

RETAIL GETS BACK ON TRACK FOR CHRISTMAS

Covering the four weeks 3 – 30 October 2021

Strictly Embargoed until 00.01 hrs – Tuesday 9th November 2021

OCT: LIKE-FOR-LIKE
RETAIL SALES

% change year-on-year

-0.2%

In October, UK retail sales decreased 0.2% on a Like-for-like basis from October 2020, when they had increased 5.2%. This was below both the 3-month average growth of 0.3% and the 12-month average growth of 10.6%

OCT: TOTAL
RETAIL SALES

% change year-on-year

1.3%

On a Total basis, sales increased by 1.3% in October, against a growth of 4.9% in October 2020. This is below the 3-month average growth of 1.7% and the 12-month average growth of 10.2%.

AUG – OCT: NON-FOOD LFL
IN-STORE GROWTH

% change year-on-year

4.5%

Over the three months to October, In-Store sales of Non-Food items grew 7.9% on a Total basis and increased 4.5% on a Like-for-like basis. The Total growth was below the 12-month average of 26.3%.

AUG – OCT: TOTAL
FOOD

% change year-on-year

1.5%

Over the three months to October, Food sales increased 0.9% on a Like-for-like basis and increased 1.5% on a Total basis. This is below the 12-month Total average growth of 4.7%. For the month of October, Food was in growth year-on-year.

AUG – OCT: TOTAL
NON-FOOD

% change year-on-year

1.8%

Over the three-months to October, Non-Food retail sales decreased by 0.1% on a like-for-like basis and increased 1.8% on a Total basis. This is below the 12-month Total average growth of 14.9%. For the month of October, Non-Food was in growth year-on-year.

OCT: NON-FOOD
ONLINE GROWTH

% change year-on-year

-8.0%

Online Non-Food sales decreased by 8.0% in October, against a growth of 39.0% in October 2020. This is below the 3-mth average decline of 6.1%. Non-Food Online penetration rate decreased from 48.8% in October 2020 to 42.0% this October.



BRC – KPMG RETAIL SALES MONITOR OCTOBER 2021

Covering the four weeks 3 - 30 October 2021



Helen Dickinson OBE, Chief Executive | British Retail Consortium

"Retail is getting back on track ahead of Christmas as sales grew at a faster rate than the month prior, and well above its pre-pandemic levels. As social calendars started filling up with festivities, clothing and footwear sales performed well. Meanwhile, furniture and electrical sales were held back by global logistical issues and microchip shortages. While Halloween was heavily curtailed by the pandemic last year, chocolates and children's costumes sold a treat as families made the most of the occasion.

"Some people started their Christmas shopping early with beauty advent calendars flying off the shelves and searches for Christmas items ramping up online. Retailers are doing everything they can to offer customers the choice and availability required throughout the industry's busiest period, prioritising the food and other festive products needed to celebrate. Retailers are hopeful that demand will continue right through the golden quarter, however, there are challenges ahead with higher prices on the horizon compounded by the many increasing costs faced by consumers."



Paul Martin, UK Head of Retail | KPMG

"October provided a modest boost for the high street as total retail sales grew by 1.3% compared to last year.

"Clothing and health and beauty sales continued to dominate at the tills whilst demand for home-related purchases declined further and grocers had another poor month with food and drink sales muted at 0.27%

"Confident consumers are heading to physical stores to make purchases, as online sales fell yet again in October, although with penetration rates at 42% online shopping remains significantly higher than pre-Covid-19 levels.

"The much reported squeeze on household spending has yet to materialise as consumers seem happy to carry on shopping. Limited availability of stock has created strong pricing dynamics, which means we are unlikely to see any big discounting this Christmas, and many retailers will be hoping consumers are willing to buy the most sought after gifts at any price. With rising costs putting a strain on most retailers, they will be placing all hopes that demand remains strong as consumers plan for a bumper Christmas, shopping early for those much wanted gifts and spending more than last year when Christmas gatherings were cancelled. The main concern is now how trade will develop post-Christmas into 2022."



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

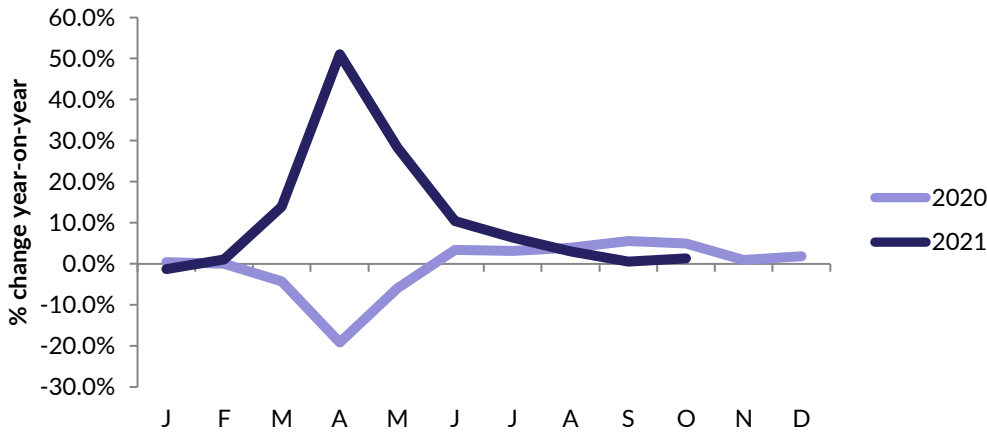
"The food and drink sector saw another muted performance in October, with sales down versus 2020, when shoppers increasingly stocked up ahead of the second lockdown in November. Preparations for Halloween 2021 offered a slight boost to performance, though the actual day fell out of the reporting period.

"IGD's Shopper Confidence Index reached one of its lowest levels (-11) in October. Our ShopperVista research reveals 28% of shoppers now expect food to get much more expensive in the year ahead, the highest level recorded, with increasing numbers signalling that rising food, energy and petrol prices are having an impact. However, with preparations for COP26 gathering pace in October, shoppers are torn in different directions. Some 40% stated that environmental impact was important when food shopping, up from 36% in September '21. Helping shoppers navigate through rising prices while also addressing environmental concerns will be a key challenge for the food industry."

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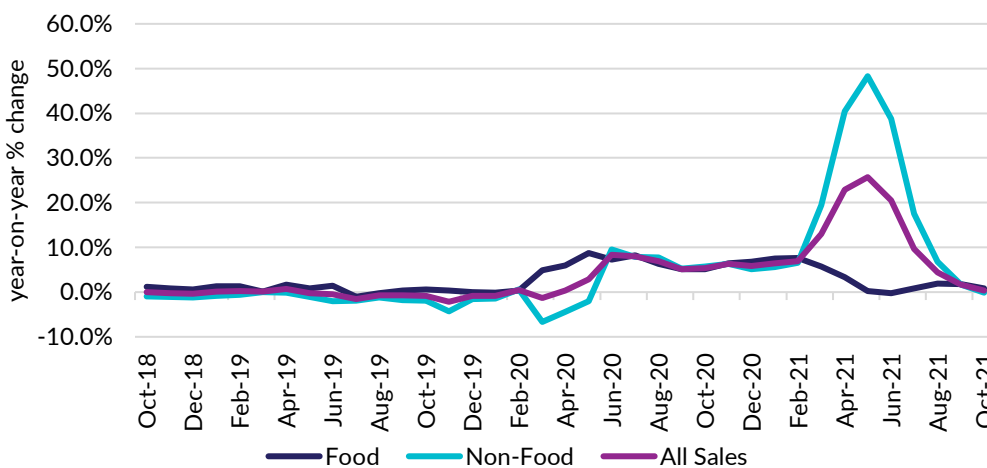
MONTHLY GROWTH OF TOTAL RETAIL SALES



	LFL	TOTAL
Oct 2021	-0.2%	1.3%
Oct 2020	5.2%	4.9%
Sep 2021	-0.6%	0.6%
3m average	0.3%	1.7%
12m average	10.6%	10.2%

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	0.9%	1.5%
Non-food	-0.1%	1.8%
All Sales	0.3%	1.7%

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



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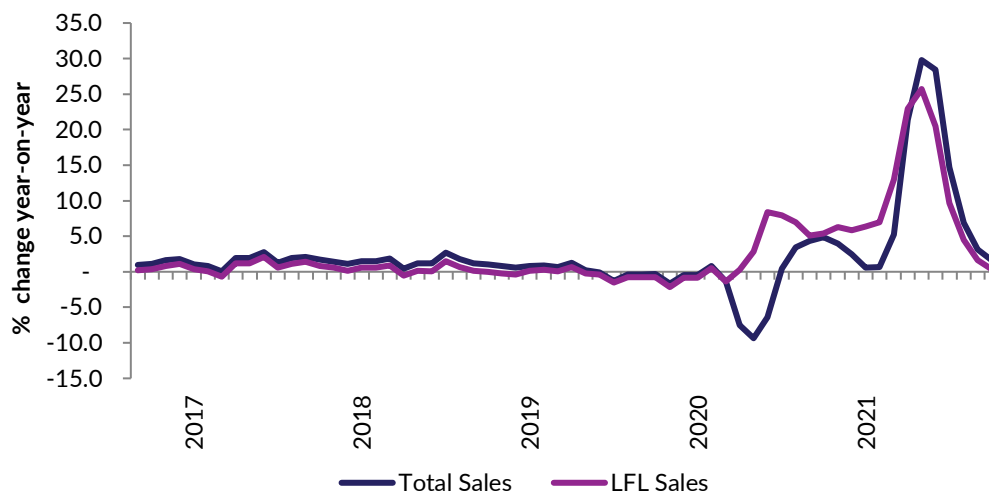
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BRC – KPMG RETAIL SALES MONITOR OCTOBER 2021

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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 October. However, year-on-two-year comparisons are still useful in certain circumstances, which will be clearly signposted in this report.

Retail sales growth accelerated in October, increasing to 1.3% on a Total basis year-on-year, from September's meagre 0.6%. While this rate was still below the strong figures seen over the summer, it was still an encouraging result ahead of the Christmas period as the comparable month from last year was boosted by the looming November 'firebreak' that had consumers rushing to the shops ahead of their closure. Also, there has been a considerable squeeze on consumer spending as the year has gone on, due to rising costs of living for many.

On a three-month basis, Food sales slowed to its lowest rate since the onset of the pandemic, with 1.5% growth year-on-year. However, it was reported that items intended for Christmas gifts started to see a significant increase in demand. On the other side of the consumer spending equation, Non-Food sales also saw a slowdown from the strong growth rates seen during the summer, with only 1.8% growth year-on-year. This was primarily a consequence of the strong comparable month from last year, as described above, however, in a similar fashion to Food sales, Christmas related goods were said to sell well earlier in the season than would be considered normal pre-pandemic. This resulted in a similar pattern to the sales seen last year but brought on by different motivations for consumers. Last year, consumers were forced to bring spending forward due to the upcoming store closures, whereas this time around the threat of stock shortages has driven consumers to get more organised to avoid disappointment.

Within Non-Food, the change of season continued to encourage spending on Clothing and other fashion-related items. This particularly came to the benefit of formal dresses, as festive social calendars began to fill up and people continued to return to office-based working. The aforementioned stock problems had a negative impact on other categories, that primarily source goods from the far east, with Furniture finding the conditions particularly challenging, while computing and gaming suffered due to the ongoing worldwide chipset shortage.

Online sales once again failed to keep pace with the stellar results posted last year, but this was expected given the reluctance of consumers to visit stores during the height of the pandemic. In contrast, stores saw growth against the same month last year, despite the rush on Christmas shopping seen last October, but remained below their pre-pandemic levels.

James Hardiman, Senior Analyst

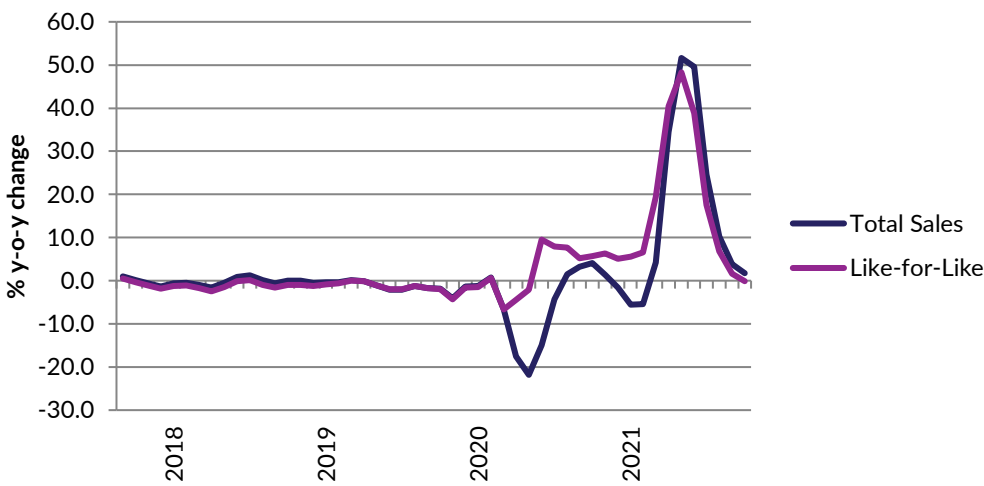
BRC - KPMG RETAIL SALES MONITOR OCTOBER 2021

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FOOD SALES: 3-MONTH AVERAGE



NON-FOOD SALES: 3-MONTH AVERAGE



Source: BRC-KPMG RSM

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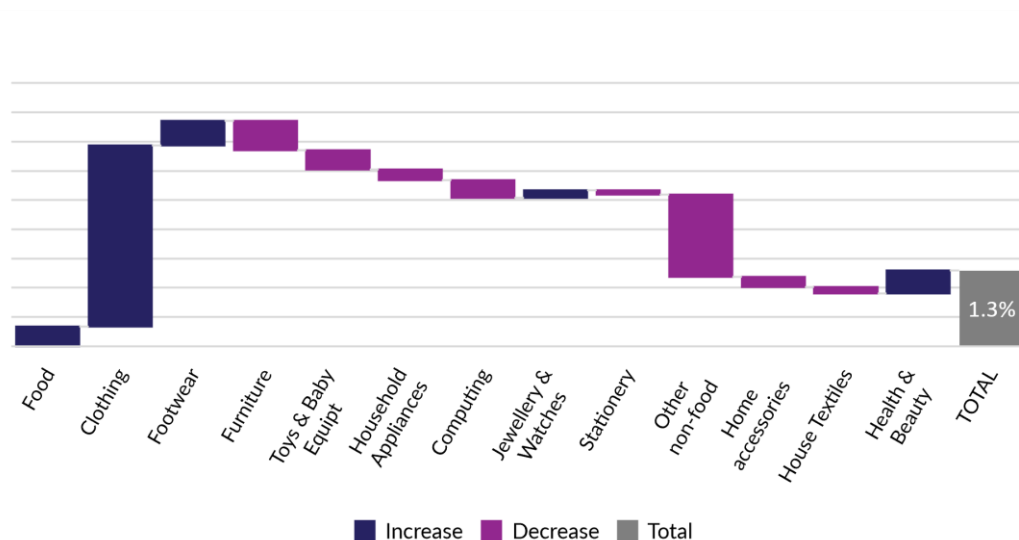
PERFORMANCE BY CATEGORY

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

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

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

SEP: CONTRIBUTION TO TOTAL SALES GROWTH BY CATEGORY - UPDATE CHART



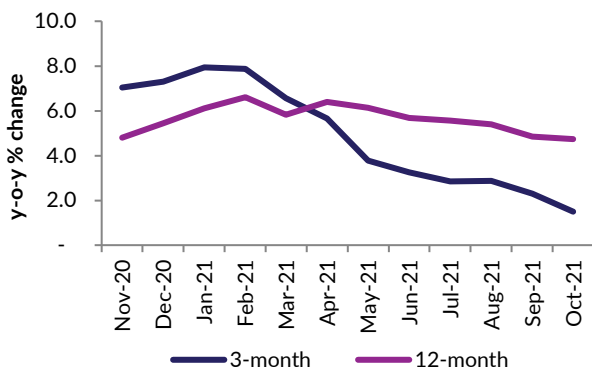
Source: BRC-KMG RSM (Includes Food data from IGD); in this chart, purple blocks represent negative contributions

BRC – KPMG RETAIL SALES MONITOR OCTOBER 2021

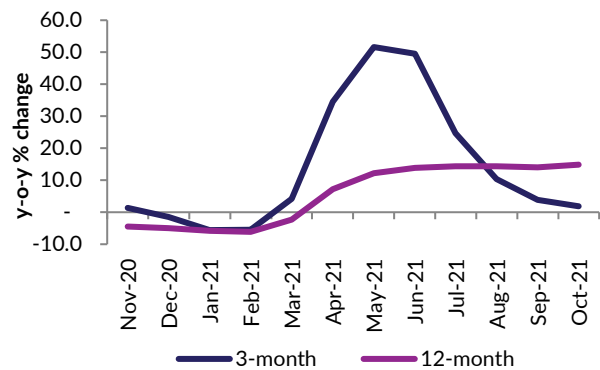
Covering the four weeks 3 - 30 October 2021

FOOD

TOTAL SALES ROLLING AVERAGE GROWTH: FOOD



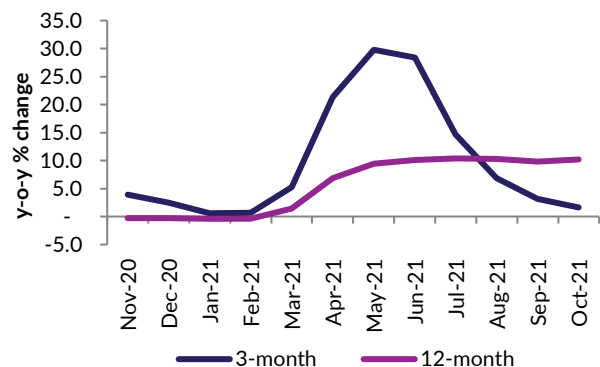
TOTAL SALES ROLLING AVERAGE GROWTH: NON-FOOD



FOOD

During the three-month period August to October, Food sales increased 0.3% year-on-year on a Like-for-like basis and grew 1.5% on a Total basis, compared with the same period last year. The Total 3-month average performance fell, compared with the previous month, when average growth reached 2.3% in the 3-month period, reaching its lowest level since February 2020. During the same 3-month period last year, Food sales grew 5.8% year-on-year. There were signs in Food sales that Christmas gift purchasing was on the rise, as it was reported alcohol and gifting treats saw an increase in demand.

TOTAL SALES ROLLING AVERAGE GROWTH: UK



“

The three-month average growth rate fell to its lowest level since February 2020

”

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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

Clothing remains one of the strongest performing categories, with the year-on-year performance continuing to reach solid double-digit growth. Following a slight slowdown in year-on-year performance during September, growth accelerated during October, with mens leisurewear and accessories said to be performing well. Demand for women's dresses and occasion wear was also said to be strong, as planning for the festive party season began. Supply chain and stock availability issues continue to impact sales for some retailers.

THE MONTH BY CHANNEL

Following a slowdown in Online Clothing sales during September, growth accelerated last month both on an annual basis and compared with September 2019. Women's clothing and lingerie continues to record strong growth, while accessories was up marginally from the flat performance in September. Childrenswear was said to have performed well online during October, however, a boost from sales of kids winterwear is yet to be seen. The Online penetration rate rose to its highest level since April, reaching 47.4% in October, down 2.7 percentage points from the same month last year.



The Online penetration rate for Clothing rose to its highest level since April

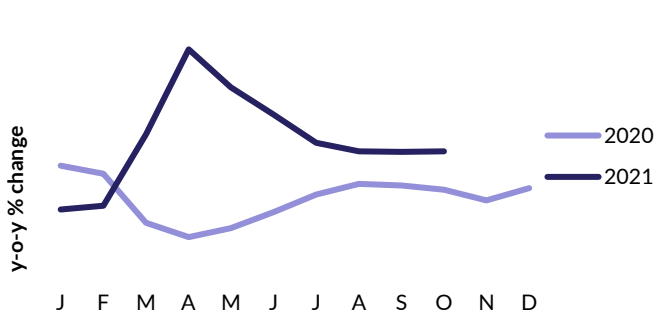


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FOOTWEAR

FOOTWEAR: UK TOTAL SALES CHANGE



FOOTWEAR: ONLINE PENETRATION RATE



FOOTWEAR: ONLINE SALES CHANGE



FOOTWEAR: STORES SALES CHANGE



THE MONTH OVERALL

The Footwear category continued to perform in line with the growth rates observed during August and September. While demand for Women’s footwear picked up in October compared with the same month last year, the Men’s category was said to see demand slump significantly. Sales of Children’s footwear during October were reported to be underwhelming, most likely due to a later return to school in September resulting in less demand for new school shoes over the half-term break.

THE MONTH BY CHANNEL

Growth in Online Footwear slowed for the fourth consecutive month, with the year-on-year performance recording a slight deceleration in growth during October, compared with the previous month. However, compared with pre-pandemic levels Online Footwear sales remains strong, with the October performance reaching the highest level recorded year-to-date. In-store year-on-year growth accelerated from the previous month but remains significantly below pre-pandemic levels. The Online Footwear penetration rate reached 57.3% in October, down 2.7 percentage points from the same month last year.



Sales of Children’s footwear was said to be underwhelming during October



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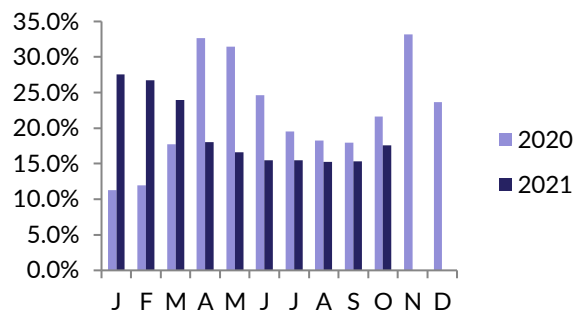
Covering the four weeks 3 - 30 October 2021

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 trend seen over recent months, where the beauty category continues to outperform sales of health products, continued during October. However, the gap in year-on-year growth rates narrowed last month. While make-up and fragrance continue to drive growth in the beauty category, it was said that strong demand for beauty-related advent calendars also boosted sales during October. In fact, these advent calendars are now a well-established item for the festive period, with more retailers offering more options than ever before this year. Overall, the Health & Beauty category continues to perform below pre-pandemic levels.

THE MONTH BY CHANNEL

Online sales of Health & Beauty were in line with the trend observed over recent months, with growth levels significantly ahead of 2019 levels, but in decline on an annual basis. After three months of single-digit growth for in-store sales, the October results reached double-digits on a year-on-year basis. It was reported that average spend and in-store conversions were up, most likely boosted by early festive shoppers. The Online penetration rate increased from the previous month, reaching 17.6% in October, down 4.0 percentage points from the same month last year.



Strong demand for beauty-related advent calendars was said to have boosted sales during October



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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

Sales continued to decline in the Furniture category on a year-on-year basis with the October decrease unchanged from the previous month. Although supply chain issues continue to hamper sales of some products, tables and chairs were said to be doing well, while there were reports of some availability issues with fabrics for sofas. The GfK Consumer Confidence Index for Major Purchases fell by 4 points, to -10 in October – this is 17 points higher than it was in the same month last year.

THE MONTH BY CHANNEL

The decline in Online Furniture sales continued during October, with the year-on-year decline reaching the lowest ever performance for this category. However, sales continue to perform ahead of pre-pandemic levels. In-store Furniture sales remain in decline both on a year-on-year and 2-year basis. The Online penetration rate in the Furniture category continues to remain stable, with the average rate in October reaching 45.7%. This is 3.3 percentage points lower than the rate recorded in the same month last year.



Online Furniture sales reached a record-low in October



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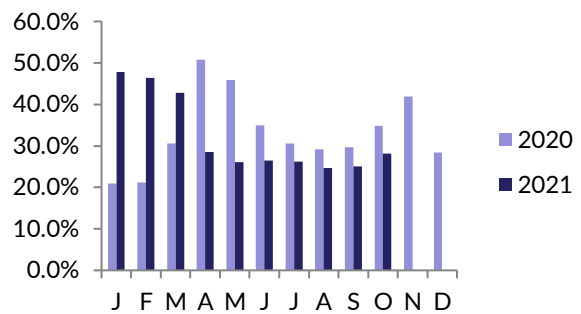
Covering the four weeks 3 - 30 October 2021

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 decline in the Home Accessories category continued during October, with year-on-year sales reaching the lowest level since January this year. For the second consecutive month, sales were also down compared with the same month in 2019. Although the shift away from home centricity continues, it was said that sales of tabletop accessories and cutlery were strong in October, likely boosted by more home entertaining and preparation for the festive season.

THE MONTH BY CHANNEL

Online sales of Accessories continue to decline with year-on-year sales decreasing at a steeper level during October compared with the previous month. On a 2-year basis, sales continue to grow ahead of pre-pandemic levels. The Online penetration rate for Home Accessories reached 28.1% in October, down 6.8 percentage points compared with October last year.



It was reported sales of tabletop accessories and cutlery were strong in October



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HOUSE TEXTILES

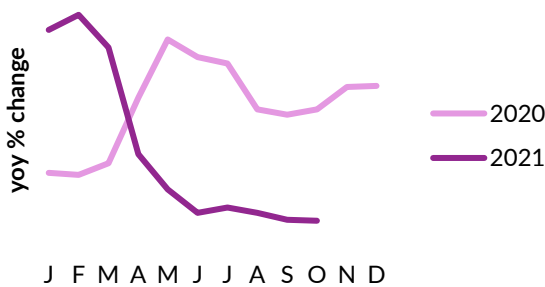
HOUSE TEXTILES: UK TOTAL SALES CHANGE



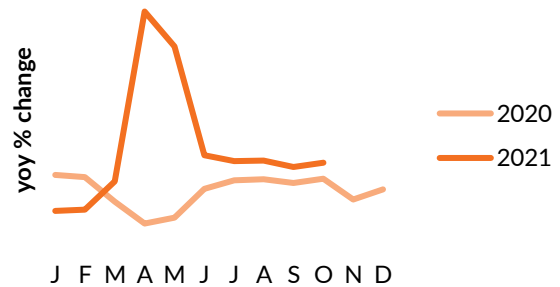
HOUSE TEXTILES: ONLINE PENETRATION RATE



HOUSE TEXTILES: ONLINE SALES CHANGE



HOUSE TEXTILES: STORES SALES CHANGE



THE MONTH OVERALL

The October performance in the House Textiles category was in line with the performance in the previous month, with sales continuing to decline year-on-year. This is the fifth consecutive month sales recorded a year-on-year decrease. Sales also decreased on a 2-year basis but the decrease was less steep than observed in the previous month.

THE MONTH BY CHANNEL

Online sales of House Textiles also continued to decline last month, with the October performance reaching a record low. The Online penetration rate reached 44.8% in October, down 11.1 percentage points from the average rate recorded in October last year.



Online sales reached a record low during October



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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

Toys & Baby Equipment sales fell even further into decline in October, resulting in their steepest fall seen since the category opened in June 2014. This was in part due to the ongoing struggles seen by the category as the country has opened up since the depths of the pandemic and was also a consequence of the children's return to schools in September. However, October's sales results were also compounded by the strong comparable month from 2020, which saw strong sales as consumers rushed to the shops before their upcoming closure.

THE MONTH BY CHANNEL

Online, the category's declining trend eased somewhat in October, as the channel continued to recover from its record low in April. In-store, Toys & Baby Equipment fell back into decline for the first time since the return to in-person shopping in April, as the ramp-up for Christmas shopping is slower this year than last. The Online penetration rate decreased by 0.9 percentage points from October last year, to 53.3% this time around.



The ongoing struggles for the category were compounded by the children's return to school



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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

Household Appliances fell further into decline from the rate seen in the previous month, but this was as much a result of the stronger comparable from last year, as it was reported that demand overall remained at a similar level as seen in September. However, when it came to the constituent parts of the category, larger items were said to see an increase in demand with smaller items not proving popular during the month. The latter may be due to Christmas gifting options for the category struggling with stock availability in comparison to the same point last year.

THE MONTH BY CHANNEL

Online, the category continued to struggle, with only a slight steepening of its declining trend since the previous month. Likewise, In-store saw little fluctuation from the levels of demand seen in September, although October remained in growth, which is encouraging given the unlikely event of more store closures in the immediate future. The Online penetration rate decreased against the levels seen in 2020 once again, with a fall of 5.2 percentage points to 67.4% in October.



Christmas gifting options for the category are struggling with stock availability

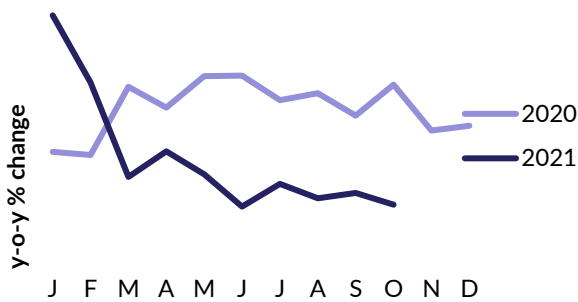


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COMPUTING

COMPUTING: UK TOTAL SALES CHANGE



COMPUTING: ONLINE PENETRATION RATE



COMPUTING: ONLINE SALES CHANGE



COMPUTING: STORES SALES CHANGE



THE MONTH OVERALL

The category continued to suffer as a consequence of its stellar performances in 2020, where home-working and schooling became the norm. However, Computing sales have suffered more and more as the year has progressed due to the worldwide shortage of chipsets that have become more acute over time. This shortage is not only affecting the retail industry, as manufacturing overall has also suffered. However, when it comes to laptops, lighter options are continuing to be the stand-out options for office workers transitioning to a hybrid pattern of working.

THE MONTH BY CHANNEL

The category fell further into decline Online in October, as it was up against a stronger comparable from last year. In-store, growth slowed slightly on a year-on-year basis and is still trading at a level below the normal pre-pandemic levels. The Online penetration rate decreased from the same point in 2020, by 10.2 percentage points, to 68.1% in October.



Computing sales have suffered due to the worldwide shortage of chipsets



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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



** 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

In October, the declining trend continued for the third consecutive month, with the category seeing its steepest rate of decline since November 2019. Stock shortages plagued Other Non-Food during the month, as the worldwide supply issues have become more intense as the year has progressed.



The worldwide supply issues have become more intense as the year has progressed



THE MONTH BY CHANNEL

Online, the category fell further into decline, but this is no surprise given the strong results posted in 2020 and it continues to trade above pre-pandemic levels. In-store the category's growth rate increased for the second consecutive month. The Online penetration rate decreased significantly from the same point last year, to 39.7% in October.

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OTHER NON-FOOD

Includes in particular:

Jewellery & Watches



In October, Jewellery & Watches continued to see growth on a year-on-year basis, with an increased rate compared to that seen in September. However, in comparison to the pre-pandemic levels in 2019 the category was in decline. The lack of tourism activity in comparison to 2019 is the main driver of this decline, once again.

Electricals & Electronics

TVs were another segment to see stock availability issues curtail sales in October, with the chipset shortage playing a large role in this. Wearable tech was also reportedly seeing lacklustre demand in October, partly for the same reason and also a result of their strong performance seen in the same point last year, where people were making the most of outdoor exercise.

Leisure Goods, Gaming, Books, CDs & DVDs

Luggage sales were said to see an increase in demand during the month, particularly in the run-up to the half-term break, as more people are going abroad for holidays than earlier in the year. Gaming's performance was, once again, driven more by supply than demand in the month, as the latest generation of consoles fly off the shelves as soon as retailers are able to get them in.

DEPARTMENT STORES

Retailers have made significant efforts to encourage shoppers to bring Christmas related spending forward this year, in order to alleviate the strain on their logistics operations as activity ramps up towards the end of the year. As Department Stores are the ideal one-stop-shop for gifting, this has come to their benefit, but it remains to be seen whether spending overall will be as high as expected over the entire period. The return of Black Friday on the horizon this year is already proving to be a challenge for many retailers, who are struggling between market share and profits in a retail landscape that has seen costs balloon across the board.

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MONTHLY RETAIL SALES: % CHANGE YEAR-ON-YEAR (2021 IS ALSO YO2Y)

MONTH	2019		2020		2021		2021 (YO2Y)	
	LFL	TOTAL	LFL (1)	TOTAL	LFL	TOTAL	LFL	TOTAL
January	1.8	2.2	0.0	0.4	7.1	-1.3	2.3	-3.4
February	-0.1	0.5	-0.4	0.1	9.5	1.0	1.2	1.7
March	-1.1	-0.5	-3.5	-4.3	20.3	13.9	8.4	8.3
April	3.7	4.1	5.7	-19.1	39.6	51.1	46.3	7.3
May	-3.0	-2.7	7.9	-5.9	18.5	28.4	23.7	10.0
June	-1.6	-1.3	10.9	3.4	6.7	10.4	17.0	13.1
July	0.1	0.3	4.3	3.2	4.7	6.4	9.1	9.8
August	-0.5	0.0	4.7	3.9	1.5	3.0	7.6	8.9
September	-1.7	-1.3	6.1	5.6	-0.6	0.6	5.8	7.0
October	0.1	0.6	5.2	4.9	-0.2	1.3	4.5	6.3
November	-4.9	-4.4	7.7	0.9
December	1.7	1.9	4.8	1.8
Jan-Oct average	-0.3	0.1	4.0	-0.6	11.7	12.3	13.3	7.2
Jan-Dec average	-0.5	-0.1	4.4	-0.3	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
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
Jul - Sep	1.7	1.6	1.7	2.3	3.8	3.1
Aug - Oct	0.9	-0.1	0.3	1.5	1.8	1.7

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 OCTOBER 2021

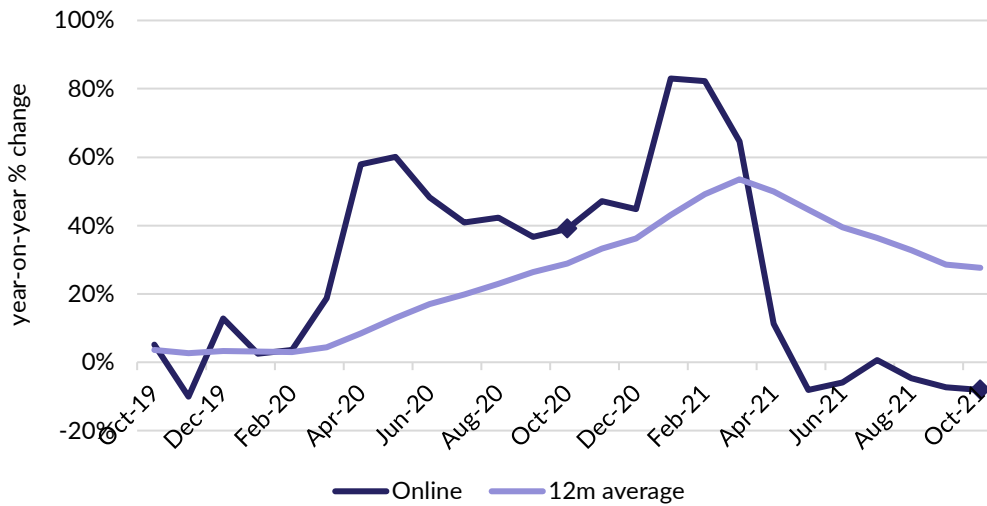
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ONLINE VERSUS STORE DATA

BRC - KPMG RETAIL SALES MONITOR OCTOBER 2021

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

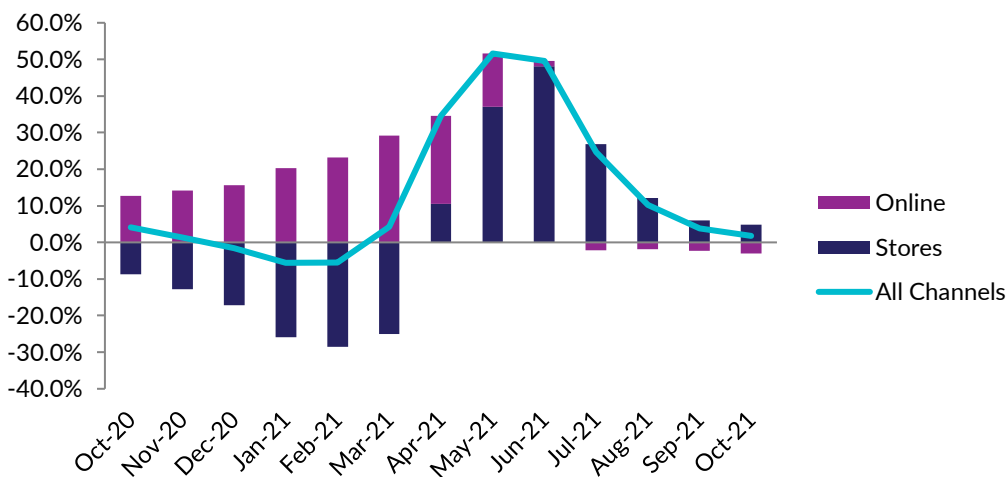


NON-FOOD GROWTH	ONLINE*	UK TOTAL
Oct 2021	-8.0%	n/d
Oct 2020	39.0%	n/d
Sep 2021	-7.3%	n/d
3m avg	-6.1%	1.8%
12m avg	27.7%	14.9%

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
Aug - Oct 21	4.5%	7.9%
Aug - Oct 20	-9.0%	-11.4%
Jul - Sep 21	6.6%	10.8%
12m avg	26.2%	26.3%

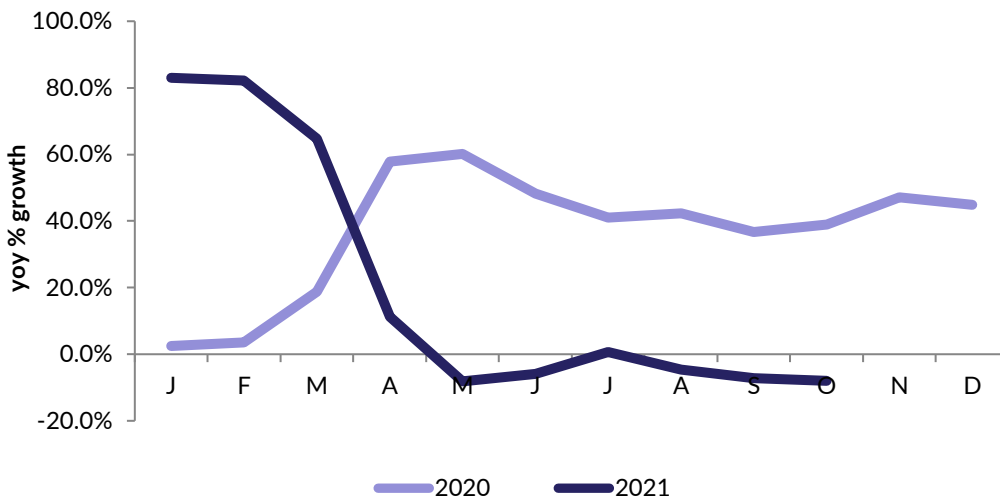
Source: BRC-KPMG RSM

BRC - KPMG RETAIL SALES MONITOR OCTOBER 2021

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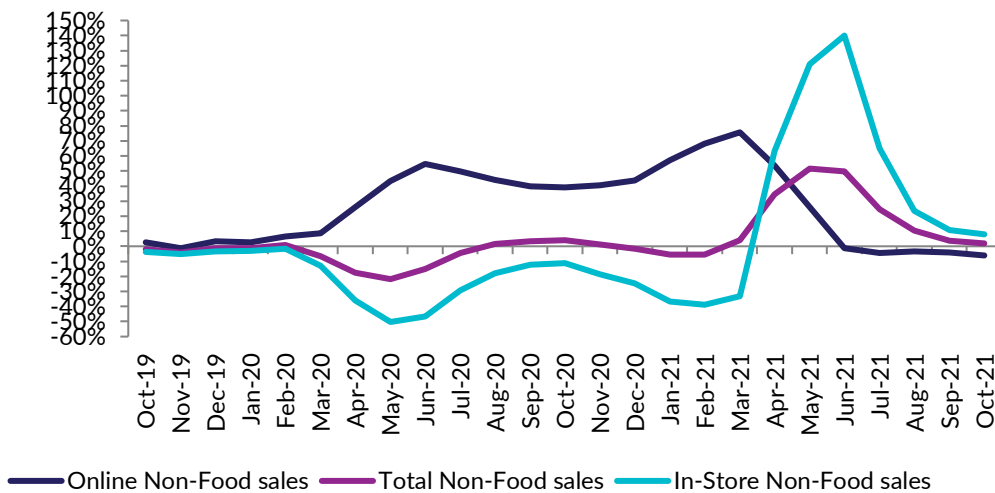
BRC-KPMG NON-FOOD RETAIL SALES YEAR-ON-YEAR GROWTH:

MONTHLY GROWTH OF ONLINE NON-FOOD RETAIL SALES



Source: BRC-KPMG RSM

3M ROLLING AVERAGE GROWTH OF NON-FOOD SALES

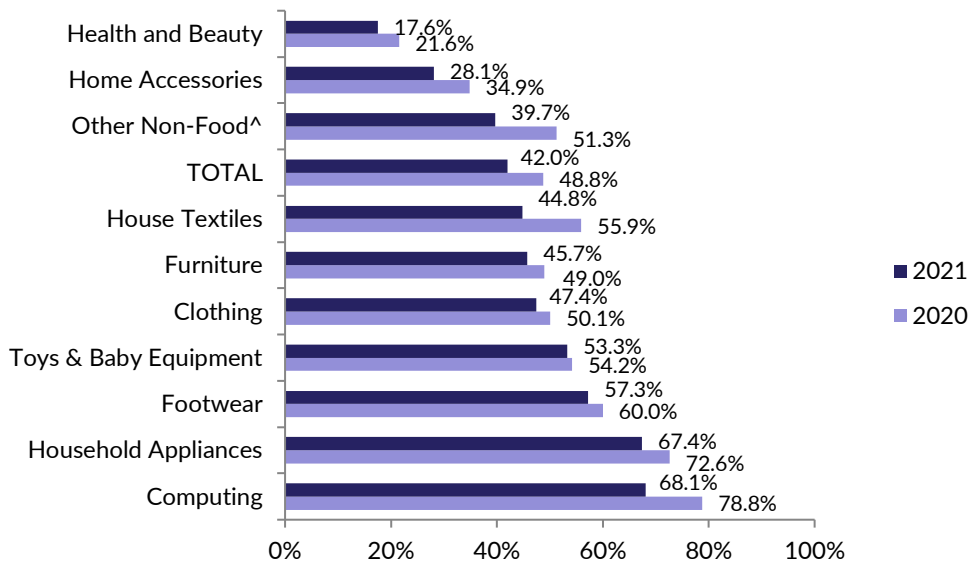


Source: BRC-KPMG RSM

BRC - KPMG RETAIL SALES MONITOR OCTOBER 2021

Covering the four weeks 3 - 30 October 2021

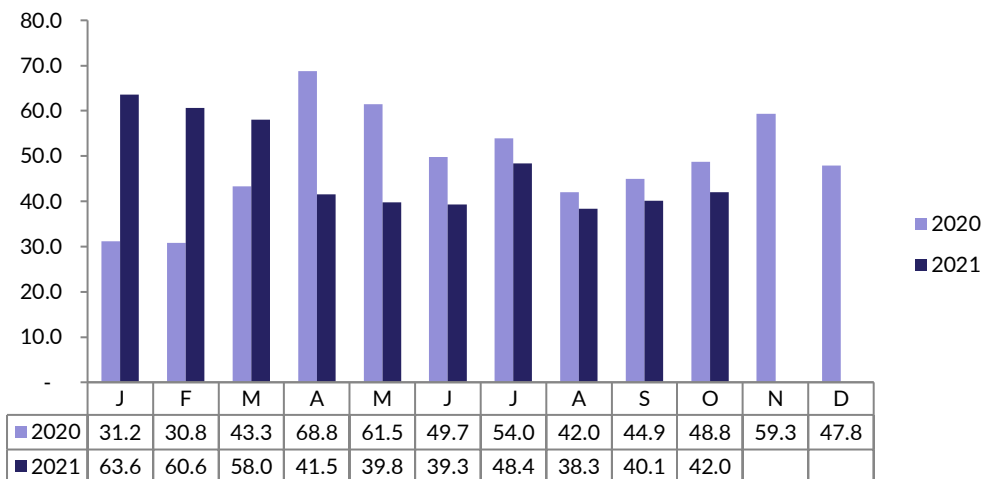
OCT: ONLINE PENETRATION RANKINGS BY CATEGORY



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	
Oct 2021	42.0%
Oct 2020	48.8%
Sep 2021	40.1%
3m average	39.3%
12m average	48.6%

Source: BRC-KPMG RSM

BRC - KPMG RETAIL SALES MONITOR OCTOBER 2021

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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
Oct 2020	39.0	39.2	48.8	45.2	13.0	12.8
Nov	47.2	40.6	59.3	50.5	18.0	14.2
Dec 2020	44.8	43.8	47.8	51.7	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%
Sep	-7.3%	-4.0%	40.1%	42.1%	-3.7%	-2.3%
Oct	-8.0%	-6.1%	42.0%	39.3%	-4.4%	-3.1%

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
Oct 2020	-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%
Sep	10.8%	6.6%
Oct	7.9%	4.5%

Source: BRC-KPMG Retail Sales Monitor

BRC – KPMG RETAIL SALES MONITOR OCTOBER 2021

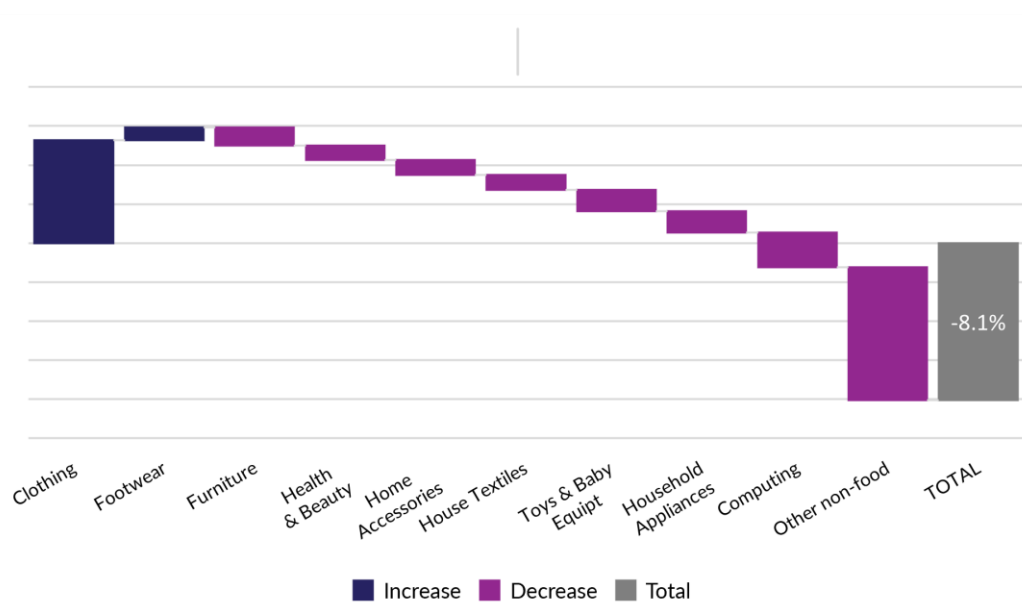
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SECTOR PERFORMANCE: ONLINE SALES GROWTH

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

Source: BRC-KPMG RSM

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



Source: BRC-KPMG RSM

BRC - KPMG RETAIL SALES MONITOR OCTOBER 2021

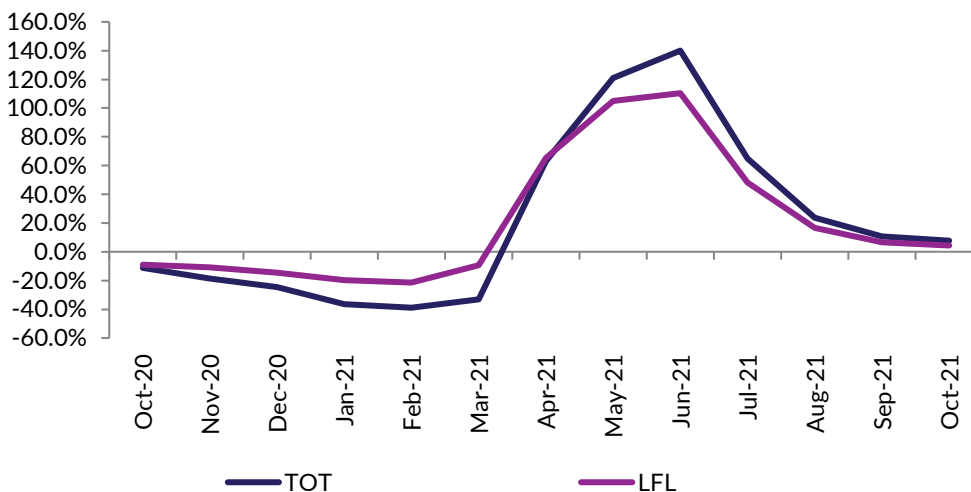
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SECTOR PERFORMANCE: STORE TOTAL SALES GROWTH (YEAR-ON-YEAR TOTAL SALES)

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

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The November 2021 Monitor, covering the four weeks 31 October – 27 November 2021, will be released at 00.01am on Tuesday 7 December 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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Covering the four weeks 3 - 30 October 2021

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