Economic report

RetailEconomics

UK Online Retail

Monthly report

Online Retail Sales

7.4%

Online Retail Sales rose by 7.4% in January, value and non-seasonally adjusted, year-on-year, according to ONS.

Retail Sales

1.8%

Retail sales rose by 1.8% in January, year-on-year, according to Retail Economics.

Average Weekly Online Sales

£1,373m

Average weekly online sales were £1,373m in January, according to ONS.

Online as a % of Total Retail Sales

19.9%

Online accounted for 19.9% of total retail sales in January, value and non-seasonally adjusted, according to ONS.

Online Clothing & Footwear Sales

-1.1%

Online Clothing & Footwear sales were down 1.1% in January, year-on-year, according to ONS.

RetailEconomics

What you get from our UK Online Retail reports

- Key economic trends from the latest available data
- A holistic view of the online UK retail market
- Comparison of online and in-store performance
- Detailed online sales data by sector
- Industry-wide performance metrics
- The big picture for UK online retail to help inform your decisions
- A sharper understanding of how consumers use the internet
- Covid-19 related insights to assist your forward planning

COVID-19 Service

We conduct extensive research and analysis on the impact of coronavirus (COVID-19) on the UK retail and leisure industry. Our service consists of frequent, timely analysis and updates in a variety of formats so you can absorb the information quickly in a way that best suits you.

What you get

1. Impact assessment reports for UK retail and leisure

These reports provide an in-depth analysis of the COVID-19 impact on the UK retail and leisure industry including consumer panel surveys, economics analysis, forecasts and other insights.

2. COVID-19 Quick Responses

Get the latest updates from retailers and the wider industry on the impact of COVID-19 as an when it happens - delivered directly to your inbox.

3. Consumer panel research

For the critical duration, we conduct fortnightly surveys using a panel of over 2,000 households to measure: 1) Behavioural shifts 2) Confidence 3) Sentiment These extensive surveys have proved to be a very accurate indicator of future trading vulnerabilities for the industry.

4. Weekly newsletter

Every week we produce a summary of all the ‘need-to-know facts and stats’ related to the impact of coronavirus on the retail and leisure industry broken down by sector (e.g. clothing & footwear, food, home and more) and by channel.

5. Economic chartbook

Produced monthly, a summary of all the critical macroeconomic data and trends in an easily digestible chartbook format. Ideal for identifying trends.

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RetailEconomics

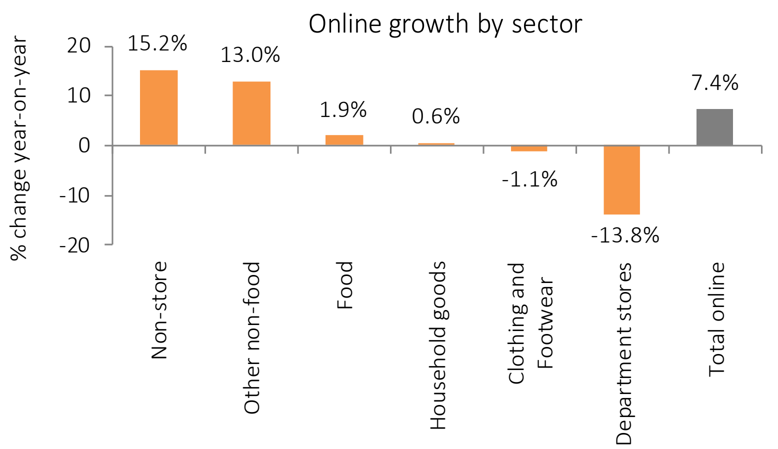
OMITTED SECTIONS

Executive Summary

Reporting period:
29 December 2019 – 1 February

RetailEconomics

Sales growth slows in January



Source: Retail Economics analysis

Online sales growth slows

- Online retail sales rose by 7.4% year-on-year (value and non-seasonally adjusted) in January against a 13.5% rise in the same month a year earlier.
- This was the ahead of the three-month average of 6.2%, but weaker than the 12-month average of 10.0%. In fact, this was the third-weakest growth rate on record with growth in November 2019 (-0.8%) distorted by the later timing of Black Friday, while in November 2012, growth was only marginally lower at 7.0%.

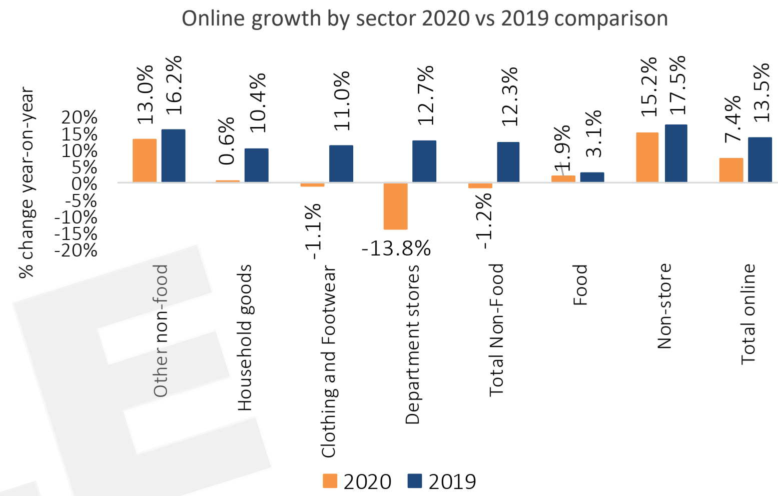
1

Sales growth Jan 2020 vs 2019

- Weaker performance at the start of the year resulted in growth slowing across all categories compared with January 2019.
- There was significant divergence in the Non-Food channel. Indeed, Household Goods (+0.6%), Clothing & Footwear (-1.1%) and Department Stores (-13.8%) all reported double-digit percentage point swings, resulting in the overall Non-Food category falling 13.5 percentage points to -1.2% year-on-year.

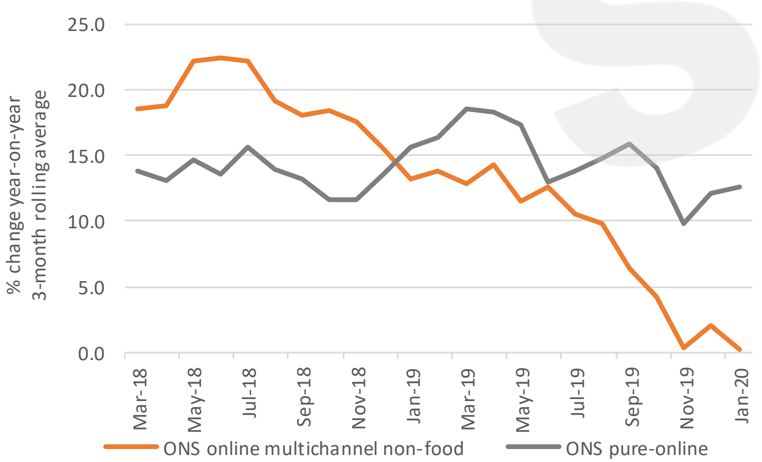
2

Online retail sales growth weaker than last year for most categories



Source: ONS, Retail Economics analysis

Online: multichannel vs. pure play (3m rolling average)



Source: ONS, Retail Economics analysis

Pure Online vs. Multichannel

- The continuing strong performance of the Non-Store retailing category (a good indication of pure online retail growth) saw sales growth rise 15.2% year-on-year. While this was lower than a year ago it remains stronger than the multichannel online non-food measure (-1.2% in January).
- What's more, on a three-month rolling basis, performance between the two categories has widened to 12.4 percentage points, the widest it's been for three years.

3

Visits to retail websites rise

- Visits to retail websites rose by 10.9% year-on-year in January, against a decline of 1.9% in the previous year.
- Visits totalled 3.0 billion in January, averaging over 747 million visits per week.
- Amazon received over a billion visits to its website in January, rising 32.3% year-on-year. This was significantly more than the next biggest retailer, eBay who witnessed a decline in visits. Elsewhere, a strong annual performance was seen by Etsy (+18.6%) and Currys (+18.2%).

4

Retail websites popular in January

	Top 10 Retail Websites	Number of visits	YoY growth
1	www.amazon.co.uk	1,130,960,915	32.3%
2	www.ebay.co.uk	240,884,143	-7.8%
3	www.argos.co.uk	82,211,903	-2.4%
4	www.johnlewis.com	42,809,012	-0.4%
5	www.currys.co.uk	34,799,954	18.2%
6	www.next.co.uk	34,383,243	-5.3%
7	www.screwfix.com	29,231,355	7.4%
8	www.marksandspencer.com	24,802,523	3.7%
9	www.etsy.com	24,389,028	18.6%
10	www.dunelm.com	22,659,501	9.2%

Source: Hitwise

UK Online Retail Overview – January 2020

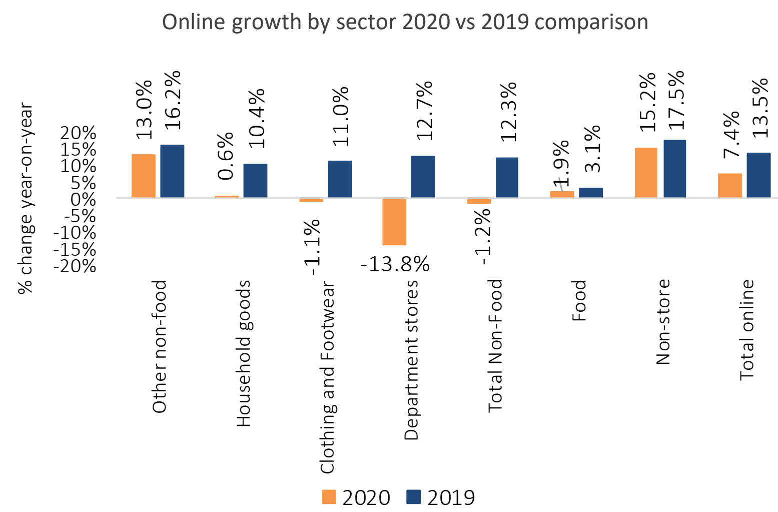
Online retail sales rose by 7.4% year-on-year (value and non-seasonally adjusted) in January against a 13.5% rise in the same month a year earlier.

This was the ahead of the three-month average of 6.2%, but weaker than the 12-month average of 10.0%. In fact, this was the third-weakest growth rate on record with growth in November 2019 (-0.8%) distorted by the later timing of Black Friday, while in November 2012, growth was only marginally lower at 7.0%.

The weaker performance at the start of the year resulted in growth slowing across all categories compared with January 2019 (chart top right). Whilst Non-Store and Food demonstrated a marginal slowdown in online sales growth compared to a year ago, there was significant divergence in the Non-Food channel. Indeed, Household Goods (+0.6%), Clothing & Footwear (-1.1%) and Department Stores (-13.8%) all reported double-digit percentage point swings which resulted in the overall Online Non-Food category falling 13.5 percentage points to -1.2% year-on-year.

For department stores and clothing and footwear retailers, growing pressure from continuing structural changes within the industry weighs on performance. It's important to note that the online Clothing & Footwear category captures the sales growth of retailers with both an online *and* store presence (whereas pure online clothing and footwear retailers, such as Boohoo, are captured in the Non-Store retailing category). Burdened with too many stores, debilitating business rates, high rents, service charges and inflexible lease structures, pressure has grown on margins.

The continuing strong performance of the Non-Store retailing category (a good indication of pure online retail growth) saw sales growth rise 15.2% year-on-year. While this was lower than a year ago it remains stronger than the multichannel online non-food measure (-1.2% in January). What's more, on a three-month rolling basis, performance between the two categories has widened to 12.4 percentage points, the widest it's been for three years (shown in graph in Executive Summary on page 3).



Source: ONS, Retail Economics analysis

UK Retail	Online Annual % growth	Online avg. weekly spend (£m)	Online as % of total retail sales
Aug-19	11.4%	£1,330	18.1%
Sep-19	8.2%	£1,319	18.1%
Oct-19	8.5%	£1,448	19.1%
Nov-19	-0.8%	£1,808	21.5%
Dec-19	11.6%	£2,074	21.4%
Jan-20	7.4%	£1,373	19.9%

Source: ONS, Retail Economics analysis
*Retail Sales Val Non Seasonally Adjusted
*Period aligned to ONS trading calendar – 29 December 2019 – 1 February 2020

Online Retail Sales

7.4%

Online Retail sales rose by 7.4% in January, year-on-year, non-seasonally adjusted.

Online Share of Total

19.9%

Online accounted for 19.9% of total retail sales in January, value and non-seasonally adjusted.

Household Goods (+0.6%), Clothing and Footwear (-1.1%) and Department Stores (-13.8%) all reported double-digit percentage points swings [in performance] which resulted in the overall Non-Food category being 13.5 percentage points lower than a year ago.

While structural changes within the industry partially explains the disappointing start to 2020 for online, there were also temporary factors a year ago which contributed.

Sales in January 2019 were impacted by snowy conditions towards the end of the month, boosting online sales growth as consumers shopped from the comfort of their homes, some unable to get to shops. This year however, there was no such boost to online sales.

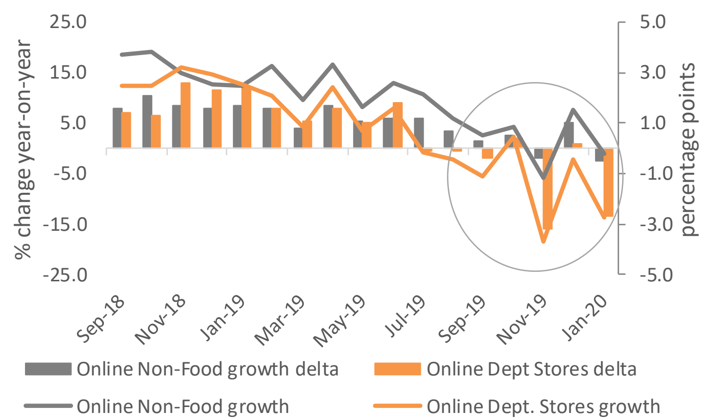
In fact, the Met Office reported it was the warmest January since 2007 (as well as being the six-warmest January on record) whilst also being the wettest for two years.

The warmer weather appears to have supported in-store performance, arguably at the expense of online sales in some categories, with data from Springboard suggesting that footfall growth improved markedly in January, falling just 0.5% year-on-year, compared with a 2.0% decline on a three-month rolling basis. Both Retail Parks and Shopping Centres drove the rise in footfall while High Street footfall disappointed, remaining in negative territory for the 10th consecutive month. The 0.2% rise for Shopping Centres was the first uplift since March 2017 and only the third rise in the last four years. A number of observations can be made regarding this. Firstly, wet weather is likely to have encouraged shoppers to covered locations, helped by store diversity. Secondly, repurposing of shopping centres in recent months has seen this channel become more attractive with more experiential options available (e.g. entertainment and dining).

Penetration data also supports the notion of a slowdown in the online channel. In fact, while the proportion of online sales in January rose 0.6 percentage points to 19.9% of total retail sales, closer investigation suggests a weakening in some categories. In fact, four categories reported a lower penetration rate than a year ago: Food, Department Stores, Clothing & Footwear and Non-Store. For Department Stores, this was the fifth time in the last six months the penetration rate has fallen on last year's level with a 2.7 percentage point fall in January (to 17.6% from 20.3% in January 2019), the sharpest on record (excluding Black Friday distortions in Nov 2019).

The fallback across a number of non-food categories resulted in the Online Non-Food penetration rate also falling year-on-year, down 0.5 percentage points to 15.9%.

Online Non-Food growth vs Online Department Store



Source: ONS, Retail Economics analysis

Other supportive data was from the IMRG Capgemini Online Retail Index showing online sales dipping 0.4% in January (5 weeks to 1 February), following strong performances in November and December. Similar to our own analysis of late, they attribute the performance in the final two months of the year to deep and widespread levels of discounting. In absence of such conditions in January, consumers reverted to their more cautionary habits. Interestingly, in their Health and Beauty and Clothing categories they noted a trend away from mid-market retailers in favour of discount players suggesting that consumers are focusing on value.

Looking ahead, February's data will face similar challenges with strong comparisons a year ago for most Non-Food categories in particular. This is likely to lead to continued slowdown in online retail sales growth.

Online Non-Food Penetration rate

15.9%

The online Non-Food penetration rate for January was 15.9%, slowing 0.5 percentage points on the previous year.

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Four categories reported a lower penetration rate than a year ago: Food, Department Stores, Clothing & Footwear and Non-Store.

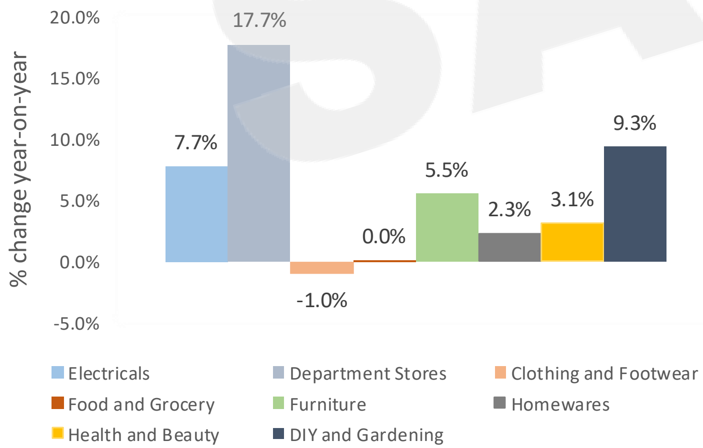
Hitwise Online Retail Traffic Index – January 2020

Visits to retail websites rose by 10.9% year-on-year in January, against a decline of 1.9% in the previous year.

Visits totalled 3.0 billion in January, averaging over 747 million visits per week.

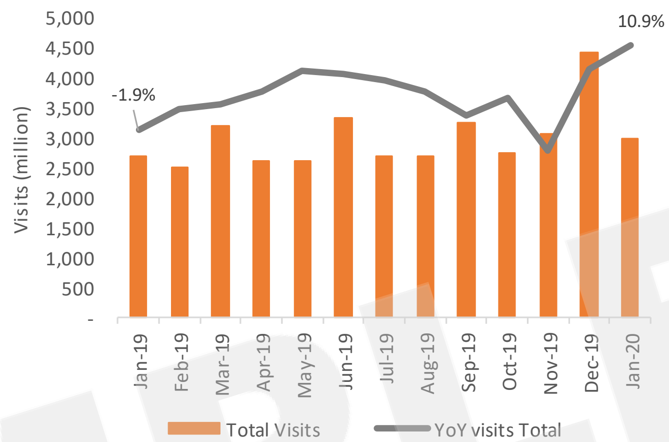
All but one category saw increasing visits to their websites in January, year-on-year, with multi-category retailers (Department Stores) reporting the strongest rise (+17.7%), followed by DIY & Gardening (+9.3%) and Electricals (+7.7%). This compares with Clothing & Footwear which reported a marginal fall in visits of 1.0%.

Amazon received over a billion visits to its website in January, rising 32.3% year-on-year. This was significantly more than the next biggest retailer, eBay who witnessed a decline in visits. Elsewhere, a strong annual performance was seen by Etsy (+18.6%) and Currys (+18.2%).



Source: Hitwise, Retail Economics analysis

Visits to retail websites – January 2020



Source: Hitwise, Retail Economics analysis

Top 10 retail websites – January 2020

	Top 10 Retail Websites	Number of visits	YoY growth
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9	www.etsy.com	24,389,028	18.6%
10	www.dunelm.com	22,659,501	9.2%

Source: Hitwise, Retail Economics analysis

Retail Website visits

10.9%

Visits to retail websites rose 10.9% in January, year-on-year, according to Hitwise.

Mobile Visits

57%

57% of visits to retail websites were on mobile devices in January, according to Hitwise

Visits totalled 3.0 billion in January, averaging over 747 million visits per week.

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ONS Online Retail Sales - January 2020

Online sales (value and non-seasonally adjusted) rose by 7.4% year-on-year, accounting for 19.9% of all retail spend in January.

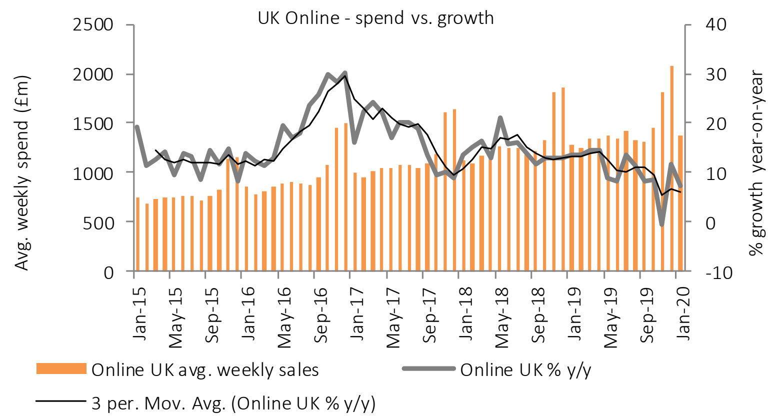
January's slowdown was above the three-month average of 6.2%, but underperformed the 12-month average of 10.0%.

A relatively strong comparison a year ago goes some way to explain the weakened January performance when sales rose 13.5%. This was driven by snowy weather conditions a year earlier which boosted online sales growth towards the end of the month.

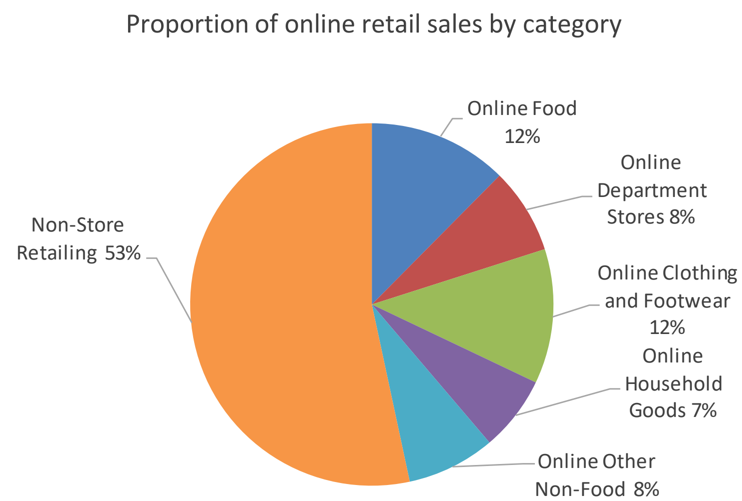
Just two categories outperformed the overall rise in January; Non-Store (a good indication of pure online retailers, +15.2%) and Other Non-Food (which includes DIY & Gardening, Health & Beauty and some Electricals,+13.0%).

Elsewhere, Food (+1.9%) returned to positive territory whilst Household Goods (+0.6%) sales slowed considerably.

Negative growth continued for Department Stores (-13.8%) and Clothing & Footwear (-1.1%), both for three consecutive months.



Source: ONS, Retail Economics analysis



Source: ONS, Retail Economics analysis
*Period aligned to ONS trading calendar – 29 December 2019 – 1 February 2020

Note – non-store retailing includes pure online sales from multiple categories such as clothing and footwear, electricals and food

Online Retail Sales

7.4%

Online Retail sales rose by 7.4% in January, year-on-year.

Three-month average

6.2%

In the three months to January, online retail sales rose by 6.2%.

January's slowdown was above the three-month average of 6.2%, but underperformed the 12-month average of 10.0%.

BRC Online Retail Sales – January 2020

Online Non-Food sales increased by a subdued 2.5% year-on-year in January. This was lower than the 12-month average of 3.1%.

January's rise was up against a 5.4% uplift a year ago, when online sales were supported by snow in the last two weeks of January 2019.

Health & Beauty and Computing were the strongest performing online categories, followed by Household Appliances and Clothing. A disappointing performance was seen in Toys & Baby Equipment, Other Non-Food and House Textiles which all resided at the bottom of the BRC's ranking table.

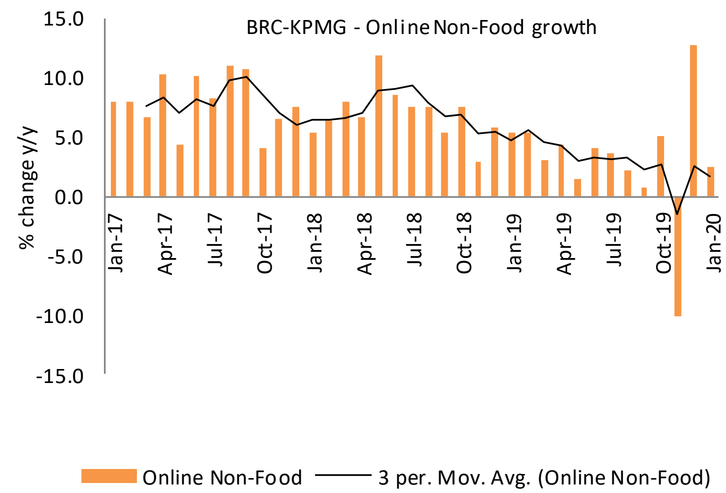
The BRC estimates that in the three months to January, Online Non-Food sales rose by 2.6%, while in-store sales fell by 3.0% on a total basis.

Compared to last year, the Non-food online penetration rate increased by 1.1% points to 30.6% in January.

As noted in previous months, the BRC's online non-food measure has significant omissions from their sample including: Amazon, eBay, Boohoo, Apple, Missguided, FarFetch, Etsy and others.

BRC Online Non-Food	Annual % growth	Penetration (%)
Aug-19	2.2%	29.8%
Sep-19	0.7%	29.5%
Oct-19	5.1%	29.9%
Nov-19	-10.1%	31.6%
Dec-19	12.8%	33.8%
Jan-20	2.5%	34.5%

Source: BRC, Retail Economics analysis



Online Sector Performance	Jan-20	Rolling 3 month	Rolling 12 month
Health and Beauty	1	1	1
Computing	2	5	3
Household Appliances	3	2	4
Clothing	4	3	2
Furniture	5	4	6
Footwear	6	8	5
Home Accessories	7	7	7
House Textiles	8	6	9
Other Non-Food	9	9	8
Toys and Baby Equipment	10	10	10

Source: BRC, Retail Economics analysis
*Period aligned to ONS trading calendar – 29 December 2019 – 1 February 2020

BRC Online Non-Food

2.5%

According to the BRC, Online Non-Food sales rose by 2.5% in January, year-on-year.

Penetration Rate

30.6%

According to the BRC, 30.6% of all Non-Food sales in January were made online.

January's rise was up against a 5.4% uplift a year ago, when online sales were supported by snow in the last two weeks of January 2019.

Interactive Contents

BDO Non-Store Retail Sales – January 2020

Total non-store LFLs rose 18.8% in January, year-on-year, against a 19.1% rise a year earlier.

Sales growth was strongest in the first (+24.3%) and third (25.8%) weeks of the month, with week one the weakest performing, demonstrating growth of 10.4%.

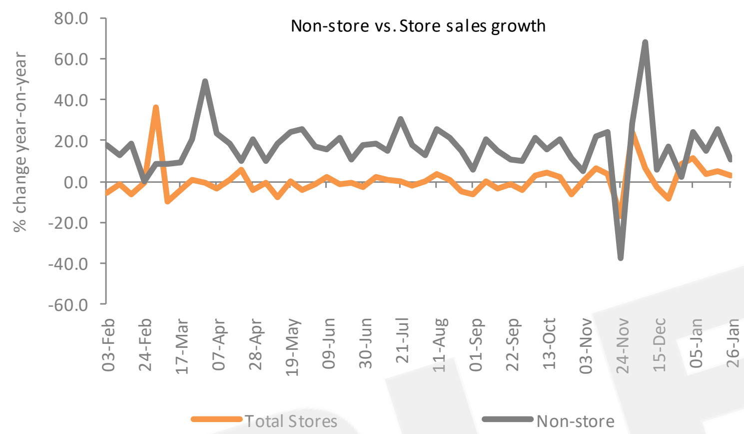
Non-Store Homewares remained the strongest performing category for the third consecutive month. Sales growth outperformed the overall average, rising 21.8% year-on-year in January. The middle two weeks were the strongest performing while week four reported a slight decline (-1.9%).

Non-Store Fashion sales was the next best performing, rising 17.4% year-on-year. A strong performance in the first and third weeks of the month helped outweigh single-digit growth in the other weeks.

The Non-Store Lifestyle category reported a 14.6% rise in sales growth in January, boosted by a strong performance in the final three weeks of the month. Notably, week two (+20.0%) reported the sharpest rise.

Week ending:	Total Non-Food Non-Store	Non-Store Fashion	Non-Store Lifestyle	Non-Store Homewares
05 January	24.3	25.8	6.7	21.3
12 January	15.0	8.9	20.0	37.9
19 January	25.8	30.5	12.5	29.8
26 January	10.4	4.6	19.0	-1.9
Total January	18.8%	17.4%	14.6%	21.8%

Source: BDO



Source: BDO

Source: BDO

Online Non-Food

18.8%

According to BDO, Online Non-Food sales rose by 18.8% in January, year-on-year.

Online Fashion

17.4%

According to BDO, Online Fashion sales rose by 17.4% in January, year-on-year.

Sales growth was strongest in the first (+24.3%) and third (25.8%) weeks of the month, with week one the weakest performing, demonstrating growth of 10.4%.

IMRG Capgemini e-Retail Sales Index – January 2020

The IMRG-Capgemini e-Retail Sales Index reported online sales fell 0.4% year-on-year in the five weeks to 1 February, down on the 9.4% rise in January. This was below the three-month (+8.9%) and 12-month (+5.5%) averages.

Online-only (+7.6%) retailers continued to outperform multi-channel retailers (-2.9%) in January.

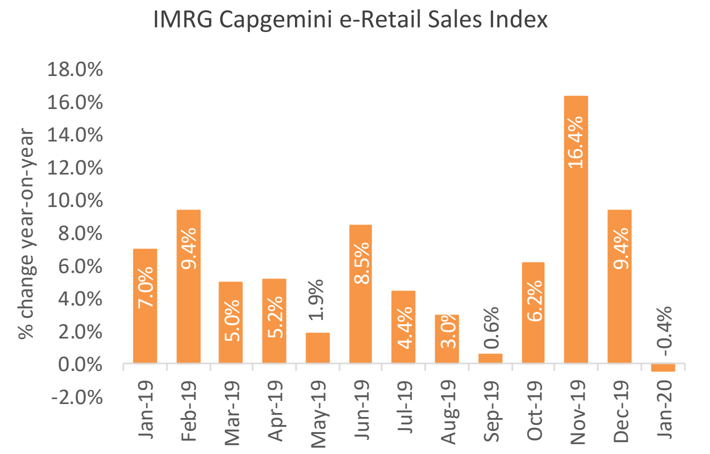
In terms of category performance, it was Beauty (7.1%) which remained one of the strongest performing, although underperformed its average during 2019 (+23.3%). This was followed by Home (+6.1%) and Clothing (+3.1%). Elsewhere, Electricals sales fell 17.7% year-on-year.

Anecdotal commentary suggests that mid-market retailers particularly in the clothing and beauty segments were losing out to budget retailers. This gives a strong indication that consumers remained cautious in January, despite an improvement in confidence and more certainty surrounding Brexit.

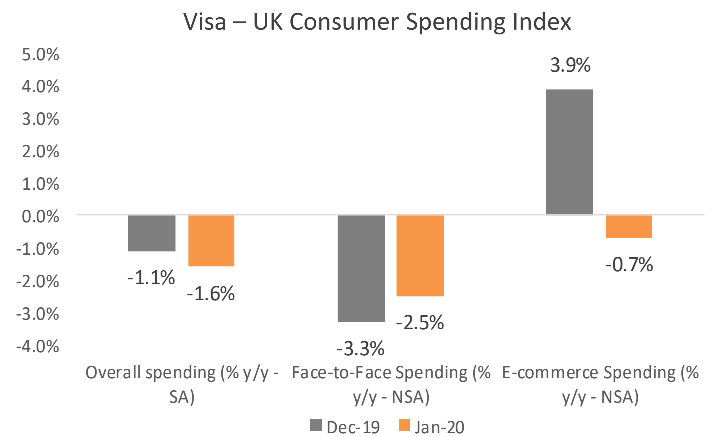
Visa – UK Consumer Spending Index (Volumes) – January 2020

E-commerce (-0.7%) spending returned to negative territory in January following December's improvement which was boosted by the later timing of Cyber Monday. This was the seventh decline in the last 12 months.

Meanwhile, store spending continued to decline, although reported an improvement in January. Face-to-Face expenditure fell -2.5% in January year-on-year, from December's 3.3% decline, the ninth consecutive month of falling spending.



Source: IMRG



	Dec-19	Jan-20
Overall spending (% y/y - SA)	-1.1%	-1.6%
Face-to-Face Spending (% y/y - NSA)	-3.3%	-2.5%
E-commerce Spending (% y/y - NSA)	3.9%	-0.7%

Source: Visa Europe's UK Consumer Spending Index

IMRG Online Retail Sales

-0.4%

According to IMRG, online retail sales fell by 0.4% in January, year-on-year.

Visa E-commerce sales

-0.7%

According to Visa, e-commerce sales fell 0.7% in January, year-on-year.

E-commerce (-0.7%) spending returned to negative territory in January following December's improvement which was boosted by the later timing of Cyber Monday. This was the seventh decline in the last 12 months.

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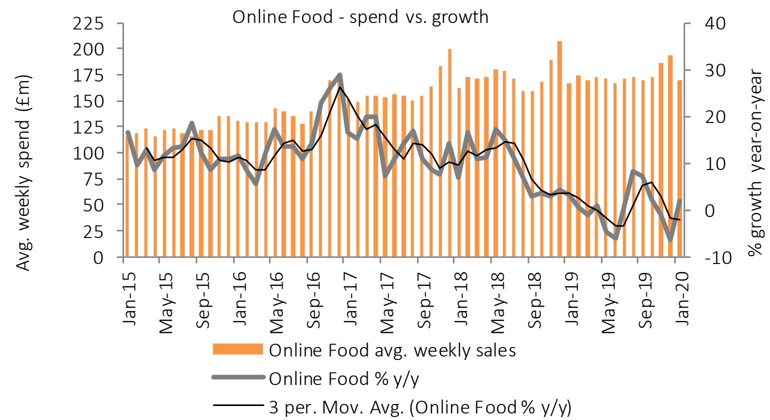
Online Food – Office for National Statistics – January 2020

The Online Food category rose by 1.9% in January, year-on-year, following two consecutive months in negative territory. This was against a 3.1% rise a year earlier which was a relatively strong performance for the category a year ago.

The improved performance in January outperformed the three-month and 12-month averages of -2.0% and +0.1% respectively.

Online Food sales accounted for 5.6% of total Food sales in January, lower than the 5.7% proportion in the previous year.

Average weekly spending for Online Food was £170m, up on the £167m spent in the previous year.



Source: ONS, Retail Economics analysis

Online Food	Annual % growth	Avg. weekly spend (£m)
Aug-19	8.3%	£173
Sep-19	7.1%	£170
Oct-19	2.2%	£173
Nov-19	-1.2%	£186
Dec-19	-6.6%	£194
Jan-20	1.9%	£170

Source: ONS, Retail Economics analysis
*Period aligned to ONS trading calendar – 29 December 2019 – 1 February 2020

Online Food

1.9%

Online Food sales rose by 1.9% in January, year-on-year.

Average Weekly Spend

£170m

The average online weekly spend on Food was £170m in January.

Online Food sales accounted for 5.6% of total Food sales in January, lower than the 5.7% proportion in the previous year.

Online Non-Food – Office for National Statistics – January 2020

Online Non-Food sales fell by 1.2% in January year-on-year, against a 12.6% rise in the same month a year earlier.

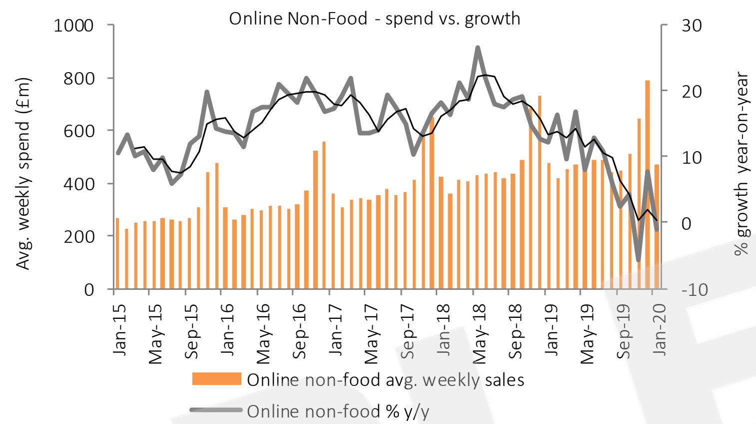
This resulted in growth falling below the three-month and 12-month averages of 0.3% and 7.3% respectively.

Disappointing performances were reported by Department Stores (-13.8%) and Clothing & Footwear (-1.1%) which have both been in negative territory for three consecutive months. Elsewhere, Household Goods reported a marginal rise of 0.6%, slowing on the 10.4% rise a year ago.

Other Non-Food (13.0%) was the only category to significantly outperform online growth in the overall Non-Food category.

Online Non-Food sales accounted for 15.9% of total Non-Food sales in January, down 0.5 percentage points from the 16.4% rise reported a year earlier.

Online Non-Food spending averaged £470m per week in January, lower than the £476m per week spent in the same month a year earlier.



Source: ONS, Retail Economics analysis

Online Non-Food	Annual % growth	Avg. weekly spend (£m)
Aug-19	5.9%	£444
Sep-19	2.5%	£447
Oct-19	4.3%	£511
Nov-19	-5.7%	£647
Dec-19	7.7%	£787
Jan-20	-1.2%	£470

Source: ONS, Retail Economics analysis
*Period aligned to ONS trading calendar – 29 December 2019 – 1 February 2020

Online Non-Food

-1.2%

Online Non-Food sales fell by 1.2% in January, year-on-year.

Average Weekly Spend

£470m

The average online weekly spend on Non-Food in January was £470m.

Disappointing performances were reported by Department Stores (-13.8%) and Clothing & Footwear (-1.1%) which have both been in negative territory for three consecutive months.

Online Clothing & Footwear – Office for National Statistics – January 2020

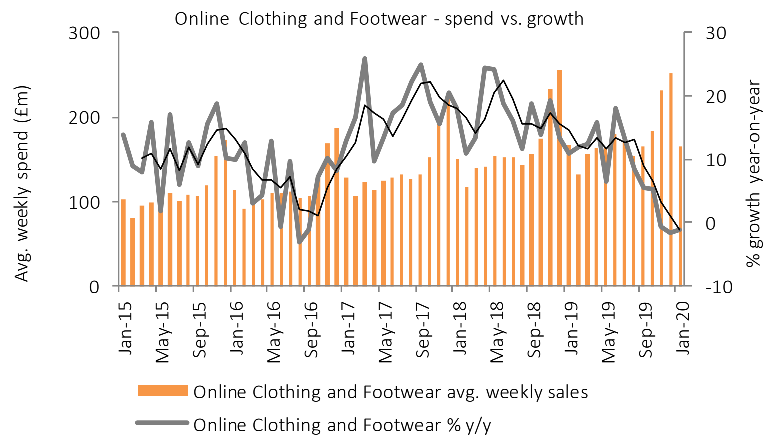
Online Clothing & Footwear sales fell for the third consecutive month in January, down 1.1% year-on-year against a 11.0% rise in the same month a year ago. This was a slight improvement on the 1.6% fall in December.

The decline was in line with the three-month of -1.1%, but was considerably weaker that the 12-month average (+7.8%).

The category continues to be impacted by the ongoing structural changes within the industry.

Online sales of Clothing & Footwear accounted for 20.0% of total retail sales in January, down 0.8 percentage points from the 20.8% proportion a year ago.

Average weekly spending for Online Clothing & Footwear stood at £165m in January, lower than the £167m average spent in the same month a year earlier.



Source: ONS, Retail Economics analysis

Online Clothing and Footwear	Annual % growth	Avg. weekly spend (£m)
Aug-19	8.5%	£154
Sep-19	5.6%	£165
Oct-19	5.4%	£183
Nov-19	-0.7%	£232
Dec-19	-1.6%	£252
Jan-20	-1.1%	£165

Source: ONS, Retail Economics analysis
*Period aligned to ONS trading calendar – 29 December 2019 – 1 February 2020

Online Clothing & Footwear

-1.1%

Online Clothing & Footwear sales fell 1.1% in January, year-on-year.

Average Weekly Spend

£165m

The average online weekly spend for Clothing & Footwear was £165m in January.

Online sales of Clothing & Footwear accounted for 20.0% of total retail sales in January, down 0.8 percentage points from the 20.8% proportion a year ago.

Online Retail Sales by Sector

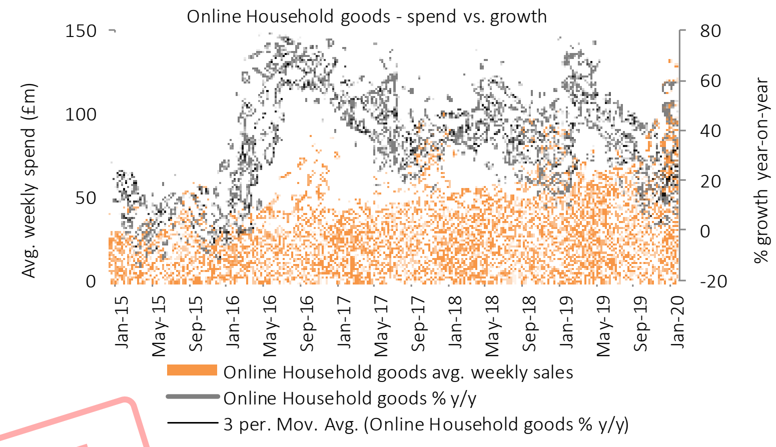
Online Household Goods – Office for National Statistics – January 2020

Online Household Goods rose [illegible] in January, year-on-year. This was against a [illegible] rise a year earlier.

Growth was significantly weaker than the three-month and 12-month averages of [illegible] and [illegible] respectively.

Online Household Goods sales accounted for 14.6% of total online sales in January, up 0.2 percentage points from the 14.4% proportion a year ago.

The average weekly spend was £92m, in line with the average weekly spend in the same month a year earlier.



Source: ONS, Retail Economics analysis

Online Household Goods	Annual % growth	Avg. weekly spend (£m)
Aug-19	1.0%	£85
Sep-19	9.2%	£96
Oct-19	12.7%	£110
Nov-19	-10.1%	£116
Dec-19	19.8%	£136
Jan-20	[illegible]	[illegible]

Source: ONS – value, non-seasonally adjusted
*Period aligned to ONS trading calendar – 29 December 2019 – 1 February 2020

ONS Online Household Goods

X.X%

According to the ONS, Online Household Goods sales rose by 0.6% in January, year-on-year.

Average Weekly Spend

£XXm

The average online weekly spend on Household Goods was £92m in January.

Online Household Goods sales accounted for 14.6% of total online sales in January, up 0.2 percentage points from the 14.4% proportion a year ago.

Online Retail Sales by Sector

RetailEconomics

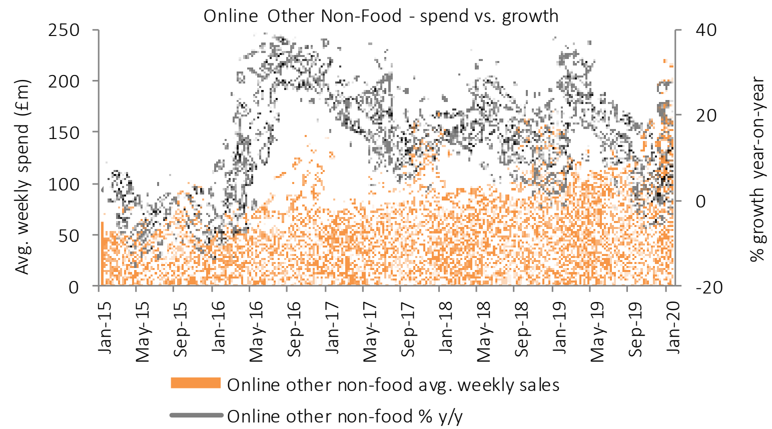
Online Other Non-Food – Office for National Statistics – January 2020

Online Other Non-Food (which includes DIY & Gardening, Health & Beauty and some Electricals) rose [illegible] year-on-year in January against a [illegible] rise a year earlier.

This was the second-best performing category in January, only being outperformed by Non-Store Retailing. It's worth noting that in the coming three months, strong comparisons a year earlier are likely to stifle growth.

Online Other Non-Food sales accounted for 11.9% of total online sales in January, up on the [illegible] proportion in January 2019.

Average weekly sales were £[illegible]m in January, up on the £96m spent from the same month a year earlier.



Source: ONS, Retail Economics analysis

Online Other Non-Food	Annual % growth	Avg. weekly spend (£m)
Aug-19	15.3%	£107
Sep-19	-1.0%	£99
Oct-19	-2.5%	£119
Nov-19	3.9%	£164
Dec-19	25.9%	£206
Jan-20	[illegible]	[illegible]

Source: ONS – value, non-seasonally adjusted
*Period aligned to ONS trading calendar – 29 December 2019 – 1 February 2020

ONS Online Other Non-Food

XX.X%

According to the ONS, Online Other Non-Food sales rose by 13.0% in January, year-on-year.

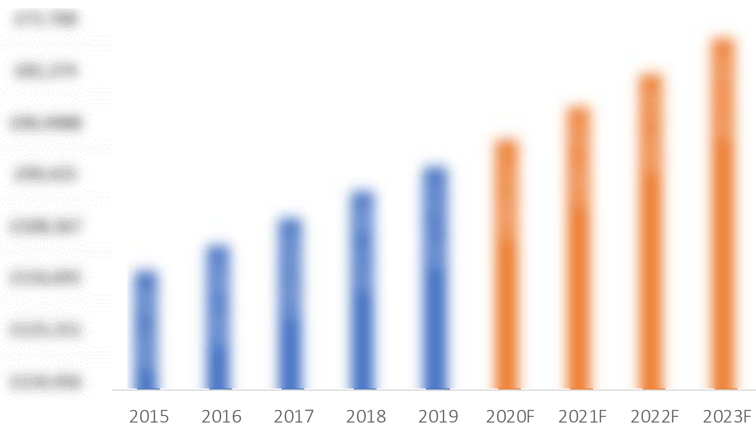
Average Weekly Spend

£XXXm

The average online weekly spend on Other Non-Food was £108m in January.

Online Other Non-Food sales accounted for 11.9% of total online sales in January, up on the 11.0% proportion in January 2019.

Total Retail Industry (£m)

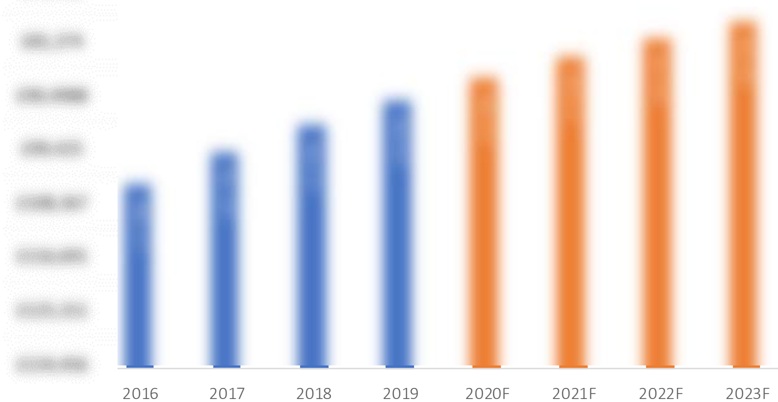


Forecasts

Year	Total Online market (£m)	Annual growth (%)
2017	[illegible]	[illegible]
2018	[illegible]	[illegible]
2019	[illegible]	[illegible]
2020F	[illegible]	[illegible]
2021F	[illegible]	[illegible]
2022F	[illegible]	[illegible]
2023F	[illegible]	[illegible]
2024F	[illegible]	[illegible]

Online (£m)

Penetration Rate



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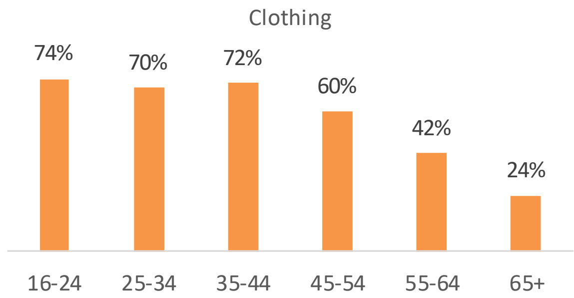
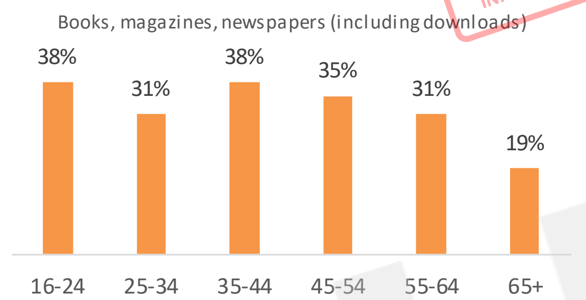
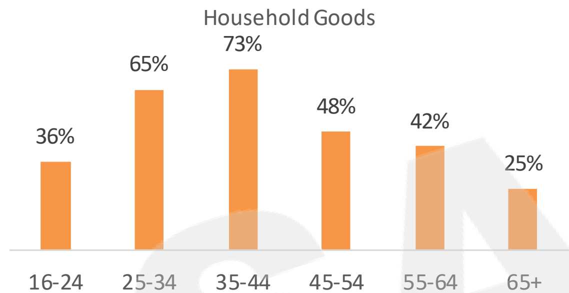
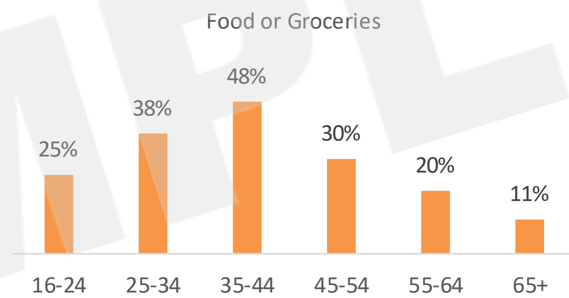
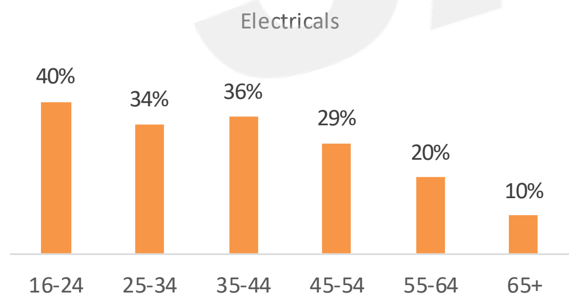
Online purchases by age group and sector within last 12 months

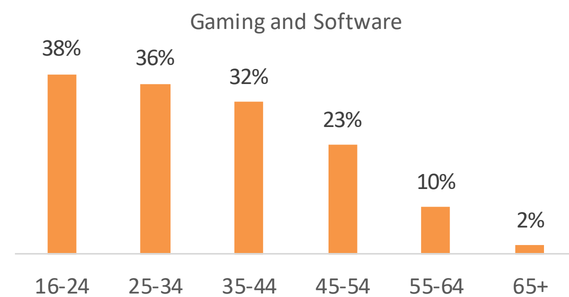












Source: ONS, Retail Economics analysis

Source: ONS, Retail Economics analysis

Interactive Contents
Executive Summary
UK Overview
Online Retail Traffic Index
Online Retail Sales
Office for National Statistics
BRC-KPMG Sales Monitor
BDO High Street Sales Tracker
IMRG-Capgemini E-retail Sales Index
Visa Consumer Spending Index
Online Retail Sales by Sector
Food and Grocery
Non-Food
Clothing and Footwear
Household Goods
Other Non-Food
Market Size Estimates and Forecasts
ONS Online Statistics
Retail Economics
Other reports
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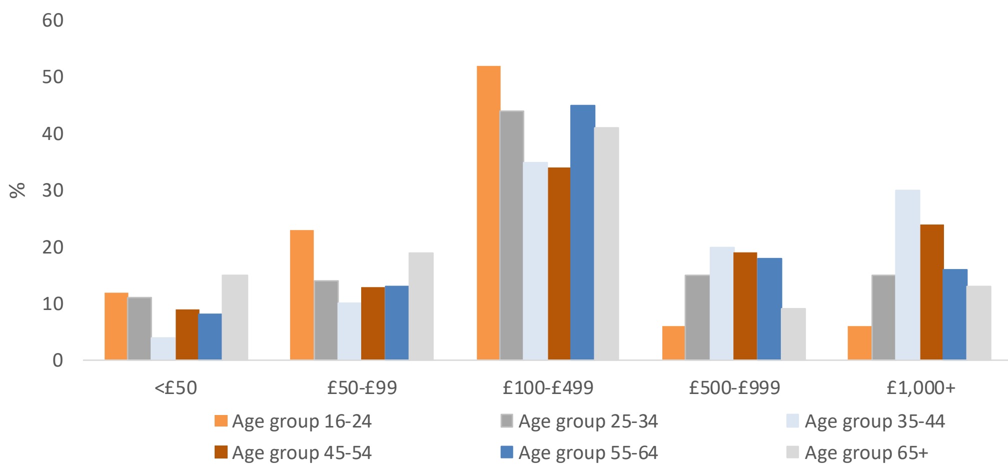
Total value of Online Purchases by Age Group and Gender



%	16-24	25-34	35-44	45-54	55-64	65+
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
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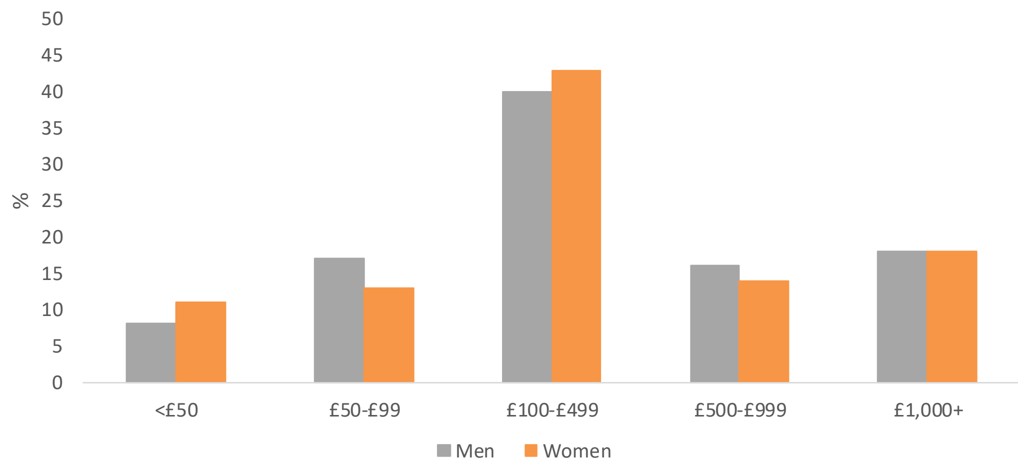

%	Male	Female
[illegible]	[illegible]	[illegible]
[illegible]	[illegible]	[illegible]
[illegible]	[illegible]	[illegible]
[illegible]	[illegible]	[illegible]
[illegible]	[illegible]	[illegible]

Source: ONS, Retail Economics analysis

Other reports and Services

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WE PUBLISH MANY OTHER RETAIL REPORTS

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Monthly: covers a range of retail sales indices and category breakdowns including online retail sales, clothing and footwear, household goods, food, DIY and gardening, consumer electricals and more. More info >

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Food online sales and penetration rates
Market share data
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Bespoke sector specific economic analysis
Clothing online sales and penetration rates
Consumer trends for online shopping
Spend on clothing by region and more. More info >

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Homewares retail sales index
Bespoke sector specific economic analysis
Homewares region spending data
Analysis of key economic drivers such as house moves, personal finances etc.
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Furniture & Flooring retail sales index
Bespoke sector specific economic analysis
Consumer trends for online shopping
Analysis of key economic drivers such as consumer confidence, credit and lending
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Bespoke sector specific economic analysis
DIY & Gardening region spending data
Analysis of key economic drivers such as weather data, 'improve not move' trends
Executive summary and more. More info >

Electricals

Electricals retail sales index
Bespoke sector specific economic analysis
Consumer trends for online shopping
Analysis of key economic drivers such as disposable income growth, product launches etc.
Electricals inflation and more. More info >

Health & Beauty

Health & Beauty retail sales index
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Health & Beauty shopper trends such as 'lipstick effect', own-brand cosmetics etc.
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