



CAF UK GIVING 2019

An overview
of charitable
giving in the UK

May 2019
#UKGiving

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FOREWORD

Nearly all of us turn to a charity at some point in our lives. Even if we don't realise it, charities underpin our way of life. They provide the foundation for our cultural, religious and educational establishments large and small. They shoulder the burden of medical research, health services and support for the vulnerable in society; the disadvantaged, the young and the old.

We rightly celebrate the enduring generosity of the UK, and we do rank among the most generous in the world. But that spirit of giving is not something that our charities, our politicians and our wider communities can ever take for granted.

This year's CAF UK Giving survey shows that yet again the key measures of giving are on a downward path. For the third year running significantly fewer people say they are giving money. The overall estimate of household giving in the UK is relatively stable in cash terms at £10.1bn, but that is a result of a smaller group of dedicated donors giving more.

Meanwhile, trust in charities is down once again, a trend reflected in both this research and that of others. The scale of this study, interviewing around 12,000 people across each year, suggests that these trends are to be viewed with concern.

The decline of trust in institutions is a global phenomenon, affecting all sectors. But it is something we in civil society should take seriously. People are not obliged to give. They give because they are inspired, because they are touched and because they know they can make a difference.

It is incumbent on all of us to make the case for the work of charities in all their forms – from the major institutions tackling significant national and international issues to the vast majority of smaller charities, some meeting in a village hall or around a kitchen table to tackle a local issue or meet a local need.

Above all, charities embody a simple idea; that people come together to make the world a better place. At a time of political turmoil and economic uncertainty, that is something worth fighting to protect.



Sir John Low
Chief Executive, Charities Aid Foundation

INTRODUCTION

CAF's UK Giving report is the largest study of giving behaviour in the UK. The report is based on monthly interviews and encompasses a yearly total of c.12,000 individual interviews with the goal of assisting charities, government and wider society to better understand the UK's giving landscape. CAF has been producing insight into giving for decades and this year's report builds on our past research and analyses.

In addition to our annual report, we also produce infographics containing key UK Giving insights each month and which are available free by subscribing to our research at: www.cafonline.org/about-us/research. We do hope you find this report both topical and useful – if you do have any questions, comments or suggestions, please contact the CAF Research team at research@cafonline.org

ABOUT CAF

We help people and businesses support the causes they care about, and for charities, we provide simple and straightforward day-to-day banking and fundraising services, freeing them up to concentrate on the real work of making a difference. We also understand and influence the wider environment for charities and civil society across the UK and beyond via our research, policy and campaigns work.

KEY FINDINGS

Our analysis provides these key findings for individual giving in the UK in 2018:

- The number of people reporting having participated in charitable or social activities in the previous four weeks has decreased over the last three years. But with 64% of people taking part in charitable activities, participation remains high.
- The proportion of people giving money to charity either by donating or via sponsorship has seen a steady decline between 2016 and 2018 (69% to 65% in 2018).
- Although fewer people report that they are giving money, those who do give are giving higher amounts. Overall, the total amount given to charity in 2018 remains largely the same as 2017 at £10.1 billion.
- Trust in charities has decreased significantly since 2016 from 51% to 48% agreeing that they *believe charities to be trustworthy*.
- In 2018 children/young people and animal welfare jointly lead the list of the causes people say they donate to, with 26% of people saying they gave to each of those causes in the past month.
- Peak months for giving money are November and December. This has become a yearly pattern largely due to established fundraising campaigns over these months – these are also the main months for donating with cash.
- Fewer people say they have been approached to donate money than in previous years in a variety of ways: on the street, door to door and particularly direct mail (fallen from 28% in 2016 to 23% in 2018).
- Rates of volunteering remain stable, as do the proportion of people giving goods to a charitable cause.

DETAILED FINDINGS

1.0 Overall picture of how people get involved

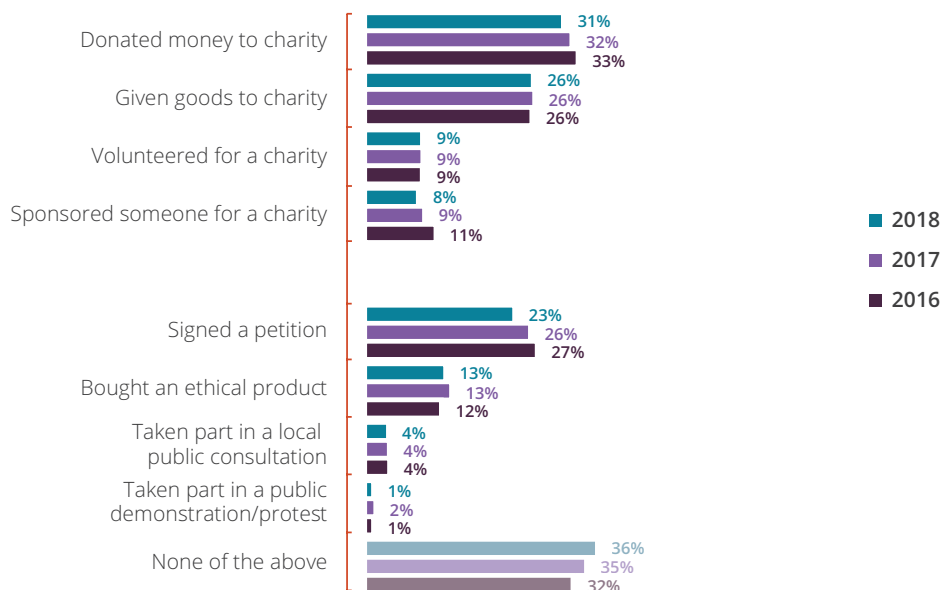
All those interviewed were shown a list of actions and asked whether they had done any in the last four weeks or 12 months. The behaviours are shown in a way that differentiates between charitable and social actions.

Figure 1: Which, if any, of the following have you done in the last year?



Base: all adults 16+ 2018: (n=13,277), 2017: (n=12,211), 2016: (n=8,137)

Figure 2: Which, if any, of the following have you done in the last four weeks?



Base: all adults 16+ 2018: (n=13,277), 2017: (n=12,211), 2016: (n=8,137)

Over the past three years, at an overall level, fewer people are participating in charitable or social activities. Since 2016, the number of people doing so within the last four weeks has decreased from 68% to 64%, which is a significant decline. At the same time, those having done anything in the last 12 months has decreased from 89% to 87%. These are still very high levels of participation but could be the start of a negative trend that we will continue to monitor.

We will look at each of these measures in more detail in subsequent paragraphs.

1.1 Giving money

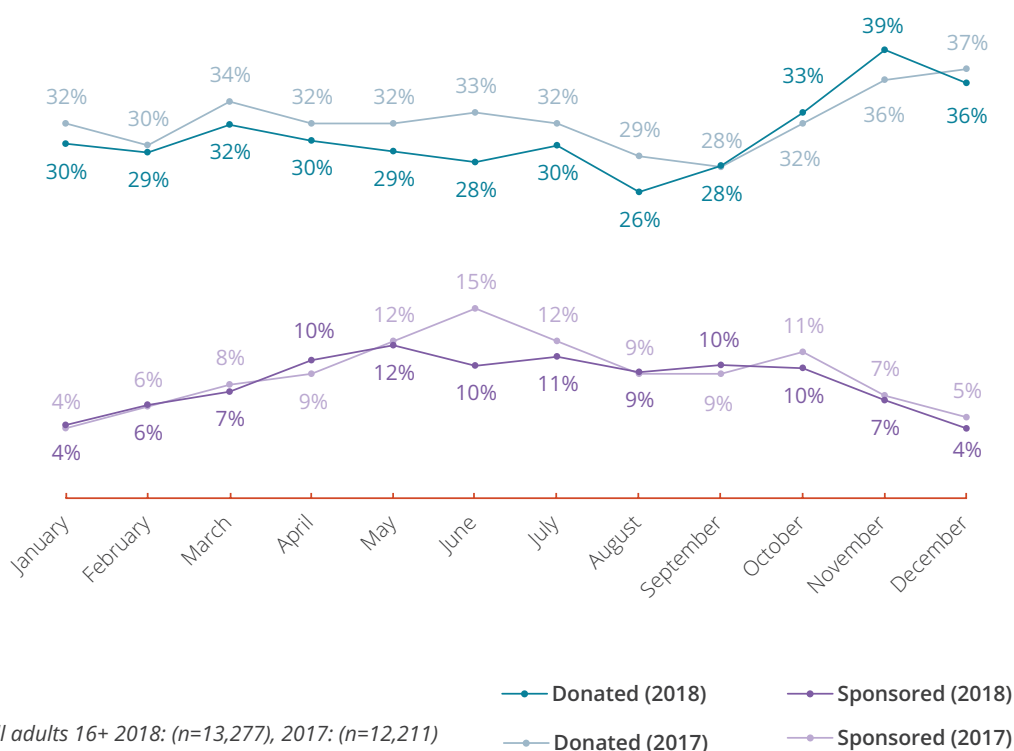
As with every year in which we have been looking at giving behaviour across the UK, giving money is the number one way in which people have participated. Over half of people (57%) said they had donated money in the last year, however this is significantly fewer people than we have seen in each of the last three years (57% vs. 60% in 2017 and 61% in 2016). Those having given in the last four weeks also declined albeit not by the same degree, down from 33% in 2016 to 32% in 2017 and now 31% for 2018.

There has also been a consistent fall in the number of people saying they have sponsored someone for charity in each of the last three years, from 37% in 2016 to 32% in 2018. Those having sponsored someone in the last four weeks has also decreased over the last three years, from 11% in 2016 to 8% in 2018.

The number of people having given money either by donating or via sponsorship has therefore seen a steady decline between 2016 and 2018.

When looking at a combination of donating money to charity and sponsoring someone, 65% had done so in the last 12 months, down from 67% in 2017 and 69% in 2016. Thirty-five percent report donating or sponsoring in the last four weeks, down from 37% in 2017 and 39% in 2016. This reflects the decrease in both those donating money and sponsoring someone.

Figure 3: Which, if any, of the following have you done in the last four weeks?
(Donated money to charity, sponsored someone for a charity)



Base: all adults 16+ 2018: (n=13,277), 2017: (n=12,211)

Looking at results month-by-month across years, we see that giving through sponsorship is higher in the warmer months of the year, around 10% from April to October both in 2017 and in 2018. This is perhaps of no surprise, as many sponsored sporting events take place during this period, and in 2018 sponsorship peaked in May (12%), following the London marathon at the end of April. The pattern seen in 2018 echoes that of 2017, though June was a particularly high month in 2017 (15%), which may have been caused by people responding to the Manchester Arena bomb attack in May of that year.

In terms of donating money, the peak months for giving in 2018 are November and December with 39% and 36% having donated in the last four weeks compared to an average of 32% across the year. This is similar to 2016 and 2017 and likely to be related to campaigns such as the World War I centenary, Movember, and Children in Need in November and Christmas appeals.

The donation figure for December (36%) is similar to that seen in 2017 (37%) and in 2016 (38%), and giving to homeless people, housing and refuge shelters (25%) remains higher in December than other months – an established pattern since 2016.

The donation figure for November rose slightly from 36% in 2017 to 39% in 2018, similar to the figure seen in November 2016 (41%). During November, donors were more likely to have given to charities that fall into the 'other' category (24%), of which 46% mention the Royal British Legion, the Poppy Appeal, or remembrance. This again echoes patterns seen in 2016 and 2017.

In 2016 and 2017 we saw donations to children and young people spike in November, likely to be due to the Children in Need campaign running around this time. In November 2018, while it is the most common cause (28%), donations to children and young people were less common than in some other months.

As we saw in 2016 and 2017, November (48%) saw the highest proportions of donors using cash to give compared to the rest of the year (41% average). Ad hoc giving in general, including giving using cash, via text, or online, among other methods, is higher in November (81%) and December (80%) than the average for the year (75%), highlighting the campaign-led nature of giving towards the end of the year.

Among those who reported donating to charity, over half (51%) said they used Gift Aid, consistent with the level we saw in 2016 and 2017. 2018 saw the highest Gift Aid usage among those aged 25-44 (56%), likely due to levels of employment and taxable income.

1.2 Volunteering

In 2018, one in six (16%) said they had volunteered for a charity over the last year, while almost one in ten (9%) reported doing so in the last four weeks. Both are consistent with the levels we saw in 2016 and in 2017.

Women remain more likely to have volunteered than men, both in the last year (19% vs. 14%) and in the last four weeks (10% vs. 7%).

The highest levels of volunteering in the last year were reported amongst full time students (24%) and those working part time less than 8 hours a week (25%). This is likely due to the amount of free time available to these groups, as well as the encouragement schools and universities give to volunteer.

1.3 Giving goods

After donating money, giving goods to charity is the second most common charitable or social action taken part in. Well over half (56%) reported doing so in the last year, while a quarter (26%) say they have done so in the last four weeks, the same as 2016 and 2017.

Donating goods is especially prevalent among older people (73% of 65+s vs. 31% of 16-24s), and women (67% vs. 44% of men), a pattern we have seen over the last three years.

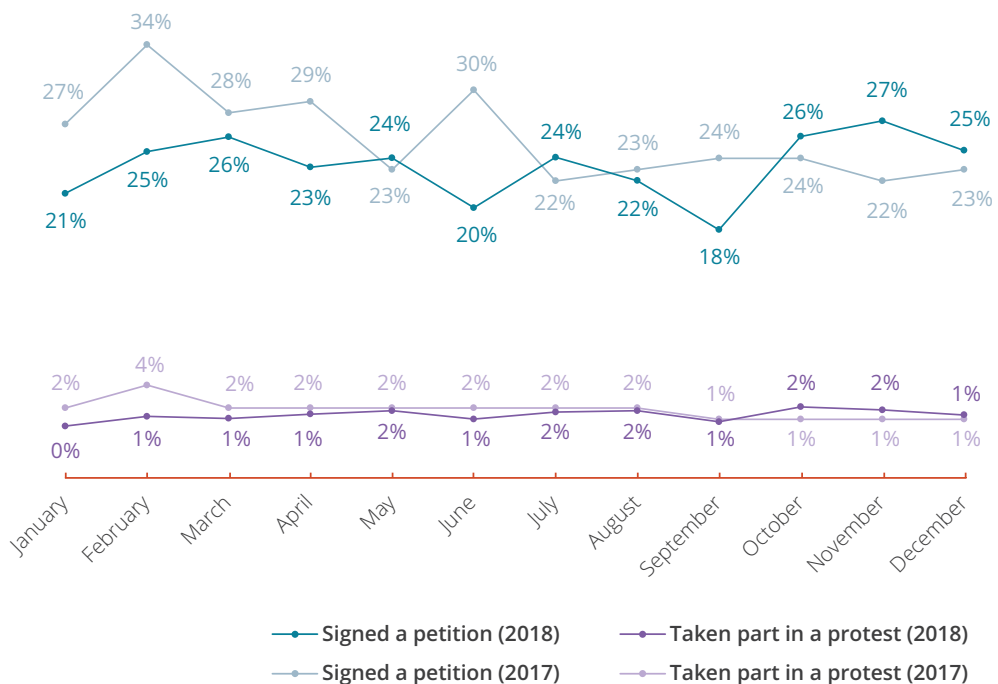
1.4 Protesting and petitioning

The third most common charitable or social action is signing a petition, with 49% reporting doing so in the last year. Although it is still quite high, this has fallen significantly from the 54% seen in 2017 and 56% in 2016. Although around a quarter (23%) reported having signed a petition in the last four weeks, this is also down from 26% in 2017 and 27% in 2016.

The proportion reporting they had signed a petition in the last four weeks was significantly higher in November (27%) and October (26%), which may be connected to the demands for a second referendum on the UK's membership of the EU. In the previous year, 2017, the proportion signing a petition peaked in February in the lead up to the Government's triggering of Article 50 in order for the UK to begin the process of its withdrawal from the European Union.

The most likely group to have signed a petition in the last year is those aged 16-24 (53% vs. 49% on average). Indeed, this is the activity most participated in by this age group. Women are again more engaged than men, with 51% reporting having signed a petition in the past year compared to 47% of men.

Figure 4: Which, if any, of the following have you done in the last four weeks?
(Signed a petition, taken part in a public demonstration or protest)



Base: all adults 16+ 2018: (n=13,277), 2017: (n=12,211)

Six per cent report taking part in a public demonstration or protest in the last year, with one per cent reporting doing so in the last four weeks. Both figures remain similar to those seen in 2017 and 2016. The proportion taking part in a protest has remained consistent since a high of 4% in February 2017, around the triggering of Article 50 to begin the process for the UK to leave the European Union; no other month has seen more than 2% taking part.

Londoners are the most likely to have taken part in a public demonstration or protest in the last year (10%), likely as a result of many of the major protests relating to Brexit or the visit of President Trump in July in the capital city. As with signing petitions, the youngest age group are also the most likely to have protested in the last year (9% of 16-24s vs. 6% on average). Protesting is one of the few charitable or social actions where men are more likely than women to have taken part (6% vs. 5%).

2.0 Who engages most?

In line with previous years, women and older people are the most likely to engage in charitable and social activities. Only 10% of women report doing none of the eight activities (shown in Figure 1), compared to 17% of men. Whilst this has remained similar for men since 2017, the number of women not participating has increased from 8%. Among all adults aged 65+, only 8% have done none of the activities, compared to 17% of 16-24s. Both figures remain similar to 2017.

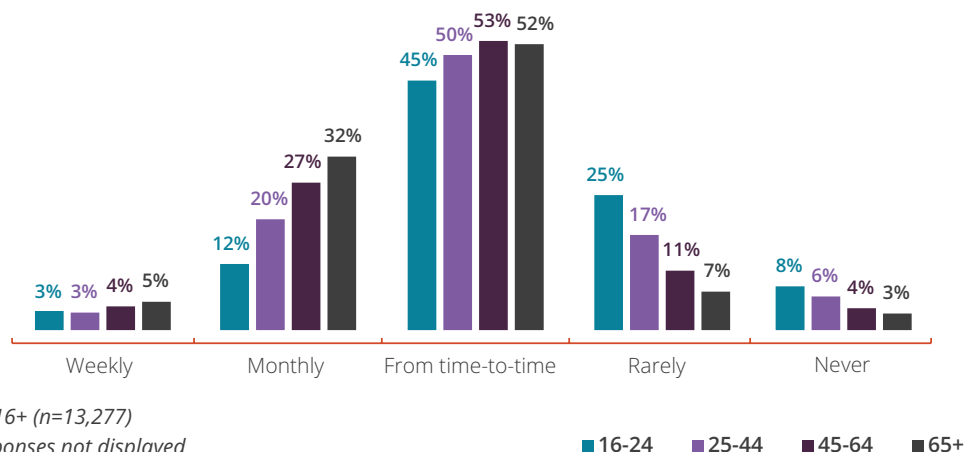
As we have seen in previous years, it is worth noting that type of charitable and social engagement varies by age, with younger people more likely to be involved in volunteering, buying ethical products, petition signing and protests.

3.0 Frequency of giving

The frequency of giving in 2018 was similar to both 2017 and 2016, with the majority (51%) giving “from time to time”, a further quarter (24%) giving monthly, and 4% weekly. There remains a consistent number giving less regularly, with 14% saying they give to charity rarely and 5% stating that they never give.

Men are twice as likely as women to say that they rarely or never give to charity (26% vs. 13%). Giving weekly or monthly is more common among those in the highest social grades (36% of ABs, compared to 23% of DEs), likely due to higher levels of disposable income.

Figure 5: Which of the following best describes how often you give to charity?



In previous years, we have seen consistent levels of giving “from time to time” across all age ranges, but in 2018 there was a significant decrease among those aged 16-24 from 51% in 2017 to 45%. People of this age are more likely to give rarely or never – which when combined, is three percentage points higher than in 2017. As this is the first time we have seen this trend, it is something we will continue to monitor over time.

4.0 Total amount given

Each year we have calculated a total giving amount in the UK in a way that takes into account all months of the year and any seasonal differences. Consistently we see around £10 billion donated annually by generous individuals across the UK, and this year is no different. Specifically, a total amount of £10.1 billion was given in 2018, compared to a figure of £10.3 billion for 2017 and £9.7 billion in 2016.

As the total amount given has not varied significantly over the last three years, and as we have already seen within this report, fewer people are giving money to charity both directly and via sponsorship, this means that once again fewer people are giving but those that did are giving higher levels of money. This is discussed in more detail in the next section.

It is important to note that the UK Giving estimate for total giving is calculated from reported giving, as recalled and relayed by individual survey participants, and so is subject to respondent reliability, as well as other considerations that apply to all surveys based on a sample of a population rather than a census.

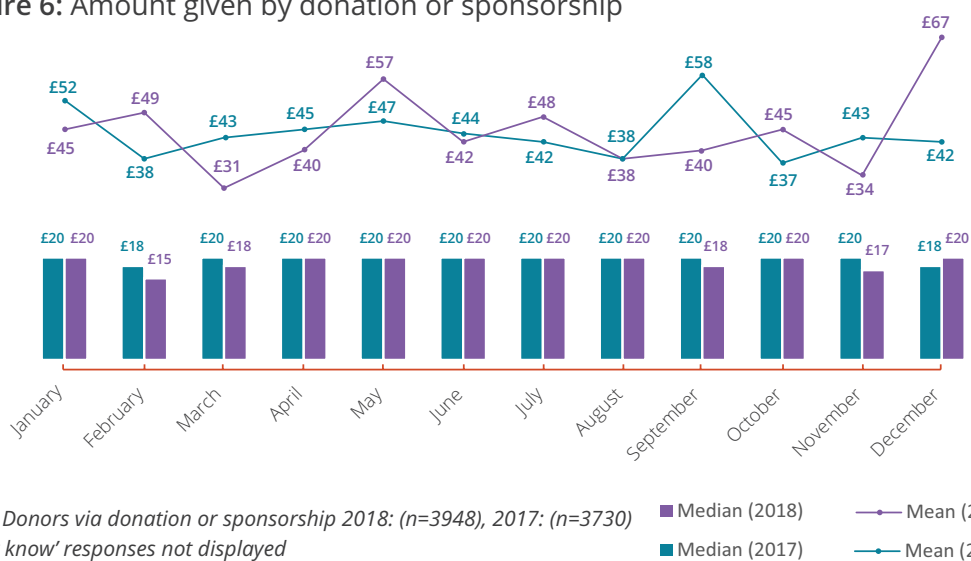
5.0 Typical amount given

5.1 Typical amount given in donations

This section focuses on the amounts given via both direct donations and sponsorship.

The median¹ monthly amount given by a donor in 2018, either donating or sponsoring in the last four weeks, was £20, while the mean amount given was £45. Whilst the median is the same as 2017, the mean has increased by £1 from £44. Both the median and the mean are higher than in 2016 (£18 and £40 respectively).

Figure 6: Amount given by donation or sponsorship



¹ Mean = average amount given across all individuals. Median = middle value of all amounts given by individuals.

There were some small changes in the median amount given month by month in 2018, with February dropping below the £20 figure to £15, November to £17, and March and September to £18. There was more variance in the mean amount donated in the last four weeks, with the figures ranging from £31 in March to £67 in December. On the mean in particular, there is little consistency when we compare month to month across 2017 and 2018.

Those aged 65+ have both the highest median and mean amount (£21 and £58 respectively), which we also saw in 2016 and 2017. In 2017 we saw the lowest donation figures from those aged 25-34, a shift from previous years where we had seen those aged 16-24 giving the lowest amounts. In 2018, we saw a mix, with 16-24 year olds having the lowest median donation amounts (£11), while those aged 25-34 had the lowest mean donation amounts (£35). This indicates that those aged 16-24 are giving lower amounts in general, but there are some individuals making bigger ticket donations.

In 2017, we saw that the mean donation for women had increased to £42 from £35 in 2016. This year we saw this mean drop back down to £38, while the mean donation for men has increased from £46 in 2017 to £53. The differential between men and women has therefore increased again back up to £15. The median donation for men and women remained the same in 2018, at £20.

5.2 Typical amount given in sponsorship

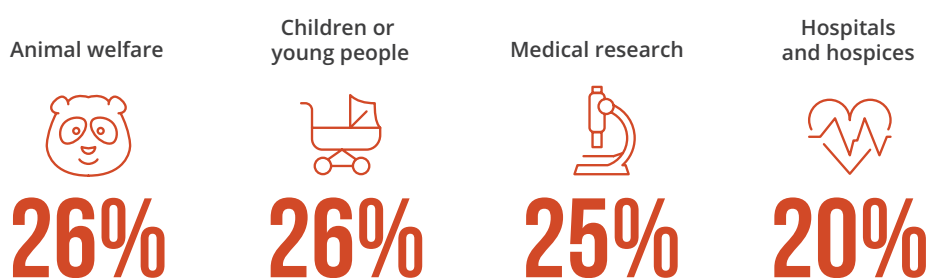
Looking just at sponsorship shows a lower level of giving than through direct donations. The median sponsorship contribution is £15, while the mean is £30, with both figures similar to those seen in 2017 (£15 and £28 respectively) and higher than those seen in 2016 (£10 median and £22 mean).

The most popular cause to sponsor someone was the same as 2016 and 2017, with medical research (37%) coming out on top – an increase from the 33% who sponsored someone for this cause in 2017. Children and young people has moved up to the second most popular cause (21% vs 18% in 2017), a position previously occupied by hospitals and hospices. In general, sponsorship for health-related causes is much lower than in 2017 with the proportion sponsoring someone for hospitals and hospices falling (19% vs 24% in 2017) and for physical and mental health care from 21% in 2017 to 13% in 2018.

6.0 What people give to

The top four causes donors report giving to was the same as 2017 and 2016, although the order has changed, with 'Children or young people' and 'animal welfare' moving into joint top spot in 2018.

Figure 7: Which of the following causes have you given to in the last four weeks?



Base: All adults 16+ who have donated to a charity in the last four weeks (n= 4,243)

Children or young people (26%), animal welfare (26%), medical research (25%), hospitals and hospices (20%) and homeless people, housing and refuge shelters in the UK (18%) were the most popular causes to donate money to.

Compared to 2017, donations have coalesced around three causes this year. While in 2017 the difference between the most popular and fifth most popular cause was only three percentage points, in 2018 it was eight. The number supporting children's charities has increased from 2017 (26% vs 23%) as has the number supporting animal charities (26% vs 24%). With fewer donating overall, this suggests that charities supporting children, young people or animals are taking a greater share of the number of donations rather than more charities supported overall.

Despite remaining in 4th place, giving to hospitals and hospices dropped from 23% in 2017. After seeing a spike in 2017, likely due to the number of large scale, highly covered international disasters which unfortunately occurred in 2017, including the Rohingya crisis, Hurricanes Harvey and Maria, the earthquake in Mexico, and monsoon flooding and landslides in Bangladesh, Sierra Leone and Colombia, giving to overseas aid and disaster relief dropped in 2018, from 23% to 18%.

Within the data we see seasonal differences and spikes in terms of causes given to each month. Giving to homeless people reached its peak in December (25%), when a number of charities run Christmas campaigns. This is consistent with 2016 and 2017 where the total donating to these charities peaked in December at 22% and 25% respectively.

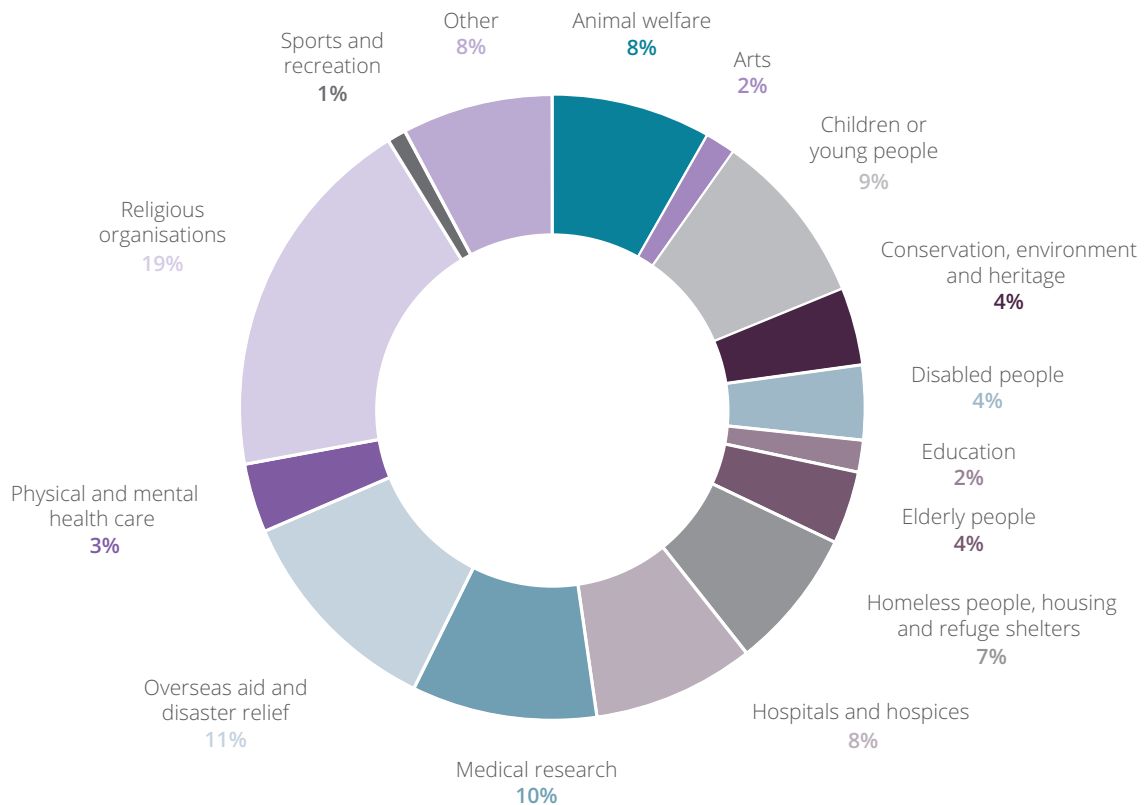
Consistently with previous years, 'arts' and 'sports and recreation' are the least popular causes for UK donors to give to (both 2%). Giving to sports peaked in March (4%), in line with the Sport Relief campaign.

6.1 Proportions given to cause areas

Amongst donors who gave directly to charity, religious causes see by far the largest donations, with a mean donation of £74 in the last four weeks, an increase on the £59 mean donation seen in 2017 and the £60 mean donation seen in 2016. This is followed by overseas aid and disaster relief and the arts (both £30). In 2018, donations for schools, colleges, universities and other education remained the same as 2017 (£21) after a dramatic fall from £46 in 2016. 'Sports and recreation' and elderly people saw the smallest median donations of £5, while religious organisations continue to come out on top, with £35.

Reflecting what we saw in 2017, religious organisations received 19% of the money donated in 2018, but from only 12% of donors. This is due to the high level of the mean donations for this cause. Conversely, despite being the most likely cause for people to have donated to (26%), 'children or young people' only received 9% of the money. The majority of causes have maintained their proportion of donations received from 2017 to 2018.

Figure 8: Proportion of total donation amount received by each cause in 2018



Base: All adults 16+ who have donated directly to a charity in the last four weeks (n=4,243)

6.2 Who gives to what?

As seen in previous years, women are more likely to give to certain causes than men. Animal welfare charities remain the most popular choice for women (31% vs 20% of men) following the pattern of 2017 where 29% of women donated to animal welfare charities compared to 19% of men. Other popular causes for women in 2018 included ‘children and young people’ (28% vs 24% of men) and ‘homeless people, housing and refuge shelters’ (20% vs 16% of men).

Similarly, certain causes capture the imagination of young people more than older people. Those aged 16-24 were more likely to support children or young people (32%) than those 65+ and this has increased from 23% in 2017 to overtake ‘physical and mental health charities’ and become the most popular cause amongst the 16-24 age group. Although young people are still more likely to support causes relating to ‘physical and mental health’ than older people (14% vs 9% of those aged 65+), it fell from 27% in 2017.

The oldest age group are more likely to give to ‘hospitals and hospices’ (28% vs. 20% overall), religious organisations (16% vs. 12% overall) and causes supporting elderly people (11% vs. 8% overall). Amongst those aged 65+, supporting religious causes fell from 22% in 2016 and 2017 to 16% in 2018, but the other principal causes for this age group have remained the same.

The most popular causes for those in the AB social group were ‘medical research’ (29% vs. 25% overall), ‘overseas aid and disaster relief’ (22% vs. 17% overall), ‘homeless people, housing and refuge shelters’ (22% vs. 18% overall), ‘conservation, the environment and heritage’ (16% vs. 13% overall), religious organisations (14% vs. 12% overall) and the arts (4% vs. 2% overall). However, the number in this demographic group donating to any cause in the past four weeks decreased significantly from 46% in 2017 to 43% in 2018; driven by fewer people donating to religious organisations and overseas aid.

The proportion donating to other causes remained roughly the same. In line with 2017, those in the DE social group were more likely to donate to animal welfare (30% vs 26% overall) and disabled people (16% vs 13% overall).

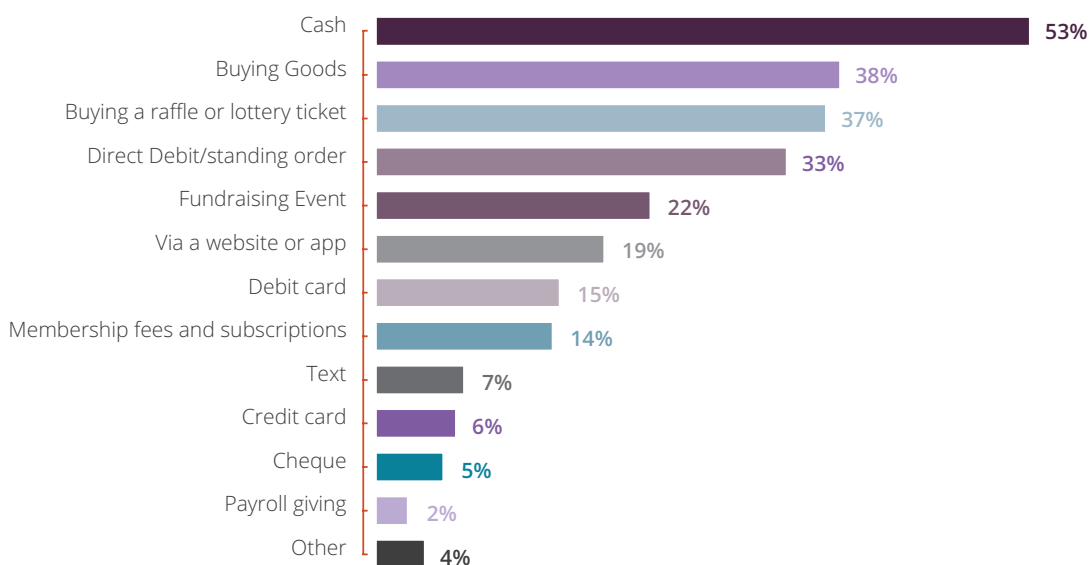
Regionally, the support base for the arts is clearly established in London (6% vs 2% nationwide), as is support for educational institutions (6% vs 4% nationwide), with more donating in London than anywhere else in the UK for a second year running. Religious organisations are more likely to be donated to in Northern Ireland (21% vs 12% overall) although this has fallen since 2017 when 27% donated to religious causes. Another established pattern from 2017 is greater support for ‘conservation and the environment’ in the South West (17%), Wales (16%) and the South East (16%) than elsewhere (13% overall).

7.0 How people give

People were also asked how they gave money to charity and what method they preferred. As the question text was changed from 2017 to 2018 to reflect some of the more modern technologies, we are unable to make year on year comparisons, but the findings from 2018 are presented below.

Giving using cash is the most common way of giving money to charity, with over half (53%) doing so in 2018. Giving through buying goods (38%) and by buying a raffle or lottery ticket (37%) are also very popular methods of giving. A further two methods are used by around one in five people – namely; a fundraising event which 22% have given through and 19% via a website or app.

Figure 9: In the last 12 months, have you given to charity by any of these methods?



Base: All adults 16+ who have donated to charity in the last twelve months (n=7,788)

The oldest age group of 65+ are the most likely to have given by buying a raffle ticket (45%), direct debit (44%), buying goods (41%), membership fees (20%), cheque (13%), and credit card (10%), and the least likely to have done so through a website or app (13%). The youngest age group of 16-24 year olds are the most likely to give through a fundraising event (27%) and by debit card (21%).

For those who said that they had used a website or app to donate in the past four weeks, nearly half (46%) gave directly to a charity via their website and 3% using a charity's app. However, the most common type of website or app to donate is a third party website, such as JustGiving (58%). One in seven (14%) of those who donated using a website or app in the last four weeks gave through social media, such as Facebook's 'donate' button.

Women are more likely to have donated on social media than men (17% vs. 9%). Giving through a third party is most popular among those aged 25-54 (69% vs. 60% overall), while the more traditional route of giving direct to charity is more common among those aged 65+ (65% vs. 47% overall).

Among those who have given through membership fees and subscriptions in the last four weeks, the vast majority do so using a direct debit or standing order (90%), but one in five (19%) make one off payments.

Among donors who used a debit card in the last four weeks, only one in ten used contactless (9%). Perhaps unsurprisingly, the youngest donors are more likely to have adopted the new technology, with 14% of 16-34s who made a donation using their debit card using contactless, compared to just 3% of those aged 65+. This relatively low level of giving this way is likely to be as a result of contactless terminals yet to be used widely by charities.

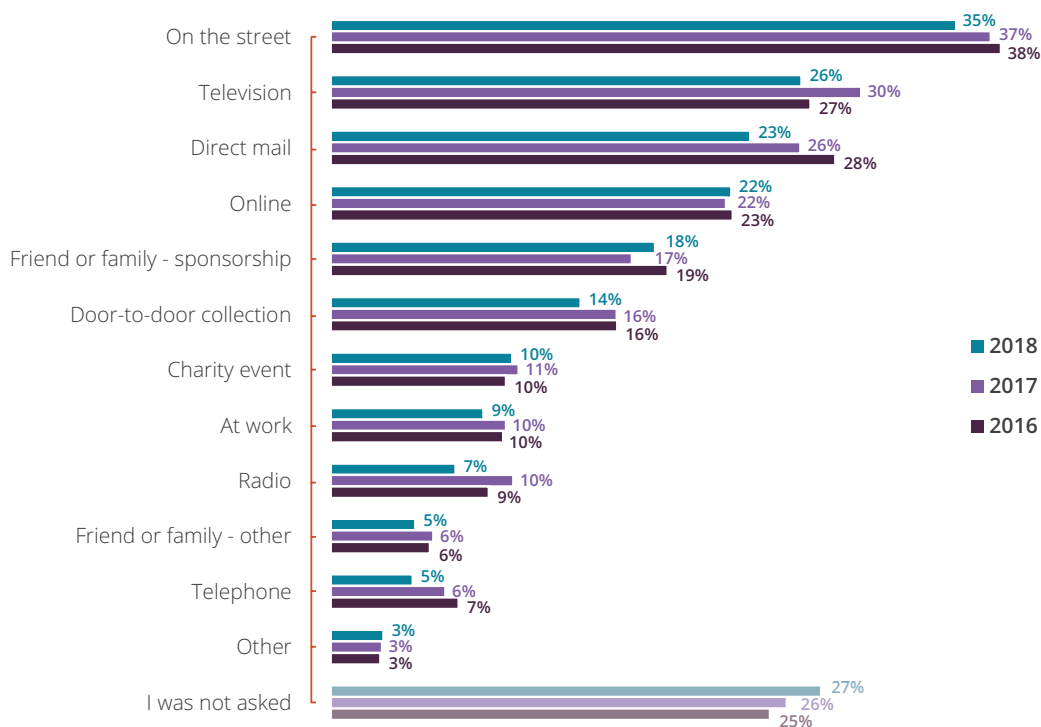
7.1 Being asked to give

We asked people, regardless of their giving behavior, how they had been asked to give to charity in the last four weeks. The most common way people reported being approached to donate was on the street (35%), followed by television (26%) and via direct mail (23%). The top three remain consistent with 2016 and 2017, however in the past 12 months the number being approached has fallen across most methods and the number not being asked has risen from 25% in 2016 to 27% this year. Fewer are being approached physically, with a marked fall in the proportion being approached on the street (35% vs 37%), by direct mail (23% vs 26%) and by door-to-door collection (14% vs 16%) than in 2017; the fall in those being approached through direct mail is particularly pronounced having decreased by five percentage points since 2016. This is likely to be as a result of the GDPR legislation² which came into effect in May 2018 and resulted in many charities cleaning their direct mail lists in order to ensure consent in receiving mailings.

Fewer people report being asked to donate through the media compared to 2017: by television (26% vs 30%) or radio (7% vs 10%). This may reflect the number and type of campaigns run on the media between 2017 and 2018. The only methods to stay consistent or increase from 2017 were online (22% both years) and being asked by friends or family to sponsor them (18% vs 17%).

² <https://www.eugdpr.org/>

Figure 10: Regardless of whether you gave to charity or not, in which of the following ways have you been approached to donate to charity in the last four weeks?



Base: All adults 16+ 2018: (n=13,277), 2017: (n=12,211), 2016: (n=8,137)

Being asked by a friend or family member to sponsor them was highest in the summer months, reaching 20% in June and 21% in May and July. This ties in with the peak months we see when people say they have sponsored friends or family. In November, being approached via television (33%) reached its highest point, likely driven by Children in Need. November, along with December, are also peak times to be asked to donate on the street (38% and 39% respectively), online (25% and 26%), and through direct mail (26% each), possibly because of the Poppy Appeal and the charity Christmas appeals.

Young people are more likely to have been asked to give on the street (41% vs. 32% of 65+s), online (29% vs. 20% of 65+s), and at a charity event (14% vs. 9% of 65+s), while the older group are more likely to have been asked through direct mail (37% vs. 11% of 16-24s) and by telephone (6% vs. 3% of 16-24s). These patterns are the same as we saw in 2016 and 2017.

Consistent with 2017, those living in London are the most likely group to report being approached to give on the street (43% vs. 35% overall), and more likely than average to have been approached to donate online (25% vs. 22% overall). Those in Northern Ireland (39%) and Scotland (37%) are also more likely than average to have been asked to give on the street.

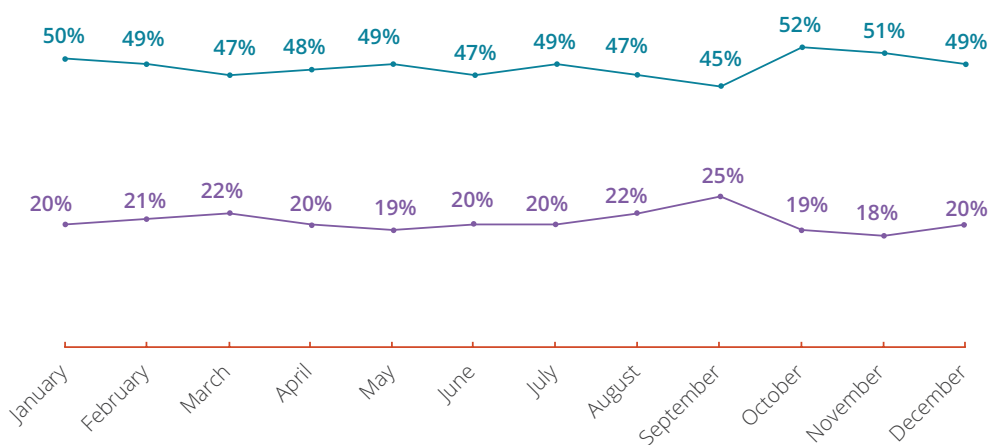
For those who were approached to donate online, social media is the most common method, with more than half (53%) being asked this way, 39% through advertising and 22% via a channel they follow. Being approached to donate to charity on social media decreases with age from two thirds (66%) of those aged 16-24, to 57% of 25-44s, 50% of 45-64s and 36% of those aged 65 and older. In part this will be a reflection of the age groups most likely to use social media and the frequency in which they do so.

Among those who said they were approached to donate through direct mail, we asked whether this was done through the post or via email. The majority (83%) said they had been approached through the post, but a third (33%) said this request had come by email. 16-24 year olds are more likely to have received an email (47% vs. 25% of 65+s), while those aged 65+ are most likely to have had a request come through the post (90% vs. 64% of 16-24s).

8.0 Trust in charities

At a time when trust in institutions is at an all time low according to a number of influential reports³, trust in charities has also declined. Just under half of the UK population (48%) say that they believe charities to be trustworthy, significantly lower than 51% in 2017. Trust reached a peak in October (52%) and a low in September (45%). Those saying they **do not believe charities to be trustworthy** significantly increased from 19% in 2016 and 2017 to 21% in 2018. This year's results are therefore particularly concerning.

Figure 11: Levels of trust over 2018



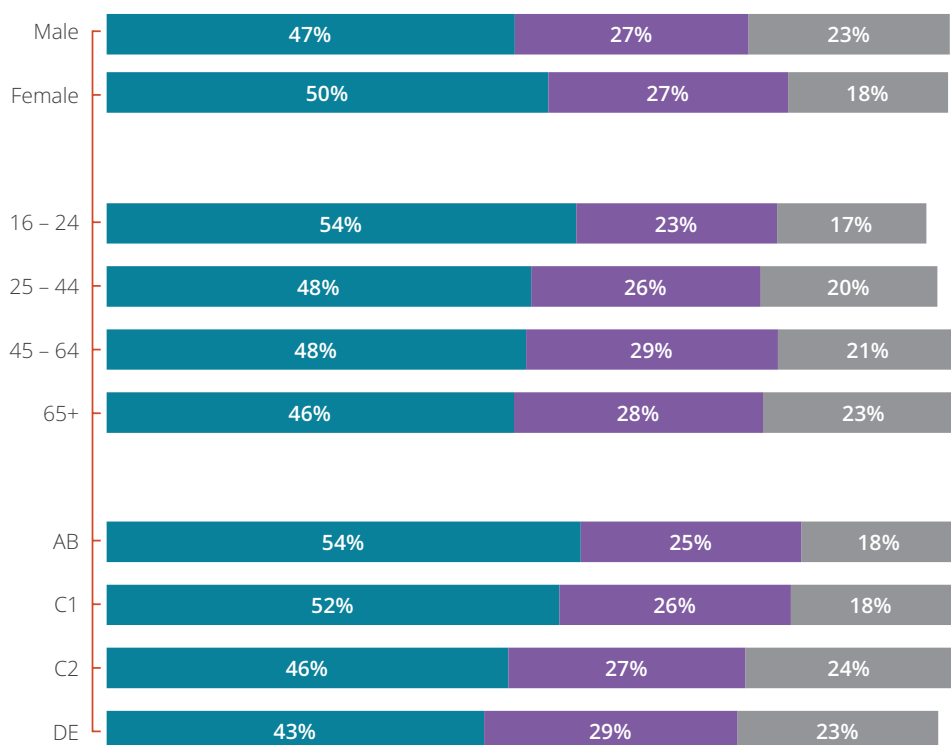
Base: all adults 16+ 2018: (n=13,277)

— Trustworthy — Untrustworthy

Women (50% vs. 47% of men), young people aged 16-24 (54% vs. 46% of those aged 65+), and those of social grade AB (54% vs. 43% of DEs) are significantly more likely to consider charities to be trustworthy across 2018. These differences are consistent with 2016 and 2017, but trust levels have fallen for all groups.

³ <https://www.edelman.com/trust-barometer>
https://www.ipsos.com/sites/default/files/ct/news/documents/2018-11/veracity_index_2018_v1_161118_public.pdf

Figure 12: To what extent, if at all, do you agree or disagree that most charities are trustworthy?



Base: All adults 16+ (n=13,277)
 'Don't know' responses not displayed

■ Agree ■ Neither agree nor disagree ■ Disagree

Disagreement figures highlight the differences in these demographic groups further, with 23% of men disagreeing that charities are trustworthy, compared to 18% of women. 23% of those aged 65+ and of those in social grade DE disagreed, compared to 17% of 16–24 year olds and 18% of ABs.

Despite trusting charities more than men, more women disagreed that charities are trustworthy in 2018 (18%) than in 2017 (16%). We see a similar pattern with those in social grade AB, with 18% disagreeing in 2018, up from 15% in 2017. Trust among those who never give to charity in particular has fallen, with 56% disagreeing that charities are trustworthy in 2018 compared to 50% in 2017. These are concerning trends for all of us in the charity sector and beyond.

METHOD

CAF has been producing the UK Giving report since 2004, and has been tracking giving in the UK for several decades. In that time, there have been a number of changes to how the study is conducted in terms of approach and questions asked.

During 2016 the UK Giving survey transitioned from a quarterly face to face survey with 1,000 responses each time to a monthly survey with 1,000 responses conducted online. We've now been reporting on this new boosted sample size for three years. This monthly approach enables us to level out seasonal effects as well as those established spikes in charitable giving that occur around particular high-profile events or as a result of humanitarian disasters or specific appeals. The changes also results in the ability to access an annual pool of 12,000 responses with all the advantages of sub-group analysis. This has enabled us to produce additional analysis and produce our CAF Scotland Giving⁴ reports.

Further information on the detail of transitioning the survey to this approach can be found in CAF UK Giving 2017.⁵

4 <https://www.cafonline.org/about-us/publications/2018-publications/scotland-giving-2018>

5 <https://www.cafonline.org/docs/default-source/about-us-publications/caf-uk-giving-web.pdf?sfvrsn=8>



Charities Aid Foundation

25 Kings Hill Avenue, Kings Hill,
West Malling, Kent ME19 4TA UK

T: +44 (0)3000 123 000

E: research@cafonline.org

2362080519