

CHARITY STREET II

The value of charity to British households

July 2016



Introduction

In 2014, the Charities Aid Foundation (CAF) produced a report, 'Charity Street', in conjunction with IPPR North on the usage of charitable organisations. CAF decided to revisit and enhance the quantitative survey previously used in 2014¹ to understand this topic in more detail and to see what, if anything, had changed in the two years since the previous report was published. The aim of the report is to gain a deeper insight into the way households and individuals use charitable services and to understand whether or not individuals are aware these are charitable services.

The report uncovers differences between gender, age groups and the type of area in which people live (as defined by the index of multiple deprivation², which we are looking at for the first time). The report also looks at differences between this year's results and those from the previous report in 2014.

About the data

The data in this report is based on the Charity Street 2016 survey which collected information about service use from adults aged 18 and over in the United Kingdom. The survey ran between 19th and 21st February 2016 as part of Populus's online omnibus. 2,054 responses were collected in total and were weighted to be representative of the UK adult population.

About CAF

Charities Aid Foundation (CAF) is a leading international charity registered in the United Kingdom, with nine offices covering six continents. Our mission is to motivate society to give ever more effectively and help transform lives and communities around the world. We do this by working globally to increase the flow of funds to the charity and non-profit sectors through the provision of philanthropy advice and services.

1 The 2014 Charity Street report can be found here <https://www.cafonline.org/docs/default-source/about-us-publications/charity-street-report-sept14.pdf>

2 For more information on the English Index of Multiple Deprivation, please visit <https://www.gov.uk/government/statistics/english-indices-of-deprivation-2015> or <http://opendatacommunities.org/data/societal-wellbeing/imd/indices> (same approach taken for the other parts of the UK)

Key findings

- **The use of charity services is widespread** – the report finds that nearly every household in the UK (98%) has used a charity at some point, and four out of five (83%) have used a charity service in the last 12 months.
- **Use of charities is on the rise** – there has been an increase in the household use of charity services since 2014, when 79% had used a charity in the last 12 months and 93% had ever used a charity service.
- **Those in the least deprived areas of the UK access a larger number of charitable services** – those in the least deprived areas in the UK have accessed on average 6.24 services compared to 5.60 services for those in the most deprived areas. Services accessed differ, with those in the least deprived areas accessing charitable services provided for entertainment or education (such as museums and universities) compared to those in the most deprived areas. Conversely, those in the most deprived areas are more likely to access services that provide support, advice, care or housing.
- **Young people and women are more likely to have personally used a charity service** - 18-24 year olds are more likely to have personally used a service provided by a charitable organisation in the last month (60% vs. 50% overall) and women are more likely to have used a service in the last month than men (54% vs. 44%).
- **Charities are seen to provide a wide range of benefits to people** – the most common benefit reported from using a charity service was providing an enjoyable/fun experience (22%, up from 13% in 2014). The second biggest benefit was receiving emotional support or counselling from a charity service (20%, up from 14% in 2014).
- **Charity or not a charity? That is the question** – the research found that almost a quarter (23%) were unaware that the services that they or someone in their household had used were run by charities.
- **There is a lack of charitable awareness** – just 8% of those interviewed were aware that all of the services that were included in the research were run by charities prior to taking part in the survey.
- **Charities underpin society** – people believe that charities play an essential / very important role in society in general (92%), as well as in the area in which they live (80%). More than 2 in 5 (43%) feel that charities play an essential or very important role in their lives and those of their household.
- **Charities are best placed and most trusted to speak on behalf of the disadvantaged** – 84% felt that charities were best placed to speak on behalf of disadvantaged people and 76% said they most trusted charities to do this. This is significantly higher than for politicians where 27% felt MPs were best placed and just 3% said they would trust them most to speak on behalf of disadvantaged people.

CHARITIES UNDERPIN SOCIETY

80% OF BRITS THINK CHARITIES PLAY AN ESSENTIAL ROLE



IN THEIR LOCAL COMMUNITY

WIDESPREAD CHARITY SERVICES

IN THE LAST YEAR

83%



OF UK HOUSEHOLDS USED A CHARITY SERVICE

LACK OF AWARENESS

1/4 OF US ARE UNAWARE



THAT SERVICES WE HAVE USED ARE PROVIDED BY A CHARITY

USE OF CHARITIES

YOUNG PEOPLE AND WOMEN



ARE MORE LIKELY TO HAVE USED A CHARITY SERVICE

PEOPLE IN DEPRIVED AREAS

ARE MORE LIKELY TO ACCESS SERVICES THAT PROVIDE



SUPPORT



ADVICE



CARE



HOUSING

PEOPLE IN AFFLUENT AREAS

PEOPLE ARE MORE LIKELY TO ACCESS CHARITY SERVICES SUCH AS MUSEUMS AND UNIVERSITIES



CHARITIES ARE A TRUSTED VOICE IN SOCIETY

84% OF BRITS THINK CHARITIES ARE BEST PLACED

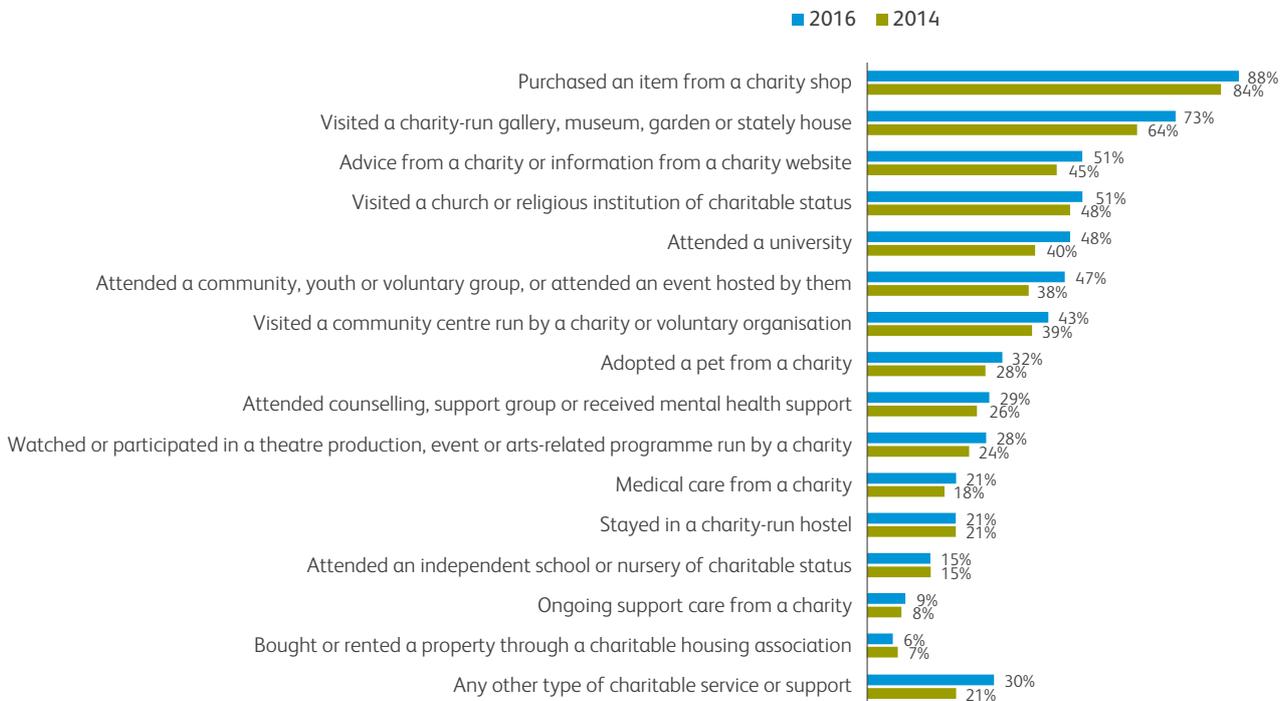


TO SPEAK ON BEHALF OF DISADVANTAGED PEOPLE

Household use of charities

Usage of charities has increased in the past two years. In 2016, more than half (53%) of households in the UK reported using at least one charity service in the last month, a level which is similar to the 51% in 2014. However, we see increases from 2014 in usage across the previous year, with five out of six (83%) households having used a charity service in the last year, up from 79% in 2014. Indeed, 98% of households report having ever used a charity service, up from 93% in 2014. This increase is supported by CAF's 2015 Social Landscape³ report which found that 78% of charities had seen an increase in demand for services and 83% expected a further increase in demand over the following year.

Figure 1: For each of the below services, please let us know whether you or other members of your household have used this service in the last year



Base: All respondents in 2014 (n=2070) and 2016 (n=2054)

3 Full download of the Social Landscape report 2015 can be found here <https://www.cafonline.org/about-us/publications/2015-publications/social-landscape>

Household use excluding universities, churches and charity shops

One aim of the research is to understand whether people are aware that certain organisations and services, such as universities and churches, are classed as charities. However, it is also recognised that their inclusion in some figures, such as frequency of use of charities or average number of charities used, may not give a full picture of how charities (as defined in a traditional sense) are used, particularly as they are some of the more commonly used services. As such, we also looked at the effect of charitable usage if we exclude universities, churches and charity shops from the data.

After removing these three types of service 92% of households have used a charity at any point, compared to 98% when they are included. This still represents a significant majority and demonstrates that charities are intertwined with everyday life.

Table 1 shows the impact on usage when we remove the three services mentioned above.

Table 1: Proportion of respondents having used a charity service ever by all charities, or excluding certain services

	Ever used a charity
Overall	98%
Excluding universities only	97%
Excluding churches only	98%
Excluding charity shops only	95%
Excluding all of universities, churches and charity shops	92%

Base: All respondents (n=2054)

Regularity of charity use is on the up

It is not just overall use that has increased since 2014: UK households are using charities more regularly than before. One in seven (14%) households use charity services at least once a week, equivalent to 3.7million UK households. One in three (34%) use charities' services at least monthly (up from 27% in 2014) while just over two in three (69%) use them at least once a year (up from 54% in 2014).

Households in the UK are also using more types of charity services than before, with the average UK household reporting having ever used 6.07 charity services compared to 5.67 in 2014. If we remove universities, churches and charity shops we see a reduction in the average number of charities used, although it does remain high. When each of the three is removed

individually, the average number of services used is still around 5.5 and even if all three are excluded together it remains at 4.43, which clearly demonstrates that people are using a range of charitable services.

Table 2: Average number of charities used by respondents

Average number of charities used (ever)	
Overall	6.07
Excluding universities only	5.64
Excluding churches only	5.55
Excluding charity shops only	5.34
Excluding all of universities, churches and charity shops	4.43

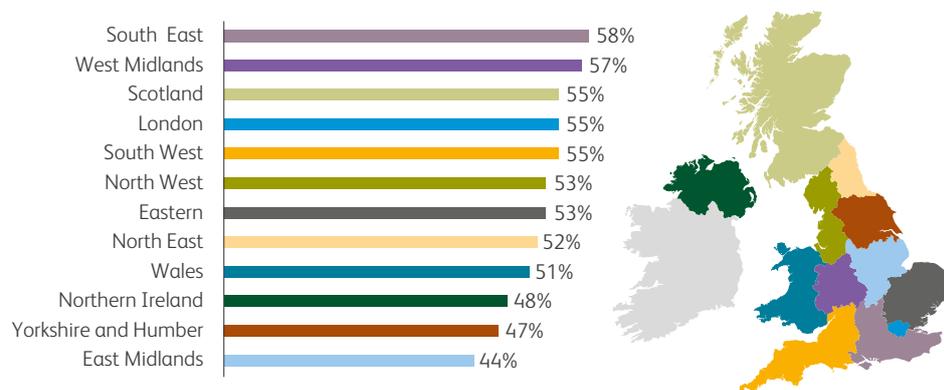
Base: All respondents (n=2054)

Young families are increasing their charity use

Across different household types, young families have seen the biggest increase in their use of charities since 2014. This year, 88% said they have used a charitable service in the last year, up from 78% two years ago. In the last year they are the most likely household type to have received a range of services such as advice or information, medical care or ongoing support from a charity, bought or rented through a charitable Housing Association, stayed in a charity-run hostel, or attended a youth/voluntary group.

Differences between regions

Looking at variations across different regions, households in the South East are the most likely to have used a charity service in the last month (58%), while those in the East Midlands are the least likely (44%).



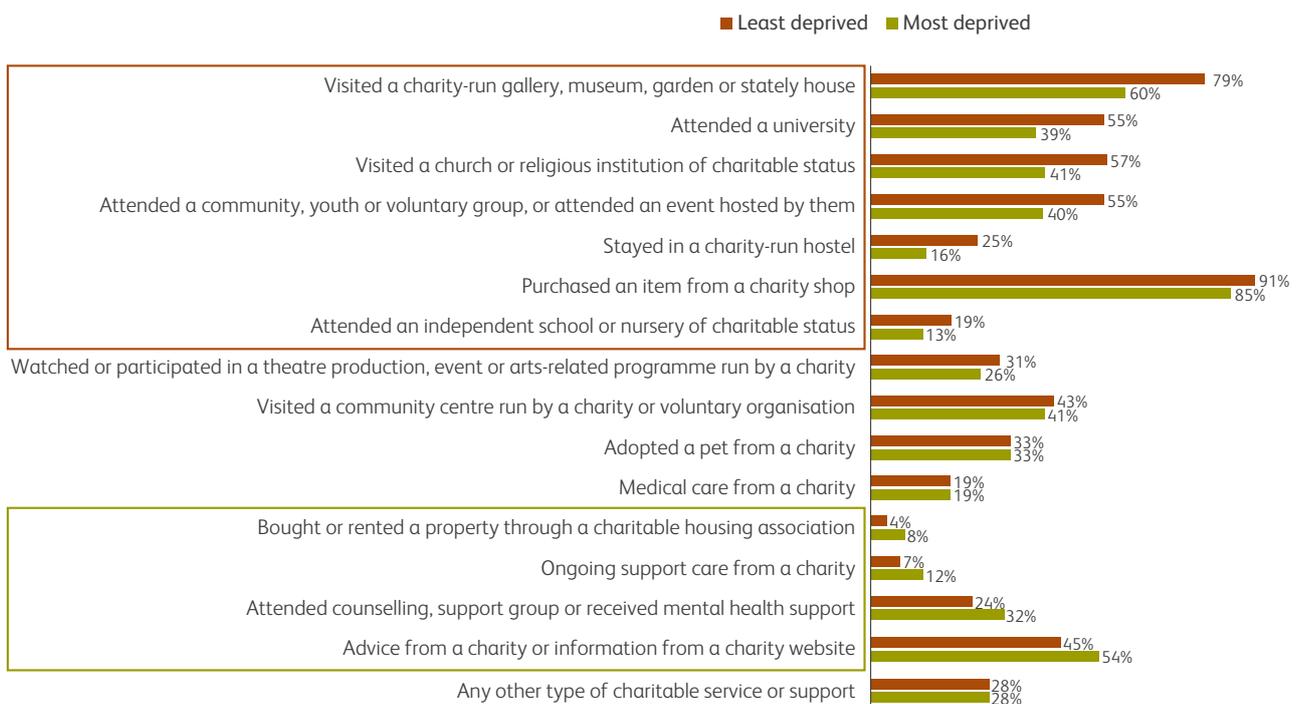
Households in London have used the most charities at some point in their lives, averaging 6.69 per household, while those in Wales have used the least (averaging 5.42 per household).

Differences between IMD areas

This year, we have looked at the data by the Index of Multiple Deprivation (IMD)⁴. IMD is an officially used definition of how deprived an area is and ranks each neighbourhood by its level of deprivation. These areas are then put into a decile so that every neighbourhood falls into one of ten groups. The top 10% are collectively the least deprived areas across the country and the bottom 10% are the most deprived areas.

Within this study, we found that those in the top 20% (i.e. the least deprived areas) have used on average 6.24 charities, while those in the bottom 20% (i.e. the most deprived areas) have used, on average, 5.60 charitable services. Looking further into this, it is evident that this difference is likely accounted for by around four charitable services which those in the least deprived areas are much more likely to have accessed or used compared to those in the most deprived areas, as illustrated by Figure 2.

Figure 2: For each of the below services, please let us know whether you or other members of your household have ever used this service



Base: Respondents in 1st and 2nd indices (n=401) and 9th and 10th indices (n=338)

Those in the least deprived areas are more likely to have used a number of different charitable services, most notably having visited a charity run gallery, museum, garden or stately home, attended university, visited a church, attended a community, youth or volunteering group (or an event run by them) or stayed in a charity-run hostel. In contrast, those in the bottom 20% of IMD are only more likely to have accessed four of the services; attending counselling, a support group or received mental health support, accessing advice from a charity, or information from a charity website, ongoing support and having bought or rented a property through a charitable housing association.

It is interesting to note that those in the least deprived areas are more likely to access the services which provide entertainment and education than those in the most deprived areas, and those in the most deprived areas are more likely to access the services which provide support, advice and housing.

⁴ For more information on the English Index of Multiple Deprivation, please visit <https://www.gov.uk/government/statistics/english-indices-of-deprivation-2015> or <http://opendatacommunities.org/data/societal-wellbeing/imd/indices> (same approach taken for the other parts of the UK)

For example, 60% of those in the most deprived areas have visited a charity-run gallery, museum, garden or stately home and 54% have received advice from a charity or information from a charity website. This represents just a 6 percentage point difference between the advice based charities and those that are not. On the other hand, 79% of those in the least deprived areas have visited a gallery, museum, garden or stately home and just 45% have accessed advice from a charity or information from a charity website, meaning that they are much more likely to have accessed only the non advice based charities.

However, it is not just advice and information from charities where this difference is apparent. Looking at those charities which are more commonly accessed by those in the least deprived areas, each one offers some level of enjoyment, whether it is a day out, shopping or attending school or university. In contrast, those charities which people in the most deprived areas are more likely to access are exclusively there for advice, support and guidance.

Personal use of charities

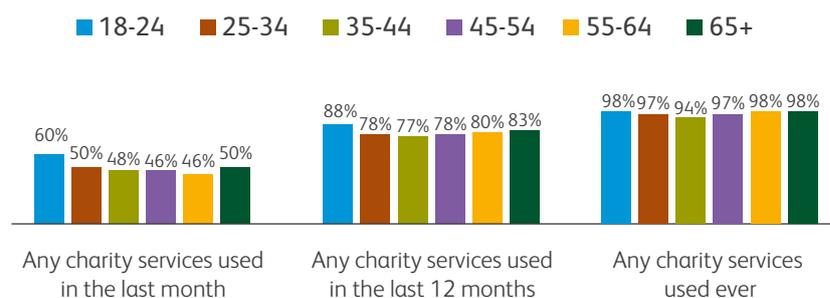
In 2014, the research undertaken only focussed on household usage of charitable services. In this year's report, we decided to also look at personal usage in order to be able to comment on any individual demographic differences. This section therefore explores personal use of charities, moving away from thinking about their household as a whole.

Half of respondents have personally used a charity service within the last month, while four out of five have used a service in the past year and 97% have used a service over their lifetime. As might be expected, these figures are very similar to those when analysed by household. There are, however, a number of interesting findings about how individuals use charity services when viewed by age, gender and area, which are explored in more detail throughout this section.

Differences between age groups

Young people are the most likely age group to have used a charity service in the last month (60% vs. 50% overall) or in the last year, with nearly nine out of ten (88%) 18-24 year olds having done so compared to eight out of ten across all age groups. The trend is therefore similar to that of young family households.

Figure 3: For each of the below services, please let us know whether you personally have used this service



Base: All respondents (n=2054)

The younger age group has also used more types of charities than any other age group (on average 3.75 in the last year) and in the previous 12 months are the most likely to have received medical care (10% vs 5% overall), counselling/mental health support (19% vs 9% overall), watched/participated in a theatre production or arts-related programme (20% vs. 10% overall), visited a gallery/museum/garden or stately house run by a charity (43% vs 34% overall) or stayed in a charity run hostel (10% vs 3% overall).

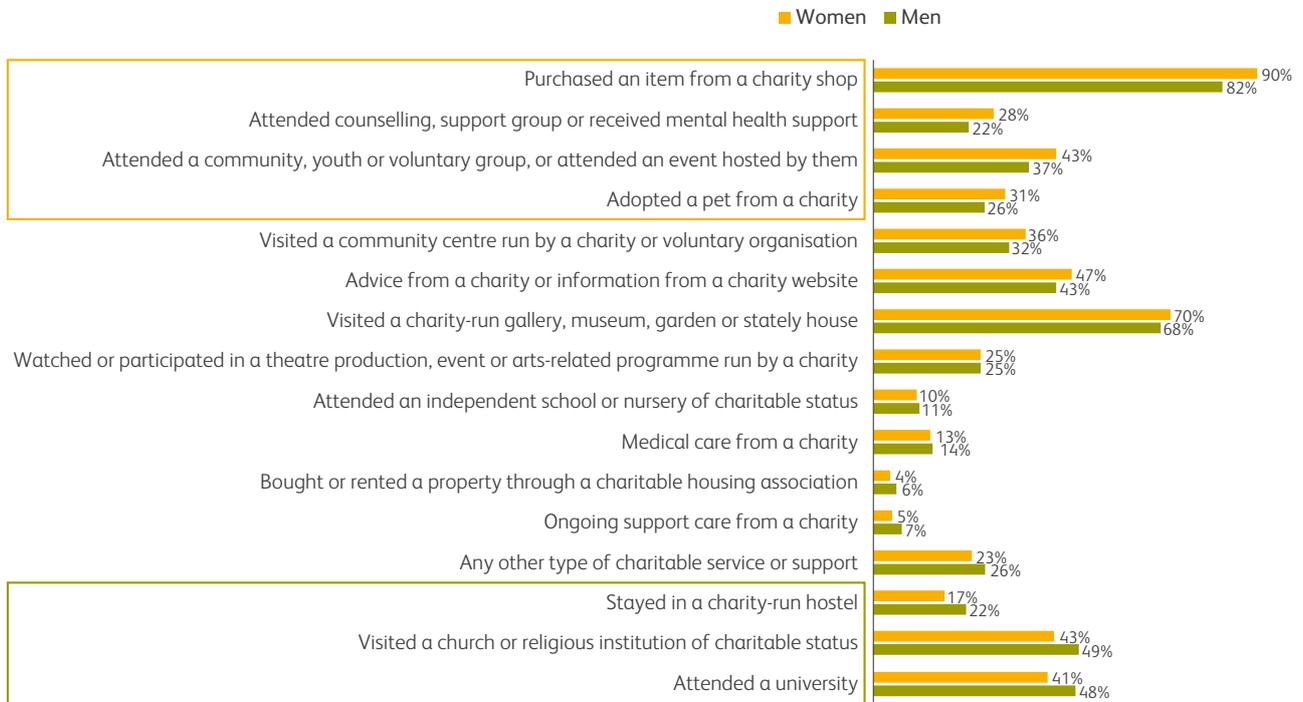
People aged 35-44 are the least likely group to have used a charitable service in the past 12 months with 77% saying they had done so. The only activity older people are more likely to have done in the last year (compared to any other age group) is purchasing an item from a charity shop (71% of 65+ year olds vs 63% overall).

Differences between men and women

Women are more likely than men to have personally used a charity in the last month (54% vs 44% of men) or in the last year (86% women vs 75% men), with the number of charity services used in the last year showing little difference between women and men (averaging 2.82 for men vs 2.79 for women).

Figure 4 shows the differences between men and women for each charitable activity, with the coloured boxes indicating significant differences between the two groups. Women are more likely to have ever purchased an item from a charity shop than men (90% vs. 82%), as well as being more likely to have purchased an item both in the last 12 months (70% vs. 54%) and the last month (36% vs. 25%). Women are also more likely than men to have attended counselling, support groups or received mental health support, adopted a pet from a charity and attended a community, youth or volunteering group. Men are more likely to have stayed in a hostel, visited a church or religious institution and have attended university. There are therefore clearly gender differences when it comes to charitable service usage.

Figure 4: For each of the below services, please let us know whether you personally have ever used this service



Base: All respondents split by Men (n=1001) and Women (n=1053)

Individual differences

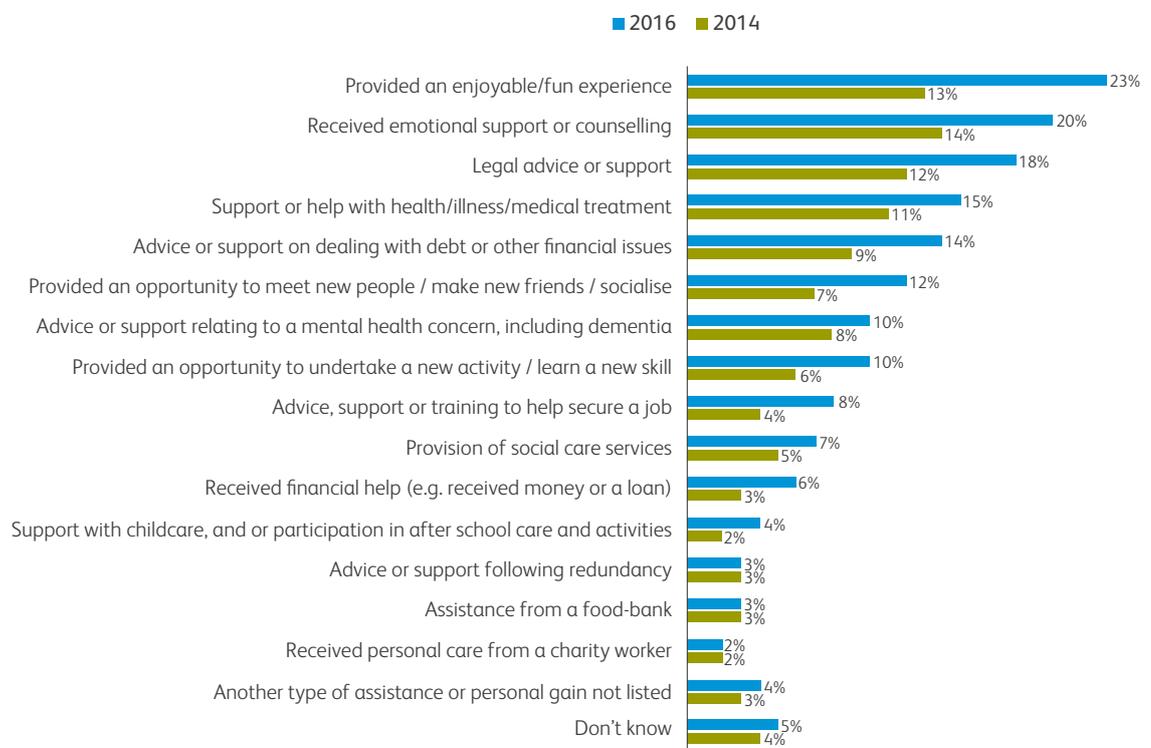
In the past year, people with a disability are more likely than those without to have received information or advice from a charity (20% vs. 13%), and to have received counselling or mental health support (21% vs. 5%). They are, however, less likely to have visited a charity-run gallery, museum, garden or stately house (28% vs. 37%). Research by Vitalise⁵ into 52 of the top 100 tourist attractions in the UK found that almost two thirds (63%) were not fully wheelchair accessible, 26% did not have information about accessibility on their websites and just 13% said that all of their staff had disability awareness training. These barriers may help in part explain why people with a disability are less likely than those without to have visited galleries, museums, gardens or stately homes run by charities in the last year.

5 <http://www.bbc.co.uk/news/uk-28804914>

Personal benefits of charity use

This year has seen a big increase in the proportion of people who report receiving a personal gain as a result of charity use compared to two years ago. The most common benefit reported from using a charity service was providing an enjoyable/fun experience (23% up from 13% in 2014). This year also saw 20% receiving emotional support or counselling from a charity service, up from 14% in 2014. The full list is below, and shows that there has been an increase in most of the types of personal gain that charity users can experience.

Figure 5: Which, if any, of the types of support or personal gain listed below have you or a member of your household received from charities?



Base: All respondents who use any of the charities or support services mentioned in 2014 (n=1915) and 2016 (n=2009)

Younger families are more likely than average to have benefited in terms of being provided with an enjoyable/fun experience (29%), while older families are more likely to have benefited from legal advice or support (23%).

Respondents living in the most deprived areas of the country (bottom 20% of the Index of Multiple Deprivation) are less likely to have been provided with a fun and enjoyable experience (16%) than both people overall (23%) and those in the least deprived areas (29%). They are more likely to have received legal advice or support (23%), compared to just 18% of all respondents and 15% of those in the areas of least deprivation. The percentage of this group having been provided with a fun and enjoyable experience is therefore likely to be a reflection of the types of services they have used.

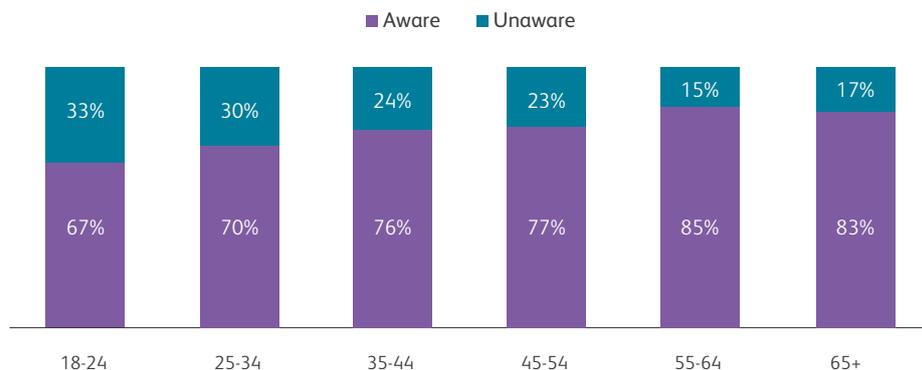
Awareness

In 2016 we also looked at, for the first time, people's awareness of the services asked about being charities. This was explored on two levels: awareness of the services they used being charities, and; awareness of all services asked about throughout the survey being charities. As might be expected, the results indicate that people are more aware of services they use being charities compared to services they might not use. However, even on this level, there was by no means universal awareness. Overall there was a fairly low level of awareness of what services were charities, which ties in with research conducted by Localgiving⁶ finding that local charities themselves felt that there was a lack of awareness of local charities and the work that they do.

Awareness of charities being used by households

The research found that around a quarter (23%) were unaware that the charity services that they or someone in their household have used were run by charities. Lack of awareness of charitable status decreases with age; with a third of 18-24 year olds unaware of their charity status compared to around one in six (16%) of 55+ year olds.

Figure 6: Thinking about the services you said you or someone in your household uses, were you aware or unaware before today that these were run by charities?



Base: All respondents who use any of the charities or support services mentioned (n=2009)

There is also a difference in awareness between regions, with a third (34%) in Northern Ireland and the North East (33%) unaware, compared to 14% who are unaware in the West Midlands.

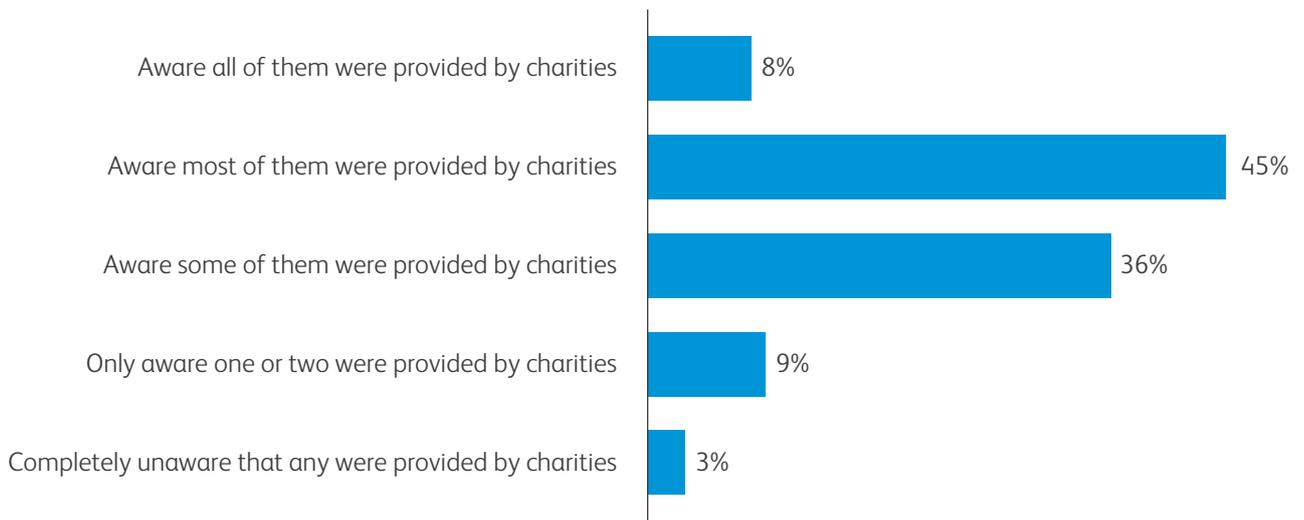
Awareness of a service's charitable status does, however, increase with use. Just over four in five of those whose household uses charity services at least weekly (81%) or monthly (82%) were aware of their charitable status, compared to three quarters (75%) of those who use the services less often.

6 <https://localgiving.org/what-we-do/reports/>

Awareness of all charities shown

Among all respondents (whether or not they had used a charity service) fewer than one in ten (8%) were aware that all of the services listed were provided by charities. Less than half (45%) were aware that most of the services were provided by charities. This means that around half were only aware of some of the charitable services asked about being charities and around one in ten (12%) were either completely unaware or aware of only one or two being services provided by charity.

Figure 7: Please take a look again at this list of services provided by charities. Prior to seeing this list today, to what extent were you aware or unaware that these services were provided by charities?

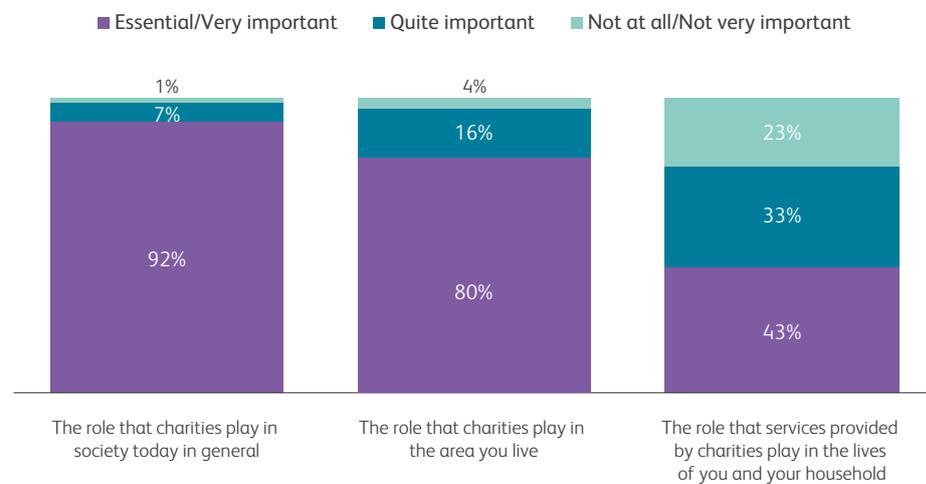


Base: All respondents (n=2054)

The role of charities

More than nine out of ten (92%) rate the role of charities in society today as essential or very important whilst eight in ten rate the role charities play in their local area as essential or very important. Just over two fifths (43%) rate the role that services provided by charities in the lives of them and their household as essential or very important, with a further third (33%) rating them as quite important.

Figure 8: To what extent do you think the role charities play is important or unimportant in each of the below contexts?



Base: All respondents (n=2054)

Women were more likely to rate the role that charities play in society as essential/important (95%) than men were (89%). This is likely to be, at least in part, due to women being more likely to have used charitable services.

Unsurprisingly, those whose household has used a charity in the previous 12 months were more likely to rate their role in society today as essential/very important (93%) compared to those who had not (84%). People in Scotland were the most likely to rate the role of charities in the area they live as essential or very important (86%) while those in the North East (73%) and Yorkshire & Humber (73%) were the least likely to do so.

Those whose household used a charity in the last 12 months were far more likely to rate their role in the lives of them and their household as essential/very important (47%) than those who had not used one in the last 12 months (25%). Similarly, those using charities at least once a week (69%) or at least once a month (60%) were much more likely to rate them positively than those using charities less often (35%).

Ratings by Index of multiple deprivation

There is an interesting pattern between those in the least deprived areas and those in the most deprived areas and how they rate the role of charities in different situations.

At an overall society level, those in the most deprived areas are less likely (89%) than those in the least deprived areas (95%) to rate the role of charities as essential or very important. When it moves down to the role that charities play in the area in which the respondents live, there is next to no difference between those in the least deprived areas (79%) and those in the most deprived areas (80%). However, when we drill down to how important the role of charities is in the lives of the respondent and those in their household, the results indicate that those in the most deprived areas (48%) are more likely to rate their role as essential or very important than those in the least deprived areas (37%). This suggests that those in the most deprived areas are slightly less likely to see the impact on broader society and more likely to recognise the personal impact.

Advocacy

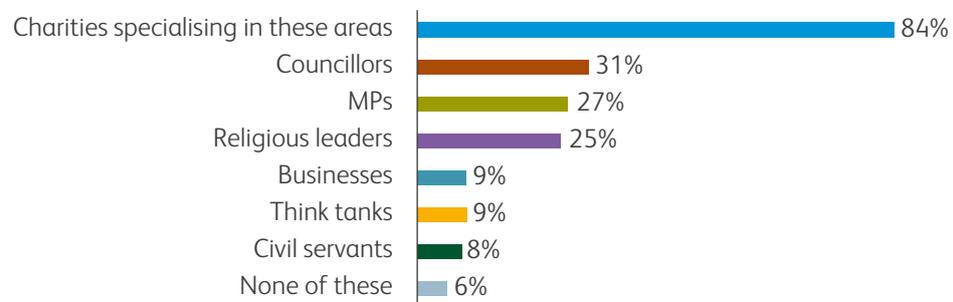
Who is best placed to speak on behalf of disadvantaged people

One of the key functions of many charitable organisations is to advocate for changes to the law and policies in order to help their beneficiaries. This often includes speaking up for vulnerable people, who otherwise would not have a voice in the political process. Despite strong support for charity advocacy from the public, recent government policies have made it more difficult for charities to give their beneficiaries a voice⁷.

The need for charities to act as advocates is borne out by the attitudes of those surveyed in this latest research. When asked who they think are best placed to speak on behalf of disadvantaged people (such as vulnerable adults and children, homeless people, unemployed jobseekers) to government to help influence government policies, 84% think charities specialising in these areas are best placed. Across all demographics, this is the case although this number was even higher among the oldest age group (89% of 65+), and those in the South East (89%) and South West (89%).

Less than a third think Councillors (31%), MPs (27%), or religious leaders (25%) are best placed, while less than one in ten think businesses (9%), think tanks (9%), or civil servants (8%) are best.

Figure 9: Which of the following do you think are best placed to speak on behalf of disadvantaged people to government to help influence government policies?



Base: All respondents (n=2054)

Young people (18-24 year olds) are less likely to think that MPs (21%) or religious leaders (12%) are best placed to speak on behalf of disadvantaged people compared to older age groups. This may in part be due to younger people's higher levels of disengagement with politics and being less likely to trust institutions. Similarly, data from the 2011 Census shows that 37% of 18-24 year olds identified as 'no religion' compared to just 9% of those aged 65+ and 13% of those aged 50+⁸ thus explaining the low standing of religious leaders amongst this age group in particular.

7 CAF's 'Do as I Say, Not as I Do' report explores the current landscape for charity advocacy in the UK in more detail <https://www.cafonline.org/docs/default-source/about-us-policy-and-campaigns/closing-space-report-2016>

8 http://www.nomisweb.co.uk/census/2011/DC2107EW/view/2092957703?rows=c_relpuk11&cols=c_age

Who is most trusted to speak up for disadvantaged people

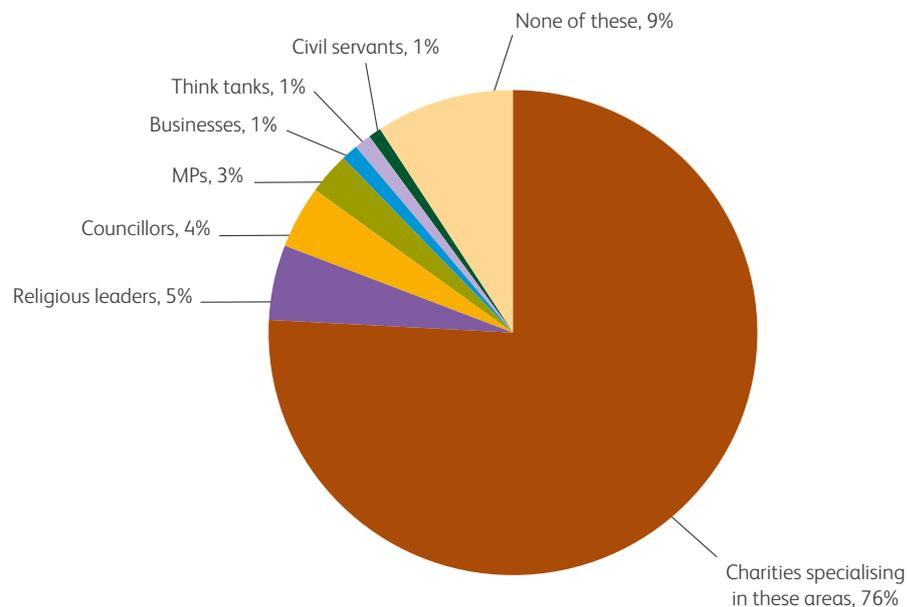
Three-quarters (76%) most trust charities to speak up for the disadvantaged. The second most trusted group is religious leaders, but with only 5% trusting them most. Fewer than one in twenty most trust councillors (4%), MPs (3%), businesses (1%), think tanks (1%) or civil servants (1%) to speak up for the disadvantaged. Charities are therefore overwhelmingly the most trusted of the groups.

Those who have used charitable organisations in the last year are more likely to say they most trust charities than those who have not used a charity in the last 12 months (78% vs. 64%). However, those that have not used a charity are not more likely to say they would trust another organisation or people, they are just more likely to say that they would trust none of the organisations or people listed (19%).

For people who live in the most deprived areas of the UK, around three quarters (74%) would most trust charities, a very similar level to the overall figure. However, they are also much more likely than those in the least deprived areas to say that they would trust none of the organisations or people listed to speak up for disadvantaged people (13% vs. 7%). This suggests a level of disenchantment for other organisations asked about within this group, and is reflective of civic engagement levels.

The overall picture presented is clear: charities are both viewed as best placed and most trusted to speak up for disadvantaged people.

Figure 10: Which of the following do you trust most to best speak up for disadvantaged people?



Base: All respondents (n=2054)

Recommendations

Whilst the purpose of this report is to help us learn more about the different ways in which people use charitable services, a number of key findings emerge:

- Levels of deprivation have a clear impact on the types of charity service that households access, with those from the most deprived backgrounds significantly more likely to turn to charities that provide support or advice. Government and funders should examine links between charitable provision and deprivation, to ensure that charity support is accessible to those with the greatest need.
- Charities are best placed to speak up for disadvantaged people, often because they are interacting with them on a daily basis and therefore have a heightened understanding of their issues. The Government should work collaboratively with charities to ensure that they are able to continue advocating for their beneficiaries and use their expertise to help in the development of public policy.
- Awareness of the services that charities provide remains relatively low. Charities offering services to people should seek to promote and raise awareness of their status, and help to use the affinity that people feel towards the charities that they interact with on a regular basis as a way to help increase trust and support for charities more broadly.
- People are more positive about the importance of charities across society generally, than in their own local area. As the Government pushes forward plans for greater devolution and localism, it is important that charities are provided with opportunities to get involved with the provision of local services to use their own expertise and experience to help local people. Charities, government and funders should explore the opportunities and challenges that the 'Devolution Revolution' includes for charities.