



Quarterly Market Analysis

April-June (Q2) 2022

Charity Retail Association[®]
The voice of charity retail

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Market analysis: key takeaways



Staffing challenges have persisted, with 45% of charities reporting that retail employee shortages and 43% reporting that volunteer shortages have had a negative effect on income.



Transaction volumes have grown considerably as more customers turn to charity shops as a result of the cost of living crisis. There were 85 transactions per shop per day on average in May-June 2022, compared to 74 in the same period in 2021; this has led to year-on-year like-for-like income growth of 11.6%.



Online selling remains strong, with 79% of all charities reporting selling online. These charities saw income from online sales increase by 44% in April-June (Q2) 2022 compared to Q2 2021.



Donation quality has declined slightly. While not a widespread issue, a significant minority of charities (25%) report donation quality slipping this quarter; some also predict this will continue to fall later in the year as the cost of living crisis forces donors to hold onto their items for longer.

April-June 2022 Market Analysis: summary

- 70 charities took part in the survey, representing 4,604 shops
- These charities saw a 11.6% growth in like-for-like in-store income in May-June 2022 vs May-June 2021
- Customer spending habits are changing as a result of the cost of living crisis: more low-value, single-item sales, but in greater volume.
- Average transaction value was £6.52, compared to £6.41 in May-June 2021
- Average number of transactions was 85, compared to 74 in May-June 2021
- 79% of respondents sold online in April-June 2022
- 43% report that volunteer levels are negatively impacting income
- 45% report that retail employee levels are negatively impacting income



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