

MONTHLY FD REVIEW

BDO CHARITY RETAIL SALES TRACKER

SEPTEMBER 2019

CHARITY RETAILERS CHALLENGE THE HIGH STREET CRISIS

CHARITY

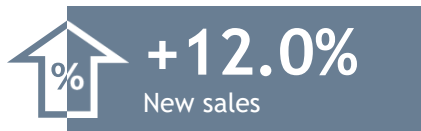
Charity Retail Association®
The voice of charity retail



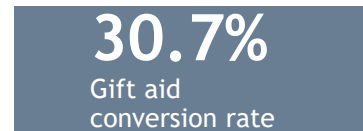
September 2018: +1.9%*



September 2018: +1.7%*



September 2018: +2.4%



September 2018: 29.7%*

*2018 figures are updated and re stated

COMMENTS FROM CHARITY RETAIL

- Charity retailers reported another month of strong growth, with several highlighting overall LFL sales were remarkable, compared to both last year's performance and budget.
- Medium-sized retailers saw the strongest growth across donated goods, but it was larger sized retailers that reported stronger sales of new goods.

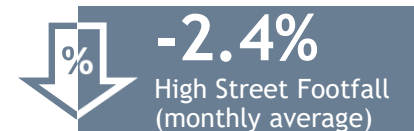
KEY FACTORS AFFECTING THE MONTH

- A very bleak end to the summer was by far the biggest challenge.
- Staffing levels continued to prove challenging, as low volunteer hours, seasonal turnover and sickness took a toll.

COMMERCIAL



September 2018: -2.7%



September 2018: -1.7%

COMMENTS FROM COMMERCIAL RETAIL

- In-store LFLs fell by -3.1% from an already poor base of -2.7% for last year - the worst in-store LFL for September since 2011.
- **Strongest performer:** Homewares was the only category to report positive results - but just barely at +0.2%.
- **Weak performance:** Both Lifestyle and Fashion reported negative results this month.

Source: BDO High Street Sales Tracker



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: charityretailsalestracker@bdo.co.uk

FURTHER INFORMATION:

Zarine Manekshaw
Charity Retail Lead
zarine.manekshaw@bdo.co.uk
+44 (0)207 893 2559

Alistair Brisbane
Senior Research Analyst
alistair.x.brisbourne@bdo.co.uk
+44 (0)207 893 3259

The Charity Retail Sales Tracker Monthly Review outlines monthly like-for-like sales changes of charity retailers with approximately 4,000 individual stores between them. Any footfall figures quoted come from Springboard who are a leading provider of automated visitor counting and retail sales analysis.

BDO LLP, a UK limited liability partnership registered in England and Wales under number OC305127, is a member of BDO International Limited, a UK company limited by guarantee, and forms part of the international BDO network of independent member firms. A list of members' names is open to inspection at our registered office, 55 Baker Street, London W1U 7EU. BDO LLP is authorised and regulated by the Financial Conduct Authority to conduct investment business. BDO is the brand name of the BDO network and for each of the BDO member firms. BDO Northern Ireland, a partnership formed in and under the laws of Northern Ireland, is licensed to operate within the international BDO network of independent member firms. Copyright © September 2019 BDO LLP. All rights reserved. Published in the UK.