

MONTHLY REVIEW

BDO CHARITY RETAIL SALES TRACKER

SEPTEMBER 2025

TOTAL SALES, TOTAL SALES OF DONATED GOODS, AND NEW SALES WERE ALL POSITIVE

CHARITY



September 2024: -1.4%



September 2024: +1.5%

* Figure re-stated excluding extreme values

CHARITY AND COMMERCIAL RETAILERS

Total LFL sales increased for the third month in a row, increasing by +1.4%, and an improvement on the -1.4% achieved this time last year. Total LFL sales of new goods saw a strong performance, rising by +6.2% this month, and ahead of the +1.5% seen this time last year. Total LFL sales of donated goods grew for a third month in a row, growing by +0.4%, and better than the -1.5% seen this time last year.

The Met Office described September as “a month of contrasts.” The start of the month was unsettled, bringing plenty of wet weather and changeable conditions. However, as we moved further into September, the pattern shifted dramatically, with much drier and calmer conditions taking hold. Springboard figures showed footfall on the high street averaged -1.0% in September.

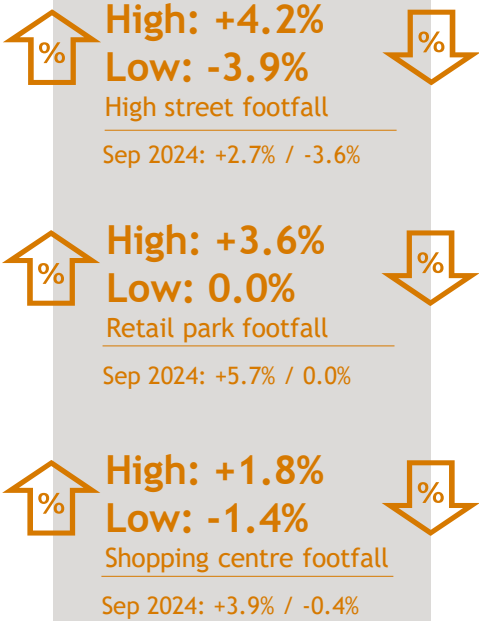
Total LFL sales of +1.4% achieved by charity retailers mirrored the positive momentum of the commercial high street which saw in-store sales grow by +3.7%. Looking at the economy, the ONS said GDP grew by +0.1% in August. However, the ONS said it had revised down July’s flatlining growth to a -0.1% contraction, limiting the rise in output over the three months to August to +0.3%. Analysts said the UK’s economic outlook is likely to continue improving, but at a sluggish pace while businesses and consumers wait to see the outcome of the Chancellor’s budget on 26 November. Meanwhile, the consumer prices index remained unchanged in August at 3.8% - the same level as July.

COMMERCIAL



September 2024: +1.8%

*Source: BDO High Street Sales Tracker
www.bdo.co.uk/high-street-sales-tracker



Any footfall figures quoted come from Springboard who are a leading provider of automated visitor counting and retail sales analysis.

INDIVIDUAL CHARITY’S LIKE-FOR-LIKE GROWTH (SEPTEMBER 2025)

VERY LARGE CHARITIES (301+ SHOPS)	Charity	Total sales	Total sales of donated goods	New sales	Gift aid conversion rate	Comments
	C	+3.77%	+1.78%	+15.90%	37.32%	The level of gift aid sign ups, staffing levels, and the weather were all challenging this month.
	BB	+0.63%	-1.19%	+13.59%	32.89%	-
	B	+0.50%	+0.77%	-2.08%	43.43%	-
	F	-0.42%	-0.64%	+2.37%	40.72%	New good sales was a highlight this month.
	H	-3.94%	-6.64%	+3.98%	49.26%	There was a consistent level of donations this month but selling prices remain lower than prior years.
LARGE CHARITIES (101-300 SHOPS)	Charity	Total sales	Total sales of donated goods	New sales	Gift aid conversion rate	Comments
	T	+9.96%	+11.22%	-2.57%	19.19%	The opening of a new location helped sales. Challenges were the weather and the level of gift aid sign ups.

KEY CHALLENGES THIS MONTH

- Staffing levels
- Quality of donated stock
- Level of donations
- Level of gift aid sign ups
- Weather

HIGHLIGHTS THIS MONTH

- Increase in gift aid donations

“Staffing was the biggest challenge this month. Almost an equal number cited the level of donations and the quality of donations as challenges. Footfall appears to have been better this month, with no charity retailers including it as a challenge.”

INDIVIDUAL CHARITY'S LIKE-FOR-LIKE GROWTH (SEPTEMBER 2025)

MEDIUM CHARITIES (10-100 SHOPS)	Charity	Total sales	Total sales of donated goods	New sales	Gift aid conversion rate	Comments
	V	+14.99%	+14.90%	+92.52%	22.88%	Weekend trading was a highlight this month. Challenges were the level of donations, the quality of donated stock, and staffing levels.
	M	+10.21%	+10.67%	-17.78%	19.11%	An increase in gift aid donation sales was a highlight this month. Staffing levels was a challenge.
	J	+6.70%	+7.88%	-1.17%	34.03%	The weather was a challenge this month.
	FF	+6.57%	+0.40%	+9.07%	0.49%	Great month on the sales line and high volumes of donations. Staffing levels was a challenge.
	E	+6.06%	+6.06%	+5.33%	16.38%	The opening of a new shop was a highlight. Challenges this month included the level of donations, the level of gift aid sign ups, and staffing levels.
	ZZ	+4.78%	+2.25%	+103.46%	38.67%	Year-on-year growth of bought-in goods was the highlight this month. Challenges included theft, the quality of donated stock, and staffing levels.
	GG	+1.03%	+0.97%	+9.80%	35.56%	Sales of 'sold as seen' stock increased across the whole country, and gift aid remained level. Theft was a challenge this month.
	ZG	-1.92%	-2.68%	+29.85%	31.44%	The roll out of the EPOS system was the highlight this month. The quality of donated stock was challenging.
	AA	-1.94%	-1.57%	-7.65%	36.17%	Sales of Christmas cards was a highlight this month. Maintaining income while having to close some stores for maintenance is challenging.
	ZE	-13.53%	-15.96%	+88.75%	42.91%	Increasing gift aid conversion rate was the highlight this month. Staffing levels was a challenge.
	ZH	-20.11%	-21.19%	+28.44%	12.26%	A good level of donated goods from retail partnerships was the highlight this month. LfL figures were impacted due to a very large donation from a corporate partner this time last year. Challenges included the level of donations, the quality of donated stock, and staffing levels.

LIKE-FOR-LIKE GROWTH BY RETAIL CHAIN SIZE (SEPTEMBER 2025)

LFL SALES GROWTH	Retail chain size	Total sales	Total sales of donated goods	New sales	Gift aid conversion rate
	Very Large	+0.11%	-1.19%	+6.75%	40.73%
	Large	+9.96%	+11.22%	-2.57%	19.19%
	Medium	+1.17%	+0.16%	+6.99%	26.35%

LFL GIFT AID GROWTH	Retail chain size	Number of retailers/ individual stores	Total sales	Retail gift aided sales as a proportion of total sales of donated goods (gift aid conversion rate)		
				Average	Lowest	Highest
	Very Large	5/2,601	+0.11%	40.73%	32.89%	49.26%
	Large	1/260+	+9.96%	19.19%	19.19%	19.19%
	Medium	11/503	+1.17%	26.35%	0.49%	42.91%

This report has been produced in association with the Charity Retail Association (CRA). The CRA produce a separate Quarterly Market Analysis report and specialist reports (e.g., on salaries, volunteers, selling prices, sources of stock, rag prices, etc.); which provide detailed retail benchmarking data for charities of all sizes.

Please contact the CRA for further details:
mail@charityretail.org.uk

BDO's specialist team of charity experts host regular webinars on the latest hot topics and developments in the charity sector. Providing guidance, ideas and inspiration to help you succeed, our webinars focus on all different areas, including charity finance, tax, governance, strategy, board effectiveness, risk management, fraud, cybercrime and much more. Subscribe to receive invites to our future webinars.

Please contact Fiona Condrón, National Head of Charities, for further details:
fiona.condron@bdo.co.uk

ACCESS TO THIS YEAR'S CHARITY FRAUD CONFERENCE

Back for the 5th year, we would like to invite you to support our fight against charity fraud on Monday 8 December 2025 from 10:30-18:30

➤ [Register to attend our Charity Fraud conference](#)

Registration deadline: Monday, 3 November 2025

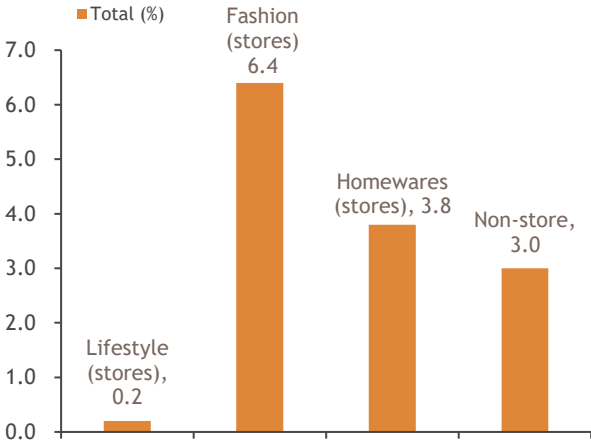


MONTHLY LIKE-FOR-LIKE RESULTS - LAST SIX MONTHS

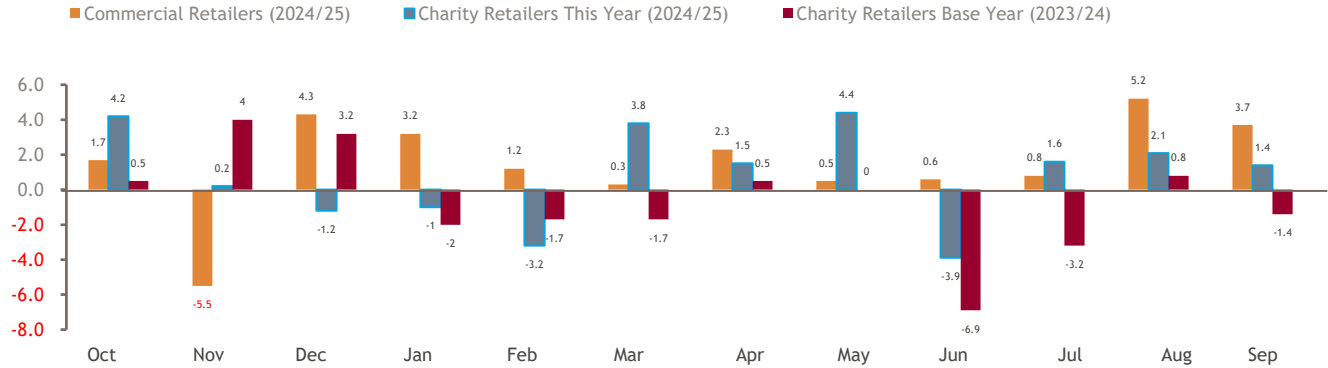
LFL Growth	Apr	May	Jun*	Jul*	Aug	Sep*
New Goods Sales	+4.21%	+4.74%	-6.70%	-2.19%	-1.93%	+6.22%
Total Sales of Donated Goods	+1.04%	+3.97%	-3.31%	+1.44%	+2.10%	+0.41%
Gift aid Conversion Rate	31.27%	33.54%	33.61%	33.53%	34.75%	30.16%
Commercial High Street (stores)	+2.3%	+0.5%	+0.6%	+0.8%	+5.2%	+3.7%
Total Sales	+1.46%	+4.44%	-3.89%	+1.57%	+2.10%	+1.37%
Population						
No of retailers/Individual stores	17/3,400	19/3,650	15/2,977	16/2,937	19/3,121	17/3,300
- VL	5/2,647	5/2,641	4/2,077	4/2,071	4/2,067	5/2,601
- L	1/250+	3/496	3/495	3/501	3/496	1/260+
- M	11/563	11/513	8/405	9/365	12/558	11/503

* Figure re-stated excluding extreme values.

BDO HIGH-STREET SALES TRACKER LIKE-FOR-LIKE RESULTS SEPTEMBER 2025



ANNUAL MONTHLY ROLLING LIKE-FOR-LIKE RESULTS 2025: CHARITY VS. COMMERCIAL RETAILERS (% CHANGE)



FURTHER INFORMATION:

David Chapman
Research Manager

david.a.chapman@bdo.co.uk
+44 7442 783 633

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