



# CAF UK GIVING 2017

*An overview of charitable giving in the UK*

April 2017

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## *Foreword*

Last year was a tumultuous one. The political shocks of Brexit and Donald Trump, the historic scale of the refugee crisis and the steady flow of upsetting and unsettling stories which dominated the headlines made 2016 an eventful 12 months. It was a year of change and of challenging established norms.

While huge change was taking place around us, some things remained consistent. One of those was the reliable and enduring generosity of people in the UK in their support of good causes.

CAF has been producing UK Giving for more than a decade and, throughout that time, people's dedication to the causes they care about has remained reassuringly consistent.

The EU referendum has already brought about a lot of change. The consequences of this are likely to become increasingly apparent over the months and years ahead, but so far it does not appear to have had any impact on charitable giving from the public.

While there may not have been any 'Brexit-effect' on donations, the implications for charities in the UK are considerable. People feel the country and their communities are now more divided and, perhaps as a result, there has been a resurgent appetite to get involved in social and political issues. Our research reveals a significant increase in people signing petitions and going on protest marches in 2016.

We know that people increasingly feel they want to make a difference and many see charities as a way to achieve that. Charities already play an integral role in the lives of so many. At this critical time in our nation's history, their importance is only likely to increase.

This year's UK Giving research is the most thorough and comprehensive yet. The sample size has been doubled to further enhance the UK's leading study of charitable giving. This means we can now look at how patterns of giving change month-by-month and provide an even more detailed picture of how people support charities. Next year we will increase the sample size once more. With 2017 already shaping up to be a defining year, we hope that the new and improved UK Giving will offer an increasingly valuable insight into the public generosity which underpins charities' vital work.



Dr John Low  
Chief Executive  
Charities Aid Foundation

## *Introduction*

CAF has been producing the UK Giving report since 2004, and has been tracking giving in the UK for several decades. In that time, there have been a number of changes to how the study is conducted in terms of approach and questions asked. As we mentioned within last year's report, we listened to charities and their thirst for greater knowledge about giving behaviours in the UK and took the decision to move to a monthly tracking study rather than interviewing at four separate points in the year. This report covers the first year in which the research has been conducted monthly through YouGov's online panel.

From May 2016 we switched to a methodology based on conducting 1,000 interviews every month to help charities understand UK giving behaviour in much more detail. This means that within this report we have doubled the number of interviews we report on from 4,000 per year to 8,000 per year and, from next year, we will be in a position to report on a tripled number of 12,000 per year. As we commenced interviewing via the new approach in May of 2016, this means that this report contains data for eight calendar months used for reporting on 2016. We have worked with YouGov on the statistics and factored up results for 2016 so that we can confidently present the findings as a full calendar year. Where results can be compared to previous data we have done so, and where we believe it useful to show initial trend data month by month for 2016, we have also done this. We have kept the question wording consistent with previous years.

With the new sample sizes, UK Giving is the largest study of giving behaviour in the UK made freely available to charities. We are really excited about these developments, and the options for analysis it will give us in the future, in particular around year-on-year and month-by-month comparison trend data and the ability to look at factors such as seasonality of giving and responses to events. Transitioning UK Giving into a tracking survey has enabled us to look at major events such as the initial impact of the EU referendum result on charitable giving, for which we have provided a bespoke section within this report. We are really thrilled about the improvements we have been able to make to this survey and we would love to receive any feedback from those reading this report at [research@cafonline.org](mailto:research@cafonline.org).

If you are familiar with previous UK Giving reports, you may have spotted a slight change in how this year's report has been named. Last year's report was titled UK Giving 2015. We have titled this year's report 'CAF UK Giving 2017' to bring it in line with our other annual research reports which are titled by year of publication. We will continue with this approach for future CAF UK Giving reports.

For those interested in further detail of the differences between the methodology and sample this year compared to previous years, we have provided an appendix on method at the end of this report.

## *About CAF*

Charities Aid Foundation (CAF) is a leading international charity registered in the United Kingdom, with a presence in nine countries, 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.

## *Key findings*

Our analysis provides these key findings for individual giving in the UK in 2016:

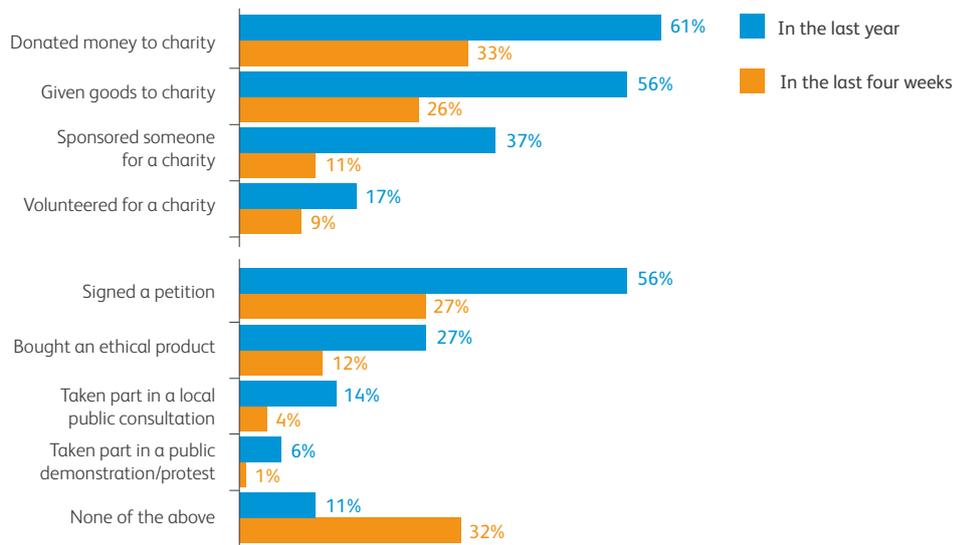
- Donating money remains the main way in which people engage with charity, 61% having done so in the last year
- Donating money peaked in November when 41% said they had done so in the last four weeks, coinciding with lots of high-profile campaigns prior to and during interviewing such as Children in Need, the Poppy Appeal, and Movember
- Medical research is the cause people are most likely to have donated to (26%)
- A total amount of £9.7 billion was donated by generous Brits in 2016 – on a par with 2015
- Younger people are less likely to donate money than older people but are more likely to volunteer, sign a petition and take part in a public demonstration or protest
- Students are the group most likely to have volunteered in the last year (23%)
- 2016 saw a significant increase in numbers of people saying they had taken part in a protest or signed a petition. Numbers who had signed a petition in the past four weeks peaked at 35% in July, following the EU referendum
- Our new questions show that 50% of Brits thought charities were trustworthy in 2016 - with women and young people most likely to trust them
- Analysis in the short term shows that the result of the EU referendum has had no impact on charitable donations so far, but appears to have led to an increase in some forms of civic engagement
- People who voted in the EU referendum are more likely to have participated in a charitable activity than those who did not vote

# Detailed findings

## 1.0 Overall picture of how people get involved

All those interviewed were shown a list of behaviours and asked whether they had done any of these a) in the last four weeks; b) in the last 12 months. We have shown the behaviours split across two charts to differentiate between the charitable and social actions.

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



Base: All adults 16+ (n=8,137)

At an overall level, we see a higher number (89%) of people reporting to have participated in at least one charitable or social action over the previous year, compared to 79% during 2015. When people are asked about their behaviour in the previous four weeks, 68% say they have participated in the last four weeks, compared to 57% during 2015.

Overall, in 2016 more people are claiming to be involved in charitable and social action activities. While part of this may be down to changes to our methodology, other research CAF conducted in 2016 also finds increased engagement. Our research conducted in July 2016, following the Brexit vote<sup>1</sup> showed that almost one in five (18%) claimed to be more likely to volunteer to help their local community, whilst 30% claimed that they had become more active in a political or social cause in previous months.

1 A stronger Britain – how can charities build post Brexit Britain <https://www.cafonline.org/about-us/publications/2016-publications/a-stronger-britain-how-can-charities-build-post-brex-it-britain>

## 1.1 Giving money

In 2016, a similar number to 2015 claimed to have donated money to charity in the last 12 months (61%), whilst a third (33%) had done so in the last four weeks. When combining donating money with sponsoring someone, 39% had done so in the last four weeks, slightly down on the 42% reported in the 2015 report. This slight decrease, however, is a result of a fall in the proportion of people donating money to charity, rather than amongst those sponsoring someone.

As we are now able to look at the results month-by-month across the year, we see that from May 2016, donating money to charity was at its highest in November (41%), the average for the year being 33%.

The November figure coincides with a number of major national charity events in the lead up to interviewing: Children in Need, Movember and the Poppy Appeal, which is reflected in the fact that, of those who donated, more gave to children or young people (33%) and to charities that fall into the 'other' category (26%) in this month. Indeed, the impact of these campaigns is borne out by the fact that in November, 38% of the 'other' category mentioned giving to a military charity, the poppy appeal, or mentioned the Royal British Legion by name.

Compared to other months in 2016, December also saw a higher-than-average number donating to charity (38%), which is likely to be related to various Christmas appeals, #givingtuesday and, the DEC Yemen appeal. When causes are looked at, December was higher than other months in 2016 in giving to 'homeless people, housing and refuge shelters in the UK' (22%) and 'overseas aid and disaster relief' (22%).

Over time we will look to see whether these trends are specific to 2016 or happen year-on-year. It is interesting to note that in our 2015 UK Giving report<sup>2</sup> May was the month with the highest level of donations, which can perhaps be attributed to the success of the DEC Nepal campaign. This year, May was in fact one of the months with the lowest level of donations thus suggesting that giving is indeed driven by responses to high-profile events and campaigns.

Both November and December had the highest proportions of giving using cash (51% each) compared to the rest of year, suggesting that this is a period where people are more likely to give to charities on an ad-hoc, spontaneous basis.

Of those who donated money to charity, over half (52%) said they used Gift Aid on their donation, a higher level than 2015 (47%), with those aged 25-44 (60%) being the most likely age group to have done so. This age group consistently comes out as the most likely to utilise Gift Aid, likely due to their levels of employment and taxable income, which makes them eligible for Gift Aid.



### NOVEMBER

was the highest month for giving money in 2016 (41%), with people responding to national campaigns.

<sup>2</sup> [https://www.cafonline.org/docs/default-source/personal-giving/caf\\_ukgiving2015\\_1891a\\_web\\_230516.pdf?sfvrsn=2](https://www.cafonline.org/docs/default-source/personal-giving/caf_ukgiving2015_1891a_web_230516.pdf?sfvrsn=2)

## 1.2 Volunteering

In 2016, one in six (17%) said they had volunteered for a charity over the previous year, with one in ten (9%) saying they had done so in the last four weeks. Both of these levels are higher than in 2015 (13% and 6% respectively) and again, may be down to the increased levels of civic engagement we saw in 2016.<sup>3</sup>

There are some interesting demographic differences of note and these tie in with other research on volunteering such as the recently published Office for National Statistics report<sup>4</sup>. Full-time students are the most likely group to have volunteered in the last year, with just under a quarter (23%) having done so. This compares to 16% of those working and 16% of retired people. This is likely due to both having more free time as students, as well as schools and universities encouraging participation in such activities. In 2016, CAF spoke to a number of retirement age people about retirement and produced a report<sup>5</sup> which included recommendations on getting older people to volunteer. One of the key recommendations was to encourage people to engage with charities as they transition out of employment and into retirement and called for the establishment of a Post-Careers Advice Service to provide people with information about how they can go on giving later in life. The fact that only 16% of retired people claim to volunteer, demonstrates that there is scope for this service.

Reflecting findings seen elsewhere which show that women are more likely to participate in a range of charitable behaviours than men, overall, women remain more likely than men to volunteer (18% vs 15%).

## 1.3 Giving goods

Behind donating money, giving goods to charity is the second most common form of engaging with charities. 56% claimed to have given goods in the last year, and 26% in the last four weeks, with both of these levels up on 2015 (46% and 20% respectively). As seen previously, older people are much more likely to give in this way (40% for 65+, 10% for 16-24s), as are women (34% vs. 19% for men). Geographically, those from London are less likely to donate goods than all other areas (18% vs. 26% average).

## 1.4 Protesting and petitioning

One of the results where we have seen a large increase since 2015 is in terms of the numbers participating in public demonstrations and, in particular, those having signed a petition. In 2016, over half (56%) reported signing a petition in the last year, and 27% over the previous four weeks. The number of people claiming to have signed a petition in the previous four weeks was significantly higher in July (35%) than in any other month interviewing took place, which could be explained by the EU referendum vote towards the end of June and the spate of protest petitions following. 2016 was, by any interpretation, a tumultuous year with petitions and protests around a number of areas such as Brexit, and the election of Donald Trump as President of the USA, which may go some way to explaining the noteworthy increase in this type of activism.



In 2016

**1 IN 6**

claimed to have volunteered for charity in the previous year



**STUDENTS**

are the group most likely to volunteer

<sup>3</sup> <https://www.cafonline.org/about-us/publications/2016-publications/a-stronger-britain-how-can-charities-build-post-brex-it-britain>

<sup>4</sup> Changes in the value and division of unpaid volunteering in the UK 2005-2015 <https://www.ons.gov.uk/economy/nationalaccounts/satelliteaccounts/articles/changesinthevalueanddivisionofunpaidcareworkintheuk/2015>

<sup>5</sup> A post-careers advice service – Giving people the tools to go on giving <https://www.cafonline.org/docs/default-source/about-us-publications/a-post-careers-advice-service-giving-people-the-tools-to-go-on-giving.pdf>

In terms of age groups, we see that younger people are much more likely to have signed a petition in the last year (61% of 16-24 year olds vs. 49% of over 65s). In particular, students are the most likely to have signed a petition in the last year (65%), and indeed, this is the most common action done by this group in the last year.

Six per cent of Brits reported taking part in a public demonstration or protest in the past year. Londoners are the most likely group to have taken part in a public demonstration or protest in the last year (11%) which is likely to be a result of many of the higher profile demonstrations taking place in England's capital. As with signing petitions, younger people are also much more likely to have taken part in a public demonstration or protest (9% of 16-24s vs. 4% of 65+s).

## LONDONERS

are most likely to have taken part in a public demonstration or protest in the previous year

## 2.0 Who engages most?

The patterns we see in terms of engagement are very similar to those we have seen in recent years. The main difference this year is that with the larger sample size, we are able to break the results down into sub groups with greater confidence. Overall, older people and women are the most likely to engage in charitable or social activities, with only 7% of over 65s saying they had done none of the eight listed activities (as shown in figure 1) in the past year, compared to 11% on average. Nearly twice as many men (14%) as women (8%) say the same.

However, as some of the results in the previous paragraphs show, there are differences in terms of engagement with specific actions such as volunteering, petition signing, and protests, which younger people are more likely to do. The type of charitable engagement does vary by age.

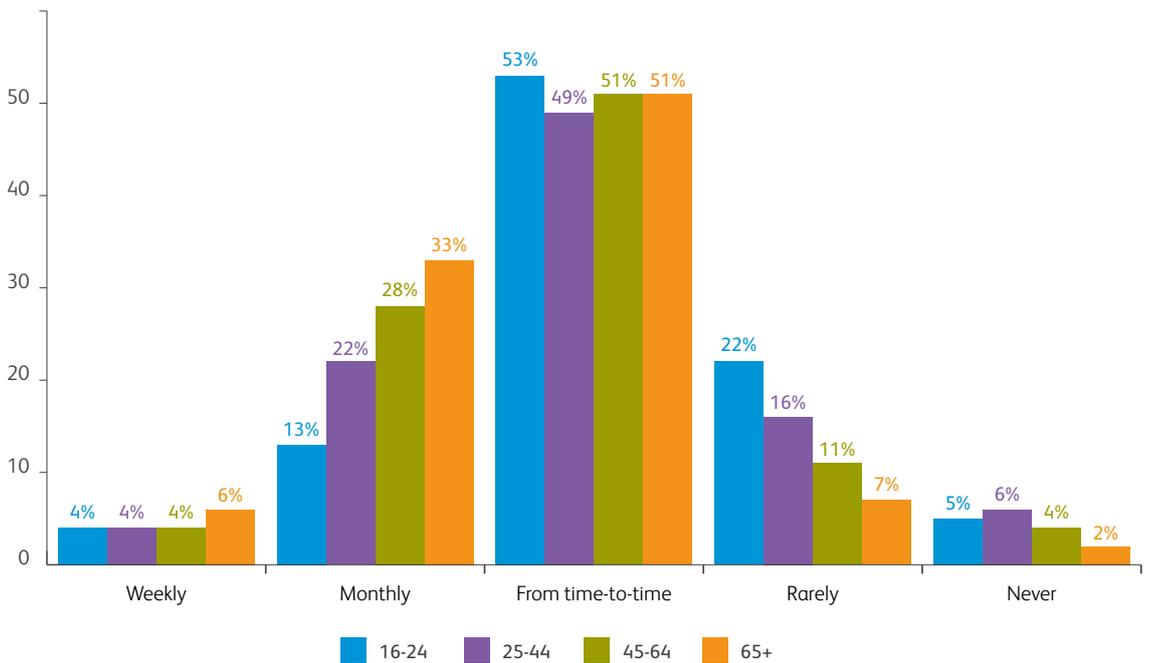
Geographically, those in Wales (92%), Ulster (91%), the South West (90%) and the East Midlands (90%) are the most likely to have done any of the charitable or social actions.

### 3.0 Frequency of giving

The majority of people usually give to charity from time-to-time (51%), with a further quarter (25%) giving monthly. The number giving monthly has decreased since 2015, from 31%, whilst the number giving on a more ad hoc basis has increased from 41%, suggesting lower frequency of giving during 2016. This ties in with recent qualitative research conducted by CAF amongst medium sized charities which indicated that the more structured giving was perhaps lower than previously seen. The number giving weekly has remained consistent (5% in 2016), although 13% say that they rarely give and a further 4% say they never give to charity.

Men are twice as likely to say that they rarely or never give to charity (24%) compared to women (12%). Those in the highest social grades (AB) are more likely to give monthly than those in the lowest social grades (DE)<sup>6</sup>, likely due to having a more regular disposable income available to them. Giving weekly, and from time to time, is fairly consistent across all social grades.

Figure 2: Which of the following best describes how often you give to charity?



Base: All adults 16+ (n=8,137)

Although weekly giving remains consistent across age groups from 16-64, it does then increase amongst the oldest age group. Monthly giving, however, does step change through the age groups, peaking amongst 65+ year olds. The opposite pattern appears in terms of age with those giving 'rarely'.

<sup>6</sup> 32% of ABs vs. 22% of DEs give monthly

## 4.0 Total amount given

As mentioned in the introduction, on certain measures we have factored up results to account for a 12 month calendar year. We have applied this to calculate the total amount donated to charity in 2016. Our research suggests a total amount for 2016 of £9.7 billion<sup>7</sup>. In the 2015 UK Giving report, we reported an overall figure of £9.6 billion and the latest figure would therefore suggest that there has been little or no movement as it is well within the margin of error.

**£9.7 BILLION**

donated to charity  
in 2016



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

## 5.0 Typical amount given

### 5.1 Typical amount donated

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

The typical (median) monthly amount given by a donor in 2016, either donating or sponsoring in the last four weeks, was £18, while the mean donation was £40. Both of these levels were higher than those recorded in 2015 (£14 and £37 respectively).

The typical amount given rises at various points throughout the interviewing year, with May, July, October and December all having a median amount of £20, and June and November falling joint last with £15. There was some variance with the mean amount given each month, with the highest level in December (£49) and lowest in November (£33). This shows that although more people give in November in response to specific appeals, the actual amount given is not as high as giving to other charitable causes throughout the year.

Along with being more likely to give to charity, the median donation from women is also higher than that of men (£20 vs. £15). However, the mean donation from men (£45) is higher than women (£35), indicating that men are more likely to give a high-value donation.

Both the mean and median amounts given increase with age. 16-24 year olds give a mean amount of £30, while those aged 65+ give £51; the median amount given by 16-24s is £10, and £22 by 65+s. This is most likely because of the amount of disposable income these groups have to give from.

Geographically, those in London, the East Midlands, the East of England, the South East, and Scotland (all £20) give the highest median amount to charity, while those in the West Midlands give the lowest (£14). Londoners also have the highest mean donation, at £58, while those in Ulster have the lowest mean donation (£27).

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<sup>7</sup> This calculation is based on direct donations and sponsorship.

## 5.2 Sponsorship

Looking just at sponsorship shows a lower monetary level of giving than through direct donations. The median sponsorship contribution is £10, while the mean is £22. This may be because when people are sponsoring a person they are giving to that person's choice of charitable cause, whereas with a direct donation they are giving to a cause that they personally have chosen.

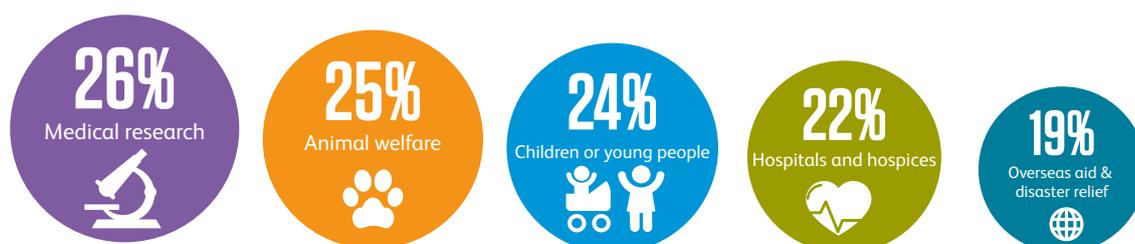
In terms of the causes people are most likely to sponsor others for, medical causes are the most popular, with medical research (37%) being the most common cause, followed by physical and mental health care (21%) and hospitals and hospices (21%) – these are all similar levels to 2015.



## 6.0 What people give to

When people who have donated directly to charity are asked which cause area they have given to in the last four weeks, the top five remains the same as 2015 although the order has changed slightly, as Figure 3 shows.

Figure 3: Which of the following causes have you given to in the last four weeks?



Base: All adults 16+ who have donated to a charity in the last four weeks (n=2,903)

Medical research (26%), animal welfare (25%) and children or young people (24%) were the most popular causes to donate money to. There are a number of seasonal differences in terms of causes given to in each month, with, for example, donations to children or young people seeing a spike in November, the same time as the Children in Need television campaign. A third (33%) of those who donated in the previous four weeks said they had given to this cause.

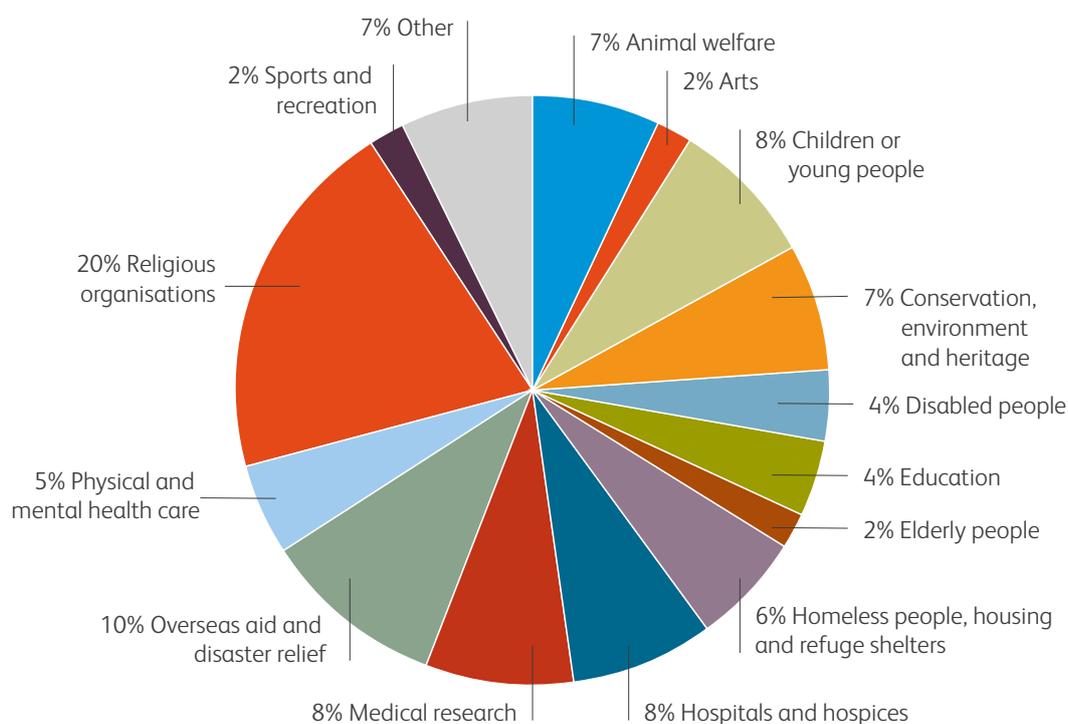
Although not in the top five overall, donating to homeless people, housing and refuge shelters in the UK remained around 15% each month, though this saw a high of 22% in December, perhaps down to the Christmas giving appeals.

As has been seen in previous years, the arts (3%) and sports and recreation (3%) charities are the least popular causes given to.

## 6.1 Proportions given to cause areas

Amongst donors who gave directly to charity, religious causes see by far the largest donations, with a mean average of £60 in the last four weeks. This is followed by schools, colleges, universities and other education at £46, and the arts at £24. As we have seen in previous years, religious organisations also see the highest median donations (£25), while overseas aid, homeless people/housing shelters, conservation, education, arts, and animal welfare all receive median donations of £10. There are clearly some large differences on this across the cause areas.

Figure 4: Proportion of total donation amount received by each cause in 2016



Base: All adults 16+ who have donated directly to a charity in the last four weeks (n=2,903)

Despite being the most popular cause to give to, medical research only received 8% of the proportion of total donations in 2016. The size of donations to religious organisations saw them take a fifth (20%) of the total donations, despite only 14% of those who had donated in the past four weeks giving to this cause. This is due to the higher level of mean donations for this cause. However, it is children or young people that is the only cause that is in the top three of both number of people giving to them, and the proportion of the overall donations they receive.

## 6.2 Who gives to what?

Women are more likely than men to donate to animal welfare (30% vs. 19%) and children or young people charities (26% vs. 22%).

Young people are the most likely group to give to physical and mental health care charities (24% vs. 16% overall), homeless people, housing and refuge shelters (21% vs. 14% of 65+), and educational institutions (5% vs. 2% of 65+). The oldest age group are the most likely to give to hospitals and hospices (32% vs. 22% overall), religious organisations (22% vs. 14% overall), and disabled people (16% vs. 8% of 16-24s).

Those in social grades AB are significantly more likely than DEs to donate to medical research (31% vs. 24%) and overseas aid and disaster relief (23% vs. 15%), while those in social grade DE are more likely to give to animal welfare (31% vs. 19%).

Londoners are the most likely to give to homeless charities (26% vs. 15% overall), overseas aid and disaster relief (24% vs. 19% overall), and religious organisations (20% vs. 14% overall). People in Ulster are more likely to have given to physical and mental health care (28% vs. 16% overall). Those in the North East are the most likely to give to medical research (39% vs. 26%).

Those who voted for the Green Party in the 2015 general election are significantly more likely to have given to conservation, the environment and heritage charities (29% vs. 13% overall). Those who voted for UKIP in 2015 are significantly less likely than any other party to have given to overseas aid and disaster relief (7% vs. 19% overall). There is some logical link here as UKIP was the only major party not to back the 0.7% spending target.

## 7.0 How people give

Figure 5: In the last 12 months, have you given to charity by any of these methods?

Method used to give in the last 12 months	Total (5,171)	Gender		Age			
		Male (2,413)	Female (2,758)	16-24 (521)	25-44 (1,642)	45-64 (1,741)	65+ (1,267)
Cash	58%	58%	57%	63%	57%	59%	54%
Buying goods	40%	31%	48%	35%	37%	44%	41%
Raffle / lottery	40%	36%	43%	22%	36%	44%	49%
Direct debit	31%	29%	33%	13%	30%	33%	40%
Online	26%	25%	26%	26%	32%	24%	20%
Fundraising event	22%	19%	25%	26%	25%	21%	17%
Membership	18%	18%	17%	12%	16%	18%	22%
Debit card	10%	11%	10%	12%	12%	8%	10%
Text	10%	8%	11%	10%	13%	9%	7%
Cheque	8%	7%	8%	1%	3%	6%	19%
Credit card	6%	6%	5%	3%	4%	5%	8%
Payroll	3%	3%	2%	1%	4%	3%	1%
Other	4%	4%	5%	1%	3%	6%	6%

Using cash is consistently the most common way to give to charity, with over half of all groups doing so, although it is highest amongst 16-24 year olds at 63%. Women are significantly more likely than men to donate through buying goods, by entering a raffle or a lottery and by attending a fundraising event.

Younger people are more likely to give using cash and at a fundraising event, while the oldest age group are the most likely to give using a cheque, via a direct debit, through membership fees and subscriptions, and by buying a raffle or lottery ticket. Those aged 25-44 are significantly the most likely group to donate to charity online and via text.



It is important to remember the various ways in which people choose to conduct their charitable giving. Although a relatively low percentage, at 3% of giving, payroll giving is the method chosen for some. 2017 marks the 30 year anniversary of payroll giving and over this 30 year period, this method of giving has generated £1.3 billion for good causes via CAF's Give As You Earn scheme alone.

## 7.1 Being asked to give

We asked people how they had been asked to give to charity. Regardless of their giving behaviour, people claimed that they were most commonly asked to donate to charity on the street (38%), followed by via direct mail (28%) and television (27%). Several methods of approaching people to give saw a spike in November, including on the street (43%), television (35%), direct mail (33%), and the radio (15% vs. 9% on average across the year) which would tie in with the number of campaigns run in this month. In the run-up to Christmas, December was the key time to be asked to give at work (13% in this month vs. 10% average).

Young people are most likely to claim to have been asked to give on the street (44% vs. 34% of 65+), online (30% vs. 19% of 65+), or at a charity event (13% vs. 8% of 65+), while the oldest age group are most likely to have been asked to donate via direct mail (44% vs. 14% of 16-24s) or the telephone (9% vs. 5% of 16-24s).

Geographically, those from Ulster (48%) and Londoners (45%) are the most likely to have been approached to donate to charity on the street, but are less likely to have been asked via a door-to-door collection (14% for London vs. 11% for Ulster). Londoners are also the most likely group to have been asked to donate online in the last four weeks (28% vs. 23% overall).



## 8.0 Trust in charities

Trust in charity has become a key question over recent years following various crises and media coverage of the sector. We therefore took the decision to track trust in charities over time and the Figure 6 below shows how trust has moved over each month from May 2016.

At an overall level, half of the population (50%) believed that most charities were trustworthy across 2016.

Figure 6. To what extent, if at all, do you agree or disagree that most charities are trustworthy?



\* Due to rounding, the net proportion who strongly/tend to agree may not total the sum of the figures in the chart.

As Figure 6 shows, trust overall is relatively consistent across the year. However, it is key to note the peak in trust in November (53%), the same time of year when we see a peak in giving due to the number of campaigns in that month. It does then drop off in December.

Research shows that those who engage with charities are the most likely to trust them, and the increased level of trust seen in November may be reflective of that symbiotic relationship. By comparison, the lower level of trust seen in December may be as a result of a prominent ruling about charities by the Information Commissioner, and a prolonged negative media narrative towards international development spending.

Demographically, women (51% vs. 48% of men), young people aged 16-24 (58% vs. 47% of 65+) and those of social grades AB (58% vs. 43% of DEs) are significantly more likely to have trust in charities across the year.

It is a challenge for charities to increase this level of trust amongst the public and this measure will be important to track over time. Going forward we aim to release bulletins on this periodically throughout the year.

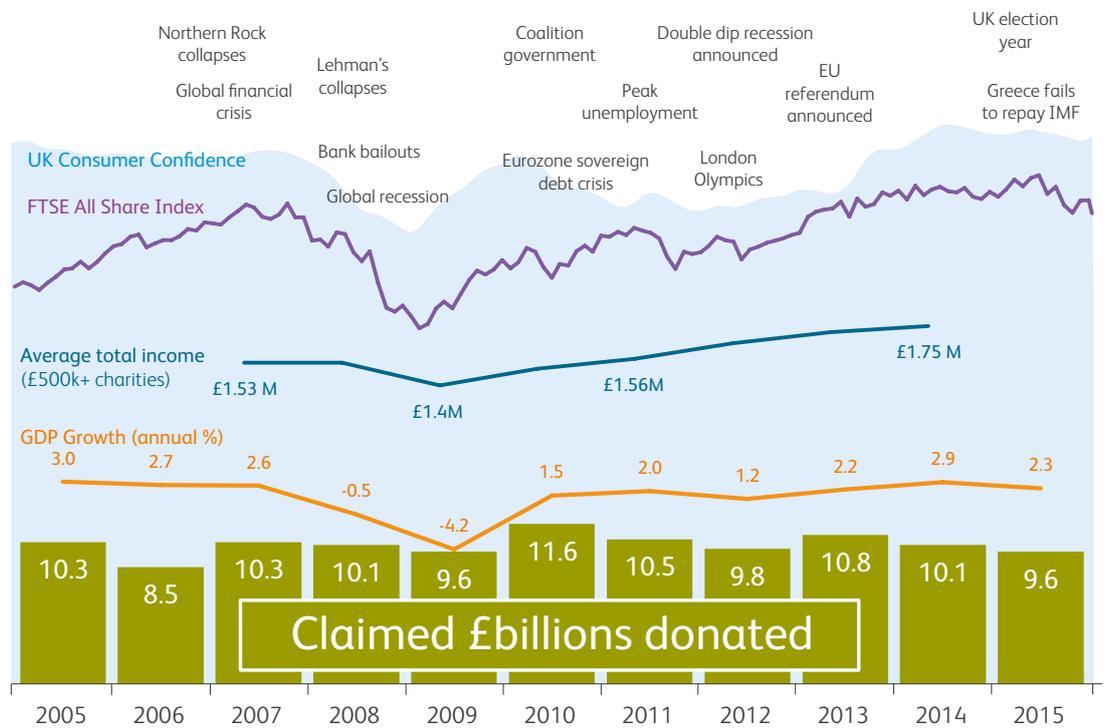
## 9.0 The impact of Brexit on charitable giving

Given all the conversations and concern around Brexit and its potential impact, we took the decision to add on a supplementary section to this year's report around this subject, which follows the work that CAF has carried out to look at the social impact of the referendum campaign and aftermath, and the potential impact of Brexit on charity policy. One of the benefits of the UK Giving revised approach is that we can look at changes over time.

Our starting point for trying to shed some light on the impact that Brexit could have on charitable giving is to look at the past.

The chart below shows 10 years of claimed donating behaviour from UK Giving, up to the year before the EU referendum. This is plotted against GDP growth, average total voluntary income, the FTSE All Share Index, UK consumer confidence and key economic events<sup>8</sup>.

Figure 7: The effects of economic events on charitable giving

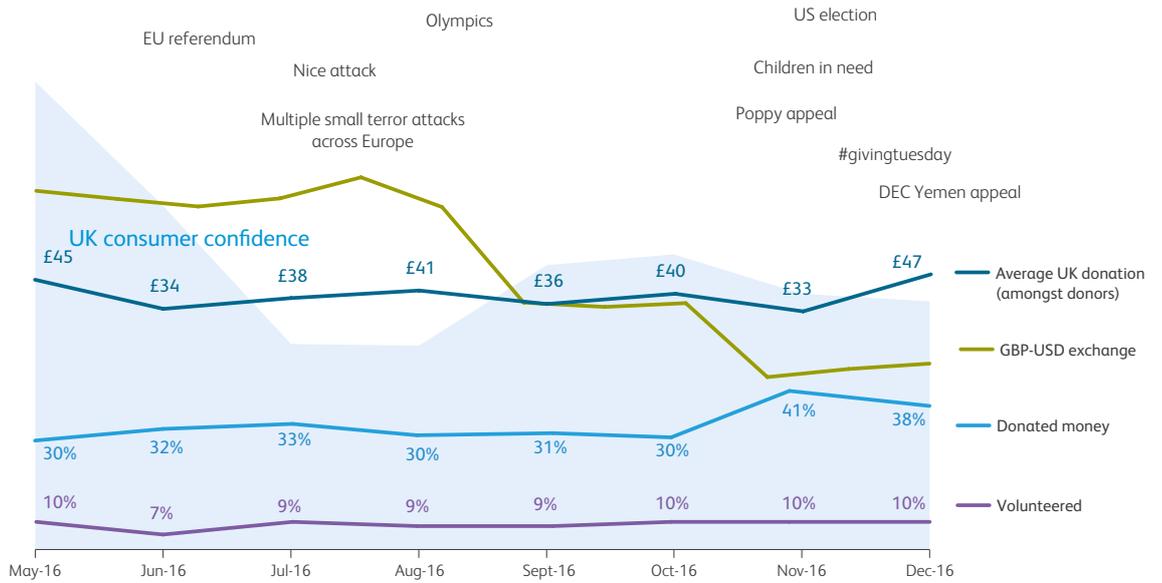


On this analysis, we can see that the claimed £billions donated each year is largely consistent (and within the margins of error) at around £10 billion per annum, regardless of the economic events. Where we do see a large uplift in 2010, this was likely down to the two disasters that occurred that year and the generous response of the British people in such events. It does therefore appear from this that charitable giving continues despite the economic conditions, at least at an overall level.

Having commenced the new tracking study in May 2016, we are able to view how charitable giving has changed since the EU referendum. Figure 8 overleaf shows the percentage who claimed to have donated, the average donation and volunteering levels in the previous four weeks from the UK Giving study. Again this is shown against key events that happened throughout the year, the consumer confidence index and the exchange rate vs the US Dollar.

<sup>8</sup> Consumer Confidence taken from the OECD (<https://data.oecd.org/leadind/consumer-confidence-index-cci.htm>) Average total voluntary income of charities (with an income of £500,000 or more) from the Charity Commission database. GDP growth taken from The World Bank (<http://data.worldbank.org/indicator/NY.GDPMKTP.KD.ZG?locations=GB>). £billions donated taken from CAF's UK Giving annual survey. FTSE All Share Index from Yahoo Finance (<https://uk.finance.yahoo.com/q/hp?s=%5EFTAS>)

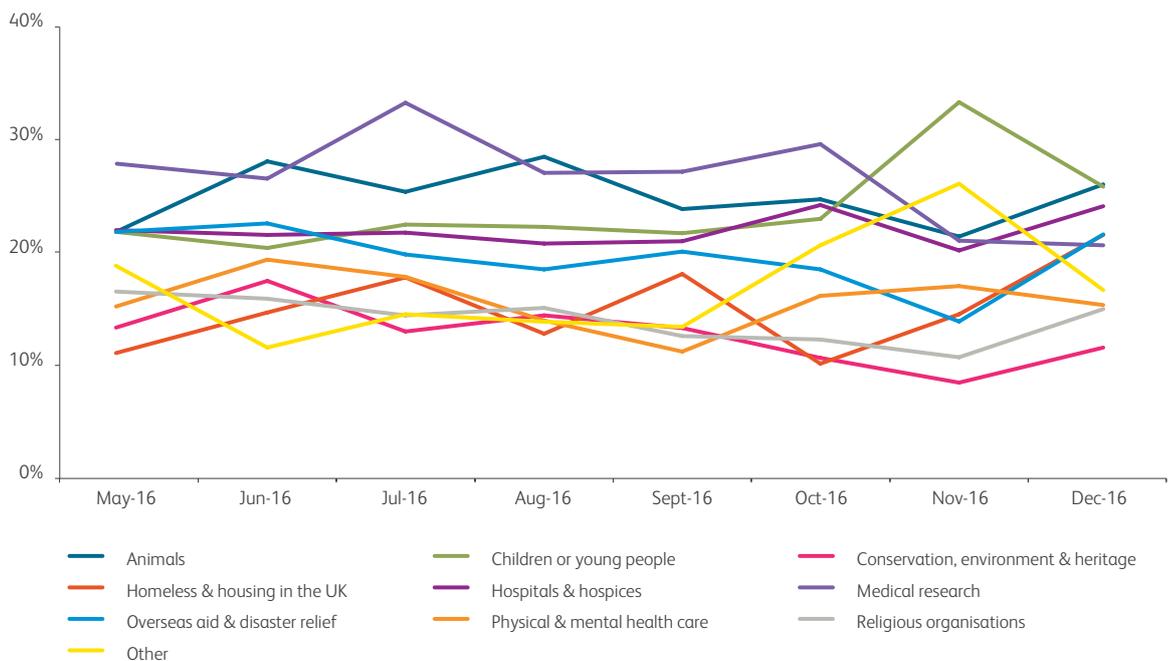
Figure 8. The effects of the EU Referendum on charitable giving



As stated earlier in this report, the overall average for donating money for the last four weeks was 33% in 2016. Figure 8 above shows that in the month prior to the EU Referendum (May), this level was 30% and the average donation was around £45. Following the EU Referendum, there appears to have been no (negative) impact on giving behaviour, with movements down to seasonal effects and specific campaigns. Indeed, we again see the overwhelming generosity of the British population responding to various campaigns in November and December.

We have also looked at causes donated to since the Brexit referendum, and this is shown in Figure 9 below.

Figure 9. Which of the following causes have you given to in the last four weeks?



Base: All adults 16+ who have donated to a charity in the last four weeks (n=2,903)

Since the Brexit vote, it does not appear that any specific causes have suffered, with campaigns and seasonality causing the peaks and troughs in the data.

So far therefore, it does not appear that the EU Referendum and the subsequent development of plans for Brexit has had an impact on charitable giving in the UK. Past economic events also do not appear to have had an impact. However, it should be borne in mind that Brexit may be different to previous economic events as it is not just about economic impact but a number of other aspects, including big questions around identity.

We also looked at a number of the questions we covered within the UK Giving survey, and any differences in results between those who voted to Remain and those who voted to Leave the EU in June 2016.

Those who voted to Remain were more likely to participate in every charitable or social action than those who voted to Leave, with the exception of giving goods to charity (58% for both groups). Those who voted to remain in the EU in the 2016 referendum are more likely to have done any of the activities (93%) than those who voted to leave (87%). Both groups, however, were more likely than those who did not vote (82%) to have done any of the other activities, indicating that political engagement may be linked to social and charitable actions.

This is an important subject to continue to monitor and we will be doing this over the coming months.

## *Method*

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

During 2016 the UK Giving survey transitioned from a quarterly face to face survey with 1,000 responses each time to a monthly survey with 1,000 responses conducted online. This began in May and so this report contains data from eight months to December 2016. This new monthly approach will level out seasonal effects as well as those established spikes in charitable giving that occur around particular high-profile events or as a result of humanitarian disasters or specific appeals. The changes also results in the ability to access an annual pool of 12,000 responses with all the advantages of sub-group analysis. This represents a three-fold increase compared to previous years.

YouGov has previous experience of managing research projects where the data collection method has changed to online and have experience of various strategies to assess, reduce and mitigate any differences. A number of issues can arise when the interviewer is removed from the process and the respondent reads the questions themselves on a screen. Different interviewers will have different speaking styles and accents in asking questions which can influence how a respondent interprets a question. There can also be an element of social desirability bias with respondents often responding more positively to questions asked by a person than when responding on their own via a computer.

In addition academic research has indicated that the hearing of a scale and remembering it can cause different (and more variable) results than online research where each respondent reads the scale and has the information presented in exactly the same way. Other issues are raised around mode effects, where, for example, it is known that online respondents use scales differently from respondents in other modes. There is conflicting research on this, some showing that online respondents are more likely to choose midpoints in scales and 'don't know' options in general, and other research, in contrast, suggesting that online respondents tend to choose extreme responses on these scales.

To assess the change in method we ran the same UK Giving survey online and face to face in May 2016. Each survey gathered just over 1,000 responses and each was weighted to an identical scheme of gender interlocked with age (7 bands), social grade (4 bands) and UK region (12).

We compared and measured any differences between the results from the two surveys. The combination of the percentages and the number of responses allowed us to test whether the two results were statistically significantly different. We also examined the extent to which the May (2016) face to face survey was similar or different to previous quarterly face to face surveys. To place the results in context it was useful to compare the surveys with other historic information, particularly to examine the extent to which the results have been static or changeable across the seasons of the year. We included results from the previous wave in February 2016 and all four quarters of 2015.

This process provided confidence that key statistics were within the margin of error for comparison over time. For example the May 2016 face to face survey recorded that 58% of people had donated to charity in the last year compared with 57% in the online survey. The mean value of donations in the previous month was £45.89 in the face to face survey, compared to £44.04 in the online survey. The close comparability of these figures in the period of parallel running has carried through in this report to comparisons made between 2016 and 2015.

We have considered the implications of the change in method on a question by question basis, and report with confidence that the results are robust and comparisons over time are only made where justified by the evidence.



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