April 2026

UK Giving Behaviours Tracker 2026

Key trends to consider
in an evolving landscape

BLUE STATE

In this report

Charitable giving in the UK is evolving —and new opportunities are emerging.

Now in its fifth year, this report sets out to better understand UK donors and the changing giving landscape—uncovering what's driving behaviour and, more importantly, where fundraisers can unlock growth. In a climate shaped by cost-of-living pressures and rising expectations, this year's findings show a sector not in decline, but actively recalibrating.

Participation remains stable, but donation values have softened. At the same time, behaviours around regular and one-off giving are largely unchanged year-on-year, despite significant shifts in how people live, spend, and engage.

This points to a clear tension: while the world has changed, many fundraising models have not. Charities continue to rely on fixed approaches—monthly commitments or one-off asks—while donors increasingly expect more control, adaptability, and relevance.

Those organisations already evolving are seeing the difference. While uncertainty over economic stability is high on everyone's mind, donors are giving in ways that give them control over financial commitments—leaning into one-off giving and emergency response—and engaging through more digital, community-led channels.

At the same time, new opportunities are coming into sharper focus. Younger and ethnic minority audiences show strong intent to give, engaging through more digital, social, and culturally relevant channels. Mid-value donors also stand out as a powerful route to sustainable growth.

The message is clear: the fundamentals of generosity remain strong, but future growth will favour organisations that adapt faster.

To succeed, organisations should:

- Design more flexible, relevant giving experiences & test new propositions aligned to evolving behaviours
- Rethink how they engage younger and ethnic minority audiences
- Prioritise the growth and retention of mid-value supporters
- Build trust and ongoing giving through transparency and stronger donor connection

This report draws on a UK-wide survey of 2,136 people conducted in Q1 2026, alongside fundraising insights from 2025 and early 2026.

If you're looking to turn insight into action, we'd love to talk. We're working with organisations to evolve their fundraising strategies and can help you do the same.

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We’re a full-service, purpose-driven agency with cross-sector experience.

Save the Children	COMIC RELIEF	WaterAid	CAFOD Catholic Agency for Overseas Development
unicef	INTERNATIONAL RESCUE COMMITTEE	PLAN INTERNATIONAL	WWF
AMNESTY INTERNATIONAL	HOPE HATE	BATTERSEA HERE FOR EVERY DOG AND CAT	OXFAM
TATE	GREENPEACE	MEDECINS SANS FRONTIERES	UNHCR The UN Refugee Agency

2025 giving: Our key findings

Individual giving stabilises

Following a period of emergency-driven generosity, giving is stabilising and returning to 2023 levels in terms of value and volume.

Younger donors continue to give generously

Donors aged 25–44 give the most on average (£185 a year). While 18-24 donors show the strongest intent to continue giving.

Mid-value donors continue to be key

Mid-value donors are growing in importance, with value holding for £50k–£100k households, while £100k+ donors remain the most generous.

Ethnic minority audiences continue to stand out

Ethnic minority audiences continue to be among the most generous donor groups, giving more on average (£217 vs £138 among "White British" donors).

Gaming & streaming are here to stay

New forms of giving are getting firmly embedded, particularly among under-35s, where 1 in 7, or 14%, have given through a game or live stream.

Donors of faith give more than 2x the average gift

Donors of faith remain the most generous (£202 vs £84 for "no religion"), with British Muslims continuing to lead in generosity at £263.

Trust will be critical to growth

UK charities are more trusted than international organisations, but uncertainty remains. Clarity, transparency, and impact are more important than ever.

National causes lead on market share

Health and medical, animal welfare, children and young people, mental health, and homelessness continue to attract the largest share of donations.

Global generosity is normalising

Donors to international causes continue to give more generously than the national average, though gift values are stabilising following emergency spikes, from £341 to £252.

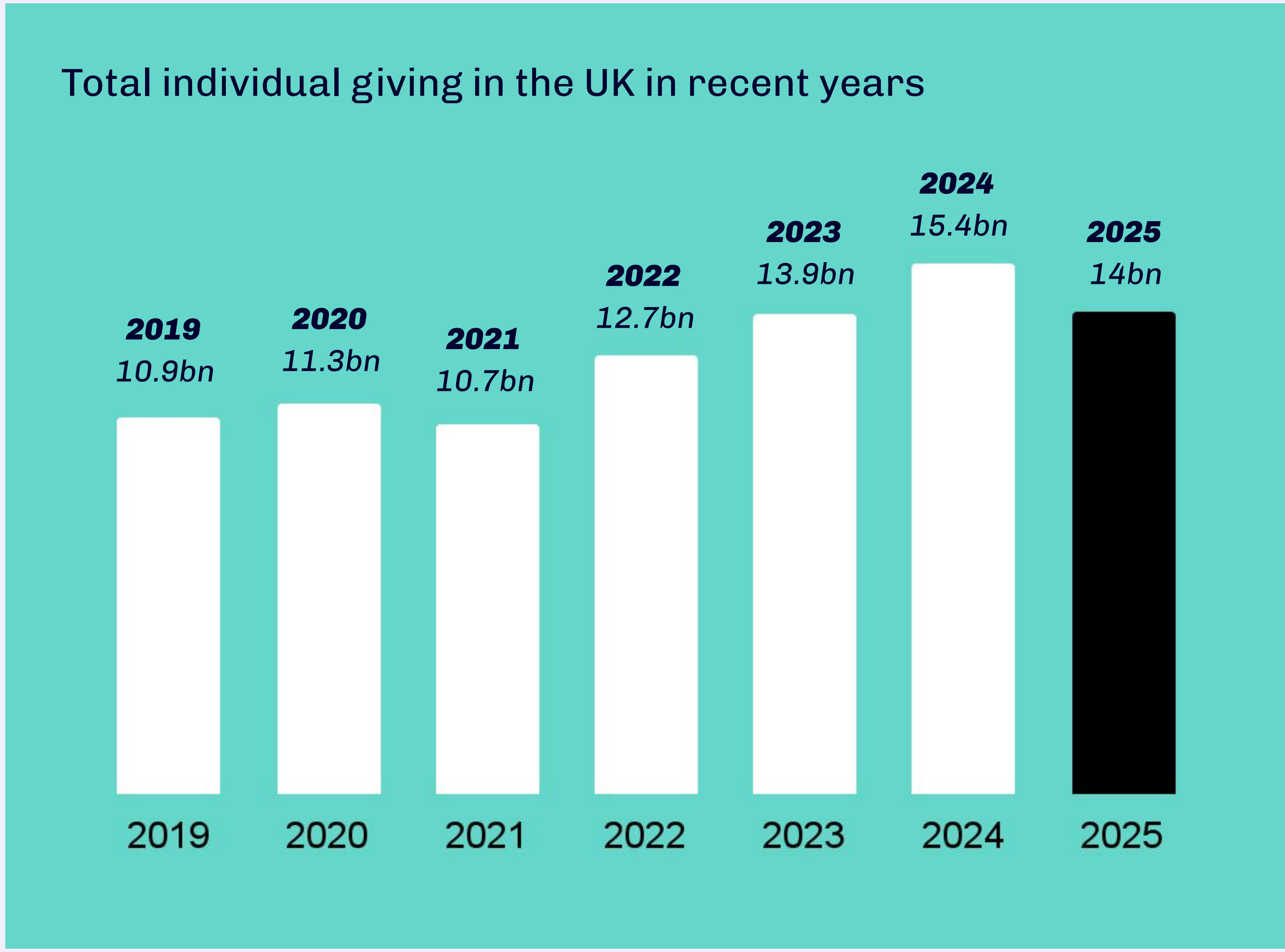
1 The UK giving landscape: settling after emergency peaks

Overall giving stabilises as total donations drop

After elevated giving at the onset of the Ukraine crisis in 2022 and Gaza appeals in 2023–24, individual giving has stabilised. Total donations fell to £14 billion in 2025, down from £15.4 billion last year—the first decline in total value since 2021 (CAF, 2026).

Of those donations, causes closest to home continue to attract the largest share, including health and medical research, animal welfare, children and young people, mental health, and homelessness.

Emergency-driven spikes are clear growth opportunities, but sustainable income depends on what happens next. Follow up with clear, consistent impact communications that show donors exactly how their money is making a difference—and put in place structured retention journeys to keep them engaged beyond the moment.



Charities Aid Foundation, UK Giving Report 2026

Values fall, participation holds steady

	Value	Volume
2025	£148 *mean value donated by an adult in 2025*	88% *of adults donated in 2025*
2024	£169 *mean value donated by an adult in 2024*	90% *of adults donated in 2024*

UK Nat Rep: Jan 2025, N: 2010 | Jan 2026, N: 2136

Average donation value has declined by around 12% (from £169 to £148), likely driven by continued cost-of-living pressures and reduced coverage of major humanitarian crises such as Ukraine, Sudan, and Gaza, which previously elevated giving levels.

In contrast, giving participation remains broadly stable, from 90% to 88% year-on-year. Note: we measure 'giving' through a different question design than CAF's UK Giving reports, making our total participation numbers higher. Both reports show stable volume from 2024 to 2025 based on our respective methods. Overall, the picture is one of softening value and a stable base of donors.

Organisations should focus on both sustaining volume and improving value per donor, while strengthening engagement with existing supporters. This includes rethinking giving products, embedding stronger value exchange, investing in brand and retention, and growing longer-term income streams such as legacy giving.

Giving behaviours broadly stable across the board

We capture the most granular set of financial actions in our yearly reports, and intentionally have one of the widest definitions for ‘giving’ to reflect the fullest view of financial support to civil society. This slide shows some of the categories.

As seen by the chart, participation has maintained across most categories, with smaller retail actions, such as buying pins, merchandise and charity shop items, being one of the highest forms of financial support.

Against a backdrop of higher acquisition costs in individual giving, we would love to challenge fundraisers to think of ways to integrate behaviours seen by audiences across a wider range of financial actions to meet audiences where they are, and offer smaller purchases, like value exchange and merchandise, as the start of a longer nurturing journey towards regular gifts.

Percentage of UK Adults who have taken a financial action in the past 12 months

UK Nat Rep: Jan 2025, N: 2010 | Jan 2026, N: 2136

Donor numbers are steady, but mid-value audiences maintain average gift

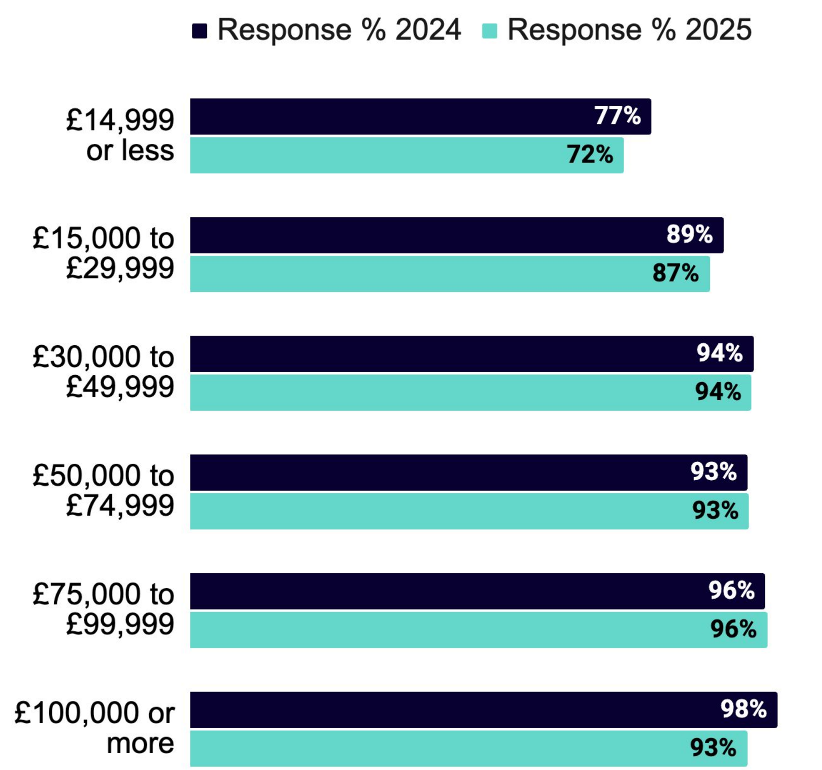
Donor participation also remains stable across incomes. However, donation values are showing a directional decline across several bands.

Unsurprisingly, this decrease is most evident among lower-income households, where rising living costs are having a sharper impact.

Interestingly, there has also been a reduction among the highest earning households we surveyed (earning over £100k, from £750 to £545. This may reflect increased financial caution, but could also indicate a normalisation following peak emergency giving and higher levels of solicitation from multiple organisations.

There are small increases in donor value for households within the £50,000–£74,999 and £75,000–£99,999 income bands, reaffirming the need for strong mid-value programmes to encourage additional generosity in these groups.

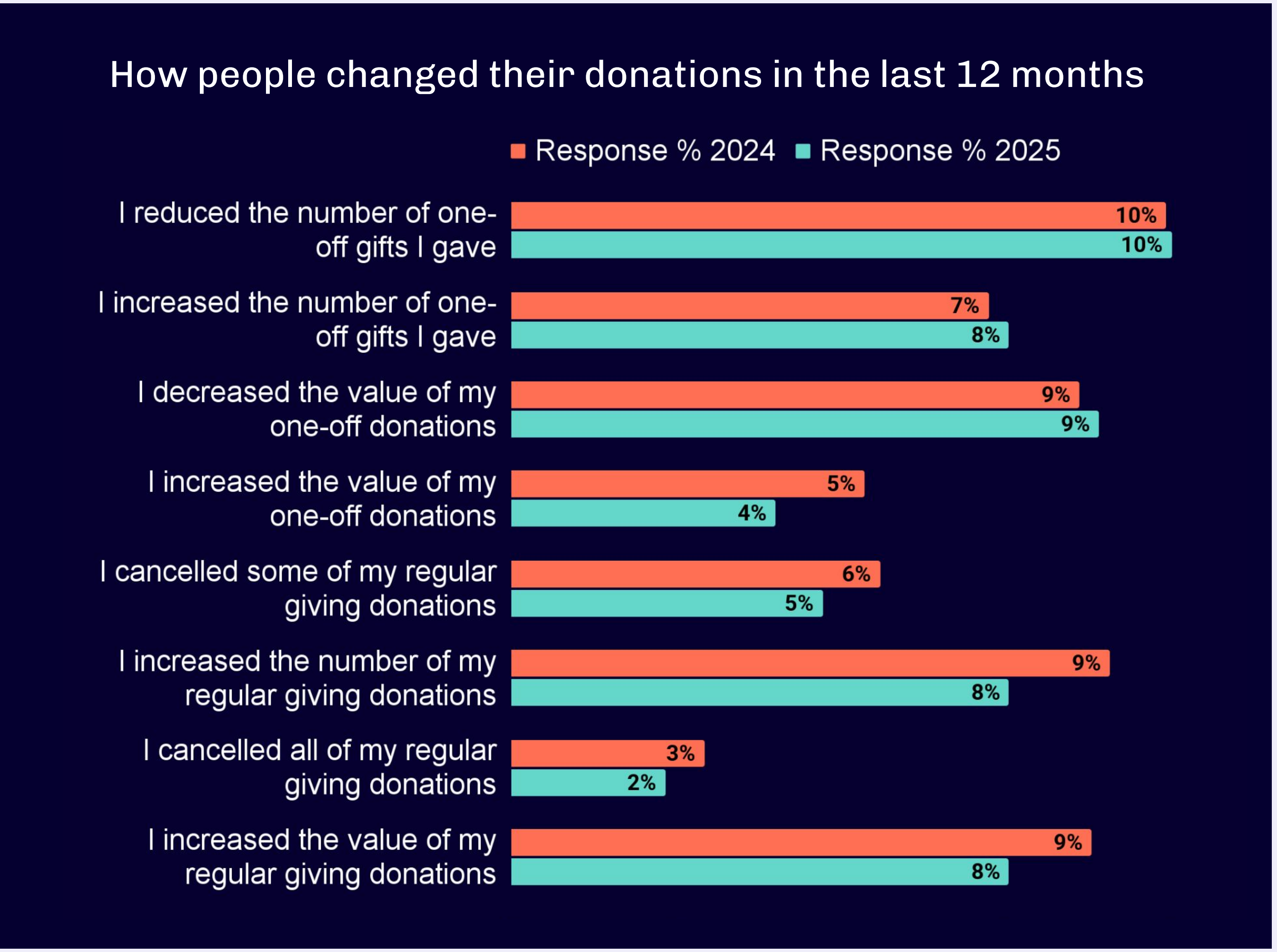
Percentage who donated in the last 12 months by household income



	Mean donation value 2024	Mean donation value 2025	YoY % value change*
£14,999 or less	£55	£46	-16%
£15,000 to £29,999	£125	£107	-14%
£30,000 to £49,999	£172	£124	-28%
£50,000 to £74,999	£170	£179	+5%
£75,000 to £99,999	£252	£256	+2%
£100,000 or more	£750	£545	-27%

UK Nat Rep: Jan 2025, N: 2010 | Jan 2026, N: 2136
**Please note, due to variation of responses within demographic groups, YoY differences are indicative.*

Regular giving and single giving trends remain consistent



UK Nat Rep: Jan 2025, N: 2010 | Jan 2026, N: 2136

Regular giving continues to stabilise. While there are small differences vs 2024, these are statistically consistent, and we are pleased to see that while fundraisers feel the landscape is especially hard in terms of acquisition, financial pressures on donors have not affected existing giving behaviours and donor development income streams to the same extent.

One-off giving also appears largely stable. The proportion of donors reducing the number of one-off gifts remains unchanged from last year at 10%, while 9% report decreasing the value. Meanwhile, 4% say they are increasing the value.

This confirms that donors are still engaging, and for fundraisers, this reinforces the importance of maintaining a balanced strategy: using one-off gifts as a flexible entry point for supporters while continuing to nurture and retain regular donors to build long-term value. Indeed, for many of our clients, leading with a one-off ask is delivering a higher LTV than an RG ask at the point of acquisition.

Global giving softens, while national causes gain value

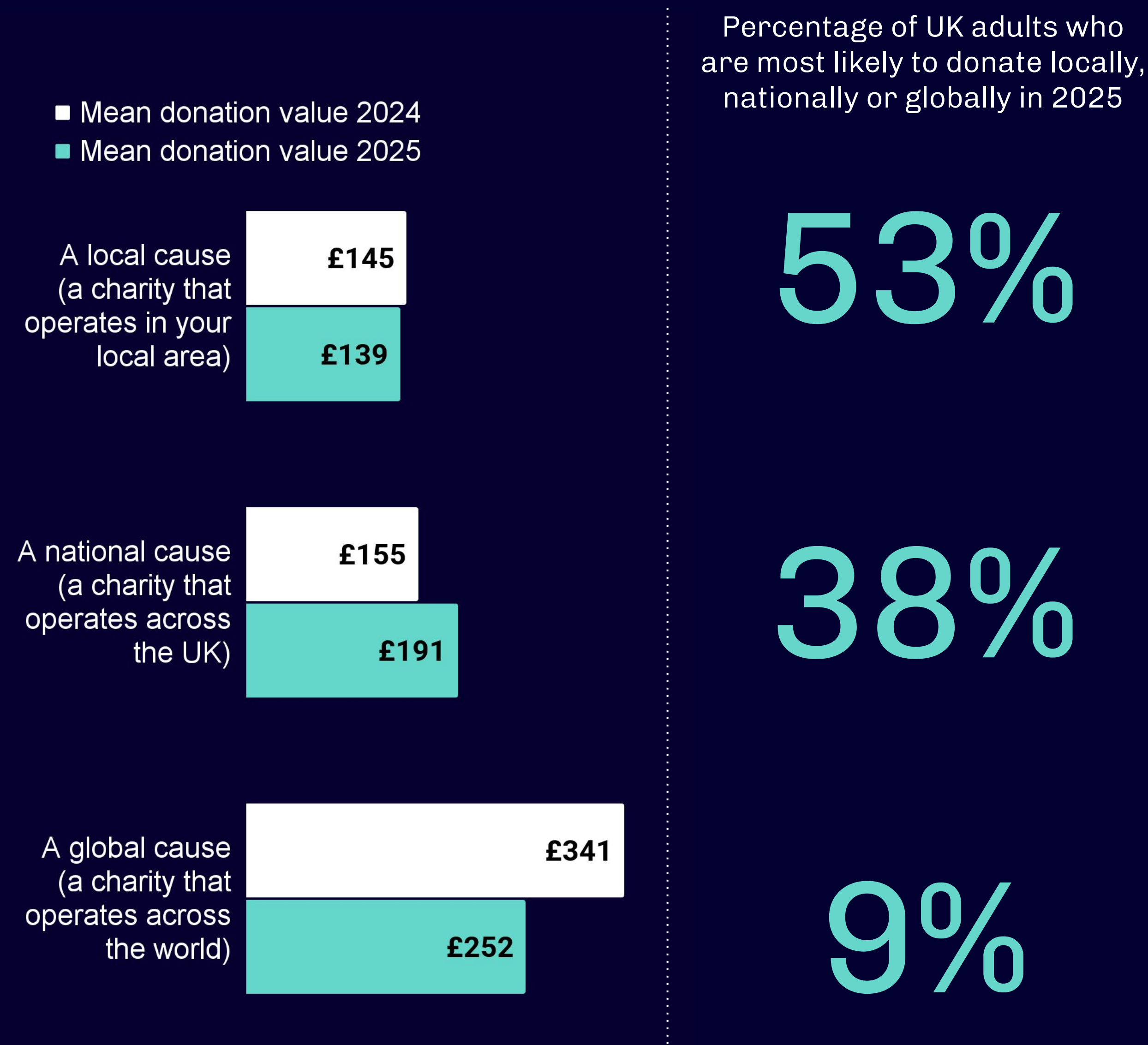
Donors supporting global causes continue to give the highest amounts. After a peak in 2024, with average gifts rising to £341, up from £275 in 2023, the average donation for 2025 was £252.

For global causes looking to grow participation, engaging diaspora communities in the UK can help generate deeper engagement with international issues and broaden your reach outside of emergency appeals.

For local causes, giving remains mostly stable, with average donations holding around £139. Donor volume has also held relatively stable 51% to 53%, showing how well visible impact translates to giving.

National charities have maintained donor participation, while the average value has increased to £191 from £155. This may reflect consolidation of giving and wanting to focus more on issues closer to home.

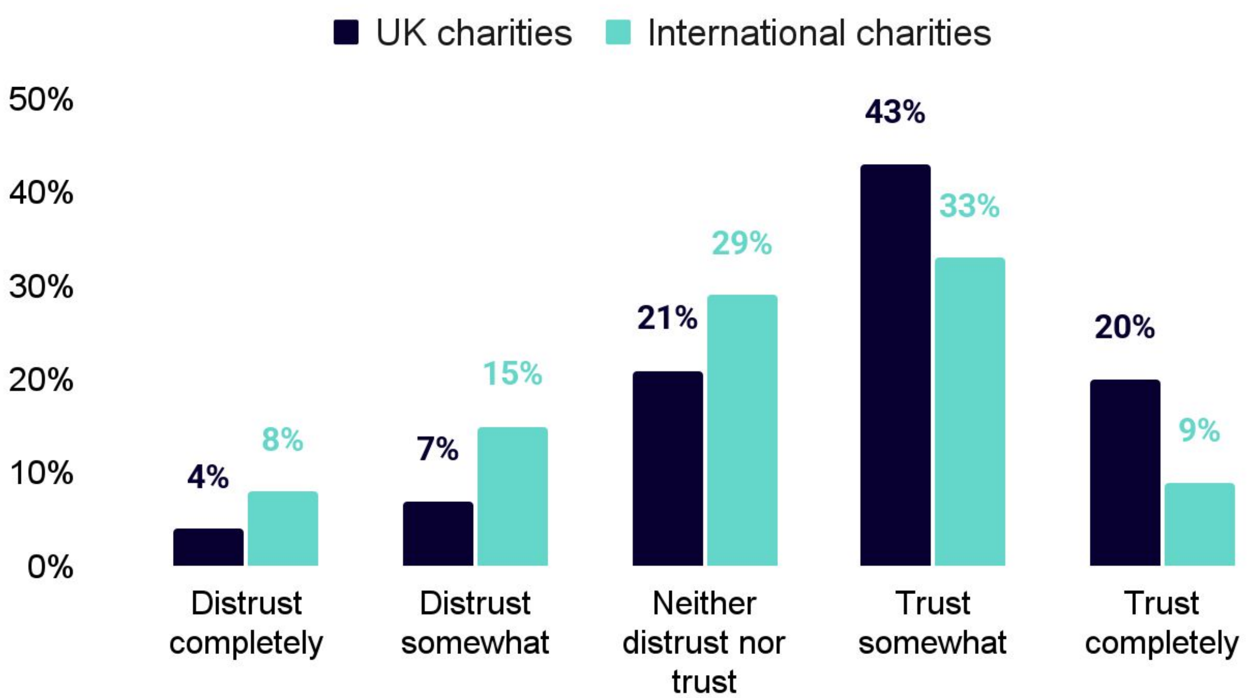
Average donation value by preference to donate locally, nationally, globally *(N:2010)*



UK Nat Rep: Jan 2025, N: 2010 | Jan 2026, N: 2136

Domestic charities hold a clear trust advantage

To what level would you say that you trust charitable organisations?



UK Nat Rep: Jan 2026, N: 2136

Trust in UK charities remains stronger than trust in international organisations. UK charities outperform international counterparts across all trust measures, with 20% of donors saying they “completely trust” them (vs 9% international) and 43% “somewhat trusting” (vs 33%). However, a significant proportion of donors remain undecided, with 21% neither trusting nor distrusting UK charities, rising to 29% for international organisations.

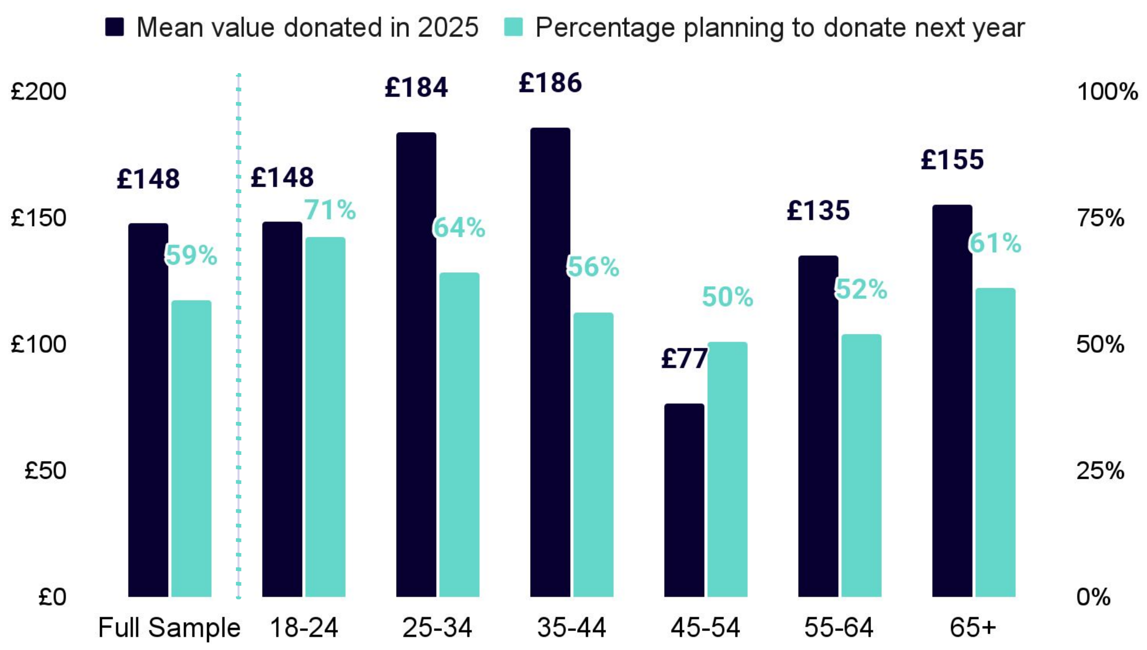
Levels of distrust are notably higher for international charities, with a combined 23% expressing some level of distrust, compared to 11% for UK organisations.

While UK charities come out top, the large numbers “on the fence” show change is needed. Across the board, this reinforces the need to build confidence through clear communication, visible impact, and transparent use of funds.

2 Sector opportunities: Engaging younger and faith-driven donors

Donors 25-44 had the higher average gift in 2025, and say they intend to give in 2026

Mean donation values in 2025 by age vs. intention to give in the next 12 months



UK Nat Rep: Jan 2026, N: 2136

Donors aged 25-34 and 35-44 were the most generous group in 2025, giving £184 and £186 per year on average, well above the national average of £148.

Meanwhile, donors aged 45-54 gave just £77 on average, and only half plan to continue giving—likely reflecting financial pressures such as mortgages and caring for family. While year-on-year fluctuations in gifts over £1,000 affect this figure, we consistently see that giving among 45-54s is lower in our sample, suggesting this group is stretched thin despite being a core audience for most UK charities.

A renewed focus on younger donors may revitalise fundraising programmes and secure much-needed growth in a difficult environment. But be aware, younger donors demand a different journey and can take longer to convert—meaning fundraisers who hope to engage them may need different measurements to assess success in acquisition tests.

Support grows for global charities UNICEF and WaterAid among younger audiences

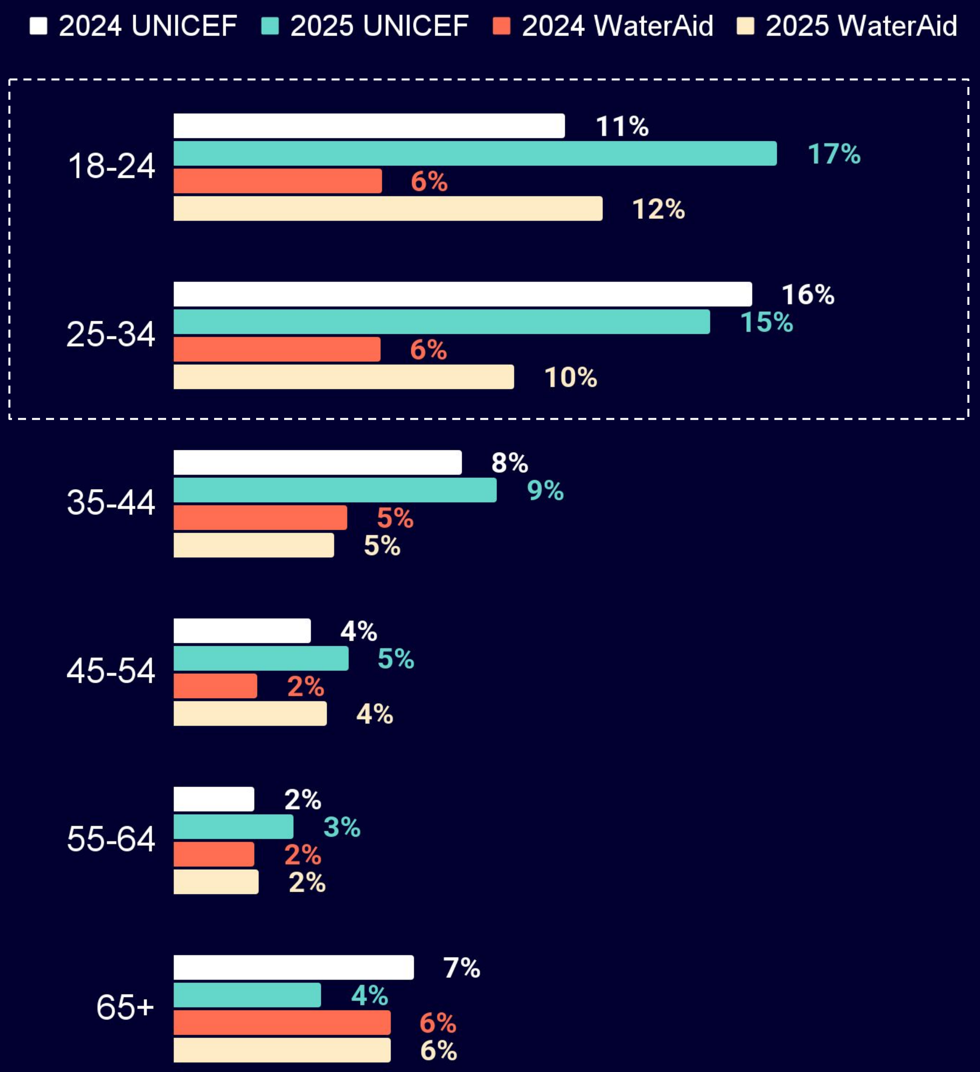
UNICEF saw support grow among 18- to 24-year-olds, from 11% in 2024 to 17% in 2025, while remaining steady at 16% among those aged 25-34. For **WaterAid**, support has doubled among donors aged 18-24 (6% to 12% and risen from 6% to 10% among donors aged 25-34.

For **WaterAid**, campaigns like #TeamWater, led by influencers Mr. Beast and Mark Rober, may have played a key role—in just 31 days, more than 10,000 creators raised $40m through large-scale livestreams to grassroots fundraising, helping to bring clean water issues to the forefront for younger audiences.

While there may not have been a standout moment for **UNICEF**, its continued visibility across global emergencies and strong digital presence have drummed up engagement.

The data highlights the opportunity for international charities to deepen connections with younger audiences through purpose-driven messaging, community participation and influencer engagement, and high-impact digital storytelling.

Percentage of UK adults who have donated to UNICEF and WaterAid in the past 12 months by age



UK Nat Rep: Jan 2025, N: 2010 | Jan 2026, N: 2136

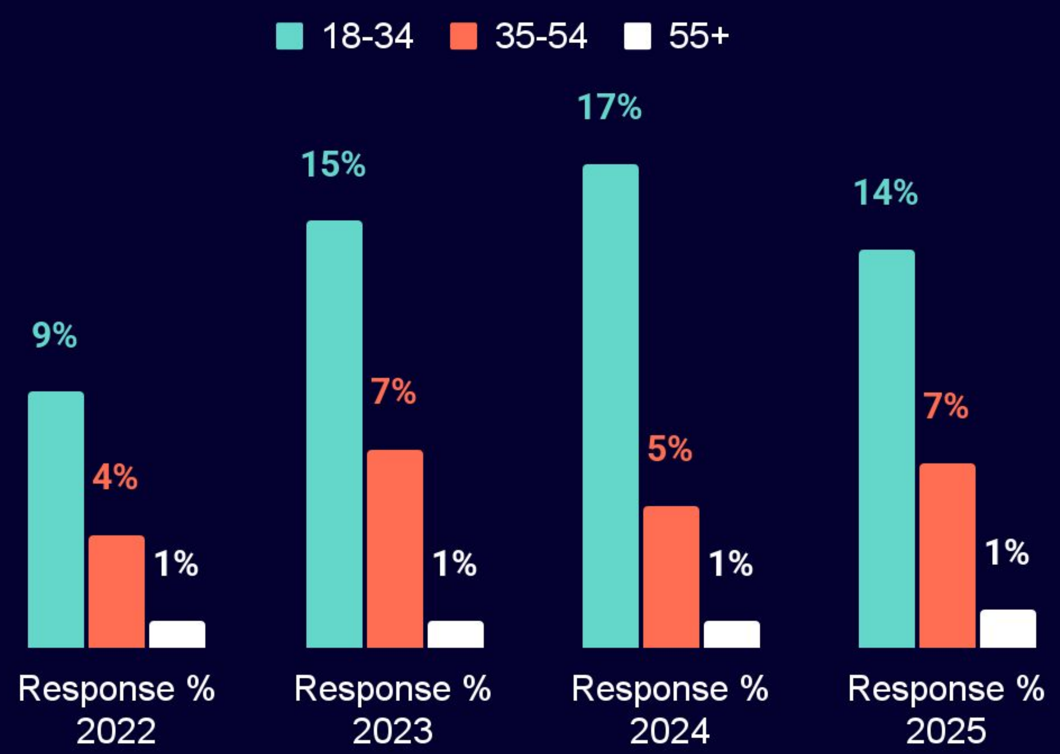
Fundraising through gaming and live streaming is here to stay

Donating through gaming and livestreams remains important for younger audiences. Among 18- to 34-year-olds, participation is up from 9% in 2023 to 17% in 2025, before a slight dip to 14% in 2026. Among donors aged 35-54, participation is lower but has increased to 7% in 2026.

Building on the previous slide, we see charities such as **UNICEF** and **WaterAid** are tapping into this and recognising the power of digital communities to drive engagement. Initiatives like UNICEF's Play for Tomorrow and the Game Changers Coalition highlight how gaming can be used to mobilise younger audiences around global issues.

For younger generations, giving is more digital, interactive, and community-driven. For charities, the opportunity lies in embedding themselves within these platforms—not just as fundraising channels, but as spaces to build community, inspire action, and connect with the next generation of donors. Please reach out to our team if you're thinking about starting a pilot in this space!

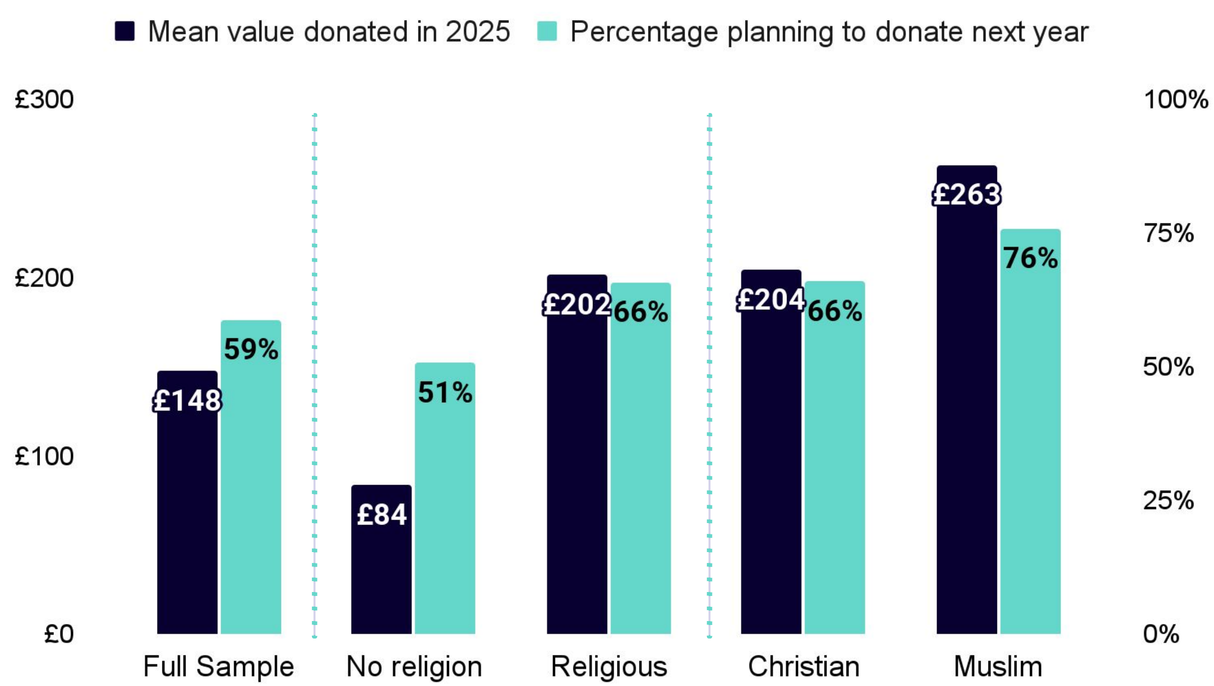
Percentage of UK adults who gave money to charity through computer games or live streams in the past 12 months



UK Nat Rep: Jan 2023, N: 1540 | Feb 2024, N: 2010 | Jan 2025, N: 2010 | Jan 2026, N: 2136

Donors of faith remain the most generous, with over 2x times the average gift of donors who chose “no religion”

Mean donation values in 2025 by religion vs. intention to give in the next 12 months



UK Nat Rep: Jan 2026, N: 2136

Note: Due to sample size, other religions have been added to the “religious” category together.

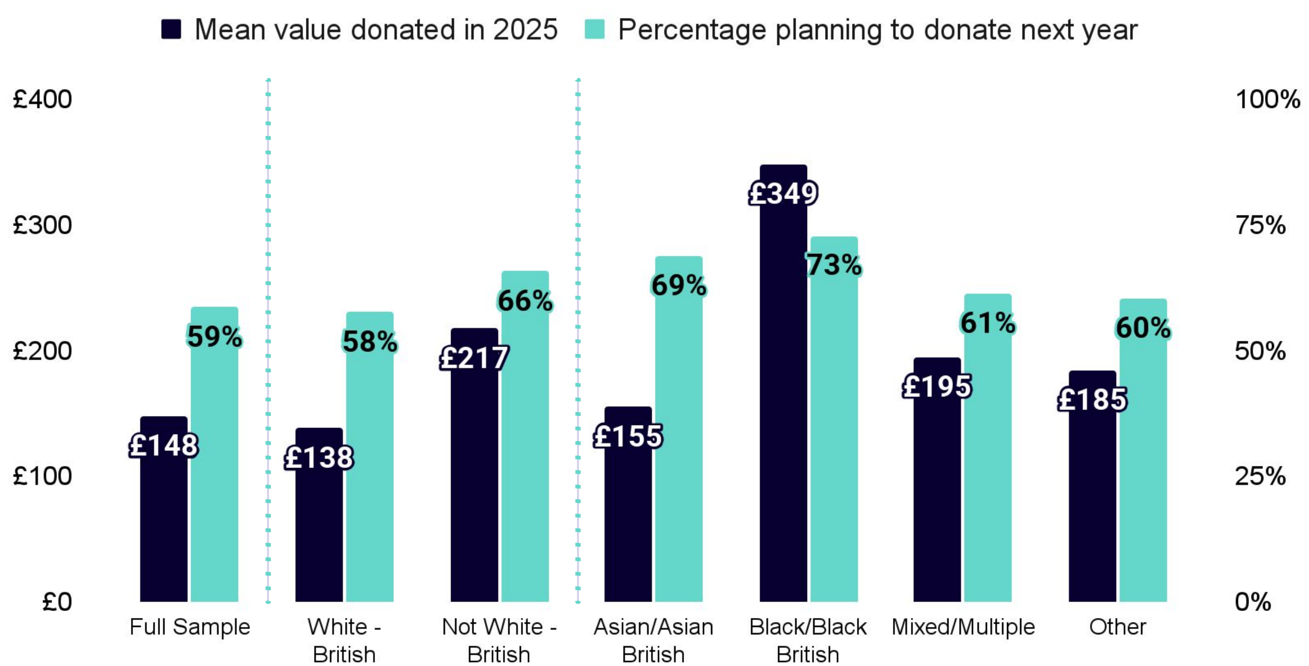
Donors of faith continue to give more than average, with donations of £202 versus £148 across the full sample; they also show stronger engagement, with 66% intending to give in the next year compared with 59% overall.

As outlined in Blue State’s [2024 British Muslim Giving Behaviours report], UK Muslim donors remain particularly generous, with 76% planning to give. However, average donation values have decreased from £373 last year to £263.

This reinforces the importance for organisations to engage religious audiences: both in a tailored way during key religious moments and all year-round, if the asks are authentic and clearly communicate both need and impact, we see religious audiences respond to both religious and secular organisations.

Ethnic minorities continue to be among the most generous - with a 46% higher average gift than the UK average (£217 vs £148)

Mean donation values in 2025 by ethnicity vs. intention to give in the next 12 months



UK Nat Rep: Jan 2026, N: 2136 **(1) Based on figures from the 2021 census*

Representing almost a fifth of the UK population, 10.9 million people, ethnic minority communities continue to stand out as some of the most generous contributors.

Overall, 66% say they intend to keep giving, compared with 58% White-British, and they give more on average (£217 vs £138 for White British donors.

Within this group, Black/Black British donors remain the most generous, with an average gift of £349 and 73% saying they intend to continue giving, although this has fallen from £449. Asian/Asian British donors also show strong giving intent (69%, although the average gift has decreased from £268 to £155.

Engaging communities with culturally appropriate creative & campaign planning

Engaging donors with ties to global communities is fundamental to many NGOs. We're proud to announce a tool we've built to help charities engage ethnic minorities, religious donors, and diaspora communities with greater sensitivity and authenticity.

Our new model helps find prospective donors, honing in on the highest-value areas and those that most align with campaign themes and global affinities. Built with privacy and GDPR at its core, it looks at areas of the country, not individual data.

Key Benefits:

- ✓ Identify postcodes where prospective donors live—diaspora communities, religious communities, and mid-value donors, based on the makeup of their areas.
- ✓ Allow organisations to align campaign creative to the culture and language of the diaspora community.
- ✓ Identify locations that resemble your warm donor file (e.g. lookalikes, even for offline campaigns).

Introducing **Blue State**'s new mid-value and diaspora community engagement model*

*Currently available in England and Wales.

3 Motivations for giving

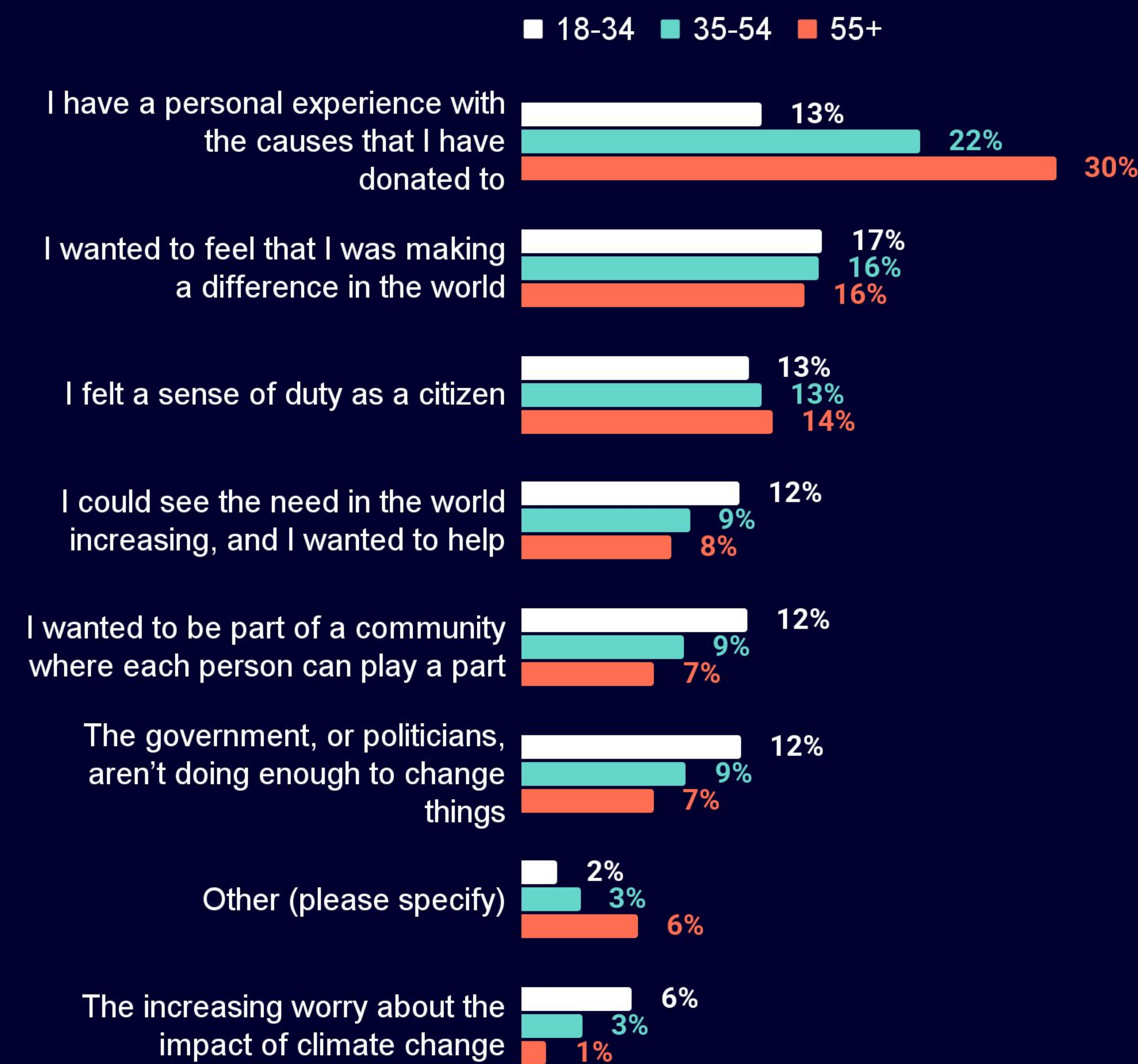
Motivations vary across generations: Younger donors are driven by impact and community, older donors by experience

Donors aged **18-34** are more likely to be motivated by the desire to make a difference in the world, as well as wanting to be **part of a community of collective help.**

Donors aged **35-54** continue to be motivated by personal connection to a cause and wanting to make a difference. **They have a strong desire to improve outcomes for those facing challenges they can relate to.**

Donors aged **55+** are even more likely to be motivated by personal experience to a cause as well as wanting to make a difference. **They give because they feel connected and morally obligated to act.**

What was your main motivation for donating money to a charity or cause in the previous 12 months?



UK Nat Rep: Jan 2026, N: 2136

Donors aged 18-34: They feel compassion and believe institutions are falling short, so they want to step up and help however they can.

Could you please tell us the main reasons why you are planning to donate to charities in the next 12 months?

> *I think donating anything contributes to the bigger cause. There is so much pain and darkness happening today and I think there is a lot of people that need help.*
>
> *18-24, Female, HHI £50k - £75k*

> *I don't think our government is doing a lot to help charities and people in need. Any small action helps.*
>
> *25-34, Female, HHI £50k - £75k*

> *I don't like seeing other people suffer. I want to help as many people as possible. Everyone deserves a chance in life.*
>
> *18-24, Male, HHI < £15k*

Donors aged 35-54: They are driven by personal experiences and close connections, donating to support others and pay forward the help they may one day need.

Could you please tell us the main reasons why you are planning to donate to charities in the next 12 months?

> *I feel it's the right thing to do and I'm taking part in a charity event that is very close to a friend's heart.*

35-44, Male, HHI £30k - £50k

> *I believe that donating money to charity is very important because I may need it in the future someday and expect that someone will help me in difficult situations, for example when I have cancer.*

35-44, Female, HHI £75k - £100k

> *There are a number of charities I support because the issues have affected me and my family already.*

45-54, Male, HHI £15k - £30k

Donors aged 55+: They feel a responsibility to give back, focusing on causes they trust and empathise with.

Could you please tell us the main reasons why you are planning to donate to charities in the next 12 months?

I feel a responsibility to support charities but have to choose those I empathise with most as I can't afford to support all causes.

55-64, Female, HHI £30k - £50k

We received a lot of help from 2 animal welfare charities in the past and now are in a position to give back to these charities.

55-64, Male, HHI £30k - 50k

I will continue to support the existing charities that I have supported for years as I know every penny goes to the cause and that they genuinely make a difference.

65-74, Female, HHI £50k - £75k

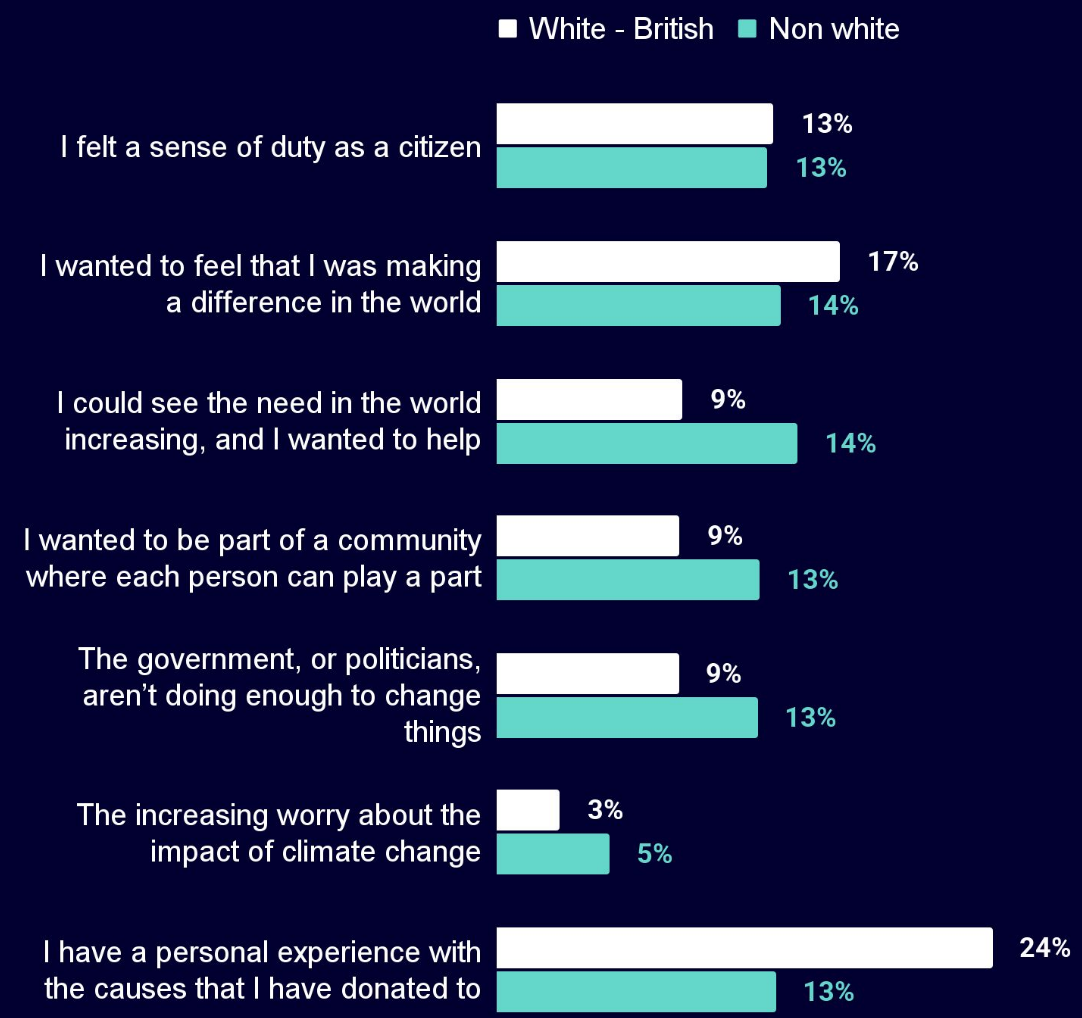
Ethnic minority audiences are more likely to be motivated to donate by seeing a global need and supporting the community.

While all groups share a desire to make a difference, underlying motivations vary.

White British donors are more likely to be driven by personal experience (24% vs. 13% non-White British) and a desire to make a difference (17% vs. 14%).

Non-White British donors are more motivated by external factors, including seeing the need increasing (14% vs. 9% White British), wanting to be part of a community (13% vs. 9%), and believing that the government is not doing enough to address key issues (13% vs. 9%). These more outward-facing drivers highlight a strong sense of collective responsibility and social awareness.

What was your main motivation for donating money to a charity or cause in the previous 12 months?



UK Nat Rep: Jan 2026, N: 2136

Ethnic minority audiences: They give what they can out of duty and compassion, aiming to help those in need and support urgent relief efforts.

Could you please tell us the main reasons why you are planning to donate to charities in the next 12 months?

> *If you are in a position to help, then you should. That does not mean you have to be wealthy to be able to help. Even if you only got £1, it is better than not giving anything.*
>
> *45-54, Female, Asian, HHI £50k - £75k*

> *I love helping the needy in my society. And the more I give out, the more blessings come into my life.*
>
> *25-34, Female, Black, HHI £150k+*

> *The need to support humanitarian aid for emergency relief and crisis has become more crucial than ever.*
>
> *25-34, Male, Asian, HHI £30k - £50k*

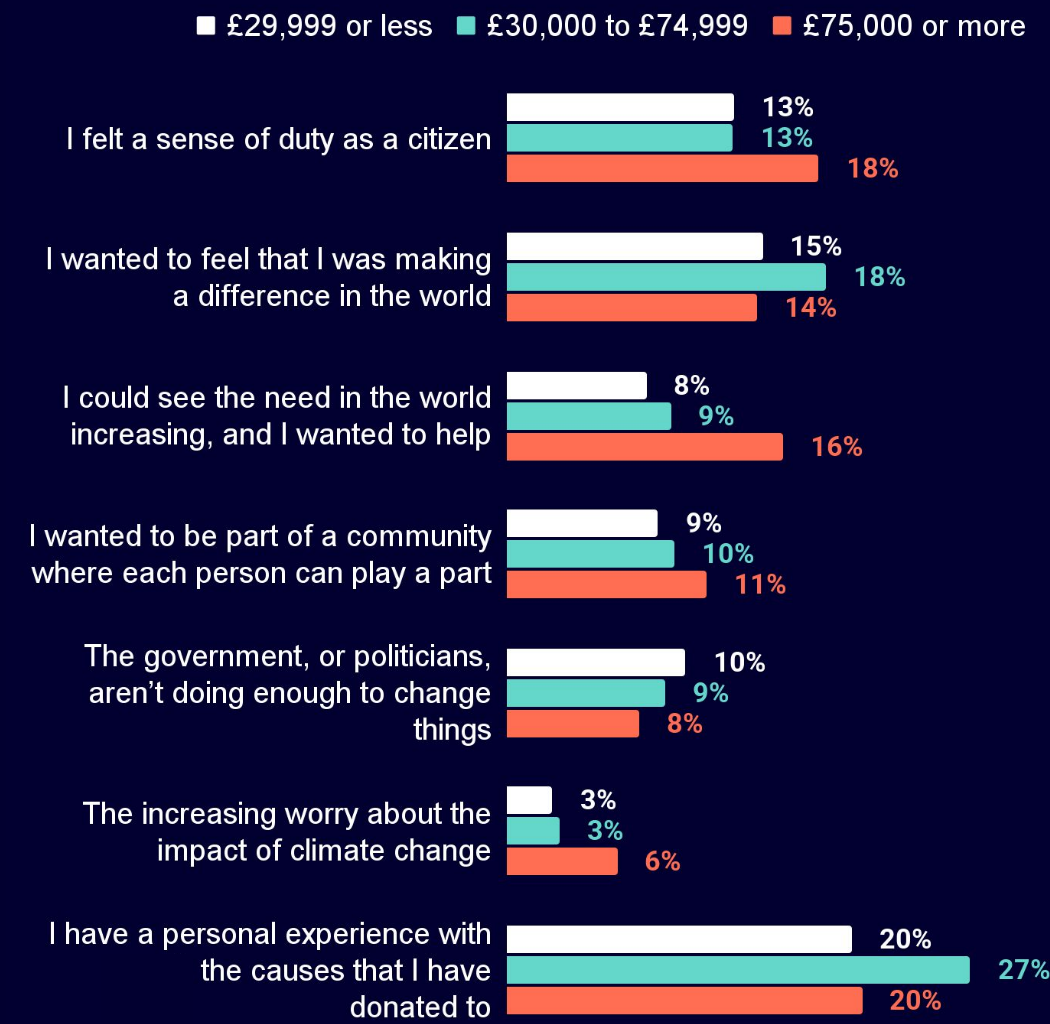
Giving motivations also vary by **household income**, with higher household income feeling a sense of obligation.

Motivations vary across income groups, with personal experience remaining a key driver. Lower- and middle-income donors are most likely to be motivated by personal experience, particularly middle-income groups (27%), alongside a desire to feel they are making a difference.

Higher-income donors, while still influenced by personal experience (20%) and a sense of duty (18%), are more likely to be motivated by seeing the need increasing than middle-income groups—seven percentage points higher, suggesting a greater responsiveness to external issues and societal challenges.

For organisations, this highlights the importance of tailoring messaging. Emotionally resonant, impact-led stories may be most effective for lower and middle-income audiences, while framing around urgency, scale of need, and collective impact is likely to better engage higher-income donors.

What was your main motivation for donating money to a charity or cause in the previous 12 months?



UK Nat Rep: Jan 2026, N: 2136

Higher-income donors:
They give because they see increasing need and not enough support, feeling a personal responsibility to help.

Could you please tell us the main reasons why you are planning to donate to charities in the next 12 months?

> *I feel the people are in increasing need for help but the government is not doing enough to help them. I know the little I can offer will go a long way.*
>
> *35-44, Male, White, HHI £100k - £150k*

> *The rate at which the less privileged and the aged are affected negatively is alarming and I will love to drop my donation to make life more bearable for them.*
>
> *25-34, Male, Black, HHI £100k - £150k*

> *I feel a responsibility to donate to causes I feel strongly about.*
>
> *45-54, Female, White, HHI £100k - £150k*

4 Sustained trends

Medical and animal welfare organisations remain the most loved causes

The top three, health or medical research (35%), animal welfare (23%) & children or youth (22%) all continue to be the nation's most supported causes.

Meanwhile, support for hunger (10% to 8%), environment and climate (7% to 6%), religious activities (6% to 5%), and refugee support (6% to 4%) have shown small directional declined.

This indicates some shifts in public priorities, with growth most closely related to health and children.

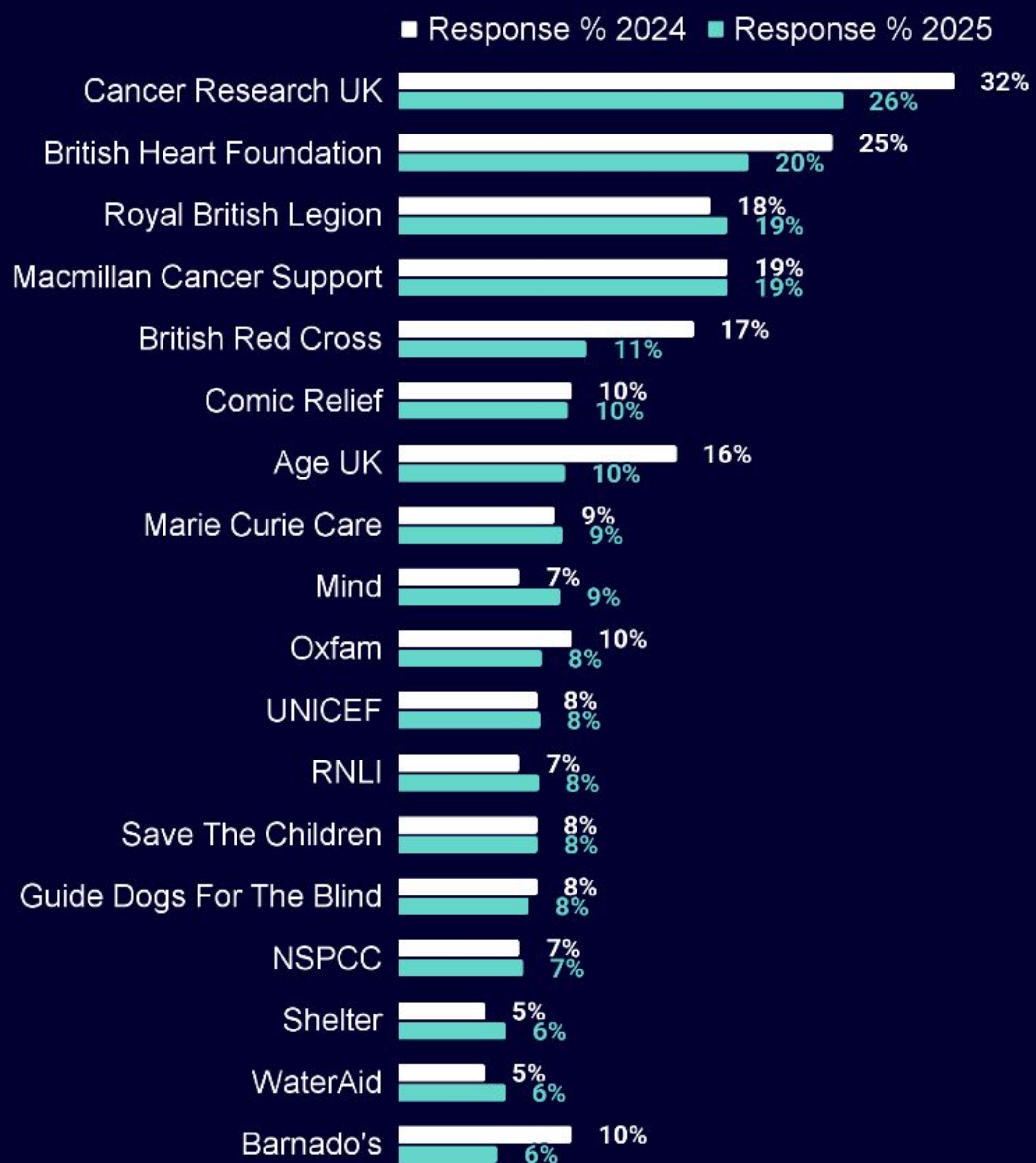
BLUE STATE

Percentage of people who have donated to specific causes/sectors in the past 12 months?

Causes / sector	Response % 2024	Response % 2025
Health or medical research	37%	35%
Animal welfare	24%	23%
Children, or youth	21%	22%
Mental Health	18%	20%
Homelessness	20%	17%
Elderly people	14%	12%
Poverty	12%	11%
Humanitarian emergencies	11%	10%
Hunger	10%	8%
Disability	8%	8%
Education	7%	6%
Human rights	6%	6%
Environment and climate	7%	6%
Religious activities	6%	5%
Arts, culture, or heritage	4%	4%
Refugee support	6%	4%
Gender rights and equality	4%	3%
LGBTQI+	3%	2%
People of particular ethnic or racial origin	2%	2%

UK Nat Rep: Jan 2025, N: 2010 | Jan 2026, N: 2136

Percentage of UK adults who have donated to organisations in the past 12 months



UK Nat Rep: Jan 2025, N: 2010 | Jan 2026, N: 2136

National organisations win on volume and market share, but there is decline for some

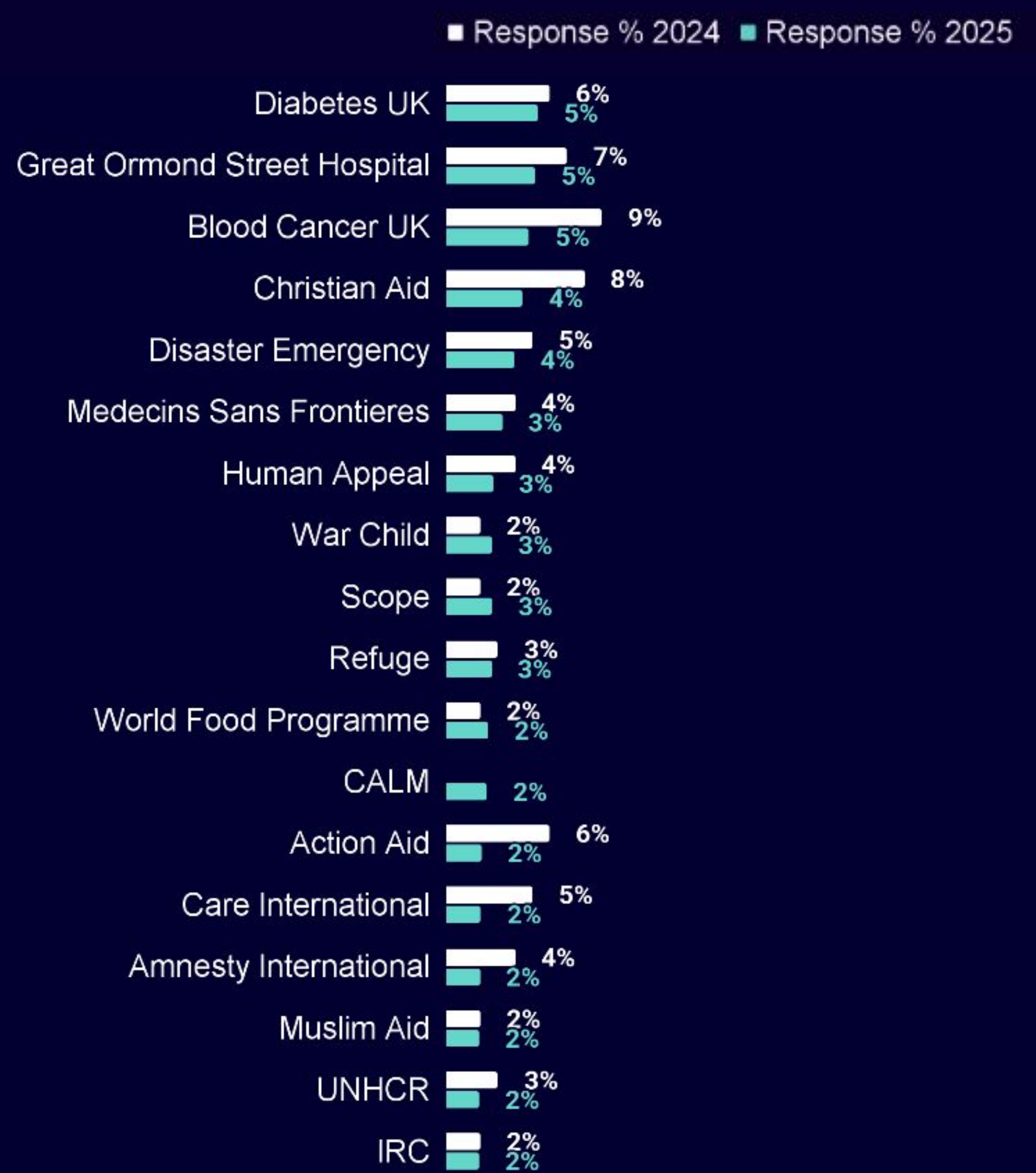
Well-known UK charities continue to dominate, with some shifts in support. **Cancer Research UK** and **British Heart Foundation** remain the most widely supported, despite small declines in our sample (32% to 26% and 25% to 20% respectively).

Macmillan Cancer Support and the **Royal British Legion** both maintained support at 19% this year.

British Red Cross has seen a notable decline (17% to 11%), likely following reduced visibility after peak international crises. Similarly, **Age UK** has decreased from 16% to 10%. In contrast, **Mind** has seen small directional growth (7% to 9%).

International children's charities such as **UNICEF** and **Save the Children** remain stable at 8% year-on-year.

Percentage of UK adults who have donated to organisations in the past 12 months



UK Nat Rep: Jan 2025, N: 2010 | Jan 2026, N: 2136

International organisations continue to trail behind national ones

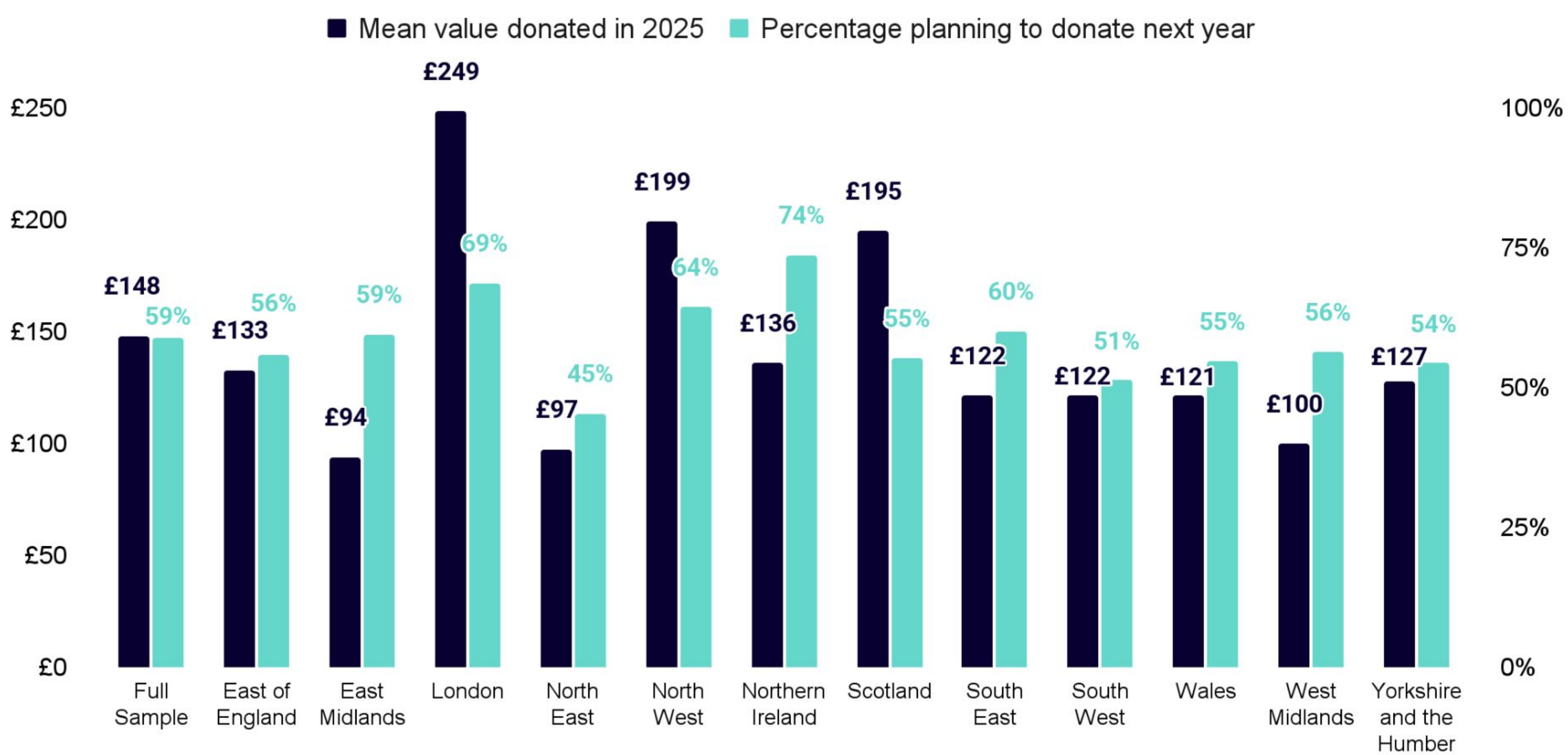
Many organisations with smaller footprints in the UK have maintained relatively stable levels of public support. These include **Diabetes UK, Médecins Sans Frontières, Human Appeal, War Child, Scope, Refuge,** and the **World Food Programme,** all of which appear to be holding steady year-on-year.

In contrast, several organisations have experienced small declines in support over the same period (or at least recalled support when asked). Specifically, **Blood Cancer UK** fell from 9% to 5%, **Christian Aid** from 8% to 4%, **ActionAid** from 6% to 2%, **CARE International** from 5% to 2%, and **Amnesty International** from 4% to 2%.

This divergence suggests a fragmentation of support among mid- to lower-profile charities. While some organisations are successfully maintaining relevance with their audiences, others are losing visibility or resonance, potentially due to shifting public priorities and reduced media salience.

London, Scotland, and the North West are key locations of high-quality donors

Mean donation values in 2025 by region vs. intention to give in the next 12 months



London continues to stand out, with both high intent and donation values. Donors give an average of £249, and 69% intend to continue, well above national averages (£148 and 59%).

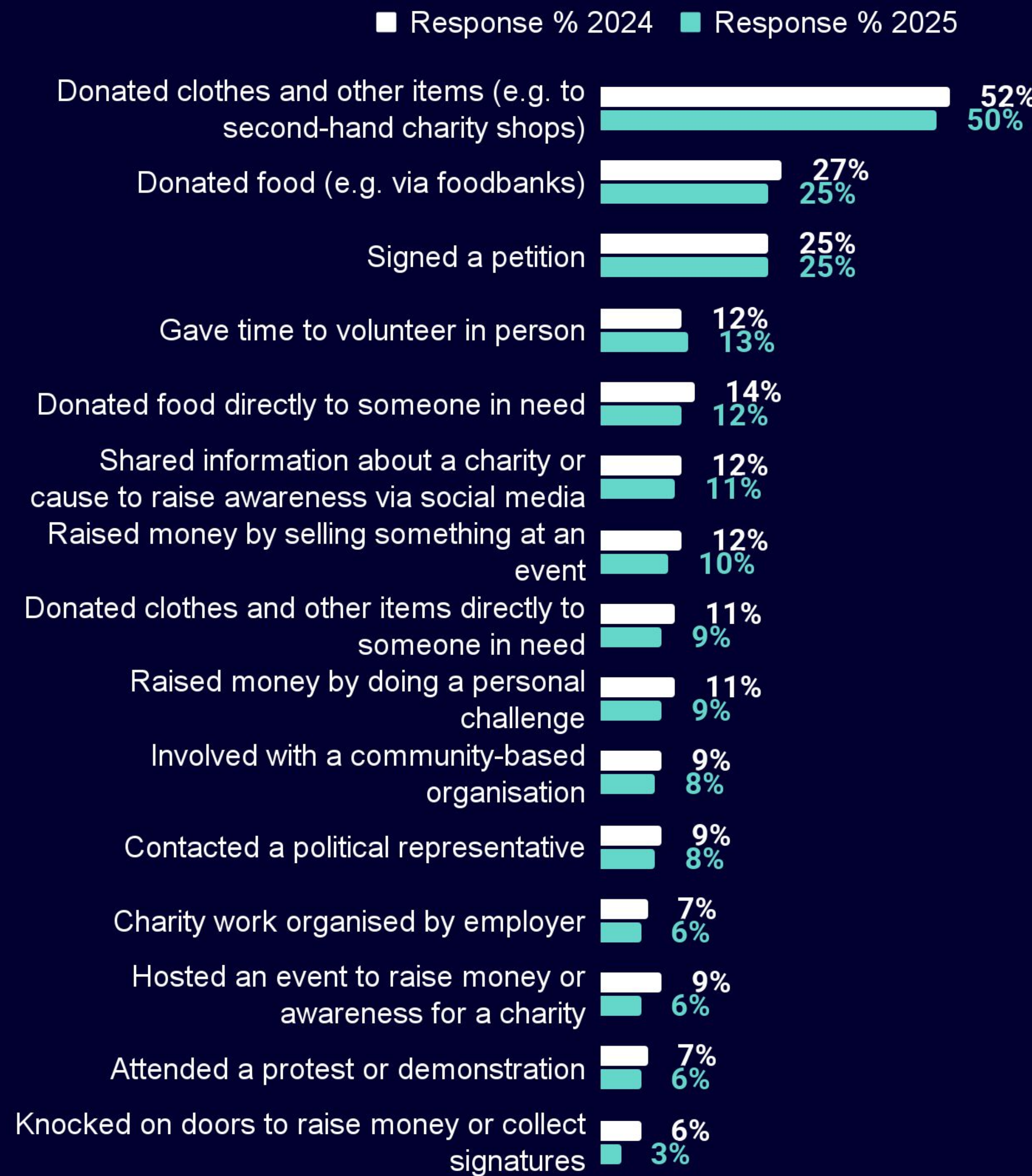
But other regions show potential. The North West performs well (£199 average, 64% intent), while Scotland combines high donation values (£195) with lower intent (55%), suggesting an opportunity to strengthen retention. Northern Ireland shows the highest intent to give (74%) despite a lower average gift (£136).

The volume of non-financial actions holds steady

UK adults continue to support causes through practical, non-financial actions. Donating clothes remains the most common behaviour (52% to 50%), while donating food via foodbanks has dipped from 27% to 25%. Petition signing remains steady at 25%. This will likely continue as individuals look to support causes without placing additional strain on household budgets in a tough economy.

For organisations, this presents an opportunity in the long-term to connect non-financial actions to fundraising pathways, e.g. by developing lead generation and conversion journeys. For example, converting petition signers or in-kind donors into financial supporters over time by focusing on the subsequent experience.

Percentage of UK Adults who have taken a non-financial action in the past 12 months



UK Nat Rep: Jan 2025, N: 2010 | Jan 2026, N: 2136

It’s a pivotal moment for fundraising

As the trends show, the sector is recalibrating, and long-term growth will rely on key shifts. As volumes waver, there is a need for innovation in both acquisition and retention to protect against volatility. Donors told us they want to give, but they may need a different ask, journey, or channel. And they need a 'why now?'—because across segments, the pull to wait for financial stability is strong.

Simultaneously, opportunity areas for long-term growth are more defined. Younger and diaspora audiences are showing strong intent to give in more digital, community-led, and culturally relevant ways. Mid-value donors are showing stability and offer a pathway to more predictable income.

Trust remains a cornerstone. We see how impactful “borrowing trust” from other messengers can be, as evidenced by the success of the MrBeast and WaterAid collaboration. Charities that nail community connection will be the ones that forge ahead—whilst continuing to comment authentically and consistently on news and always demonstrating impact with humanity and warmth.

In a moment of change, fundraisers who succeed will be those trying new products, innovating and piloting with the audience at the centre; rethinking how to engage growth audiences; investing in mid-value strategies, testing campaigns, and strengthening trust through more meaningful, transparent supporter experiences.

As always, talk to your agency-partners, and collaborate with peers from across the sector to understand what’s working, and where audiences are.

We’re always here to help, too. From applying the data to making new ideas happen, and executing acquisition and development programmes. If we can help, or include other questions in future reports, please don’t hesitate to get in touch.

And for even more insights, our new ethical fundraising report, can be found here, landing May 2026.

Best wishes,

Anjali, Jai, Jasmine, & Lizi

hellouk@bluestate.co

5 Methodology

Who we surveyed

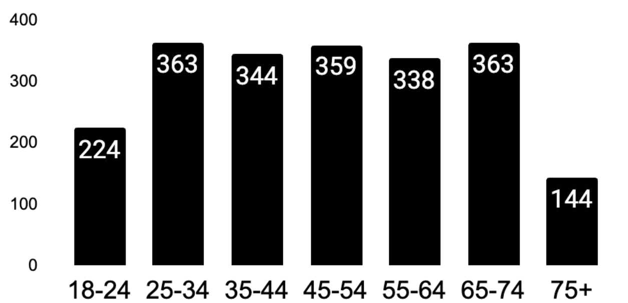
Sample composition for our 2026 study

The below shows pre-weighted sample, i.e. the number of individual respondents for each demographic group.

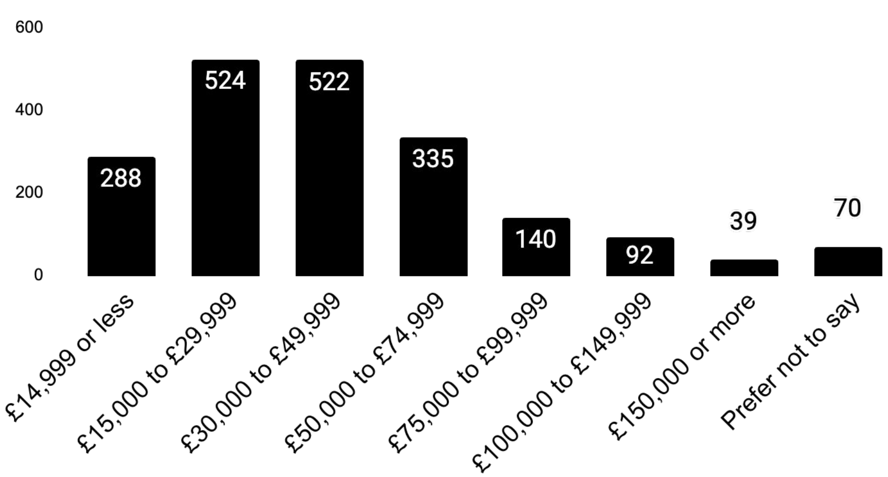
Sample size

2,136
survey responses

Age



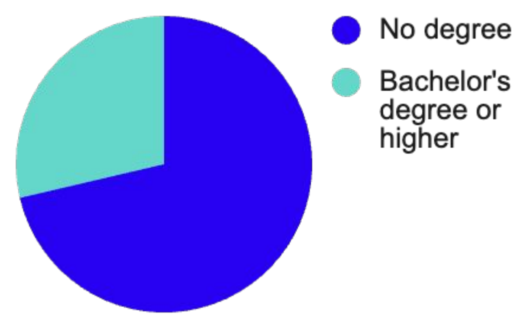
Household income (pre-tax)



Region

Region	Respon.
London	198
East of England	154
Yorkshire and the Humber	239
East Midlands	90
North West	239
West Midlands	81
South East	183
Wales	292
North East	186
South West	107
Scotland	188
Northern Ireland	179

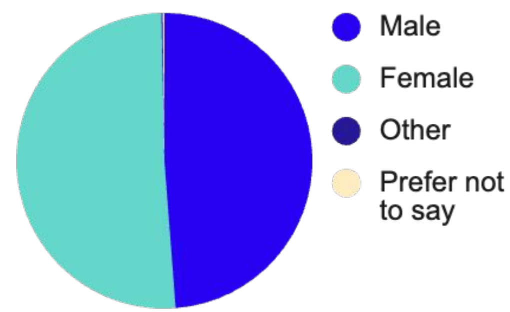
Degree



Ethnicity

Ethnicity	Respon.
White - British	1873
Asian/Asian British	72
Black/Black British	64
Mixed/Multiple	24
Other	103

Gender



Methodology

Nationally representative polling data was weighted by the following demographics: age and social grade (using Market Research Definitions of ABC1 & C2DE) interlocked, gender, region, education (degree, yes or no), and ethnicity (White British, yes or no).

Our sample includes 2,136 complete individual responses in total.

Fieldwork was completed between 30 January and 2 February 2026.

Due to weighting and rounding, percentages may not add up to 100%.

The sample was collected via computer-assisted web interviewing (CAWI) using a number of different online panels, via a panel aggregator.

Blue State is proud to be a registered member of the British Polling Council (BPC).

Where size estimates for audiences in the UK are quoted, the following data sources are used:

- Total adult population:
  - *UK, England, Wales, Scotland, and Northern Ireland from mid-2022 by the ONS*
- Total adult non-White British ethnicity population:
  - *England and Wales from the 2021 Census (England & Wales)*
  - *Scotland from the 2011 Census*
  - *Northern Ireland from the Northern Ireland Statistics Research Agency*

Thank you.

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