

## MONTHLY FD REVIEW

# BDO CHARITY RETAIL SALES TRACKER

JULY 2020

### CHARITY RETAILERS BEGIN ADJUSTING TO THE NEW REALITY

#### CHARITY

**Charity Retail Association®**  
The voice of charity retail



July 2019: +3.6%



July 2019: +2.8%



July 2019: +28.8%



July 2019: 31.0%

#### COMMENTS FROM CHARITY RETAIL

- LFL sales declined sharply in the first full month of trading following the easing of lockdown restrictions for non-essential retail in mid-June.
- Although some charity retailers highlighted the successful re-opening of stores this month, others have had to resort to a phased re-opening and some still have a way to go until their full estate is open again.

#### KEY FACTORS AFFECTING THE MONTH

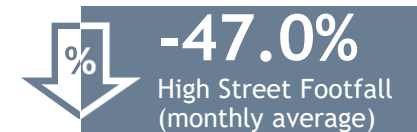
- Footfall and staffing levels still severely impacted by COVID-19 and the social distancing measures in place.
- The Government's furlough scheme has helped retailers financially, with one even managing to open a new store which had been put on hold.

\* Figure re-stated excluding extreme value. New Sales grew by +171.9% when including this extreme value.

#### COMMERCIAL



July 2019: +0.1%



July 2019: -2.7%

#### COMMENTS FROM COMMERCIAL RETAIL

- Many retailers only partially re-opened their estates and there are both signs of progress for the sector and indications that there remains a long road ahead, as in-store LFLs declined by -39.4%.
- Strongest performer:** Homewares was the only category to report positive growth of +5.4% in July - the first positive monthly LFL for the category since January.
- Weak performance:** In-store LFLs for fashion and lifestyle recorded their fifth and sixth consecutive month of decline.



#### JOIN THE TRACKER FOR MORE DETAILED REPORTS

As part of the Charity Retail Sales Tracker (CRST), we produce more detailed weekly and monthly reports for the medium to very large retail chains that take part, allowing them to easily benchmark their performance against peers.

The more charity retailers involved, the greater the value our tracker can provide for participants and the wider sector as a whole.

To participate and receive these exclusive reports, contact:

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The Charity Retail Sales Tracker Monthly Review outlines monthly LFL sales changes of charity retailers with c4,000 individual stores between them (14 charity retailers reported this month with 2,897 individual stores between them). Any footfall figures quoted come from Springboard.

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Source: BDO High Street Sales Tracker

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