

BRC – KPMG RETAIL SALES MONITOR

NOVEMBER 2022

COVERING FOUR WEEKS 30TH OCTOBER – 26TH NOVEMBER 2022

LATE FESTIVE SPENDING DRIVES SALES PICK-UP

<i>% CHANGE YEAR-ON-YEAR</i>		TOTAL	LFL
UK RETAIL SALES	▲	+4.2%	+4.1%
FOOD (3-MTH)	▲	+5.8%	+5.5%
NON-FOOD (3-MTH)	▼	+0.0%	-0.4%
NON-FOOD - STORE (3-MTH)	▲	+2.2%	+1.6%
NON-FOOD - ONLINE	▼	-0.4%	N/A

EXECUTIVE SUMMARY: 1 MINUTE READ

UK retail sales growth accelerated considerably in November, rising to 4.2% on a Total basis. This was welcome news for retailers, as the festive season up until this point had experienced a lacklustre start. However, as price inflation has also continued to accelerate during this time, this still represents a fall in volumes sold in the market.

The major event of the month was Black Friday, with the sales period kicking off roughly a week earlier than last year and extending further into December than before. This drove sales for Non-Food, with Fashion and Homewares benefitting in particular. However, this was not the only factor boosting sales during the month, as the arrival of decidedly wintery weather mid-month saw people finally spending on outerwear and home-heating appliances, to minimise household energy costs as much as possible.

Retailers are now looking towards the climax of the festive season with more optimism than earlier in the autumn, as Christmas spending has finally started, and the success of Black Friday will alleviate the necessity to roll out deep discounts to clear old stock as much as in previous years.





Helen Dickinson OBE, Chief Executive | British Retail Consortium

“Sales picked up as Black Friday discounting marked the beginning of the festive shopping season. However, sales growth remained far below current inflation, suggesting volumes continued to be down on last year. As the weather began to turn, customers were quick to purchase winter warmers, such as coats, hot water bottles, and hooded blankets. Black Friday discounts also boosted sales of home furnishings as many households traded big nights out for budget nights in.

“Despite facing huge cost pressures, retailers are doing all they can to keep prices affordable for all their customers. But, the cost of living crisis means many families might dial back their festive plans. Yet, with three weeks to go, there is still plenty of time for the Christmas cheer to bring sales home this Christmas.”



Paul Martin, UK Head of Retail | KPMG

“Black Friday bargains saw retail sales grow by over 4% in November and was a much-needed boost both on the high street and online.

“Household appliances, footwear and furniture saw positive sales growth both in store and online as consumers sought out good deals on designer items and started to prepare for Christmas gatherings at home. However, some categories such as toys, computing and baby equipment have now seen several months of negative sales figures that even the festive boost has not been able to reverse.

“As we enter the last crucial few weeks of the year, retailers will be hoping that consumers continue to focus on the Christmas feel good factor. For some struggling retailers hit hard as consumer confidence and spending declines, and costs continue to rise, the next few weeks could be critical to their survival. Retailers are well aware that in the current environment it is a battle to attract and retain every customer. Given the economic headwinds for the year ahead, with consumer behaviour expected to evolve further as shoppers look to trade down and purchase less, understanding and meeting customer needs will be mission critical for retailers, and it’s a job that keeps getting harder.”

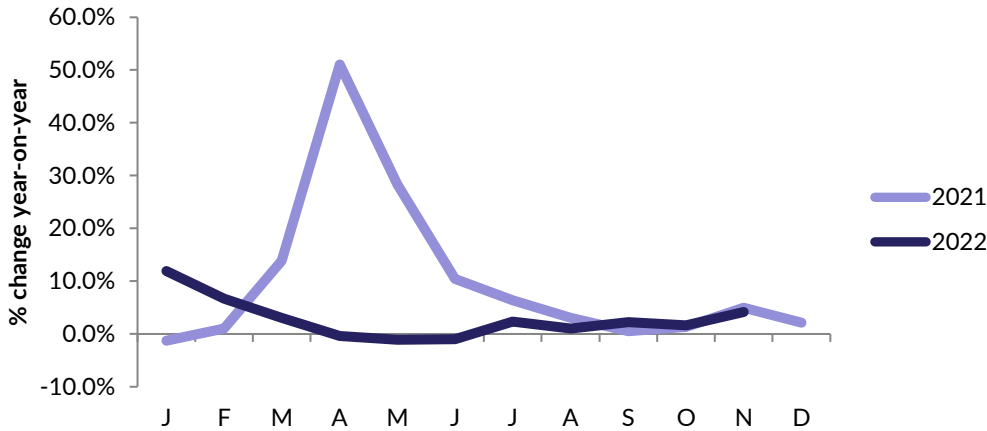


Food & Drink sector performance | Susan Barratt, CEO | IGD

“With inflation still driving accelerating top-line growth, the UK market continued to see real terms decline in November. However, that decline has slowed versus October with shoppers shifting into recognisable ‘seasonal’ mode as November wore on, while some additional demand also emerged as the World Cup got underway at the end of the month.

“Shopper trust in the industry to maintain good availability of food and groceries dropped to its lowest ever level in November. Well-publicised availability challenges in eggs and poultry may have influenced this decline. Indeed, importance of animal welfare when choosing what to buy dropped to its lowest level since our record began in 2017, as shoppers were forced to choose to go without or buy a product with lower welfare standards.”

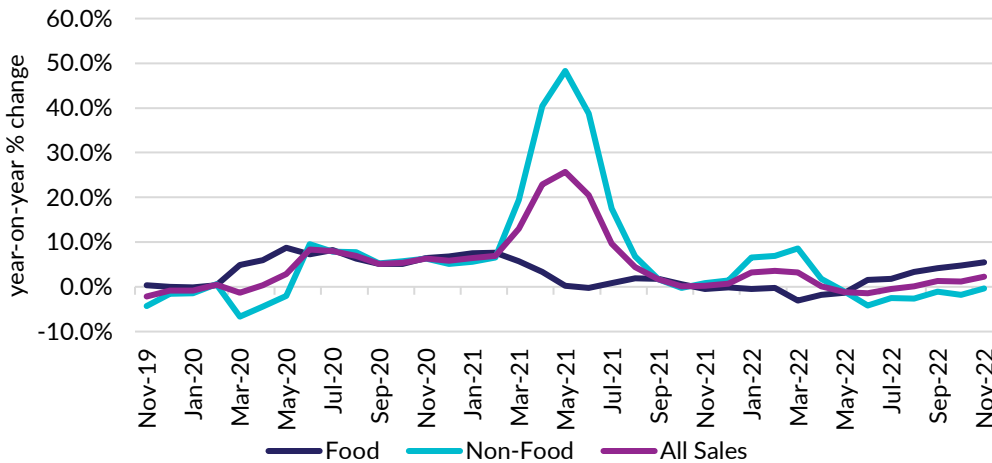
MONTHLY GROWTH OF TOTAL RETAIL SALES



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

	LFL	TOTAL
Nov 2022	4.1%	4.2%
Nov 2021	1.8%	5.0%
Oct 2022	1.2%	1.6%
3m average	2.3%	2.6%
12m average	1.2%	2.6%

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



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

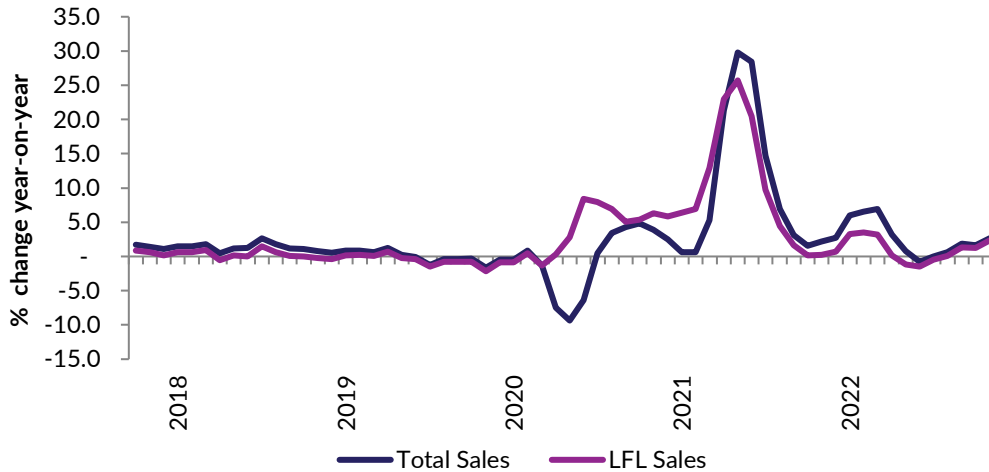
3-MONTH AVERAGE	LFL	TOTAL
Food	5.5%	5.8%
Non-food	-0.4%	0.0%
All Sales	2.3%	2.6%



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



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

OVERVIEW

In November retail sales recorded their highest rate since February, with 4.2% on a Total basis year-on-year. While ordinarily sales growth ramping up towards the all-important ‘golden quarter’ would be unequivocally good news for retailers, as this increase is primarily driven by cost-driven inflation it does not represent a true reversal of fortunes for the beleaguered industry. That being said, it is reassuring to see people finally spending on the up-coming festivities, which had not seen much interest up until this point.

Food sales values continued their steady increase in November, rising to 5.8% over the last three months year-on-year, which is their highest recorded since June 2009 (when discounting the distortions created by the covid lockdowns). Non-coincidentally, this was the last time food prices were heavily effected by price inflation, as the country was emerging from the financial crisis. While there is still plenty of time ahead of the main event for festive food shopping, the arrival of wintery weather towards the end of the month drove people towards heartier warming food to help deal with the plummeting temperatures.

Non-Food sales returned to growth following October’s decline, resulting in the flat three-month average of 0.0%. For the fashion segments, the changing seasonal weather arrived later than usual and drove sales of heavier items of clothing and outerwear, with coats and boots starting to see demand increase. However, it was, once again, the indoor electrical goods that saw the strongest sales, with those that held off from buying heaters and air friers persuaded by the colder temperatures across the country. November’s perennial stand-out event was Black Friday, which landed on the penultimate day of the month. The day itself was not a roaring success, but discounts were spread further ahead more than before, driving good sales growth in the preceding weeks. Interestingly, the biggest discounting period of the year has shifted from its Computing and other Electronics focussed origins, to now attracting more attention in Fashion and Homewares. The latter performed especially well, as this year will likely see more families and groups of friends gathering at home as opposed to meeting in restaurants in the run up to Christmas, as the cost-of-living crisis’ grip tightens on household spending power.

James Hardiman, Senior Analyst

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FOOD SALES: 3-MONTH AVERAGE



NON-FOOD SALES: 3-MONTH AVERAGE



Source: BRC-KPMG RSM

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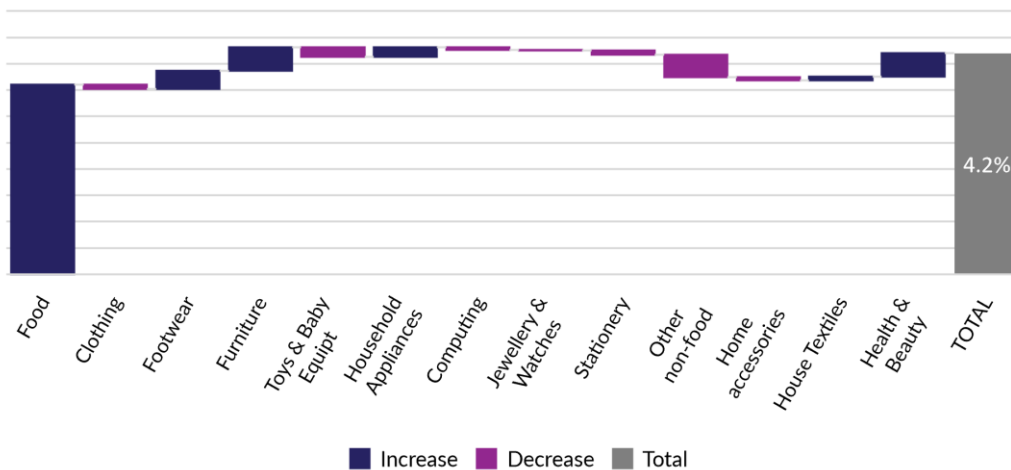
PERFORMANCE BY CATEGORY

By James Hardiman, Senior Analyst and Tina Spooner, Strategic Insight Manager

CATEGORY	UP / DOWN NOV-22		RANKINGS (TOTAL SALES)				
	LFL	TOT	NOV-22	OCT-22	NOV-21	3M AVG	12M AVG
Footwear	▲	▲	1	8	3	1	2
Furniture	▲	▲	2	1	4	3	6
Household Appliances	▲	▲	3	7	10	6	9
Food	▲	▲	4	2	7	2	5
Health and Beauty	▲	▲	5	3	5	5	4
House Textiles	▲	▲	6	5	6	4	8
Jewellery & Watches	▼	▼	7	4	1	7	1
Clothing	▼	▼	8	10	2	8	3
Other Non-Food	▼	▼	9	11	11	11	11
Home Accessories	▼	▼	10	9	8	9	7
Computing	▼	▼	11	13	13	10	13
Stationery	▼	▼	12	12	12	13	12
Toys & Baby Equipment	▼	▼	13	6	9	12	10

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

NOV: CONTRIBUTION TO TOTAL SALES GROWTH BY CATEGORY



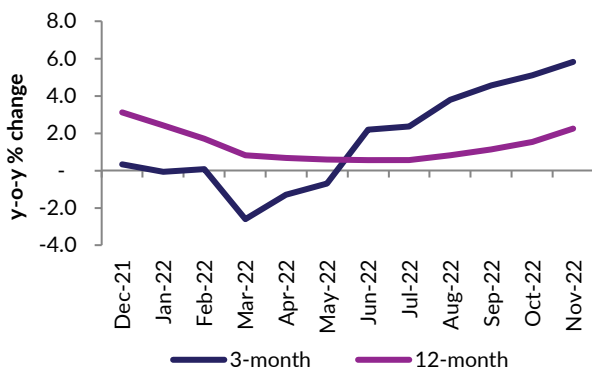
Source: BRC-KMG RSM (Includes Food data from IGD); in this chart, purple blocks represent negative contributions

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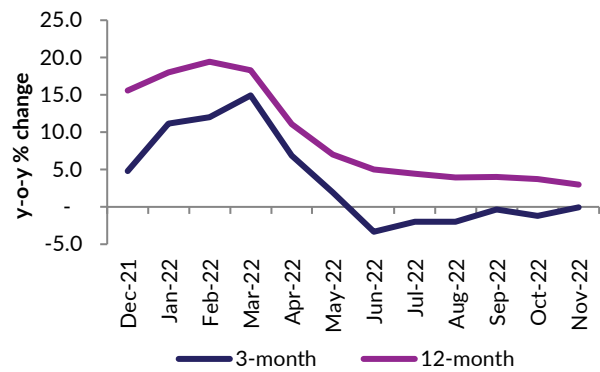
Covering the four weeks 30 October – 26 November 2022

FOOD

TOTAL SALES ROLLING AVERAGE GROWTH: FOOD



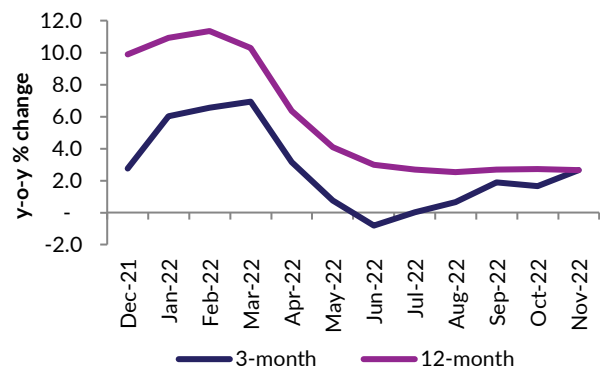
TOTAL SALES ROLLING AVERAGE GROWTH: NON-FOOD



FOOD

The value of Food sales continued to accelerate in November, resulting in average growth of 5.8% over the previous three months. When discounting the distortions during Covid lockdowns, the latest performance is the strongest recorded since June 2009. Towards the end of the month there was an increase in grocery sales, most likely boosted by the falling temperatures, but of course there is plenty of time before the main event for festive food shopping over the coming weeks. According to the BRC NielsenIQ Shop Price Index (SPI), Food price inflation accelerated strongly to 12.4% in November, up from 11.6% in October. This is the highest inflation rate in the Food category on record. Fresh Food inflation also accelerated in November to a record high of 14.3%.

TOTAL SALES ROLLING AVERAGE GROWTH: UK



“

Food sales recorded average growth of 5.8% in the 3-months to November

”

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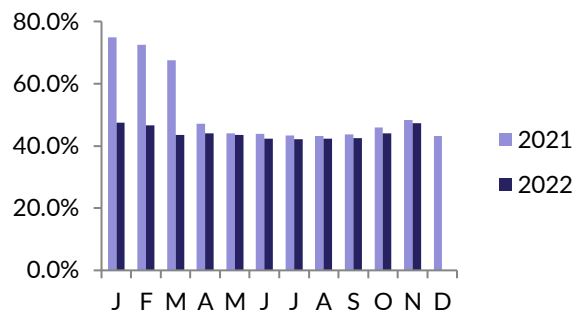
Covering the four weeks 30 October – 26 November 2022

CLOTHING

CLOTHING: UK TOTAL SALES CHANGE



CLOTHING: ONLINE PENETRATION RATE



CLOTHING: ONLINE SALES CHANGE (3-YR)



CLOTHING: STORES SALES CHANGE (3-YR)



THE MONTH OVERALL

Sales of Clothing continued to decline in November, compared with the same month last year, albeit at a lesser rate than the previous month. Sales accelerated throughout the month, peaking in the third week of November, no doubt boosted by Black Friday sales and promotions. Womenswear outperformed Menswear overall during the month, boosted by sales of coats and knitwear as the weather turned cooler. Occasionwear, including dresses was also said to have been in strong demand driven by preparations for the festive party season. Childrenswear remained the weakest performing category within Clothing during the month.

THE MONTH BY CHANNEL

Online Clothing sales continued to record an annual decline in November, resulting in a decrease in sales in three out of the past four months. However, on a 3-year basis, sales remain significantly ahead of pre-pandemic levels. In-store sales were reported to have picked up during the month, as evidenced by a return to positive year-on-year growth following a decline in October. The Online penetration rate decreased by 1.1 percentage points from the same month last year, to 47.3% in November.

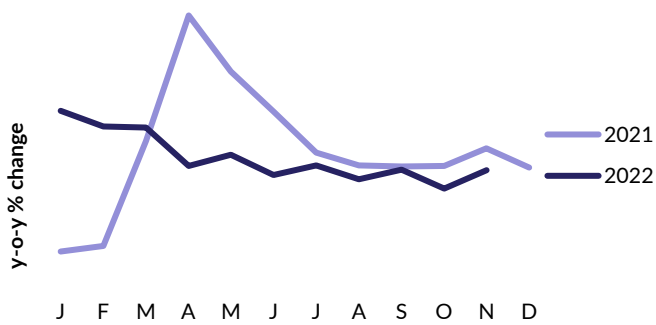
“The cooler weather boosted knitwear sales during November”

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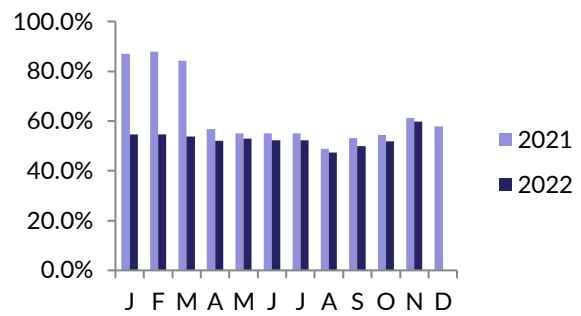
Covering the four weeks 30 October – 26 November 2022

FOOTWEAR

FOOTWEAR: UK TOTAL SALES CHANGE



FOOTWEAR: ONLINE PENETRATION RATE



FOOTWEAR: ONLINE SALES CHANGE (3-YR)



FOOTWEAR: STORES SALES CHANGE (3-YR)



THE MONTH OVERALL

Footwear was the strongest performing category in the RSM during November, with annual growth returning to double-digits, following a marginal decline in the previous month. While the performance is impressive, given the fact it comes off the back of strong growth in November last year, on a 3-year basis it is evident that sales remain below pre-pandemic levels. Both Men's and Women's footwear performed well during the month, while there was less demand for Children's shoes.

THE MONTH BY CHANNEL

Online Footwear sales also returned to growth in November, following a decline in October when the milder weather resulted in a slowdown in sales. In-store sales growth accelerated on a year-on-year basis, however, compared with 2019 levels they remained significantly below pre-pandemic levels. The Online penetration rate decreased by 1.6 percentage points from the same month last year, to 59.8% in November.



Footwear was the strongest-performing category in the RSM during November



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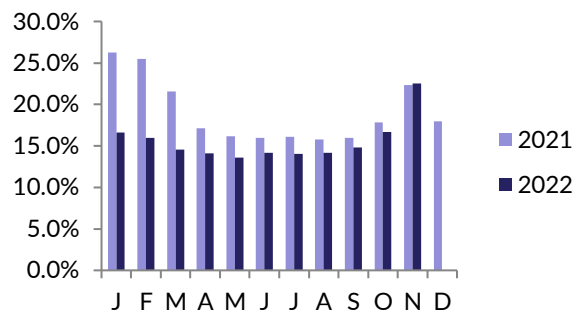
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HEALTH & BEAUTY

HEALTH AND BEAUTY: UK TOTAL SALES CHANGE



HEALTH AND BEAUTY: ONLINE PENETRATION RATE



HEALTH AND BEAUTY: ONLINE SALES CHANGE (3-YR)



HEALTH AND BEAUTY: STORES SALES CHANGE (3-YR)



THE MONTH OVERALL

Beauty continued to drive sales in the Health & Beauty category in November, with Black Friday promotions boosting growth in the second and third week of the month. Annual growth overall for Health & Beauty more than doubled from the previous month, resulting in the strongest performance recorded since July. As the festive shopping period ramped up there was said to have been strong demand for fragrance, make-up, skincare and wellness products.

THE MONTH BY CHANNEL

For the first time since March last year, the Online Health & Beauty category recorded year-on-year growth during November. Following three consecutive months of a slowdown in growth for In-store sales, last month we observed an acceleration in sales compared with the same month last year. However, In-store sales remain below the levels recorded in 2019. The Online penetration rate increased by 0.2 percentage points from the same month last year, to 22.5% in November.



Demand for fragrance, make-up, skincare and wellness products were said to have been strong



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FURNITURE

FURNITURE: UK TOTAL SALES CHANGE



FURNITURE: ONLINE PENETRATION RATE



FURNITURE: ONLINE SALES CHANGE (3-YR)



FURNITURE: STORES SALES CHANGE (3-YR)



THE MONTH OVERALL

Growth in the Furniture category continued to accelerate during November, resulting in an impressive performance when taking into account this comes off the back of double-digit growth in the same month last year. Demand for dining tables and chairs was said to be strong last month, boosted by preparations for socialising at home over the festive period. The GfK Consumer Confidence Index rose 3 points from the previous month, reaching -38 in November.

THE MONTH BY CHANNEL

Online sales remained in growth during November but slowed from the previous month on a year-on-year basis. Compared with pre-pandemic levels, Online Furniture sales remain significantly ahead of the growth rates recorded in 2019. Following a return to growth for In-store sales in October, the positive trend continued last month with year-on-year growth in November accelerating from the previous month. The Online penetration rate increased by 0.3 percentage points from the same month last year, to 51.7% in November.



Demand for dining tables and chairs was said to be strong in preparation for the festive period



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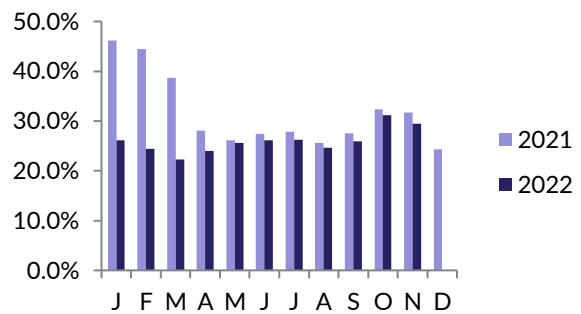
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HOME ACCESSORIES

HOME ACCESSORIES: UK TOTAL SALES CHANGE



HOME ACCESSORIES: ONLINE PENETRATION RATE



HOME ACCESSORIES: ONLINE SALES CHANGE (3-YR)



HOME ACCESSORIES: STORES SALES CHANGE (3-YR)



THE MONTH OVERALL

The Home Accessories category continues to decline, with November recording a decrease both on a year-on-year basis and compared with 2019 levels. The category has recorded an annual decline in sales in eight out of the past nine months, and there was no sign of an uplift in demand for cooking accessories and tableware ahead of the festive period.

THE MONTH BY CHANNEL

Following a slowdown in the decline in Online sales of Home Accessories over recent months, during November the decrease steepened when compared with the same month last year. However, the performance last month was ahead of pre-pandemic levels and saw an improvement compared with the previous month. The Online penetration rate decreased by 2.2 percentage points from the same month last year, to 29.5% in November.



Home Accessories has recorded an annual decline in sales in 8 out of the past nine months



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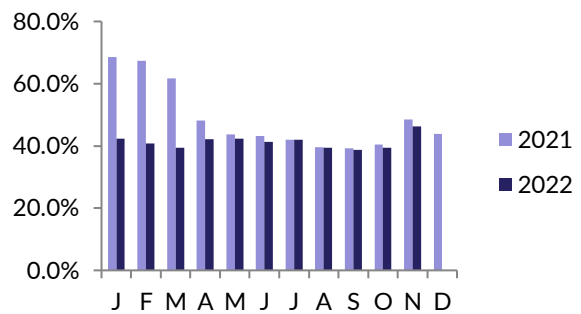
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HOUSE TEXTILES

HOUSE TEXTILES: UK TOTAL SALES CHANGE



HOUSE TEXTILES: ONLINE PENETRATION RATE



HOUSE TEXTILES: ONLINE SALES CHANGE (3-YR)



HOUSE TEXTILES: STORES SALES CHANGE (3-YR)



THE MONTH OVERALL

During October the House Textiles category recorded a slowdown with sales broadly flat year-on-year. However, November saw an improvement with an acceleration in annual growth. The demand for energy-saving items including high-tog duvets, blankets continued last month as consumers look for ways to reduce their energy bills over the winter months. House Textiles fell to 6th place in the category rankings, from 5th place in October.

THE MONTH BY CHANNEL

Following a decline in Online sales during in October, last month saw an improvement with sales flat compared with November last year. In-store sales recorded an acceleration in annual growth, while sales remain broadly flat compared with pre-pandemic levels. The Online penetration rate decreased by 2.2 percentage points from the same month last year, to 46.3% in November.



Sales of blankets and high-tog duvets continued to perform well



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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 (3-YR)



TOYS & BABY EQUIPMENT: STORES SALES CHANGE (3-YR)



THE MONTH OVERALL

Following October's year-high result, November saw the category plummet to its worst showing of 2022. The extended Black Friday sales duration did little to attract much attention during the month. Toys have continued to be less popular gifts for children throughout the year, with the run-up to Christmas also proving to be the case, as Computer games remain the more popular choice. Baby Equipment also saw slowing demand and people are trading down to cheaper options in comparison to previous years.

THE MONTH BY CHANNEL

The category suffered significantly Online in November, both on 1-year and 3-year bases, with Toys & Baby Equipment seeing a broadly downward trend over the course of the year for the latter. In-Store on the other hand, on a 3-year basis, the category returned to growth for only the second time this year. However, on a 1-year basis it was the only category not to see any growth in stores. The Online penetration rate remained broadly stable from last year, only increasing 0.3 percentage points to 58.7%.



Baby Equipment seeing slowing demand and people are trading down to cheaper options



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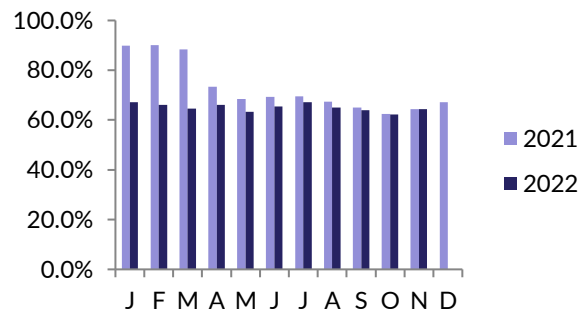
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HOUSEHOLD APPLIANCES

HOUSEHOLD APPLIANCES: UK TOTAL SALES CHANGE



HOUSEHOLD APPLIANCES: ONLINE PENETRATION RATE



HOUSEHOLD APPLIANCES: ONLINE SALES CHANGE (3-YR)



HOUSEHOLD APPLIANCES: STORES SALES CHANGE (3-YR)



THE MONTH OVERALL

Household Appliances recorded its strongest performance of the year so far in November, with strong growth for the month. The cold snap that arrived mid-month played a large role in this result, as people that had been holding off on buying home-heating appliances were encouraged to make their purchases in an effort to avoid turning up their central heating systems.

THE MONTH BY CHANNEL

It was another strong month online on a 3-year basis, with Household Appliances seeing significant growth. In comparison to last year, the category returned to growth for the first time this year, as people were hunting for the best Black Friday deals to heat their homes. In-store, the category improved from the previous month in November, but remained in decline from where it was 3 years ago. The Online penetration rate remained broadly flat from last year, with only a 0.1 percentage points increase to 64.4%.



The cold snap that arrived mid-month played a large role in this strong result



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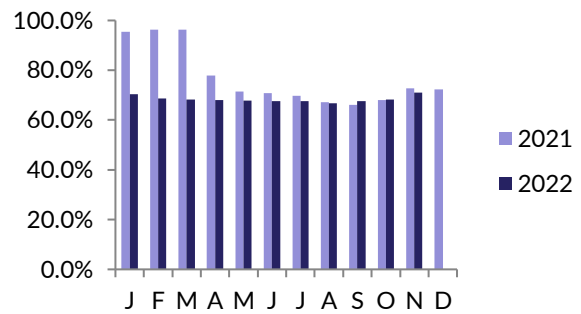
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COMPUTING

COMPUTING: UK TOTAL SALES CHANGE



COMPUTING: ONLINE PENETRATION RATE



COMPUTING: ONLINE SALES CHANGE (3-YR)



COMPUTING: STORES SALES CHANGE (3-YR)



THE MONTH OVERALL

While Computing sales improved slightly from the previous month, they remained in decline in November. As the category had seen such a surge in demand during the early days of the pandemic, there is little need for people to update their computing options yet. Especially as household spending power is so constrained currently. Interestingly, the Black Friday discounts did little for the category, even if they were spread further throughout the month than before. The event has gradually moved away from its Computing roots, towards homewares and fashion.

THE MONTH BY CHANNEL

Online sales growth continued its steady fall in November, on a 3-year basis, to a broadly flat performance. However, on a year-on-year basis, the category remained in decline for the second consecutive month. In-store sales returned to growth both on 1-year and 3-year bases, with the latter recording its strongest result of the year so far. The Online penetration rate decreased by 1.5 percentage points from the same point last year, to 71.1% in November.



The Black Friday discounts did little for the category, even if they were spread further throughout the month



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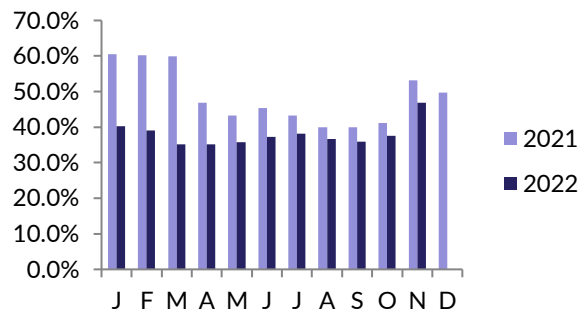
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OTHER NON-FOOD

OTHER NON-FOOD**: UK TOTAL SALES CHANGE



OTHER NON-FOOD**: ONLINE PENETRATION RATE



OTHER NON-FOOD**: ONLINE SALES CHANGE (3-YR)



OTHER NON-FOOD**: STORES SALES CHANGE (3-YR)



THE MONTH OVERALL

November saw an improved performance for the category, but it still did not make it into growth. The main areas letting down Other Non-Food were Electricals, which have fallen far from their early Black Friday popularity. Even the beginning of the World Cup didn't help TV sales, compared to when they are held in the summer.



The beginning of the World Cup didn't help TV sales



** 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, Other Non-Food remained in growth against its pre-pandemic level, but continued its slowing trajectory for yet another month. It also remained in decline on a year-on-year basis, but its rate of decline softened as it recorded its best result of the year so far. In-store sales growth continued for another month, accelerating considerably from the previous month. The Online penetration rate decreased by 6.3 percentage points from November last year, to 46.9%.

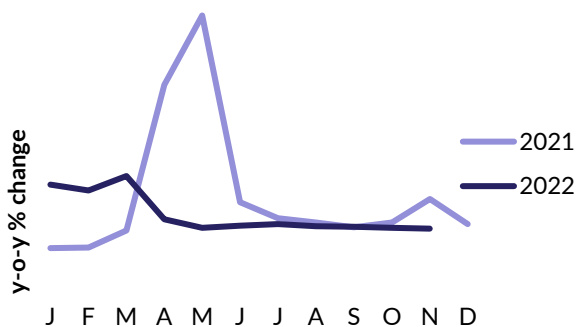
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OTHER NON-FOOD

Includes in particular:

Jewellery & Watches



In November, Jewellery & Watches fell into decline for the first time since March 2021, as attention switched towards home improvements and the Black Friday sales throughout the month. This, combined with the cost-of-living crisis, has left little demand for items that would normally perform well during the festive party season. This further highlights people’s reluctance to splash out at the moment, as they will be enjoying fewer nights out than last year.

Electricals & Electronics

The only Electricals to see much demand were naturally geared towards energy efficiency and home heating in November, as the cold weather finally arrived. Even the beginning of the World Cup could not drum up much excitement for the segment, as TV sales were reported to be lacklustre in comparison to previous editions of the tournament. The constraints on household spending power is also taking its toll on the segment, that includes items with higher price tags, as consumers continue to trade down and buy cheaper options than in previous years.

Leisure Goods, Gaming, Books, CDs & DVDs

In contrast to TVs, Gaming consoles continued to see strong demand, as the Christmas rush on gifting options arrived, albeit later than last year. Luggage was also said to be selling well, as people are more comfortable travelling now. That being said, it was against a weak period for their sales last year.

DEPARTMENT STORES

The wintery weather finally arrived mid-November, which was welcome news for Department stores as this reportedly provided a welcome boost to a wide variety of goods. It naturally helped fashion sales, as people were out looking for warming clothes for both at home and the outdoors. Heaters and blankets were also said to be flying off the shelves from Department Stores across the country, as those that had held off as long as possible made their energy saving purchases. However, the arrival of more traditionally seasonal weather also seemed to kick-start festive spending, both for home decorations and gifting ahead of Christmas.

BRC – KPMG RETAIL SALES MONITOR NOVEMBER 2022

Covering the four weeks 30 October – 26 November 2022

MONTHLY RETAIL SALES: % CHANGE YEAR-ON-YEAR (2022 ALSO YO3Y)

MONTH	2020		2021		2022		2022 (YO3Y)	
	LFL	TOTAL	LFL (1)	TOTAL	LFL	TOTAL	LFL	TOTAL
January	0.0	0.4	7.1	-1.3	8.1	11.9	12.3	6.8
February	-0.4	0.1	9.5	1.0	2.7	6.7	9.4	4.7
March	-3.5	-4.3	20.3	13.9	-0.4	3.1	8.2	5.4
April	5.7	-19.1	39.6	51.1	-1.7	-0.3	32.2	3.9
May	7.9	-5.9	18.5	28.4	-1.5	-1.1	17.4	6.2
June	10.9	3.4	6.7	10.4	-1.3	-1.0	13.0	8.8
July	4.3	3.2	4.7	6.4	1.6	2.3	9.3	10.6
August	4.7	3.9	1.5	3.0	0.5	1.0	6.1	7.4
September	6.1	5.6	-0.6	0.6	1.8	2.2	6.5	7.7
October	5.2	4.9	-0.2	1.3	1.2	1.6	5.0	6.8
November	7.7	0.9	1.8	5.0	4.1	4.2	11.5	7.7
December	4.8	1.8	0.6	2.1				
Jan-Jul average	4.3	-0.5	9.8	10.7	1.3	2.7	11.7	6.9
Jan-Dec average	4.4	-0.3	8.9	9.9	n/a	n/a	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
Sep – Nov 21	-0.5	0.9	0.2	0.1	3.9	2.2
Oct – Dec	-0.1	1.4	0.7	0.3	4.8	2.7
Nov 21 – Jan 22	-0.5	6.5	3.3	-0.1	11.1	6.0
Dec 21 – Feb 22	-0.3	6.9	3.5	0.1	12.0	6.5
Jan – Mar 22	-3.1	8.6	3.2	-2.6	14.9	6.9
Feb – Apr	-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

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 NOVEMBER 2022

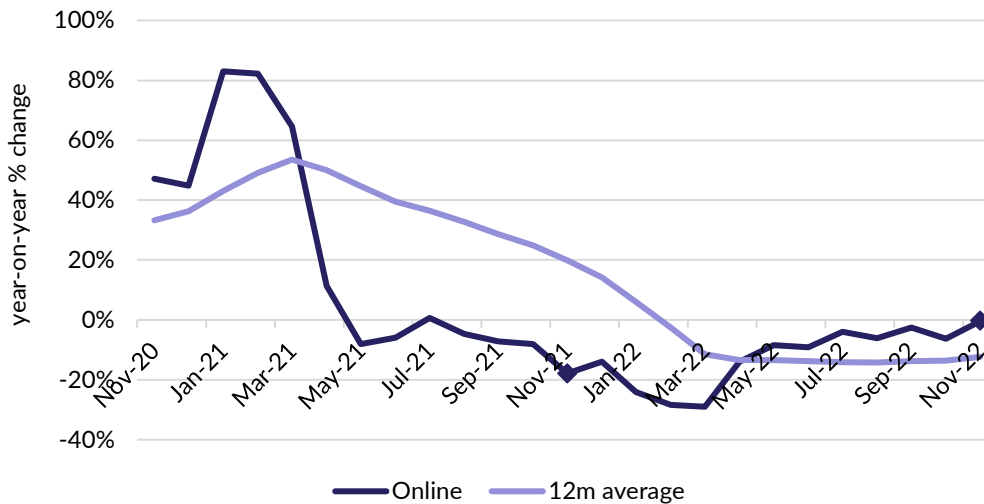
Covering the four weeks 30 October - 26 November 2022

ONLINE VERSUS STORE DATA

BRC – KPMG RETAIL SALES MONITOR NOVEMBER 2022

Covering the four weeks 30 October – 26 November 2022

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

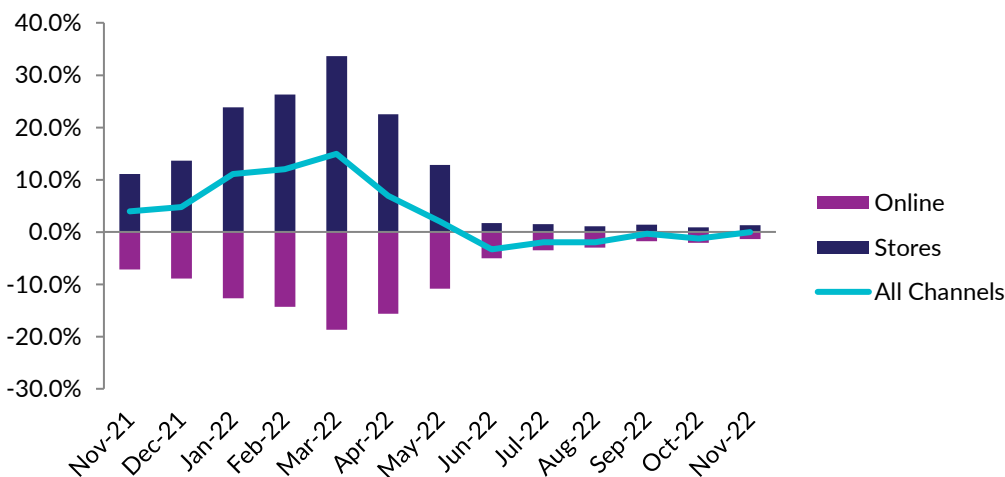


NON-FOOD GROWTH	ONLINE*	UK TOTAL
Nov 2022	-0.4%	n/d
Nov 2021	-17.9%	n/d
Oct 2022	-6.3%	n/d
3m avg	-3.1%	0.0%
12m avg	-12.3%	3.0%

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
Sep - Nov 22	1.6%	2.2%
Sep - Nov 21	22.2%	30.5%
Aug - Oct 22	0.4%	1.3%
12m avg	20.8%	26.6%

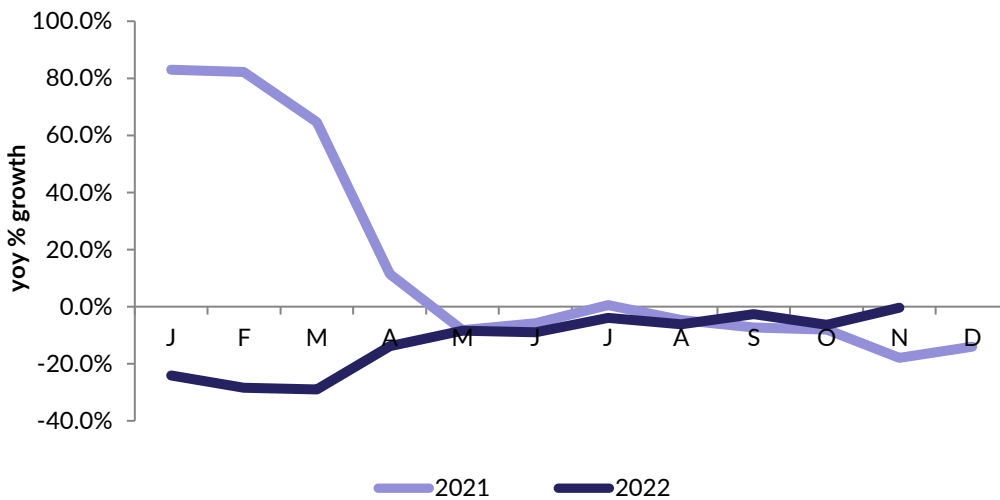
Source: BRC-KPMG RSM

BRC – KPMG RETAIL SALES MONITOR NOVEMBER 2022

Covering the four weeks 30 October – 26 November 2022

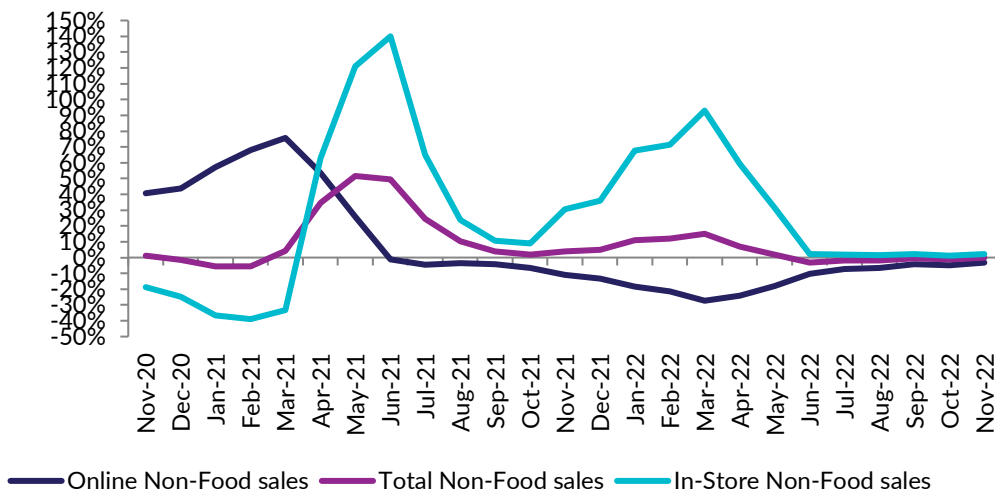
BRC-KPMG NON-FOOD RETAIL SALES YEAR-ON-YEAR GROWTH:

MONTHLY GROWTH OF ONLINE NON-FOOD RETAIL SALES



Source: BRC-KPMG RSM

3M ROLLING AVERAGE GROWTH OF NON-FOOD SALES

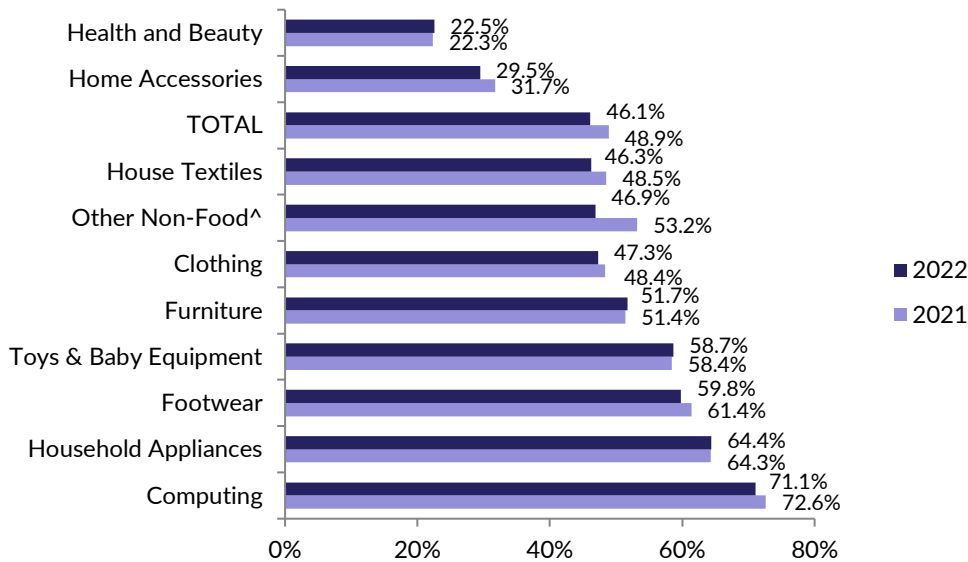


Source: BRC-KPMG RSM

BRC – KPMG RETAIL SALES MONITOR NOVEMBER 2022

Covering the four weeks 30 October – 26 November 2022

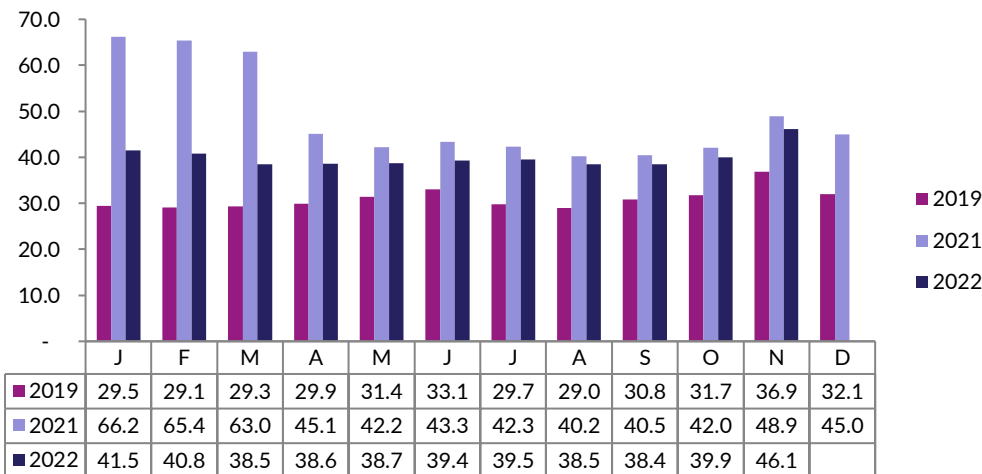
NOV: ONLINE PENETRATION RANKINGS BY CATEGORY



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	
Nov 2022	46.1%
Nov 2021	48.9%
Oct 2022	39.9%
3m average	41.3%
12m average	40.4%

Source: BRC-KPMG RSM

BRC – KPMG RETAIL SALES MONITOR NOVEMBER 2022

Covering the four weeks 30 October – 26 November 2022

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
Nov 2021	-17.9	-10.8	48.9	43.5	-14.2	-7.2
Dec	-13.9	-13.3	45.0	45.3	-8.2	-8.9
Jan 2022	-24.2	-18.3	41.5	45.1	-16.7	-12.7
Feb	-28.4	-21.5	40.8	42.6	-19.6	-14.3
Mar	-29.0	-27.3	38.5	40.1	-19.5	-18.7
Apr	-13.9	-24.1	38.6	39.2	-6.9	-15.6
May	-8.5	-18.0	38.7	38.6	-4.1	-10.9
Jun	-9.1	-10.3	39.4	38.9	-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

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
Nov 2021	30.5%	22.2%
Dec	36.0%	26.8%
Jan 2022	67.6%	54.0%
Feb	71.2%	57.2%
Mar	92.9%	74.9%
Apr	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%

Source: BRC-KPMG Retail Sales Monitor

BRC – KPMG RETAIL SALES MONITOR NOVEMBER 2022

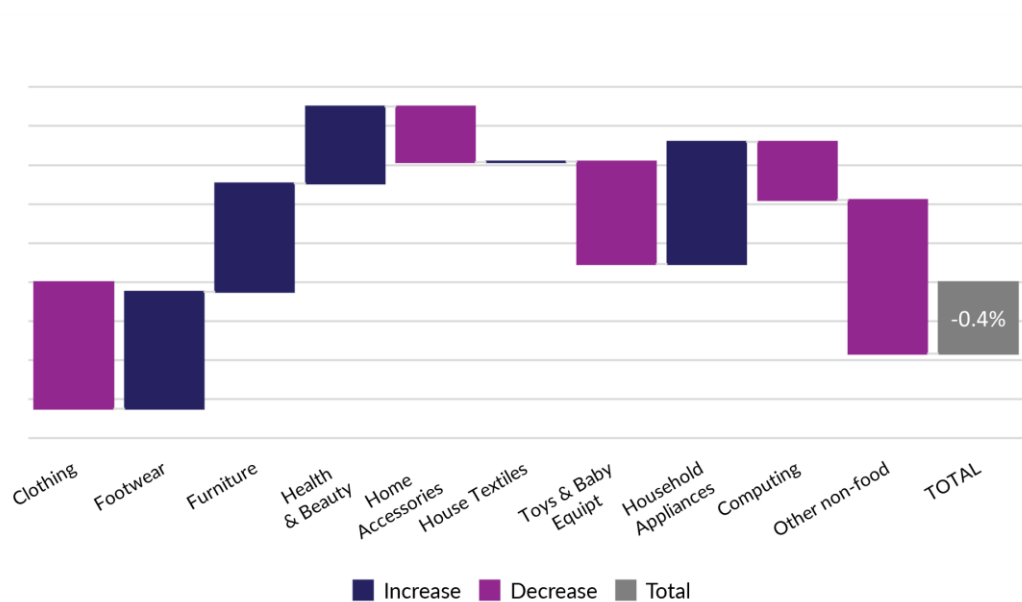
Covering the four weeks 30 October – 26 November 2022

SECTOR PERFORMANCE: ONLINE SALES GROWTH

CATEGORY	SALES UP / DOWN NOV 2022	GROWTH RANKINGS				
		NOV 2022	OCT 2022	NOV 2021	3M AVG	12M AVG
Furniture	▲	1	1	7	1	5
Household Appliances	▲	2	2	5	3	4
Footwear	▲	3	5	2	2	1
Health & Beauty	▲	4	4	3	5	3
House Textiles	▲	5	3	4	4	7
Other Non-Food	▼	6	8	10	9	8
Clothing	▼	7	9	1	6	2
Computing	▼	8	7	9	7	9
Toys & Baby Equipment	▼	9	10	6	10	6
Home Accessories	▼	10	6	8	8	10

Source: BRC-KPMG RSM

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



Source: BRC-KPMG RSM

BRC – KPMG RETAIL SALES MONITOR NOVEMBER 2022

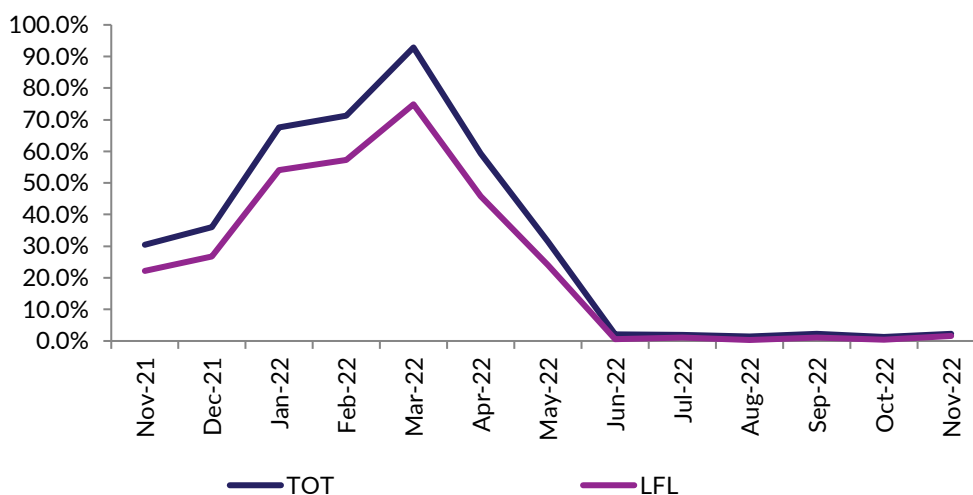
Covering the four weeks 30 October – 26 November 2022

SECTOR PERFORMANCE: STORE TOTAL SALES GROWTH

CATEGORY	SALES UP / DOWN NOV 2022	GROWTH RANKINGS				
		NOV 2022	OCT 2022	NOV 2021	3M AVG	12M AVG
Other Non-Food	▲	1	3	2	2	6
Footwear	▲	2	2	5	1	3
House Textiles	▲	3	6	8	3	7
Household Appliances	▲	4	7	6	5	5
Furniture	▲	5	5	1	6	1
Health & Beauty	▲	6	4	9	4	8
Computing	▲	7	10	3	10	2
Clothing	▲	8	9	4	7	4
Home Accessories	▲	9	8	10	8	10
Toys & Baby Equipment	▼	10	1	7	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 NOVEMBER 2022

Covering the four weeks 30 October – 26 November 2022

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 NOVEMBER 2022

Covering the four weeks 30 October – 26 November 2022

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The December 2022 Monitor, covering the five weeks 27 November – 31 December 2022, will be released at 00.01am on Tuesday 10 January 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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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 NOVEMBER 2022

Covering the four weeks 30 October – 26 November 2022

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**Detailed weekly data by category
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