

MONTHLY REVIEW

BDO CHARITY RETAIL SALES TRACKER

AUGUST 2025



TOTAL SALES AND TOTAL SALES OF DONATED GOODS GROW FOR A SECOND MONTH, BUT TOTAL SALES OF NEW GOODS FALLS AGAIN

CHARITY



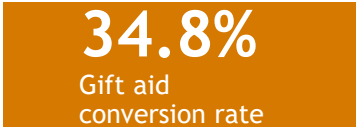
August 2024: +0.8%



August 2024: +2.8%



August 2024: +0.4%



August 2024: 33.9%

COMMERCIAL



August 2024: -0.7%

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

CHARITY AND COMMERCIAL RETAILERS

Total LFL sales increased again this month, growing by +2.1%, and ahead of the +0.8% achieved this time last year. Total LFL sales of new goods fell for the third month in a row but the rate of the decline eased to -1.9%, but worse than the +2.8% achieved a year earlier. Total LFL sales of donated goods grew for a second month, growing by +2.1%, and better than the +0.4% seen this time last year.

The Met Office said August 2025 will be remembered as a month of striking contrasts, with the UK experiencing everything from named storms and heatwaves to drought conditions and thunderstorms. Despite this, Springboard figures showed footfall on the high street averaged +1.7% in August.

Total LFL sales of +2.1% achieved by charity retailers didn't quite match the strong performance of the commercial high street which saw in-store sales grow by +5.2%. Looking at the economy, the ONS said GDP grew by just +0.2% in the three months to July, compared with the three months to April, and down from +0.3% in the three months to June. Business groups blame the Chancellor's £25bn increase in employer national insurance contribution, which came into force in April alongside a significant rise in the national living wage, for constraining growth. ONS figures show inflation rose to +3.8% in the year to July - the highest since January 2024.



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 (AUGUST 2025)

VERY LARGE CHARITIES (301+ SHOPS)	Charity	Total sales	Total sales of donated goods	New sales	Gift aid conversion rate	Comments
	F	+2.06%	+1.95%	+3.43%	41.78%	-
	BB	+1.97%	+0.15%	+15.77%	32.48%	The warm weather increased footfall this month.
	B	-0.41%	+1.01%	-11.73%	44.55%	-
	H	-1.90%	-4.18%	+4.95%	49.82%	Improved weather was a highlight this month. Challenges were the quality of donated stock, footfall, and furniture sales which continue to be very challenging.

LARGE CHARITIES (101-300 SHOPS)	Charity	Total sales	Total sales of donated goods	New sales	Gift aid conversion rate	Comments
	I	+5.36%	+3.60%	+46.53%	43.25%	-
	T	+3.26%	+3.55%	+0.54%	20.69%	The level of gift aid sign ups and staffing levels were challenging this month.
	A	+0.01%	+3.83%	-17.93%	38.63%	Good online sales was a highlight this month. Footfall was a challenge.

KEY CHALLENGES THIS MONTH

- Staffing levels
- Quality of donated stock
- Footfall
- Weather

HIGHLIGHTS THIS MONTH

- Weather
- Footfall

“Once again, staffing levels was cited as the main challenge by charity retailers this month, followed by the quality of donated stock. While some charity retailers cited the weather and footfall as challenges, others said both were highlights.”

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

MEDIUM CHARITIES (10-100 SHOPS)	Charity	Total sales	Total sales of donated goods	New sales	Gift aid conversion rate	Comments
	Z	+7.13%	+7.13%	-	64.00%	Challenges this month were the level of gift aid sign ups, the, quality of donated stock, staffing levels, and the weather.
	ZH	+6.65%	+7.94%	-23.70%	13.60%	-
	FF	+5.54%	+5.55%	-1.94%	28.40%	Staffing levels was a challenge this month.
	GG	+4.39%	+4.54%	-33.26%	36.03%	Footfall improved in city locations after a poor July. London boutique shops remain strong, and gift aid continues to increase. Challenges included staffing levels, volunteer numbers, and the quality of donated stock.
	J	+3.62%	+4.41%	-2.02%	34.15%	The weather was a challenge this month.
	ZZ	+2.43%	+0.69%	+81.60%	39.58%	Improving sales of Bought-in Goods was a highlight this month. Challenges were theft, staffing levels, and the quality of donated stock.
	M	+2.18%	+3.26%	-61.78%	19.71%	Gift aid donations increased this month, but the level of donations was a challenge.
	AA	+2.12%	+2.74%	-7.86%	34.93%	Increased footfall was a highlight this month. The quality of donated stock was a challenge.
	U	+1.39%	+1.44%	-2.76%	46.87%	Staffing levels was a challenge this month.
	V	+0.12%	+0.19%	-35.32%	22.12%	The level of donations improved this month. Challenges were staffing levels, the weather, and footfall.
	ZG	-2.43%	-4.32%	+64.50%	32.90%	The quality of donated stock was a challenge this month.
	E	-3.64%	-3.54%	-53.79%	16.72%	Staffing levels was a challenge this month.

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

LFL SALES GROWTH	Retail chain size	Total sales	Total sales of donated goods	New sales	Gift aid conversion rate
	Very Large	+0.43%	-0.27%	+3.10%	42.16%
	Large	+2.87%	+3.66%	+9.71%	34.19%
	Medium	+2.46%	+2.50%	-6.94%	32.42%

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	4/2,067	+0.43%	42.16%	32.48%	49.82%
	Large	3/496	+2.87%	34.19%	20.69%	43.25%
	Medium	12/558	+2.46%	32.42%	13.60%	64.00%

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 Condron, National Head of Charities, for further details:
fiona.condron@bdo.co.uk

EXCLUSIVE ACCESS TO THIS YEAR'S CHARITY FRAUD CONFERENCE

Back for the 5th year, we're asking you and your peers across the charity sector to support our fight against charity fraud.

➤ [Read more and take survey now](#)

Deadline: Midnight, 3 October 2025. All responses anonymous.



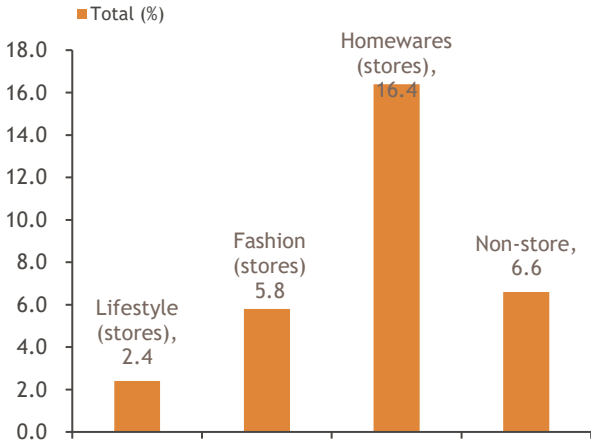
**FRAUD
ADVISORY
PANEL**

MONTHLY LIKE-FOR-LIKE RESULTS - LAST SIX MONTHS

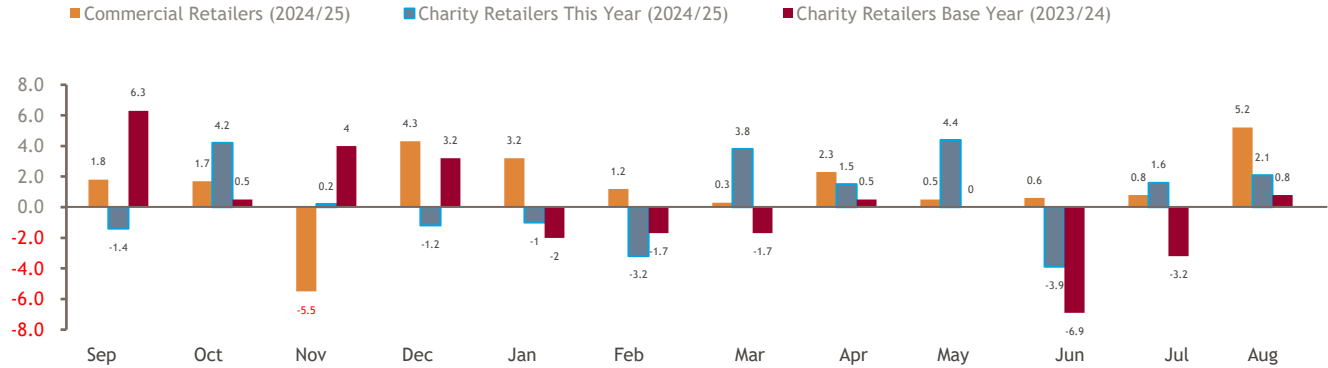
LFL Growth	Mar*	Apr	May	Jun*	Jul*	Aug
New Goods Sales	+0.14%	+4.21%	+4.74%	-6.70%	-2.19%	-1.93%
Total Sales of Donated Goods	+3.67%	+1.04%	+3.97%	-3.31%	+1.44%	+2.10%
Gift aid Conversion Rate	30.87%	31.27%	33.54%	33.61%	33.53%	34.75%
Commercial High Street (stores)	+0.3%	+2.3%	+0.5%	+0.6%	+0.8%	+5.2%
Total Sales	+3.76%	+1.46%	+4.44%	-3.89%	+1.57%	+2.10%
Population						
No of retailers/Individual stores	18/3,095	17/3,400	19/3,650	15/2,977	16/2,937	19/3,121
- VL	4/2,091	5/2,647	5/2,641	4/2,077	4/2,071	4/2,067
- L	3/499	1/250+	3/496	3/495	3/501	3/496
- M	11/505	11/563	11/513	8/405	9/365	12/558

* Figure re-stated excluding extreme values.

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



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



FURTHER INFORMATION:

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