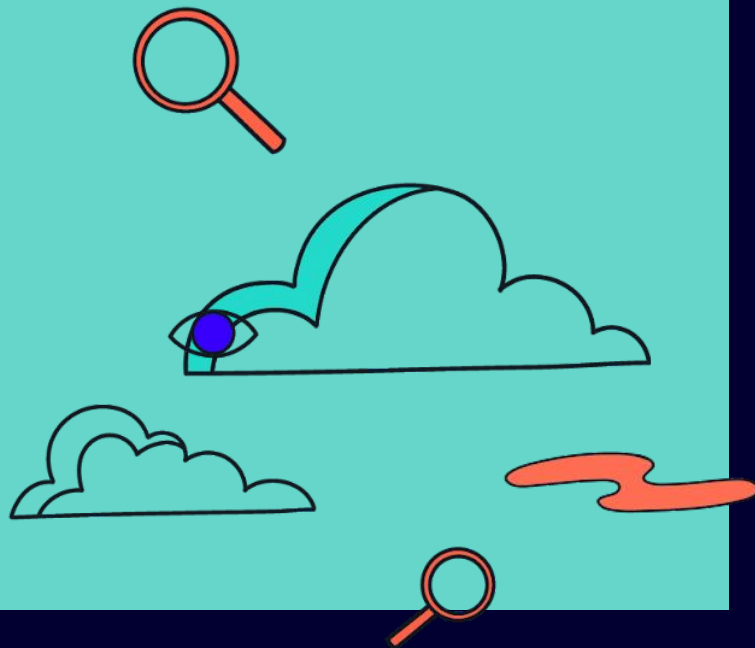


UK Giving Behaviours Tracker 2023

Why a cost of living crisis does
not necessarily mean a 'cost of
giving' crisis



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- Key Findings & Executive Summary [6](#)
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Welcome

We are living in extraordinarily challenging times. Rising inflation, stagnating wages, and increases in the cost of goods and services mean that almost everyone is feeling the effects on their finances. Understanding how this has impacted and will continue to impact people's charitable giving and behaviours is essential for the voluntary sector to plan ahead.

Currently, the running costs of charities and nonprofits are increasing alongside demand for services. Many domestic charities are feeling the squeeze. International organisations have grown significantly since the pandemic, but have increased outgoings to deal with escalating emergencies.

Is it as bad as it seems? Who are the donors who will keep giving? Where are the opportunities during this turbulent time? If people are giving more, what is motivating them?



Anjali Betra
Strategy Director,
Blue State



Jasmine Miah
Senior Strategist,
Blue State



Lizi Zipser
Executive Director,
Blue State

We wanted to find out, and we hope the results will give some fundraisers renewed hope.

Earlier this year we surveyed **a nationally representative sample of 1,540 individuals in the UK**. In this report, we will explore:

- Broad trends and themes in giving – with a shift from volume-based strategies to value-based ones.
- What organisations can do to weather the storm
- How to find new donors through a recession

We hope the information in this report will be helpful for our community. As always, if your organisation is tackling these issues and you'd like to chat, we would love to hear from you.

Our cross-sector experience





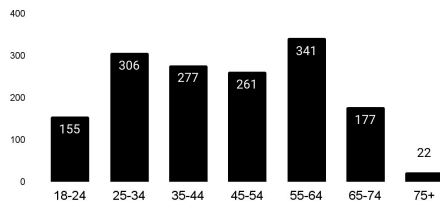
A snapshot of our UK survey response

Sample size

1,540

survey responses

Age distribution



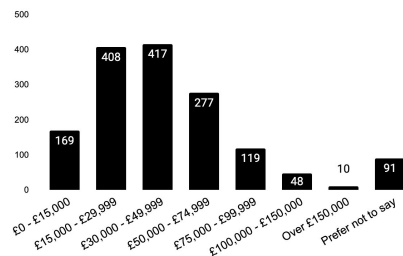
Regional representation

Region	Particip.
South East	307
North West	181
London	165
Yorkshire	163
East Midlands	157
South West	144
West Midlands	130
Scotland	122
North East	81
Wales	62
Northern Ireland	28

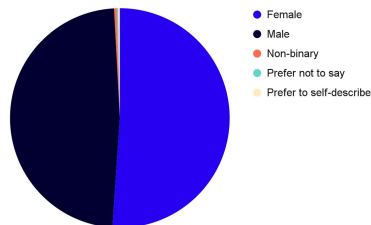
Representation by Ethnicity

Ethnicity	Particip.
White - English/Welsh/Scottish/ Northern Irish/British	1241
White - Any other White background	90
Asian/Asian British - Pakistani	32
Asian/Asian British - Indian	26
Black/Black British - African	26
Asian/Asian British - Any other	
Asian background	22
Asian/Asian British - Chinese	22
Black/Black British - Caribbean	17
White - Irish	17
Asian/Asian British - Bangladeshi	10
Mixed/Multiple ethnic groups - White and Black Caribbean	9
Mixed/Multiple ethnic groups - Any other Mixed/Multiple ethnic background	7
Other - Arab	7
Other ethnic background	6
Mixed/Multiple ethnic groups - White and Asian	5
Black/Black British - Any other Black / British Black background	3

Household income distributions



Gender distribution



Key Findings



The West Midlands

was the most generous region of the UK in 2022, with a mean average gift of £354 followed by London (£295) and the North East (£263)



Medical charities

received greatest percentage of support (42%) from the UK public, followed by Animal Welfare (29%), Children/Youth (25%) and Homelessness (23%)



18%

of people in the UK are not planning to give money to charity in 2023 (a 6 percentage point / 50% increase from 2022)



11%

of Londoners gave more than £500 a year (an increase from 7.7% in mid 2021)



British Muslims

amongst the most generous groups with 21% giving over £500 in 2022, and the most likely to say they intend to give more in 2023 (53%)



But 1 in 5 / 20%

members of the British Public are intending to give more in 2023 than 2022



55-64s

were the most generous group in our sample, with a mean donation average of £278 a year With 1 in 5 people giving more than £250 a year in this age group



22%

point increase in donations to food banks since our last tracker in 2021 (53% vs 31%)



Rising to 1 in 4 / 25%

for Brits with household incomes above £75,000 in terms of their intent to give more in 2023

Executive Summary



2023 is a turbulent time for many fundraisers — but don't panic!

2022 saw a huge rise in individual giving in the UK, and 2023 is returning to the mean after a record breaking year.

This alongside the cost of living crisis and rising acquisition costs is putting a lot of pressure on fundraisers to review and reforecast their programmes.

Our findings show that 2023 can still be a strong year for fundraising, if expectations are managed and organisations focus on the right donors and lean into where your audiences are.



Value vs volume — the only way to grow in the current financial environment

2022 saw the volume of people who were able to give to charity decline, but a significant rise in total giving. 2023 follows the same trend.

Giving will be determined by the value of donors, not their volume, and fundraisers need to identify the people who are most likely to give, and inspire them to dig even further and increase their generosity to offset losses in lower value giving.

While in a financial crisis you may be tempted to lower your ask amount - the opposite may be the key to success.



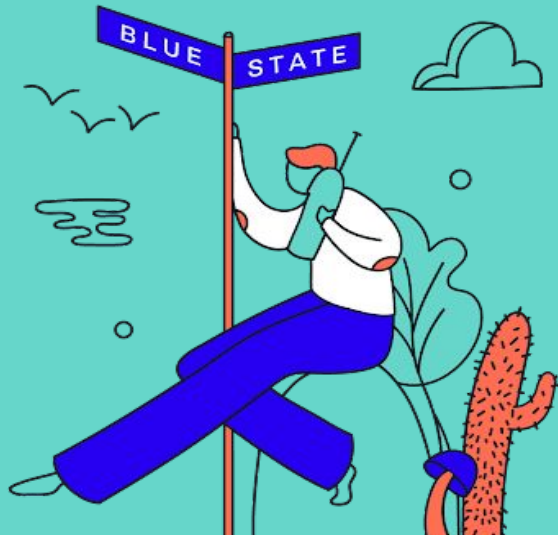
Focus on the right donors to stabilise income, including your existing donors

We are all aware there's a cost of living crisis. But it's important to remember that while in spirit we are all in this together, not everyone is equally affected.

A significant number of people intend to increase their giving in 2023, including:

- Households with incomes over £75,000
- Donors over 55
- Donors of faith, and in particular British Muslims

Build your programme around people who can afford to be generous right now.



1. Is the Cost of Living Crisis a 'Cost of Giving Crisis'?

2023 is expected to be a return to the baseline following huge growth in individual giving in the UK through 2022

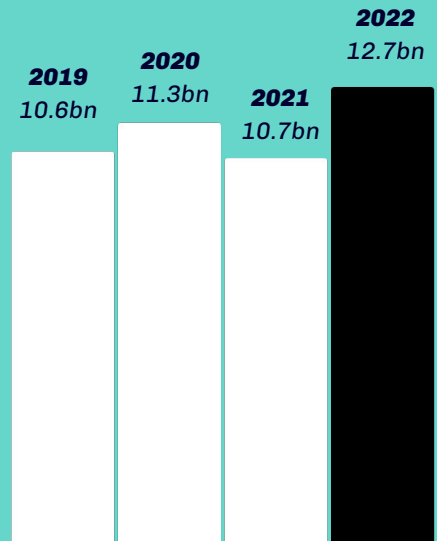
The last few years have seen a boom in giving; in 2020, giving across the UK increased by £800M over 2019. 2021 went back to baseline and **2022 then broke all records with an estimated £12.7BN donated by the British Public** (CAF 2023).

Even after factoring in inflation (which Pro Bono Economics estimated eroded around £500M of this value), 2022 was a record-breaking year for many organisations and the vast majority of our clients.

This growth in funding was especially felt by international development organisations, and those responding to the Ukraine emergency.

But much like 2021 was a return to the baseline after 2020, 2023 is a different year in fundraising, and we have been experiencing a huge surge in requests for advice and nonprofit clients asking for solutions to reset their fundraising programmes. If you're in this situation, it may be a small comfort to know you are not alone and this is a continuation of a peak and trough pattern in recent years.

Total individual giving in the UK in recent years



- Charities Aid Foundation, UK Giving 2023.

Emergencies drove giving in 2022 and 2023 – but outside of emergencies, many organisations struggle to acquire new donors

Our partners who work in emergency relief, especially in international settings, saw a huge increase in donations through 2022, which continued in 2023 following the earthquakes in Türkiye and Syria.

Outside of emergencies, and for domestic charities, the landscape is more challenging, with many reporting their 2023 income is down, and cost per acquisition sharply up. A lot of fundraisers are also cautious about asking for money, as daily news stories of struggles to pay food and heating costs pour in.

We start this chapter with the challenges, but we hope by the end of this report we will have given many hope. Hope that while the challenges are compounding both organisations' and donors' ability to provide financial support, many organisations are growing through this crisis.

Total volume of people giving was down in 2022, but total value was significantly up (CAF, 2023) - and so success can still be found by nurturing *the right people*, and leaning into what everyone can see: The world needs all the help it can get.

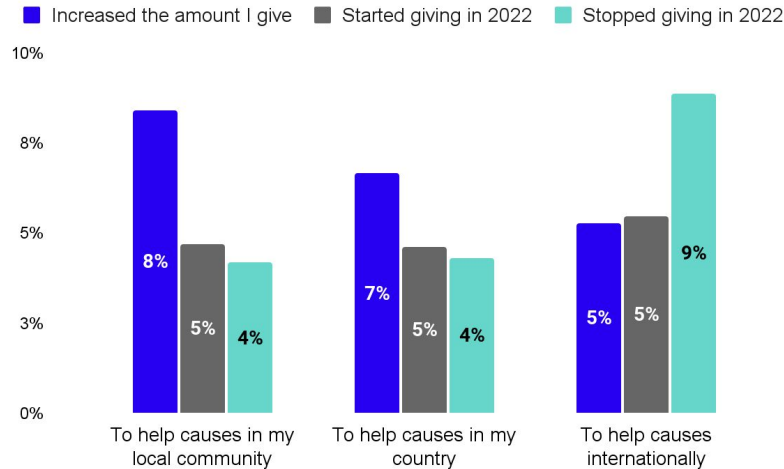
“The world is becoming increasingly shitty. Environmental destruction, poverty, wealth inequality, war, the list is ever growing, isn't it? It isn't a world I want to live in, so I've got to do something to try and change it.”

– Survey response

Outside emergencies, international orgs saw active donor volume decrease, with the highest rise in average gift, especially in mid-value segments

The percentage of people who increased their giving, started giving or stopped giving in 2022 - by type of organisation:

N: 1540



Within our client base and network, we can see the economic crisis has led to a stratified effect. Fewer people are giving, but those who have increased their giving, have increased it so much that for some organisations income is growing while active donors may make up less than 50% of the previous active file.

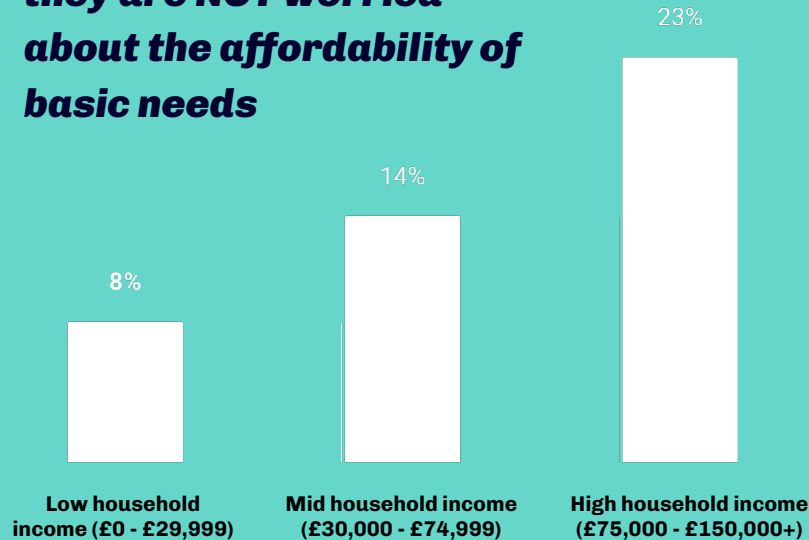
This is especially true for international organisations. As seen in this chart, **9% of individuals said they have stopped giving to international causes - contrasted with only 5% who said they started giving in 2022.** But most international clients and fundraisers in our network report that income is significantly up in both 2022 and 2023 against target and previous benchmarks.

In contrast, domestic and local charities are seeing increased donors (8% and 7% respectively in our sample) - but lower value reported from the sector - leading to an overall challenge to meet the demand in communities.

From our knowledge of the sector, we hypothesise the discrepancy in average value can be attributed to several factors: from the profile and disposable income of the typical international donors, to the fact that international charities are bolder in asking for money, even through the cost of living crisis. And when they do, they ask for more.

The cost of living crisis does not affect everyone equally. One in four higher-income households (£75,000+) are likely to have the capacity to be extra generous in 2023

People in the UK who said they are NOT worried about the affordability of basic needs



N: 1540 - see full breakdown in the appendix by household income (HHI)

The UK press has been covering the cost of living crisis extensively, painting a picture that we're all in this together.

But fundraisers would do well to remember that while most people are struggling, the impact of the financial crisis on different segments in society can mean vastly different things.

When 11 out of 12 people, with household income of up to £30,000 a year (92%), agree that they are worried about the affordability of basic needs, donations won't be high on the priorities. Signing up to a new monthly gift is certainly going to be unlikely.

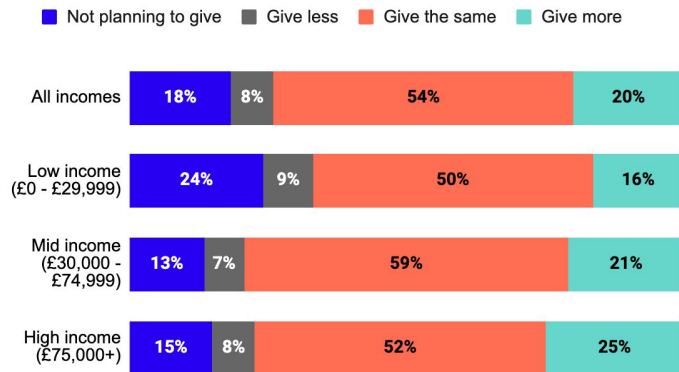
But everyone isn't sharing the burden equally. Those with a household income of £75,000 a year or more also reported challenges (3 out of 4 people agree they are worried about the above), but this leaves a significant population that disagree (23%).

In the UK there are **6.8M** people whose household income is higher than £60,000, and **3.6M** with over £100,000 a year (Global Web Index, 2022). If 1 in 4 of them significantly increases their giving, the sector may be able to offset the turbulence to come. 2023 will likely be defined by which organisations can most effectively appeal to these groups.

Donors in 2023, and likely 2024, will be defined by their capacity to continue giving. It will be *value, not volume*, that makes up the difference in income

To better understand donation intentions for 2023, we asked people:

“Compared to 2022, is your donation amount changing in 2023?”



N: 1540

Next we wanted to understand expressed intent to donate in the UK. As researchers, fundraisers and campaigners we know expressed intention does not always correlate with action - and the strength of our appeals and news coverage is highly likely to change whether intention turns into real-world support. With that caveat, results are reassuring.

Overall, 18% said they are not planning to donate in 2023, a 6 percentage points increase from the amount of people who did not donate in 2022 (12%). Unsurprisingly, the proportion is highest among low income families. But at least when intent is concerned, **people remain generous as 1 in 5 plan to donate more in 2023.**

The number is 1 in 4 (25%) for households over £75,000 - which most organisations have found to be a lifeline through the cost of living crisis - shifting from a volume strategy for donor acquisition and development to one more heavily based on value - with fewer people giving, but those who do, giving significantly more.

What's also reassuring is that the majority of respondents said they plan to give the same amount - a helpful reminder that while being squeezed, the need in communities and global crises are visible and compelling enough for generosity to stay top of the mind, while many other expenses are being slashed and other monthly commitments cancelled.

An increasing need both domestically and internationally is a strong giving motivator across all groups in UK society

We asked ***“In your own words, please explain why you expect to change what you give to charities in 2023 compared to 2022.”***

Many of the qualitative (open-ended) responses of people who said they expect to **give less** in 2023 detailed the strain on their disposable income. Looking at those **who said they intend to give more in 2023**, and breaking down responses by income bracket, we see an interesting picture of British life:

- Lower-income households are more cognisant of the increased operational costs faced by charities, and the need to provide support in managing those costs, than mid- and high-income households. Along with mid-income households, they also still show strong intention to increase donations in order to **support those impacted by the war in Ukraine**.
- Meanwhile, all income brackets show an inclination to give more due to **the rising need they are witnessing across the world and in the UK**. Both mid- and high-income households indicated they were increasing their donations due to **a sense of moral duty** and a belief that the government is failing to support communities, and to reflect their increased salaries.

“I increase my donations every year because things get worse every year. I'm a single man, I'm a simple man. I have a good-paying job that I know I'm very fortunate to have, and feel I should use my spare money to try to help others less fortunate and causes I care about... Even though mine is only a small contribution, it helps me cling to the last little vestiges of hope I have left.”

– Survey response

We found a common thread to motivate donor groups: the increased need and moral duty to share what they have

“

“It’s rare to find a single common thread in giving motivation across all societal groups. This tells us fundraisers must lean into messaging emphasising the increased need and moral duty to help in the current environment and stay present in the lives of people who can afford to share what they have”

- Lizi Zipser, Executive Director, Blue State

Low household income (£0 - £29,999)



The need to support charities with rising operational costs.



The continued support for the war in Ukraine.



The increasing need witnessed globally and domestically.



The desire and moral duty to share privilege.



The failure of the UK government to support communities.



The expectation of salary increases.

Mid household income (£30,000 - £74,999)



The need to support charities with rising operational costs.



The continued support for the war in Ukraine.



The increasing need witnessed globally and domestically.



The desire and moral duty to share privilege.



The failure of the UK government to support communities.



The expectation of salary increases.

High household income (£75,000 - £150,000+)



The need to support charities with rising operational costs.



The continued support for the war in Ukraine.



The increasing need witnessed globally and domestically.



The desire and moral duty to share privilege.



The failure of the UK government to support communities.



The expectation of salary increases.

People can see the world is getting worse, and they want to change it

"The world is becoming worse, people need help more than ever."

**South West, Male,
25-34, HHI under £30K**

"I feel like the world is becoming more desperate and in need of help."

**West Midlands, Female, 25-34,
HHI Over £75K**

"I plan to increase what I give as I see an increasing need owing to the cost of living crisis, humanitarian crises and environmental problems."

South West, Male, 75+, HHI £30K-£75K

"Because people are struggling more especially in the UK due to the cost of living crisis, so more important for those who are able to donate to do so."

**Yorkshire And The
Humber, Female, 18-24,
HHI Over £75K**

Across our sample, there is a general consensus that **the world is getting worse, and the need is increasing.**

This is likely fueled by the news agendas highlighting the cost of living crisis and its impact on everyday people in the UK. While international giving has increased, most of the sentiment in our open-ended answers related to the need in the UK, international conflict and environmental crisis.

2023 presents an opportunity to lean into moral duty as a giving motivator

"I would like to give more as things are harder for people and I realise how blessed I am compared to others."

London, Female, 25-34, HHI £30K-£75K

"I am in a better financial position than many and feel very fortunate. I came from extreme poverty in childhood and I am always mindful of the problems others have, especially when things are so tough right now."

Scotland, Male, 45-54, HHI £30K-£75K

"I increase my donations every year because things get worse every year. I'm a single man, I'm a simple man. I have a good-paying job that I know I'm very fortunate to have and feel I should use my spare money to try to help others less fortunate and causes I care about... even though mine is only a small contribution, it helps me cling to the last little vestiges of hope I have left."

South West, Male, 35-44, HHI £30K-£75K

The strongest motivator across the board – which reinforces what we know from work we do with clients – **moral responsibility**.

This is an almost universal value, which transcends religion, ethnicity and upbringing.

While messaging about our personal responsibility to share what we have with those who have less was always a tenet of faith-based fundraising, this value crosses society and into the much younger age groups.

From wider work, we also know this is especially strong in donors who are engaged and aware of wider social justice issues – including gender and race. But testing and careful messaging needs to be considered to not be too blunt and intentionally make donors feel guilty about their lifestyles or incomes.

This is even more present in groups with more disposable income

Those in higher household incomes were even more aware of their position, wanting to share what they have.

In addition, with higher wage inflation for higher earners, and new taxation lowering the additional rate of tax (45%), **it is estimated that 629,000 people will be in the highest tax bracket in 2023.** There is a clear opportunity to target the higher end of the income bracket to address unmet needs, with higher asks to offset lost income from donors who are struggling right now.

Note: other motivations identified can be seen in the appendices.

"I have more income every month which allows me to donate more. I will also select some new charities to donate to."

London, Female, 25-34, HHI Over £75K

"I am personally in a better off position having returned to work after two periods of maternity leave and having a better paid role and so I want to be able to give a little more despite my own budget still being quite tight."

East Midlands, Female, 25-34, HHI Over £75K

"I have a very comfortable lifestyle and it is heartbreaking to see and read about people who cannot afford to feed themselves, often despite holding down a full-time job."

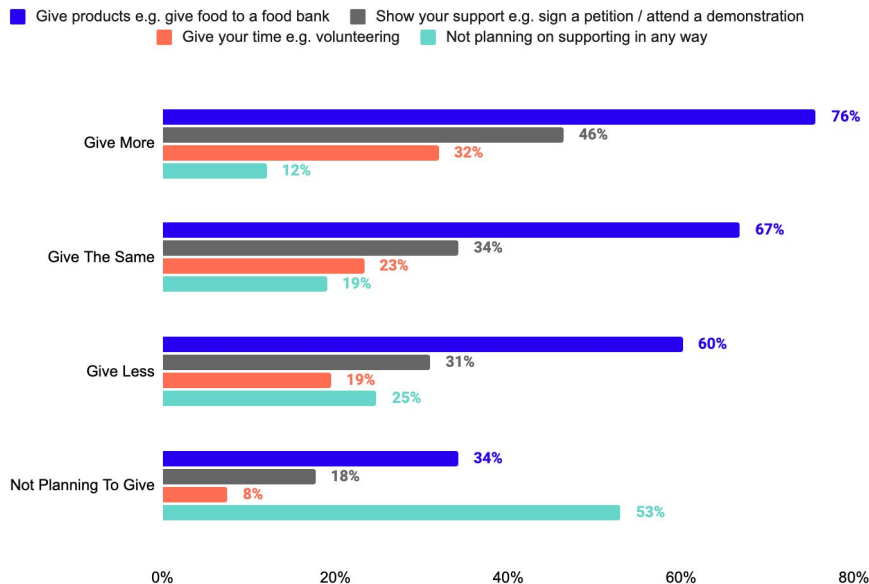
South East, Female, 55-64, HHI Over £75K

And those who have more want to do more across the board

Both financially and non-financially

2023 intentions to donate and the impact on non-financial actions

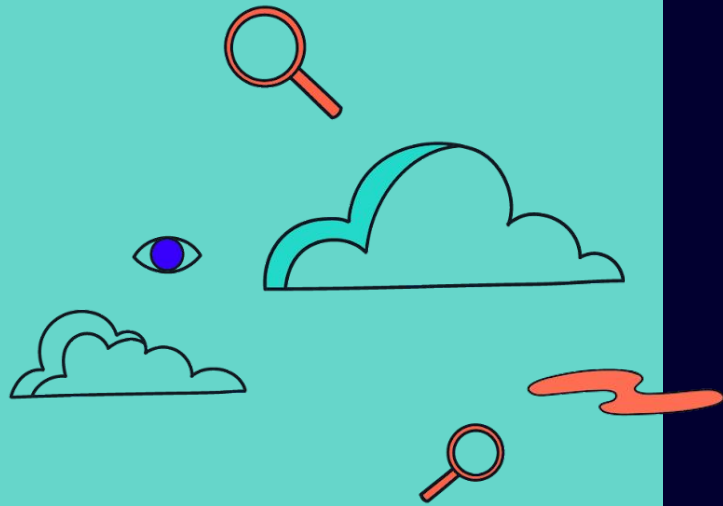
N: 1540



While individuals who acknowledge their privilege and circumstances expressed the wish to give more, they were also more likely than others to say they wanted to help in other ways - from donating to food banks to signing petitions and volunteering.

This shows a general trend to want to get involved and try to balance societal inequality – through multiple means and actions. This means organisations shouldn't simply ask for financial support. **If there is a smaller group in society that has the means and motivation to sustain the voluntary sector through this crisis, think of ways to engage and deepen the relationship with them.**

It's through their understanding of the work, its impact and how they fit into it that you will likely retain them and continue engaging them in 2023 and beyond.



2. Finding new potential donors in a difficult economy



2023 marks a change to the ‘acquisition-first’ mentality. While CPAs are high and response is low, focus on deepening relationships with people you know

For as long as we can remember, fundraisers have spoken about the importance of donor retention and development, while spending over 90% of their budgets and attention on acquisition. 2023 sees a shift in that mentality, as the tough market inflates acquisition costs and monthly giving is a particularly hard sell.

Anecdotally from our clients, we can see that shifting focus and budget to re-engaging and retaining existing donors, especially with a focus on optimising ask amount, has been a much more successful endeavour in the short term while the economy stabilises. **In some cases, returns on donor development investment hit 10 ROI**, showing the untapped potential in digital and multichannel engagement of people who have already made a commitment to your cause.

After fundraisers do everything possible to deepen existing relationships, the rest of this section can help highlight where the highest value new donors could be found. And as always, **make sure you continuously test the products, propositions and ask amounts served to potential donors**. Across the board, fundraisers are reevaluating their strategies. Where once a monthly-first strategy delivered the best lifetime value, now repeat one-off gifts are delivering the highest value for many clients, showing the financial environment has made a fundamental shift in how people choose to engage with charity, during and outside of emergencies.

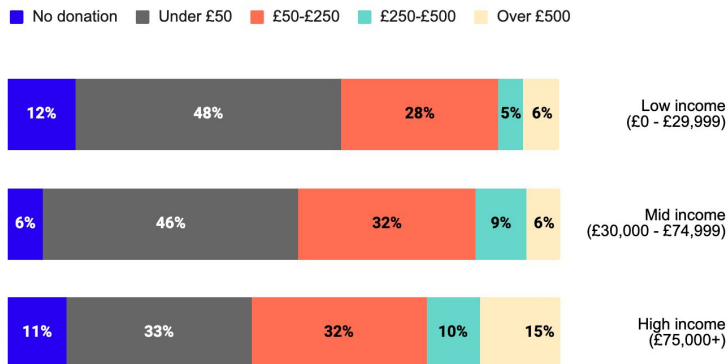
If you're here to understand how to acquire new donors, first stop and double down on engaging your existing donor file. These are the people who cared when they could afford to give more. These are the people who will have to decide which costs to minimise – don't be the org they decide to de-prioritise.

- Anjali Bewtra,
Strategy Director, Blue State

INCOME: Households earning over £75,000 hold the highest potential to become new mid-value donors and grow in value if already on file.

2022 donation amounts by household income

N: 1537



Not surprisingly, the higher earners are the ones who are able to continue and increase their generosity through the current economic climate, **with 1 in 4 giving more than £250 in 2022**. Within this higher-income segment, 15% gave above £500 a year in 2022, in comparison to 6% in other groups.

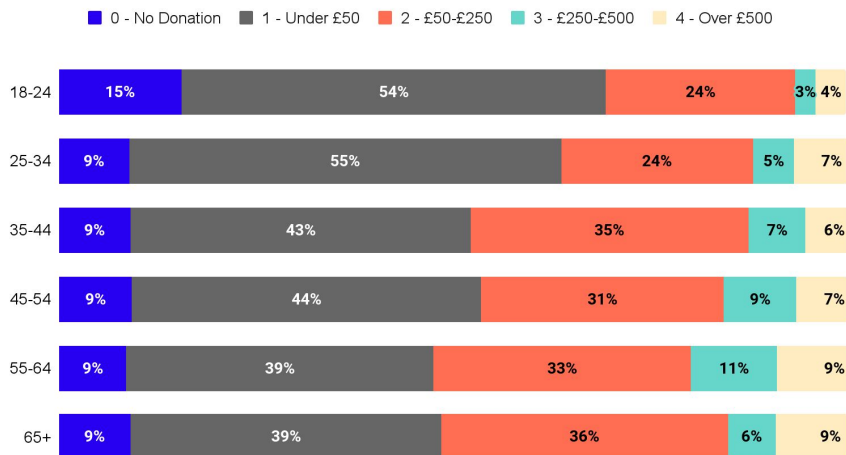
If you intend to acquire new mid-value donors, please consider some best practices we have learned across our clients. This group of donors tends to be well educated about the issues, and less likely to respond to highly emotional appeals. They are also highly attuned to stereotypical representations and want to see organisations living their values. Finally, they want to see a plausible theory of change and the impact of work to want to be personally associated with it. They will take longer to convert, will likely give one-off gifts vs a monthly donation, and have more touch-points through different channels on their journey. But when they convert, they will likely be more active and provide higher lifetime value than many other donors.

Despite being the hardest hit by the cost of living crisis, low-income households are almost as likely to have made a donation of £50-£250 in 2022 as mid- and high-income households. Consider the opportunities for community and peer-to-peer fundraising for donors who have historically been active, but now have limited resources to support your work.

AGE: 2023 sees the return of 55+ donors as a focus while they are least affected by cost of living fluctuations and rising mortgage rates

2022 donation amounts by age

N: 1537



After several years of organisations trying to diversify their supporter files, and reach younger donors, in 2022 we've seen the older donors come to the rescue of the whole sector.

We predict 2023 will be another strong year for the over 55s through all channels - including digital fundraising.

Again this is a divided audience - while many older donors may be experiencing hardship in the form of rising heating and healthcare bills, as we see in this chart, those in the group who are the most fortunate and no longer need to worry about rising mortgage costs may be the least affected by the current cost of living crisis.

This chart also shows us that there is untapped potential - especially with the over 55 and 65 year olds.

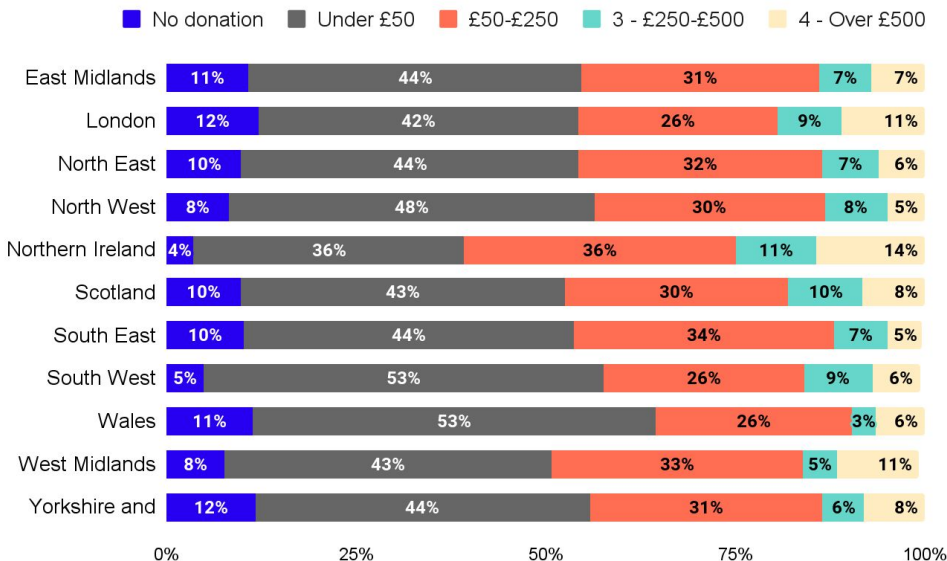
The younger donors, especially those under 35, are still contributing to the causes they care about most, but our advice to clients trying to conserve their 2023 budgets is to only focus on younger donors if you have achieved saturation in groups more likely to respond first.

And if you do invest in acquiring younger donors, make sure your content and journey meets their high expectations to be able to retain them.

LOCATION: London, the South West and South East continue to be a source of high-quality donors, with areas like the West Midlands showing promise

2022 donation amounts by household location

N: 1537



Our 2022 tracker shows the giving strongholds – London, The South East, South West and Scotland – continue to perform strongly.

The percentage of donors in London giving more than £500 a year has **increased from 7.7% in mid 2021 to 11%** for the whole of 2022 – presumably due to Ukraine giving. **This represents approximately 300,000 new mid-value donors in the capital.**

Similarly, Scotland maintained a healthy population giving above £500 a year, but the donors who gave £250-£500 a year have doubled, from 4.9% in mid 2021, to 10% for all of 2022.

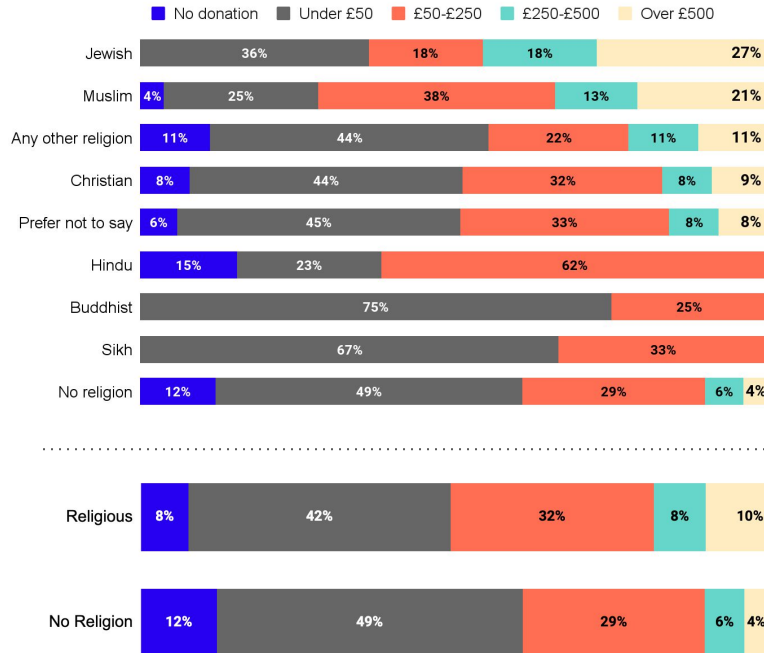
Interestingly, donor volume in the South West decreased, with fewer people giving above £500 a year since our last report (10% vs 6%).

The biggest jump in mid-value donors comes in the West Midlands, where the percentage of people giving over £500 jumped from 3% in mid 2021 to 11% in 2022. Hybrid working may be changing the traditional landscape of where the highest-value donors live, and we will continue tracking this developing picture for our clients as migration of affluent households further out of London continues.

FAITH - donors of faith are rising as a group targeted by religious as well as secular organisation, **with British Muslims a new priority for fundraisers**

2023 donation amounts by religion

N: 1540



In late 2022 the census made news with the announcement that Christianity is now a minority religion in England & Wales. This doesn't mean that faith and faith-based giving is on the decline. Many secular UK charities are seeing the potential of intentionally speaking to and nurturing people of all faiths.

While our survey found the most generous self-identified group of faith were those who identified as Jewish, this is a relatively small group (271K in the 2021 census and only 11 people in our sample). The second group, and the most generous if we look at giving over £50, are **British Muslims, now making up 6.5% of the population in the UK** – or roughly 3.9M, according to the 2021 census.

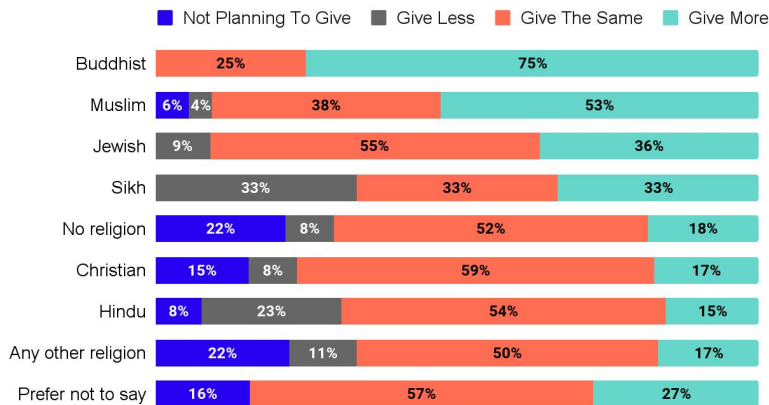
This is likely the highest potential expansion audience for many organisations, but any attempt to communicate through the language of faith needs to be done with intentional effort and care – from fundraising during Ramadan and through the year.

Overall, as seen on the next slide, audiences of faith (regardless of faith) are more likely to give more. They are also most likely to say they will keep or increase their giving to causes in 2023.

FAITH: Donors of faith are less likely to say they intend to give less in 2023, proving a continued priority across acquisition and donor development

2023 donation intent by religion

N: 1540



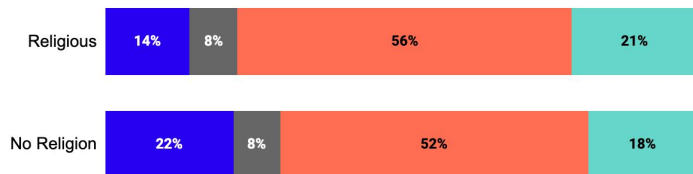
Here we see again British Muslims showing their generosity **with 53% saying they intend to give more in 2023**. This is based on a small sample (53 individuals) but is a reassuring finding that requires further validation.

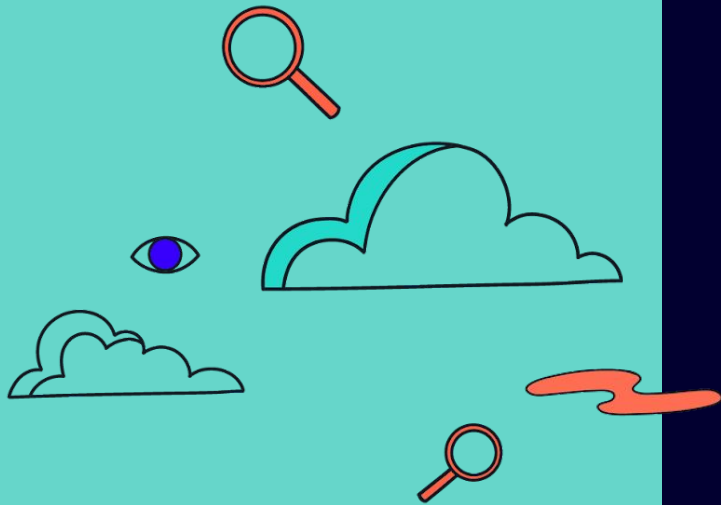
Many of our clients are asking about how to best nurture this group, and we are planning a deeper dive as a separate report to truly allow donors' voices to be heard about what they would like to see from the UK charity sector. To chat about what these trends mean for you or to receive future reports, [click here](#).

We spoke earlier about the prominence of moral responsibility against a backdrop of increased need in the world, and we are expecting this to continue while inequality and extreme need persist through this crisis. Donors of faith are especially responsive to this message, whether it comes from a religious or secular organisation, and fundraisers should consider forming specific strategies and test into how to engage these groups if this is a new endeavour for your organisation.

It's easy to get it wrong, but it can become a meaningful part of your programme if you get it right.

Note: The findings above are based on only 4 individuals who self-identified as Buddhist, 3 who identified as Sikh and 11 who identified as Jewish. We present this data for completeness, but it should not be used to drive business decisions.





3. Wider trends in giving – from favourite causes to food donations, gaming & more...



VOLUME vs VALUE: Medical research tops volume of donors in 2022, while gender rights, human rights and refugee support top value per donor

Looking at the relationship between breadth of supporters and the average given by supporters in 2022 for each sector, we see a clear trend. Sectors that have mass appeal have lower average value, sweeping a wide range of people into financial support in many different ways.

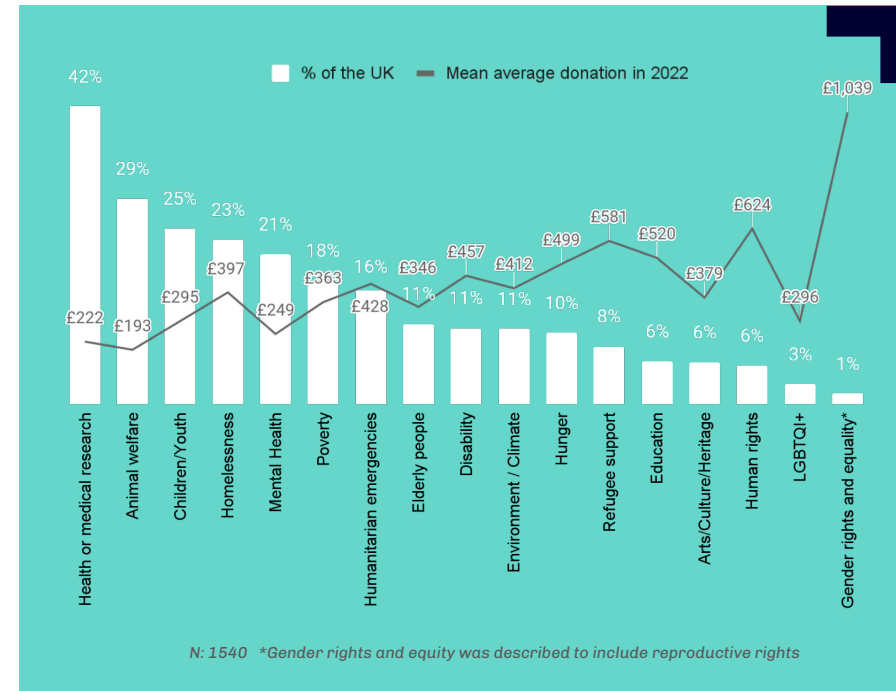
Medical research and animal welfare continue to lead the way in the UK, with a respective 42% and 29% of Brits making a donation to these causes.

While highly visible cause areas making daily news, like human rights or reproductive rights, trail behind in terms of their ability to convert public interest to donations, we see significant generosity among those who do commit to supporting these organisations.

If you are a campaigning organisation looking to convert more passionate campaigners to financial supporters, have a look at some practical case studies and advice, including our work with [Amnesty International USA](#) and [UK for UNHCR](#).

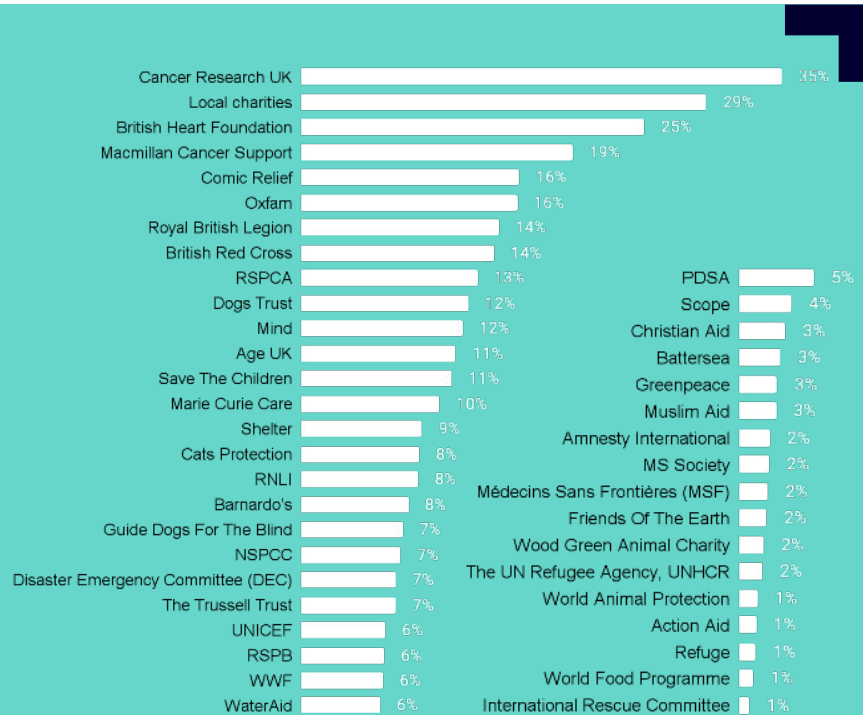
Note: Survey participants could choose multiple sectors they support. Therefore the values are not mutually exclusive. Averages are presented for the individuals who have chosen a specific sector (regardless of other sectors they may have supported in 2022).

Which charity causes have you donated to in 2022?
Choose as many as apply



UK organisations are still winning on volume and market share – with leading charities inspiring 1 in 3 Brits to donate to their cause

Percentage of people in the UK who have donated to specific organisations in 2022



N: 1537

Within the medical cause area, we can see that a few large organisations dominate giving, with **Cancer Research UK, one of the largest and most known organisations in the UK inspiring 35% of people in the UK to give.** This is followed by 29% of respondents who said they donated to their local charities, then British Heart Foundation at 25%, and Macmillan Cancer Support at 19%.

The question didn't specify whether this is through individual donations or through supporting community and peer-to-peer fundraisers, but based on the results we can assume survey respondents would have taken the question in its wider form.

We can also see the number of people who give to each organisation has strong links to the popularity and positive opinion of each brand, as measured by the [YouGov Q1 2023 tracker](#), but that volume doesn't necessarily mean total revenue – with more donors saying they have donated to Comic Relief (15%) than UNICEF (6%), with the latter raising approximately double in 2022, emphasising our previous point on leaning into value vs volume.

Please note that we include as many organisations as we can in this report, but we can never cover every option or show every result. If you have any questions for our team, or would like to be included in future waves of this research, [please get in touch](#).

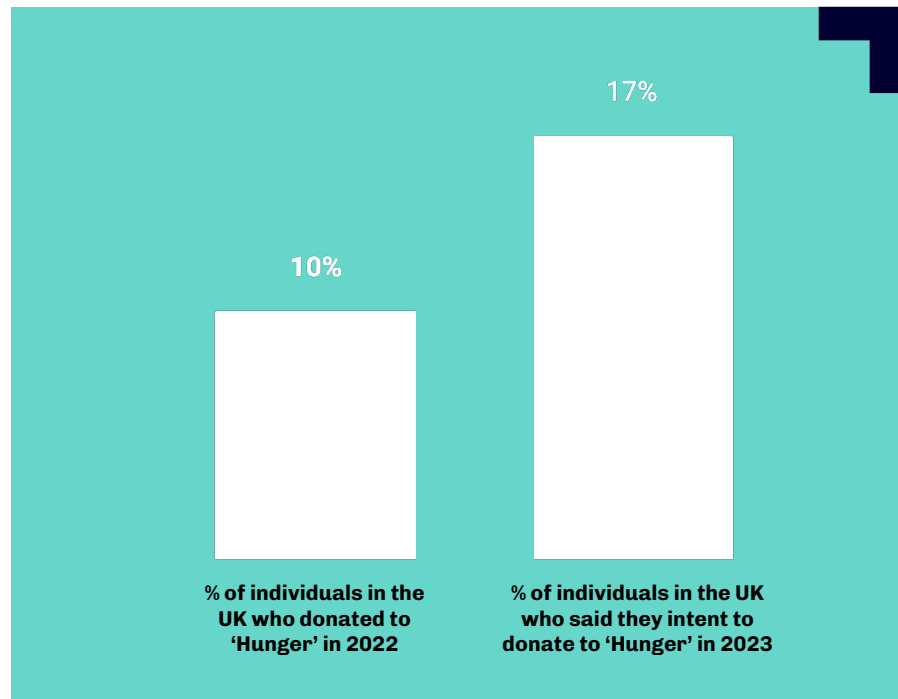
Food insecurity is becoming a universal motivation to give and a means of helping as awareness of hunger in the UK and abroad increases each year

Other than medical research and support, it is a sign of our time that both domestically and internationally, multiple organisations are converging on food security as a key topic.

Internationally, the increasing food insecurity and potential of famine in Somalia, South Sudan, Yemen, Ethiopia and many other places in the world has become front of mind for many. While most cause areas were static, **our survey found 17% of people in the UK intend to donate to 'Hunger' as a cause area**, a 7-point increase from those who did donate to this category in 2022 (10%).

The keen interest in hunger may be enhanced by media coverage of food insecurity in the UK, alongside spiraling grocery prices making the affordability of basic food supplies front of mind for many.

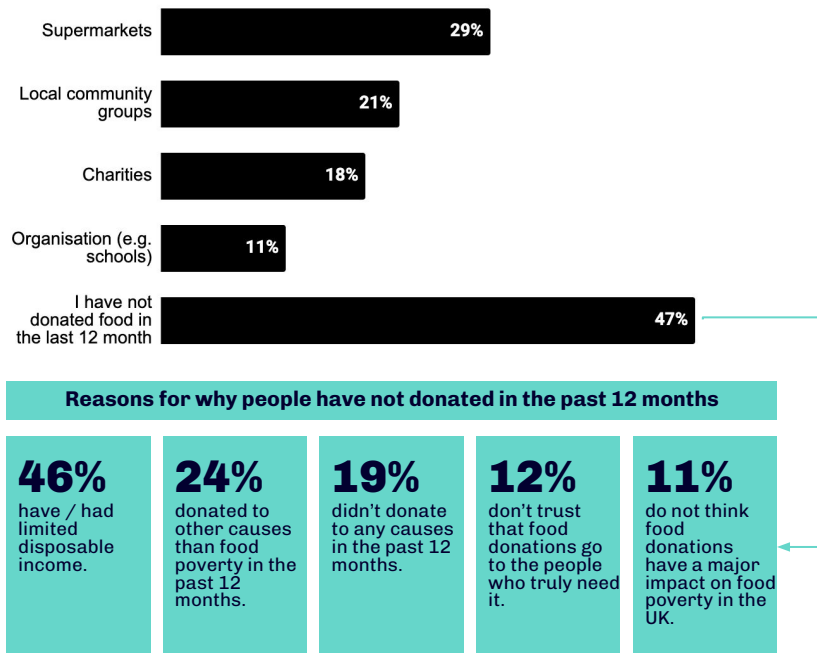
We've been honoured to work with a range of clients over the last couple of years to bring the issue of hunger to the attention of the public, from the UN Refugee Agency and World Food Programme, to Save The Children and UNICEF. If you are working in this space and would like to talk to our team about what we've learned through our work, please [get in touch](#).



FOOD DONATIONS: Over half of Brits donated food in 2022 (a 22% increase) - with the majority of donations going through supermarkets

Percentage of those who donated food and how in 2022:

Q: Have you donated food items to any of the following groups in the last 12 months? (Select all that apply) N: 1540



In addition to the extra £2bn in individual giving reported in 2022, **53% of respondents donated food in 2022**. This is a significant increase from our last tracker (a 22-point increase) and [a survey conducted by the Trussell Trust in 2019](#) that showed roughly one-third of people in the UK have made food donations.

Of those who donated to supermarkets, 93% of those most recent donations were in the last 6 months and 44% in the past month. This indicates that people are actively donating food not just once a year, but throughout the year.

For people who did not donate food in 2022, having limited disposable income was cited as the main reason, which aligns with people's concerns over economic stability and affording basic goods.

However, 1 in 10 do not trust where food donations are going and another 1 in 10 do not believe in their effectiveness. This suggests there is a need to educate about food donation programmes and the real impacts they have on people's lives. For more information, see appendices.

Charity retail saw a positive 2022 with increases in charity shop purchases as well as raffles and lotteries

Charity retail saw strong recovery from the pandemic with 6 out of 10 Brits saying they have purchased an item from a charity shop. However, levels of engagement with charity retail still trail pre-pandemic levels (8 out of 10 / 86% in 2016, [CAF Charity Street II Report](#)).

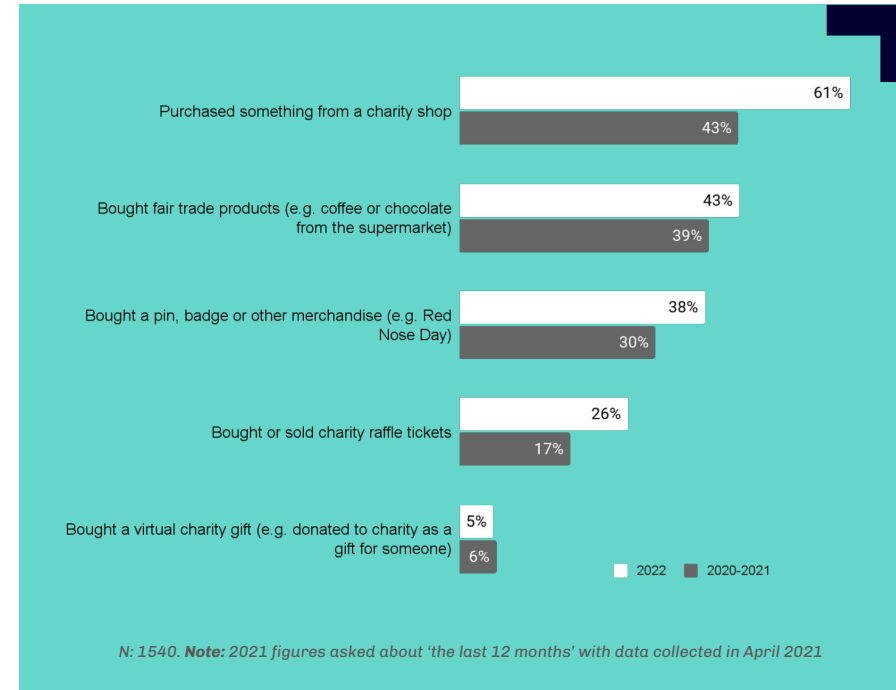
It is reassuring to see progress in charity merchandise sales as well as fair trade and ethically sourced products.

Charity gaming (raffles and weekly lotteries) are also seeing improved engagement since our 2021 tracker, which reflected renewed ability to host and take part in community events, as well as a growing trend towards online weekly lottery and prize draws products to engage younger donors in a different proposition to a monthly donation.

Our team will continue tracking these trends and alternative forms of giving.

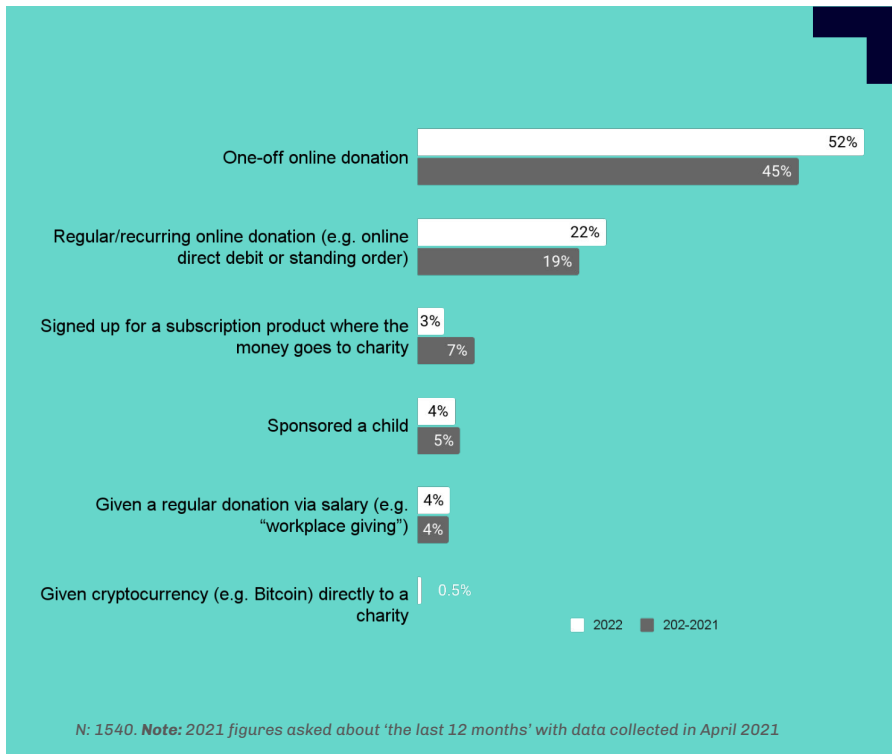
Please select any of the following financial actions you took in 2022 to support a charity or cause you cared about.

Choose as many as apply:



Online giving continues to rise while subscriptions may be in slight decline

Please select any of the following financial actions you took in 2022 to support a charity or cause you cared about.



More than half of the British public (52%) have made a donation online in 2022, demonstrating the digital revolution that charities have gone through in the pandemic. It's great to see this trend continue, alongside the volume of people in our survey who set up a regular donation online also holding strong.

Apart from that, child sponsorship and value-exchange subscription products seem to have stopped growing, and may be shrinking in response to many organisations rolling back their programmes. However, our sample may be too small to draw definite conclusions at this point.

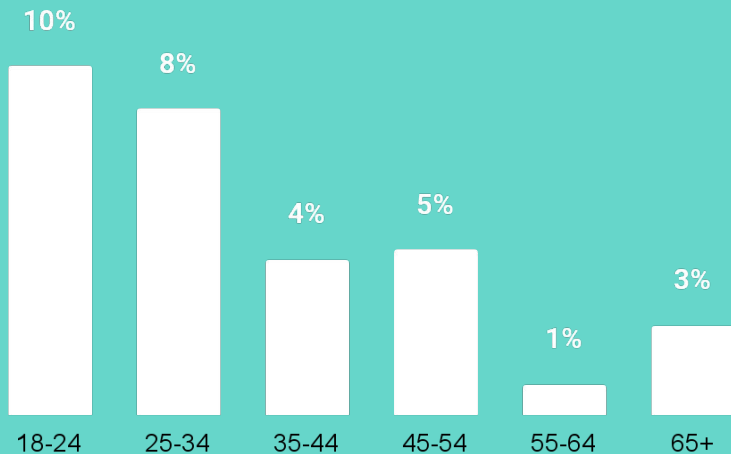
Our team is tracking the landscape for value-exchange products and, while we can attest that many can be very profitable and more effective in terms of cost per acquisition for younger donors, fundraisers must think about the onwards journey following the period of value and build this into the experience from the beginning.

For the first time in 2023 we have started tracking crypto donations with a small but not insignificant 0.52% of the British public saying they have donated cryptocurrency directly to a charity. In our sample this only represents 8 people, so should be taken with a pinch of salt. It may also be skewed by the low volume of organisations currently accepting crypto donations.

Giving while gaming: no longer a niche trend with 1 in 10 under 24 giving through games and livestreams

% of people who gave money to charity through computer games or live streams in 2022

N: 1540



Last but not least, giving while gaming continues to gain speed, with a growing number of people saying they have donated through a computer game or livestream in 2022.

The 5% national average is mostly skewed towards under 34s but is gaining speed in older segments.

Livestream fundraising in particular is becoming a wider part of community fundraising teams, and organisations all over the world are starting to see more significant returns:

- £25M raised via Jingle Jam since 2011
- Twitch streamers have raised \$110 million in 2021 via Tiltify
- Over \$32.7M USD raised via streamlabs charity

We advise fundraisers to explore gaming as part of their portfolios, while sticking to natural user behaviours – raising funds while screaming is a natural extension of a fundraising event gone digital. This is where you start... you can assume no one really wants your avatar custom outfit (yet!).

Conclusions & closing note

We hope this report was helpful to your and your organisation.

Not everything in fundraising right now is smooth sailing, but many individuals are more motivated than ever to partner with organisations making the world a better place.

We're helping our clients navigate the current environment and rebalance programmes to stabilise and grow through the current economic climate.

If you're interested in learning more about this research, or want to chat to our team about the results you're seeing, please get in touch.

We'd be happy to provide more examples and breakdowns of the data we collected,

Lizi, Anjali & Jasmine
hellouk@bluestate.co

**MAKE
GOOD
TROUBLE**

**PUT
PEOPLE
FIRST**

**BE
CURIOUS**

**DRIVE
REAL
CHANGE**

Appendices

May 2023



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breakdown of
attitudes towards
economic stability

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audiences who would
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Appendix C:
Additional attitudinal
breakdown for
audiences who would
not use a food bank



Methodology notes

The purpose of this report is to gather a snapshot of 2022 giving as well as intentions for 2023 giving in the UK.

We wanted to glean insight into how the nation's interactions with charitable causes and organisations might be changing during this unprecedented cost of living crisis.

This report is based upon the survey results of **1,540** individuals residing in the UK. A representative sample balanced for age, gender and ethnicity was selected to acknowledge the diversity of the UK population. The survey was conducted and promoted entirely online during January 2023.

Acknowledgments

A big thank you to the wider Blue State team for their support in collating this report, and to our clients for allowing us to try new models of fundraising and engage people in new ways.

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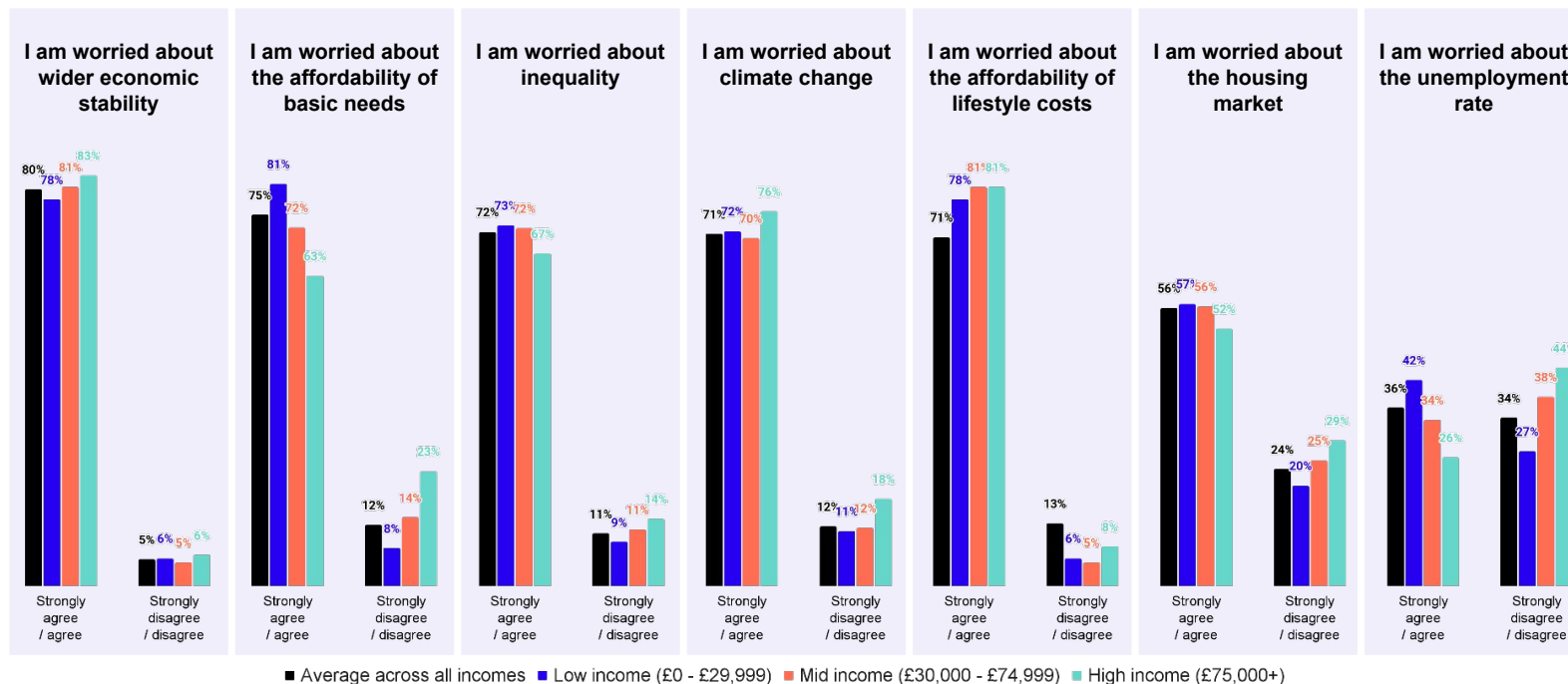
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The UK public is pessimistic about future economic stability & affordability of basic needs - especially for lower income households.



Please tell us how you feel about the following statements, indicating how much you agree or disagree with each statement on the scale provided.
(Scale: Strongly agree, Agree, Neutral, Disagree Strongly disagree) N: 1540

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There is an opportunity to emphasise the rising costs of aid to more donors

"I can see that the costs for the organisations will be rising and I think donations might decrease so I would like to try and give more."

**North East, Female,
55-64, HHI under £30K**

"Charities are losing out due to demands of the cost of living, and their running costs will increase."

**West Midlands, Female, 55-64
HHI under £30K**

"The need is likely to be similar, but inflation will reduce the effectiveness of giving, compared to former years' donated amounts by me."

South East, Male, 65-74. HHI under £30K

"Due to the current economic state, charities will need more support to be able to provide help."

**London, Female, 45-54
HHI under £30K**

As shown earlier, lower-income households are the most worried about the affordability of basic needs (83%).

This may explain why they are more empathetic and motivated to support charities dealing with increased costs of running their organisations. Anecdotally, this practical thinking was more visible in the older age group in our sample.

We didn't see this sentiment in the higher-income group, and there could be a missed opportunity to **explain the realities of rising costs and the impact on your mission to mid-value and high-value donors.**

And there is still significant support for Ukraine, even a year into the war

Significant support for Ukraine remains strong, which organisations should continue emphasising. There seems to be an invested interest not only in humanitarian need but also in Russia losing the war and maintaining peace in Europe.

"The need for support overseas only increases due to the current war in Ukraine [...] Humanitarian aid for people affected by the war should take precedent, as I believe that is the most pressing issue we will face over the next few years."

**North West, Male, 25-34,
HHI under £30K**

"Increasing need due to cost of living/economic issues in UK; ongoing need for humanitarian need due to war in Ukraine."

**Scotland, Male, 55-64,
HHI under £30K**

"I expect to give more to overseas because of the worsening situation in Ukraine."

South East, Female, 55-64, HHI £30K-£75K

"I think I will donate towards Ukraine, as I support their efforts and it is in everyone's best interest for Russia to lose the war."

**South West, Male,
25-34, HHI £30K-£75K**

Younger donors were most likely to get political and see unmet need close to home

There seems to be a strong connection in younger donors' minds between the way the government is supporting people through the financial crisis, and their propensity to give to address this unmet need

As seen this is especially true for domestic need.

While not all donors want to see charities get political, we've seen this message perform extremely well in 2022 and into 2023 for a range of partners: **Help those who are not getting support elsewhere and will otherwise be forgotten.**

"I am seeing a lot of people who are living in absolute crushing poverty and this is only getting worse with the cost of living crisis. The government is not helping and support services are overstretched. I feel that I am fortunate to have a decent income so I want to help people who are struggling as I hope someone would help me if my circumstances changed."

Yorkshire And The Humber, Female, 35-44, HHI £30K-£75K

"Politicians are not doing enough and I see the likes of war increasing in Europe, so people will need extra support."

**West Midlands, Male, 25-34,
HHI Over £75K**

"The government are putting people in worse situations resulting in them needing financial support from elsewhere."

**North West, Female,
18-24, HHI £30K-£75K**

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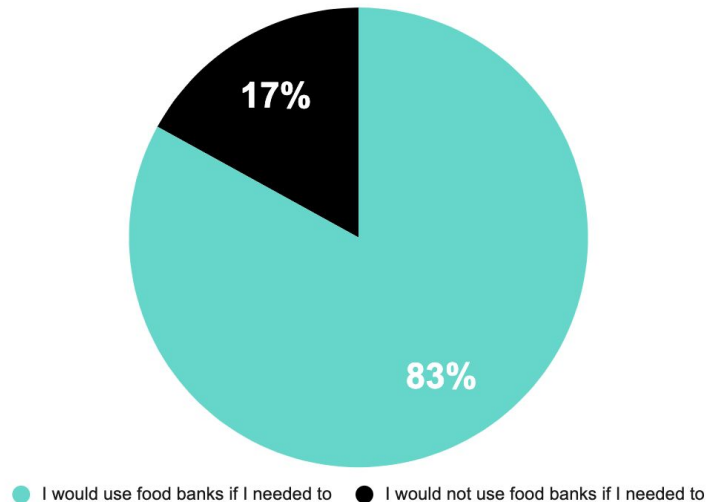
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While the majority of people in the UK are supportive of food banks, stigma persists for recipients.

Percentage of people who would and would not use food banks if they required food assistance:

N: 1540



- Older generations are more likely to refuse to use food banks; 26% of those above the age of 55 said they would not use a food bank if they needed to.
- The likelihood of not using a food bank, even if needed, is the same across all income brackets.
- Reasoning for why 1 in 5 would not use a food bank varied from outright disapproval to believing others would need the help more.

Of those who said they would not use a food bank if they needed food assistance, the following reasons were given:

N: 267

NEGATIVE
CONNOTATIONS

- 27%** Would find it humiliating and see it as a personal failure on their part if they were to resort to using a food bank.
- 21%** Believe there is always an alternative solution, leaning into the idea those who use food banks do so out of choice.
- 11%** Disapprove of food banks & those who use them, seeing them as taking handouts.

NEUTRAL
CONNOTATIONS

- 13%** Would go to friends and family for support rather than food banks.
- 13%** Believe others will need & deserve the support more than themselves and would rather they use the resources.
- 10%** Believe they would never be in a position where they require food assistance.

Reasons why people would not use food banks: negative connotations

27%

Would find it humiliating & see it as a personal failure on their part if they were to resort to using a food bank.

"I would hope to never use one, but if I had to, I would feel like a failure despite it being a necessity for millions of people. It would make me feel depressed and ashamed enough to not go."

South East, Male, 18-24

"Extremely embarrassing, I appreciate the help and the good that they are doing but for me to be in that position in the first place would be really hard for me to accept and admit."

East Midlands, Female, 25-34

"Its degrading, I would feel ashamed its come to do this"

North West, Female 45-54

"I would feel embarrassed and ashamed that I couldn't feed my family."

North West, Male, 35-44

21%

Believe there is always an alternative solution, leaning into the idea that those who use food banks do so out of choice.

"I would give up on other essentials first, like heating rather than doing without food."

South East, Male, 65-74

"There's always food available on a budget if you know where to look."

East Midlands, Male, 35-44

"I would look at my spending and adjust as necessary, buying the cheapest items and batch cooking to save money."

South East, Female, 55-64

"I feel I should be able to budget myself and not waste money on products I don't need."

North West, Female, 55-64

"I would never let us get to the point where we needed to. If we needed a job, I would find it. I would cut down / go without first."

South West, Male, 45-54

11%

Disapprove of food banks & those using them, seeing them as taking handouts.

"I sincerely do not believe people cannot afford food. Get another job or spend money on living not on luxuries."

South East, Male, 65-74

"I think everybody has a moral obligation in society to feed themselves. Too many use it when it is not needed and use the money towards non-necessities."

West Midlands, Male, 45-54

"I would never get in to situation where I would need food assistance. As individuals you must work hard, save money so you can afford essentials, it's up to you to feed, clothe yourself. Just believe it ingrains laziness & too much reliability on handouts."

Wales, Female, 45-54

"Should be totally unnecessary, people should work not scrounge."

North West, Male, 75+

Reasons why people would not use food banks: negative connotations

13% Would go to friends and family for support rather than food banks.

"I would TRY not to, hopefully friends and family could help me so I'm not taking up resources for others that don't have a wider support network."

North East, Male, 25-34

"There are members of my family / friends that would be able to support me. I don't feel right taking resources when there are those who do not have the support of others."

London, Female, 18-24

"I would hope the need would not arise but if it did I know I can count on family."

Northern Ireland, Male, 55-64

"I am lucky to have a large family and close friends that would help me out as I would them.."

North West, Female, 45-54

13% Believe others will always need and deserve the support more than them and would rather they use the resources.

"I would assume that other people needed the service more than I did."

North West, Female, 55-64

"They seem to be aimed more at families than individuals such as myself."

Yorkshire, Female, 35-44

"I believe only the poorest should use them."

East Midlands, Male, 35-44

"Worry about the stigma, or that I wasn't in as much need as others."

Yorkshire, Female, 25-34

"I feel that there are a lot of other people that have a greater need. I would look for reduced items firstly."

London, Male, 55-64

10% Believe they would never be in a position where they require food assistance.

"I don't see any circumstance when I would NEED this."

Scotland, Male, 65-74

"Hopefully will never be in a position where I need to."

North East, Male, 55-64

"I cannot imagine ever being in need."

Wales, Female, 65-74

"I can't envisage being in that situation."

Scotland, Female, 35-44

"Thankfully I'm comfortable enough to not have to worry about that."

London, Male, 18-24