	12	9	12
Toys & Baby Equipment	▼	▼	11	10	8	12	13
Household Appliances	▼	▼	12	6	2	10	6
Computing	▼	▼	13	13	1	13	9

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

### AUG: CONTRIBUTION TO TOTAL SALES GROWTH BY CATEGORY - UPDATE CHART



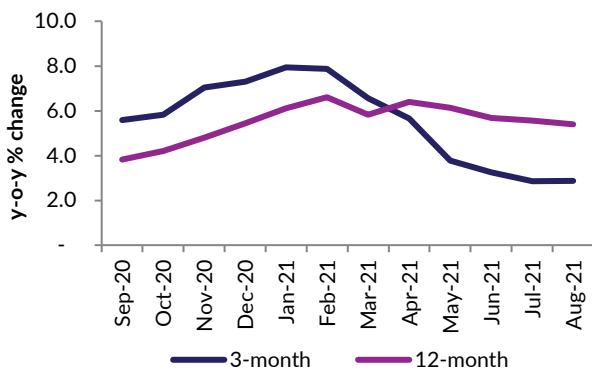
Source: BRC-KMG RSM (Includes Food data from IGD); in this chart, purple blocks represent negative contributions

## BRC – KPMG RETAIL SALES MONITOR AUGUST 2021

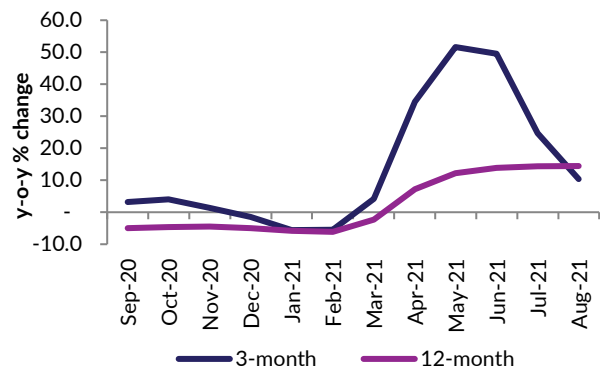
Covering the four weeks 1 – 28 August 2021

### FOOD

TOTAL SALES ROLLING AVERAGE GROWTH: FOOD



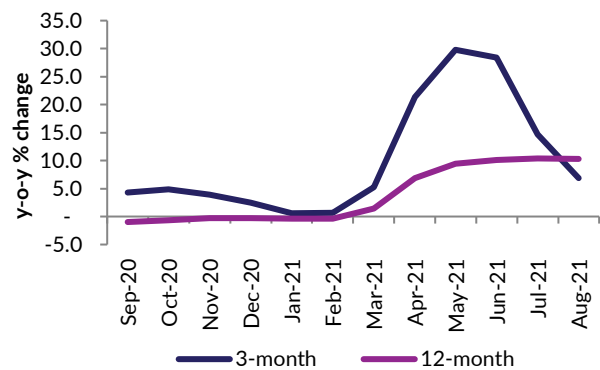
TOTAL SALES ROLLING AVERAGE GROWTH: NON-FOOD



### FOOD

Over the 3 months to August, Food sales increased 1.9% year-on-year on a Like-for-like basis and grew 2.9% on a Total basis (the same increase as in July), compared with the same period in 2020. The Total 3-month average performance remained identical to the 2.9% in the previous month, however, it should be noted this is on the back of particularly strong growth in the period June to August 2020 when sales were up 5.9% year-on-year. Poor weather throughout most of the month does not seem to have dampened demand.

TOTAL SALES ROLLING AVERAGE GROWTH: UK



“

The three-month average growth rates continue to slow on an annual basis.

”



## BRC – KPMG RETAIL SALES MONITOR AUGUST 2021

Covering the four weeks 1 – 28 August 2021

### CLOTHING

CLOTHING: UK TOTAL SALES CHANGE



CLOTHING: ONLINE PENETRATION RATE



CLOTHING: ONLINE SALES CHANGE



CLOTHING: STORES SALES CHANGE



#### THE MONTH OVERALL

Clothing sales continued their strong recovery in August. Men's and women's formalwear and workwear was said to have improved, driven by weddings and much of the country returning to office-based working. This was not consistent across all retailers, however. Back to school sales were not as strong as expected, mostly due to availability issues and challenges within the supply chain.

#### THE MONTH BY CHANNEL

Growth in Online Clothing sales slowed marginally both on an annual basis and compared with the same month in 2019. Online sales of both menswear and womenswear slowed, while sales of casualwear were stronger online in womenswear. The Online Penetration rate has remained stable since April, with the average rate in July reaching 45.4%, down 0.9 percentage points from the same month last year.

Back to school sales were not as strong as expected, mostly due to availability issues and challenges within the supply chain.

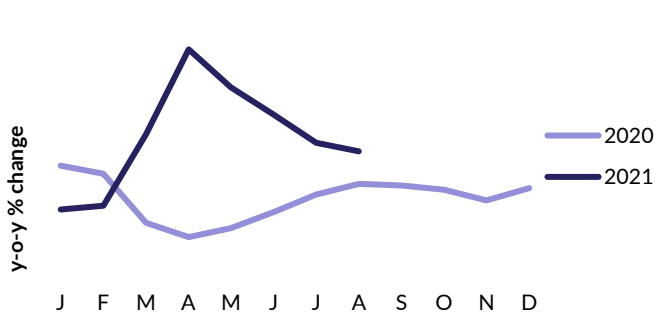


## BRC – KPMG RETAIL SALES MONITOR AUGUST 2021

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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

Footwear sales recorded a solid year-on-year performance in August, albeit representing a slight slowdown from 2020. Women’s footwear continues to outperform Men’s, while Children’s footwear slipped into negative territory. It was said that sales of men’s formal shoes picked up with the slow return towards office-based working, albeit with many only going back part-time.

#### THE MONTH BY CHANNEL

Online Footwear sales slowed substantially in August on an annual basis, compared with the same month last year, but remained strong compared with pre-pandemic levels. The Online Footwear Penetration rate declined month on month, but remained higher year on year, reaching 48.3% in August. This is up 3.0 percentage points from the same month last year.



The Online Footwear Penetration rate declined month on month, but remained higher year on year, reaching 48.3% in August.



## BRC – KPMG RETAIL SALES MONITOR AUGUST 2021

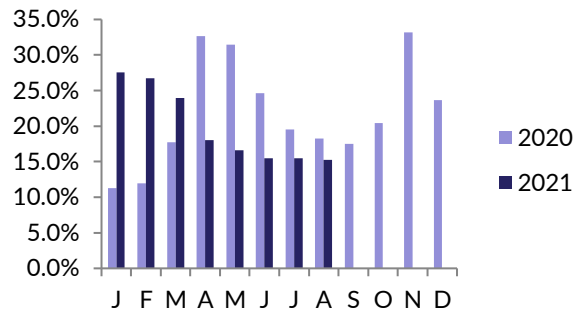
Covering the four weeks 1 – 28 August 2021

### 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



#### THE MONTH OVERALL

The Health & Beauty category continues to perform below pre-pandemic levels. For the second consecutive month since the start of the Covid crisis, sales of beauty products outperformed health-related goods on a year-on-year basis. This is in part due to the re-opening of stores, facilitating in person testing, and the category seeing a boost due to an increase in social activity and office working. Sales of make-up and fragrance were said to have performed well during the month.

#### THE MONTH BY CHANNEL

Sales growth in August continues to be well ahead of pre-pandemic levels. The Online penetration rate fell marginally when compared to the previous month at 15.2% in August, down 3.0 percentage points from the same month last year.



Sales of make-up and fragrance were said to have performed well during the month.



## BRC – KPMG RETAIL SALES MONITOR AUGUST 2021

Covering the four weeks 1 – 28 August 2021

### FURNITURE

FURNITURE: UK TOTAL SALES CHANGE



FURNITURE: ONLINE PENETRATION RATE



FURNITURE: ONLINE SALES CHANGE



FURNITURE: STORES SALES CHANGE



#### THE MONTH OVERALL

Furniture sales picked up marginally but remain down year on year, albeit against a record year when consumers' focus turned to improving their homes during the early days of the pandemic. Despite supply chain issues continuing for some retailers, in August sales continued to see solid double-digit growth on a 2-year basis. As more workers return to offices, it is no surprise that sales of home office furniture slowed further in August, with more spend being diverted towards living, dining and bedroom furniture. The GfK Consumer Confidence Index for Major Purchases fell by 5 points, to -3 in August.

#### THE MONTH BY CHANNEL

Online sales were in decline for the third month in a row, following record growth seen at the beginning of the year. The Online Penetration rate in the Furniture category has remained stable since April, with the average rate in August reaching 45.4%. This is 1.2 percentage points lower than the rate recorded in July 2020.



Online sales were in decline for the third month in a row, following record growth seen at the beginning of the year.



## BRC – KPMG RETAIL SALES MONITOR AUGUST 2021

Covering the four weeks 1 – 28 August 2021

### HOME ACCESSORIES

HOME ACCESSORIES: UK TOTAL SALES CHANGE



HOME ACCESSORIES: ONLINE PENETRATION RATE



HOME ACCESSORIES: ONLINE SALES CHANGE



HOME ACCESSORIES: STORES SALES CHANGE



#### THE MONTH OVERALL

The Home Accessories category recorded a slowdown in growth on a 2-year basis for the third consecutive month, while the year-on-year performance also recorded a decline from the same month last year. The decline in Home Accessories is hardly surprising, as the focus of many consumers has shifted from home centrality to social activities this year.

#### THE MONTH BY CHANNEL

Online sales of Home Accessories continued to see substantial declines year-on-year during August, when compared with the strong performance in the same month last year. However, on a 2-year basis, the August performance is up significantly on pre-pandemic growth levels. The Online Penetration rate for Home Accessories remained stable in August at 24.6%, down 4.6 percentage points compared with the same month last year. This is in line with the average rates recorded since April this year.

“The decline in Home Accessories is hardly surprising, as the focus of many consumers has shifted from home centrality to social activities this year.”

## BRC – KPMG RETAIL SALES MONITOR AUGUST 2021

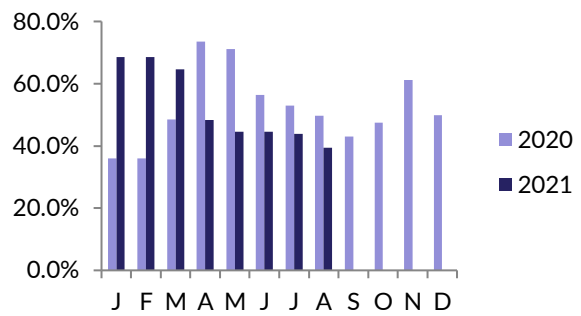
Covering the four weeks 1 – 28 August 2021

### HOUSE TEXTILES

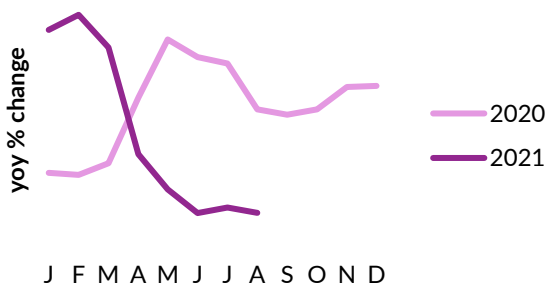
HOUSE TEXTILES: UK TOTAL SALES CHANGE



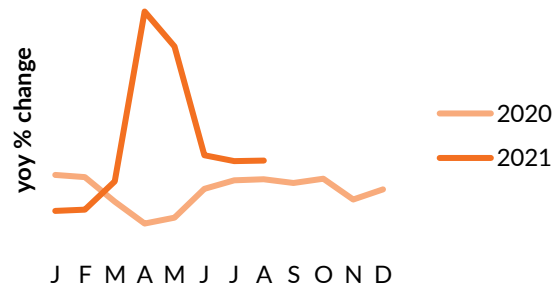
HOUSE TEXTILES: ONLINE PENETRATION RATE



HOUSE TEXTILES: ONLINE SALES CHANGE



HOUSE TEXTILES: STORES SALES CHANGE



#### THE MONTH OVERALL

This category followed a similar trend to Home Accessories in August, with the year-on-year performance in line with that observed in July, recording a slight decline in sales. However, on a 2-year basis, sales are ahead of pre-pandemic growth levels.

#### THE MONTH BY CHANNEL

The Online performance of House Textiles continued to decline year-on-year during August, the decrease was slightly steeper than the average rate observed in July. The Online Penetration rate for House Textiles reached 39.5% in August, down 10.2 percentage points from the average rate recorded in the same month last year.



The Online performance of House Textiles continued to decline year-on-year during August



## BRC – KPMG RETAIL SALES MONITOR AUGUST 2021

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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

Following an improvement in sales performance in July, the Toys & Baby Equipment category recorded a weaker performance during August. While retailers continued to report sales of nursery items and baby equipment remained strong – perhaps signs of a predicted baby boom following the lockdowns during the pandemic – sales of Toys fared less well during the month.

#### THE MONTH BY CHANNEL

Since April we have seen the decline in Online sales ease each month, against last year's strong growth rates. However, in August the improvement stalled with the annual decline unchanged from the previous month. On a 2-year basis Online sales were slightly ahead of pre-pandemic levels. However, in-store sales remain significantly below the average rates recorded in 2019. The Online penetration rate decreased by 7.5 percentage points from the same month last year, to 46.3% in August.



Baby equipment and nursery items continue to sell well, while Toys fared less well during August

## BRC – KPMG RETAIL SALES MONITOR AUGUST 2021

Covering the four weeks 1 – 28 August 2021

### 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

Following a return to growth in July, once again, this category fell into decline during August. The significant decrease in sales is the weakest year-on-year performance recorded since we began tracking this category in November 2014. It was reported that the cooler temperatures in August had a negative impact on the seasonable uplift typically seen in refrigeration products at this time of the year. Demand for fans and air-conditioning units was also said to be below typical levels at this time of the year.

#### THE MONTH BY CHANNEL

In-store sales of household appliances remains in decline, when compared with the more normal trading conditions in 2019. For the fourth consecutive month, Online sales were also in decline, with the August level reaching a record low. The Online penetration rate decreased by 3.8 percentage points from August last year but remained the highest of all categories this year with 67.6% of sales completed Online.



Sales reached a record low due to the unseasonably cool weather affecting sales of refrigeration products, fans and air-conditioning units



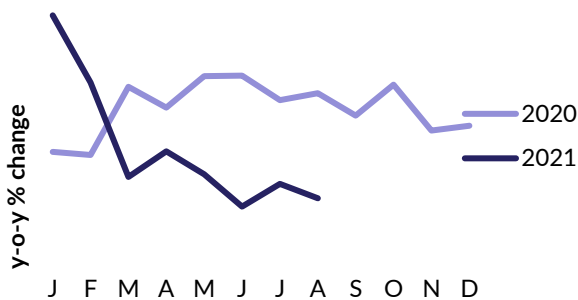


## BRC – KPMG RETAIL SALES MONITOR AUGUST 2021

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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

For the fourth consecutive month the Computing category recorded a year-on-year decline in sales, with August seeing a steeper decrease compared with the previous month. While sales continue to perform ahead of pre-pandemic levels, growth slowed to the lowest level recorded year-to-date. It was reported demand for laptops for back to college and university students was down, perhaps due to more students taking virtual classes at home rather than onsite.

#### THE MONTH BY CHANNEL

The decline in Online sales was also steeper in August compared with the previous month, while In-store sales were well below the levels seen before the crisis began but ahead of the performance recorded in August last year. The Online penetration rate decreased by 3.7 percentage points from August last year, to 67.4%.



Demand for back to university and college laptops fell during August



## BRC – KPMG RETAIL SALES MONITOR AUGUST 2021

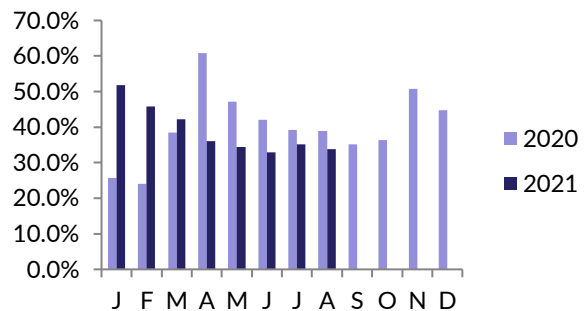
Covering the four weeks 1 – 28 August 2021

### 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



\*\* 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

Following two consecutive months of growth, this category fell into decline on a year-on-year basis. However, Other Non-Food sales continue to perform well above the growth levels recorded before the pandemic hit, boosted by the continuing strong demand for TVs and Gaming.



Strong demand for TVs and Gaming continued last month



#### THE MONTH BY CHANNEL

Following an acceleration of In-store growth during July, sales of Other Non-Food slowed significantly last month but remained in growth compared with August last year. Online sales declined at a steeper level than that observed in July. The Online penetration rate increased by 2.9 percentage points from the same month in 2020, to 37.5%.

## BRC – KPMG RETAIL SALES MONITOR AUGUST 2021

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### OTHER NON-FOOD

Includes in particular:

#### Jewellery & Watches



Jewellery & Watches continues to perform well, although year-on-year growth slowed from the previous month. However, when compared with the performance in the same month in 2019, sales are still ahead of pre-pandemic levels.

#### Electricals & Electronics

Once again, TVs and Gaming consoles performed well, with the latter boosted by demand for the latest PlayStation 5 console, aided by more stock availability. While demand for TVs continued in August, it was reported that panel shortages for small screen models resulted in availability challenges.

#### Leisure Goods, Gaming, Books, CDs & DVDs

While Sports and Fitness performed well during August, both online and in stores, this was very much driven by sports apparel rather than demand for equipment. There was reportedly a slight uplift in demand for Travel items, including luggage, as consumers increasingly start to venture abroad on holidays.

### DEPARTMENT STORES

Department Stores saw a boost during August as consumer confidence continued to increase with the return of 'normality', as more workers returned to the office and domestic tourism drove footfall in city centres. Stores reported strong sales over the Bank Holiday weekend, boosted by the cooler weather as more consumers chose shopping over leisure activities with the lack of sunshine. Back to School shoppers also provided a boost to Department Stores, however, it was reported that while demand was strong, availability issues hampered sales for some retailers.

## BRC – KPMG RETAIL SALES MONITOR AUGUST 2021

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

MONTH	2019		2020		2021	
	LFL	TOTAL	LFL	TOTAL	LFL	TOTAL
January	1.8	2.2	0.0	0.4	7.1	-1.3
February	-0.1	0.5	-0.4	0.1	9.5	1.0
March	-1.1	-0.5	-3.5	-4.3	20.3	13.9
April	3.7	4.1	5.7	-19.1	39.6	51.1
May	-3.0	-2.7	7.9	-5.9	18.5	28.4
June	-1.6	-1.3	10.9	3.4	6.7	10.4
July	0.1	0.3	4.3	3.2	4.7	6.4
August	-0.5	0.0	4.7	3.9	1.5	3.0
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-Aug average	-0.2	0.3	3.6	-2.1	13.5	14.0
Jan-Dec average	-0.5	-0.1	4.4	-0.3	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
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
Apr – Jun	-0.2	38.8	20.5	3.2	49.6	28.4
May – Jul	0.8	17.6	9.7	2.9	24.6	14.7
Jun – Aug	1.9	6.8	4.5	2.9	10.3	6.9

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 AUGUST 2021**

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Covering the four weeks 1 - 28 August 2021

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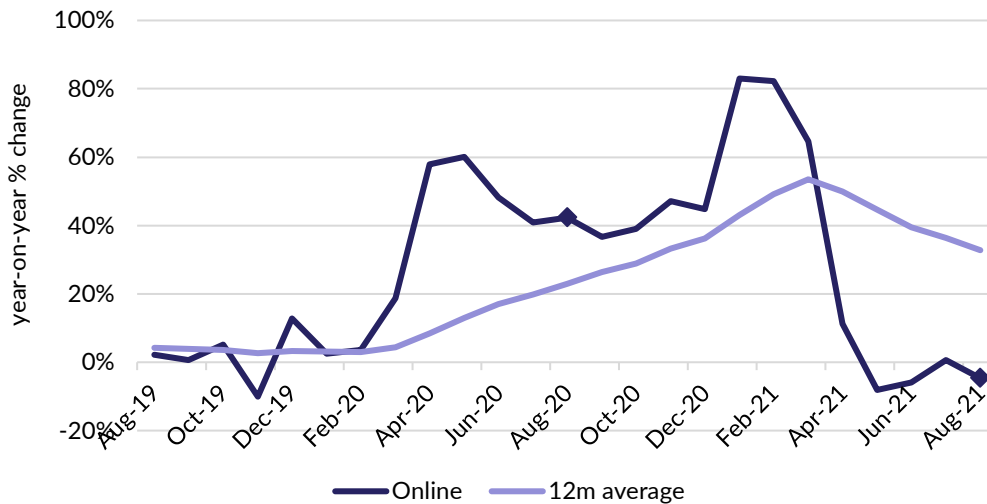
# **ONLINE VERSUS STORE DATA**

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## BRC - KPMG RETAIL SALES MONITOR AUGUST 2021

Covering the four weeks 1 - 28 August 2021

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

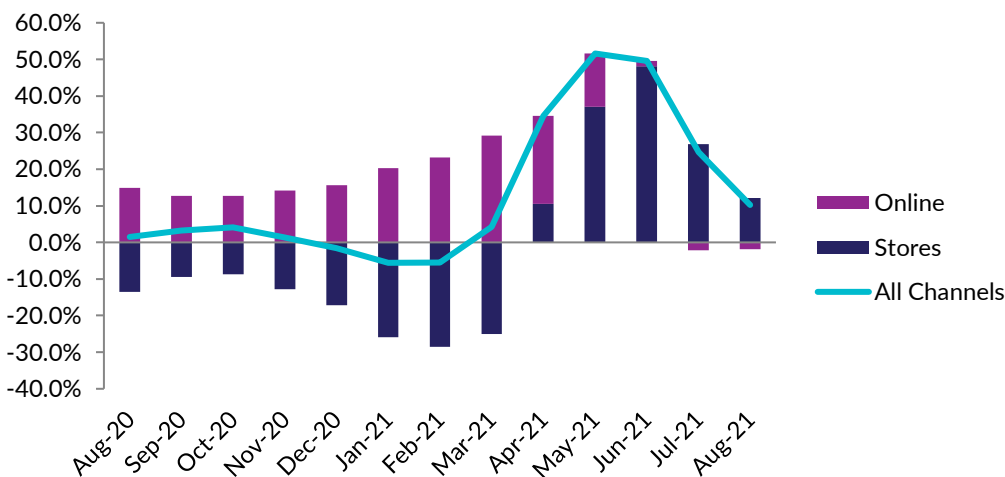


NON-FOOD GROWTH	ONLINE*	UK TOTAL
Aug 2021	-4.6%	n/d
Aug 2020	42.4%	n/d
Jul 2021	0.6%	n/d
3m avg	-3.5%	10.3%
12m avg	32.8%	14.4%

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
Jun - Aug 21	16.7%	23.7%
Jun - Aug 20	-8.5%	-17.8%
May - Jul 21	48.1%	64.9%
12m avg	22.3%	21.7%

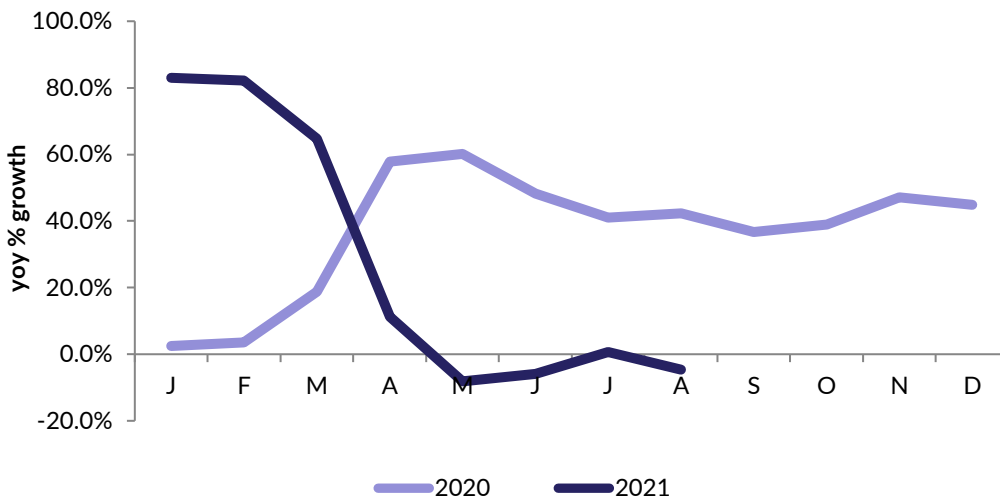
Source: BRC-KPMG RSM

## BRC - KPMG RETAIL SALES MONITOR AUGUST 2021

Covering the four weeks 1 - 28 August 2021

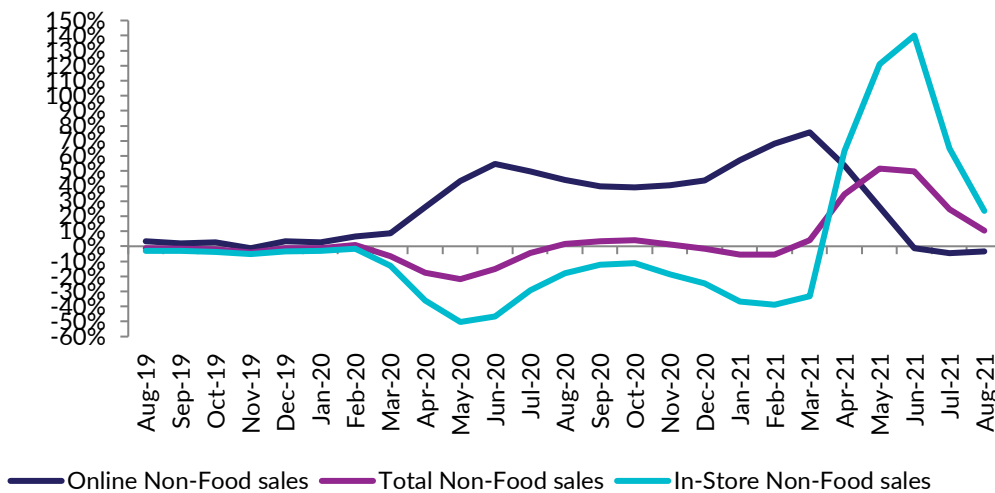
### BRC-KPMG NON-FOOD RETAIL SALES YEAR-ON-YEAR GROWTH:

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



Source: BRC-KPMG RSM

### 3M ROLLING AVERAGE GROWTH OF NON-FOOD SALES

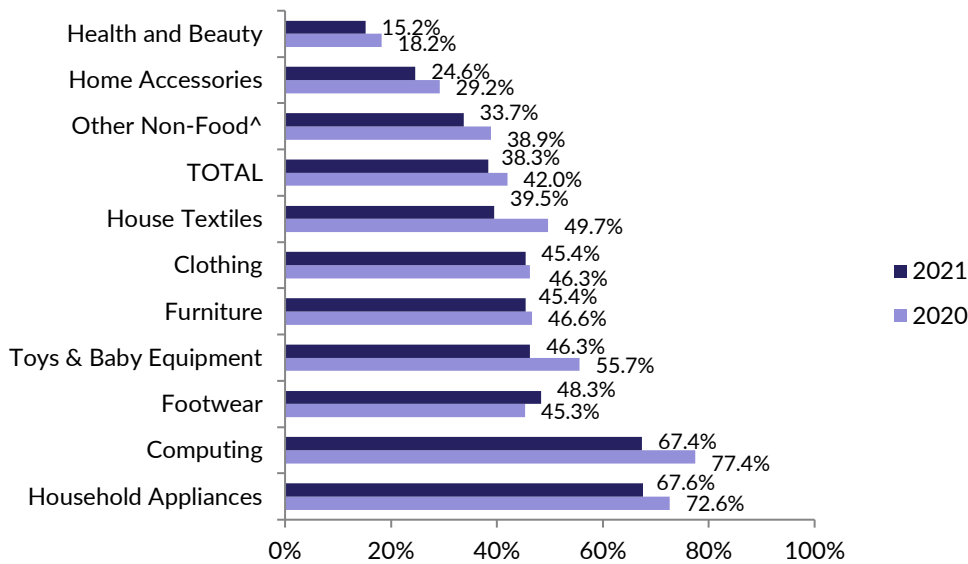


Source: BRC-KPMG RSM

## BRC - KPMG RETAIL SALES MONITOR AUGUST 2021

Covering the four weeks 1 - 28 August 2021

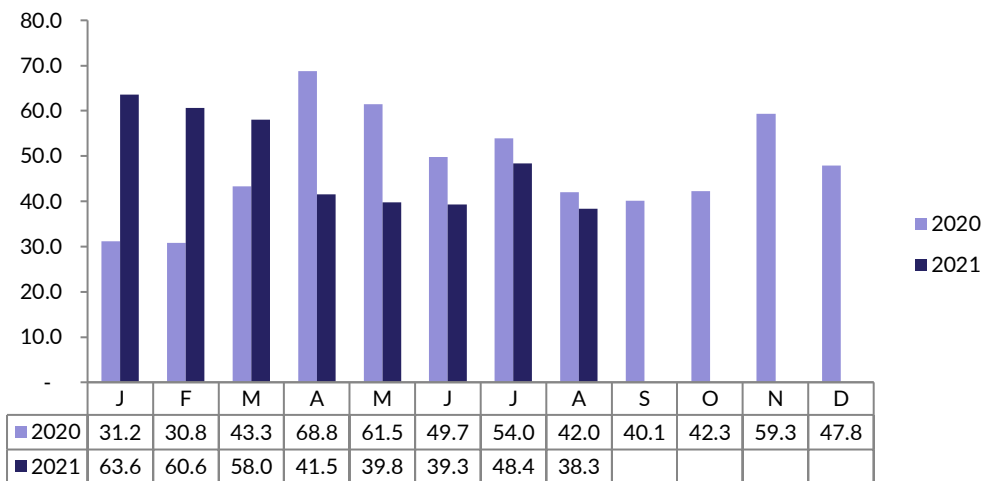
### AUG: ONLINE PENETRATION RANKINGS BY CATEGORY



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	
Aug 2021	38.3%
Aug 2020	42.0%
Jul 2021	48.4%
3m average	41.8%
12m average	48.1%

Source: BRC-KPMG RSM



## BRC – KPMG RETAIL SALES MONITOR AUGUST 2021

Covering the four weeks 1 – 28 August 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
Aug 2020	42.4	44.2	39.3	47.8	13.4	15.0
Sep	36.7	39.7	40.1	44.1	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
Jun	-5.9	-1.3	39.3	40.1	-2.7	1.5
Jul	0.6	-4.6	48.4	42.3	-0.4	-2.2
Aug	-4.6%	-3.5%	38.3%	41.8%	-2.3%	-1.9%

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
Aug 2020	-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%
Jun	140.0%	110.4%
Jul	64.9%	48.1%
Aug	23.7%	16.7%

Source: BRC-KPMG Retail Sales Monitor

## BRC – KPMG RETAIL SALES MONITOR AUGUST 2021

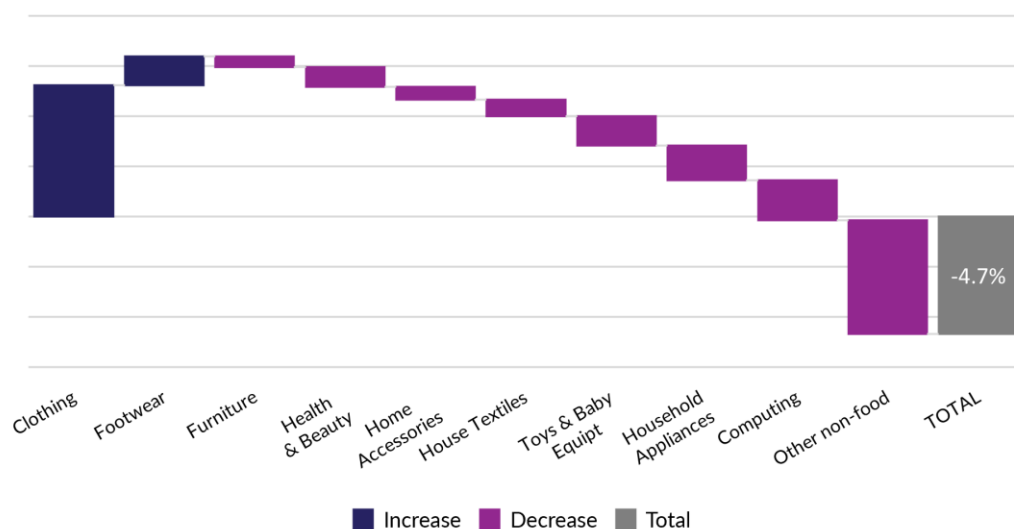
Covering the four weeks 1 – 28 August 2021

### SECTOR PERFORMANCE: ONLINE SALES GROWTH

CATEGORY	SALES UP / DOWN AUG 2020	GROWTH RANKINGS				
		AUG 2021	JUL 2021	AUG 2020	3M AVG	12M AVG
Clothing	▲	1	1	9	2	6
Footwear	▲	2	2	10	1	8
Furniture	▼	3	3	6	3	1
Health & Beauty	▼	4	6	4	6	9
Other Non-Food	▼	5	5	3	5	3
Home Accessories	▼	6	7	5	8	4
Household Appliances	▼	7	4	2	4	5
Toys & Baby Equipment	▼	8	9	8	9	10
House Textiles	▼	9	8	7	7	7
Computing	▼	10	10	1	10	2

Source: BRC-KPMG RSM

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



Source: BRC-KPMG RSM

## BRC - KPMG RETAIL SALES MONITOR AUGUST 2021

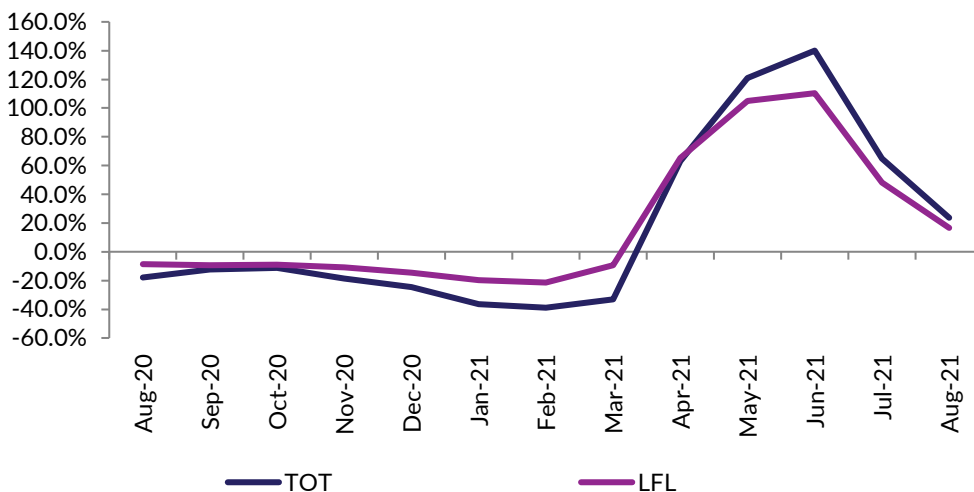
Covering the four weeks 1 - 28 August 2021

### SECTOR PERFORMANCE: STORE TOTAL SALES GROWTH (YEAR-ON-YEAR TOTAL SALES)

CATEGORY	SALES UP / DOWN AUG 2021	GROWTH RANKINGS				
		AUG 2021	JUL 2021	AUG 2020	3M AVG	12M AVG
Clothing	▲	1	1	8	2	3
Computing	▲	2	2	6	1	2
House Textiles	▲	3	6	4	7	6
Toys & Baby Equipment	▲	4	5	7	5	10
Other Non-Food	▲	5	3	3	6	8
Health & Beauty	▲	6	8	5	8	9
Footwear	▲	7	7	10	3	4
Home Accessories	▲	8	9	1	10	7
Household Appliances	▲	9	4	9	4	5
Furniture	▼	10	10	2	9	1

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 AUGUST 2021

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Covering the four weeks 1 – 28 August 2021

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### 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 AUGUST 2021

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Covering the four weeks 1 – 28 August 2021

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The September 2021 Monitor, covering the five weeks 29 August – 2 October 2021, will be released at 00.01am on Tuesday 12 October 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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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.

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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 AUGUST 2021

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Covering the four weeks 1 – 28 August 2021

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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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