

# UK GIVING 2012/13

– *an update...*

March 2014

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## *UK Giving 2012/13 – an update...*

**The UK Giving project has become a valuable source of information about levels of individual giving in the UK, how people give, and the causes they support. CAF is committed to continuing UK Giving reports, and making more information, insight and analysis available to charities, and all those who take an interest in the generosity of the UK.**

Throughout 2012 and 2013, CAF has continued to track the level of charitable giving using the long-running UK Giving survey, whilst gradually transitioning to a new survey methodology. This enhanced survey should provide more regular insights on charitable giving trends, attitudes and issues impacting the sector.

Our enhanced UK Giving survey will build on the long-running time series, and will continue to provide details of donations, methods of giving, causes and other information. We aim to be able to publish selected data on a quarterly basis, in order to give charities more timely data on patterns of giving, and add additional questions to grow our knowledge of attitudes of charity supporters across the country. We plan to publish the first full report from our enhanced work next year.

Our last word on giving within the UK<sup>1</sup> was a somewhat concerning picture, suggesting both a decline in the number of people giving and a decrease in the average donation size. In combination, this resulted in an estimated 15-20% fall in charitable giving in the UK during the 2011/12 financial year. This reflected the poor economic environment at the time, with a number of consumer confidence measures falling, a return to recession in the first quarter of 2012 and a continued squeeze on family budgets due to rising prices.

At the time, we hoped that the fall in donations was merely a 'blip' in the enduring relationship between the public and charitable giving, and that giving levels would recover, as they have done in previous recessions.

Having received numerous enquiries from the sector to understand 'what happened next...?', we have conducted analysis to arrive at our best estimate of the 2012/13 charitable giving picture<sup>2</sup>.

Because we are transitioning to a new quarterly survey, changes were made to the interviewing months for our survey work and so a direct like-for-like comparison between 2012/13 and 2011/12 (and before) is not readily available. We have undertaken analysis to provide a seasonally adjusted view in order to give a more comparable picture of giving over this period.

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1 UK Giving 2012 – November 2012

2 Detail on the analysis and subsequent data revisions undertaken is provided in the methodology section

## *Key findings*

Our analysis suggests an improving picture for giving in the UK in 2012/13...

- The proportion of people reporting that they donate to charitable causes in a typical month increased during 2012/13 to 57% - up from the 55% recorded in 2011/12, but not quite reaching the 2010/11 peak of 58%
- This represents an estimated total amount donated to charity by adults in 2012/13 of £10.4 billion, which would represent an uplift on the 2011/12 reported levels: up by £1.1 billion in cash terms, and up by £0.8 billion in real terms, after adjusting the 2011/12 figure for inflation
- Cash donations continued to be the most common method of giving, used by over half of donors in 2012/13, although direct debit accounted for the largest share of total donations
- Women continued to be more likely to give to charity than men (60% cf. 54%)
- As previously, 'medical research', 'hospitals and hospices' and 'children and young people' attracted the highest proportion of donors. Although this year 'medical research' received the largest proportion of total monies donated (16%), ahead of the 2011/12 leading cause 'religion' and 'hospitals and hospices' (both on 13%)

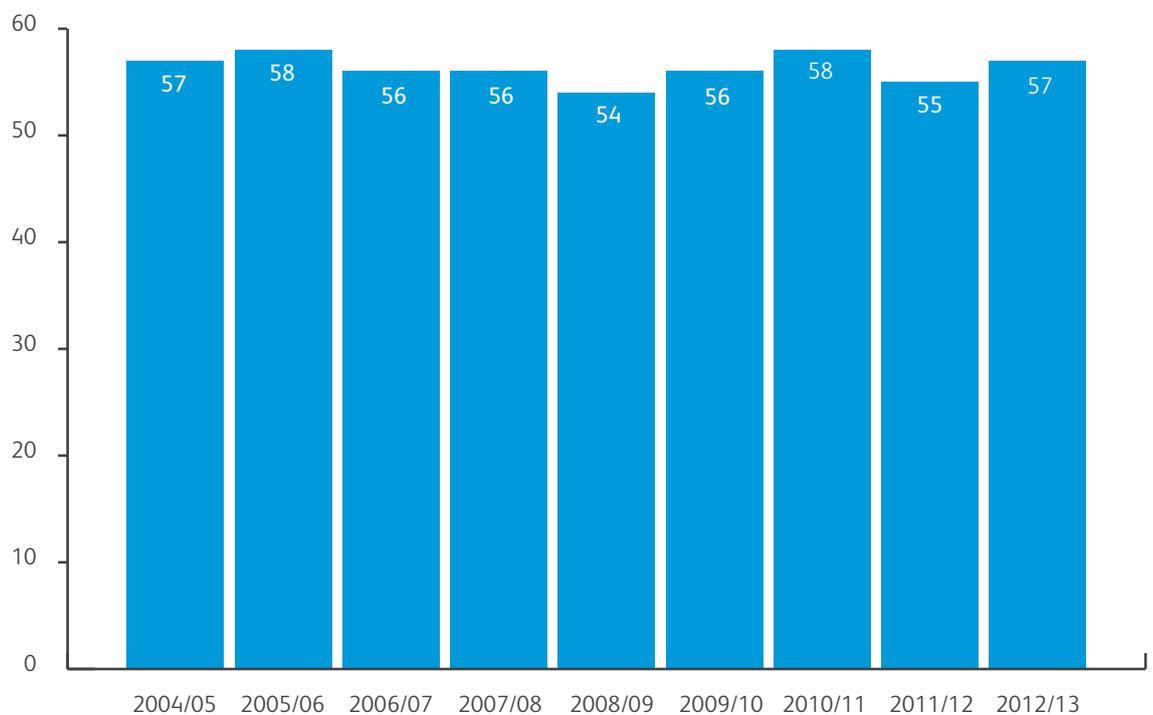
## Detailed findings 2012/13

### 1. What proportion of people give money to charity?

The proportion of people reporting to donate to charitable causes in a typical month increased during 2012/13 to 57%, equating to 29.5 million adults<sup>3</sup>. This represents an increase since 2011/12, when 55% (28.4 million adults) reportedly gave.

Participation levels have not quite reached those recorded in 2010/2011 (58%), although a rise in the UK adult population since this time means that the number of people giving in absolute terms is now at the same level as during this peak.

Figure 1: Proportion of adults in the UK giving to charity in a typical month, 2004/05-2012/13



<sup>3</sup> To calculate the total number of donors in a year, we multiply the proportion of donors by the estimated number of adults in the UK population, using ONS mid-year population estimates (released 08/08/2013).

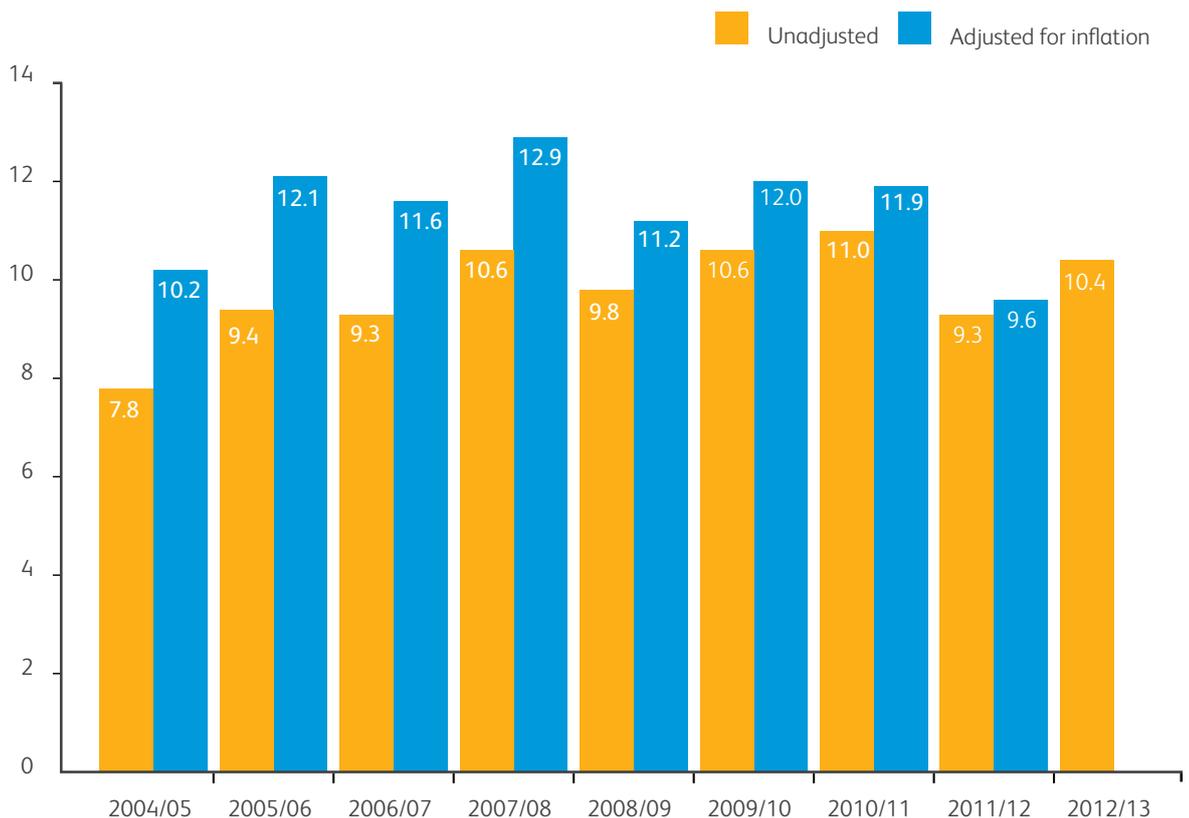
## 2. What is the total amount given by individuals in 2012/13?

Our survey results suggest an estimated total amount donated to charity by adults in 2012/13 of £10.4 billion. That would represent an uplift on the 2011/12 reported levels: up by £1.1 billion in cash terms, and up by £0.8 billion in real terms, after adjusting the 2011/12 figure for inflation.

The total amount given by adults in the UK is calculated by multiplying the number of donors in our survey by the mean amount given per year.

In 2012/13, the mean donation was £29, £2 higher than that reported in 2011/12, but still lower than the mean donation levels recorded between 2007/08 and 2010/11 which range between £30-£32<sup>4</sup>.

Figure 2: Estimated total amounts given by individuals, adjusted for inflation and unadjusted, 2004/05 to 2011/12 (£billions)



### Notes:

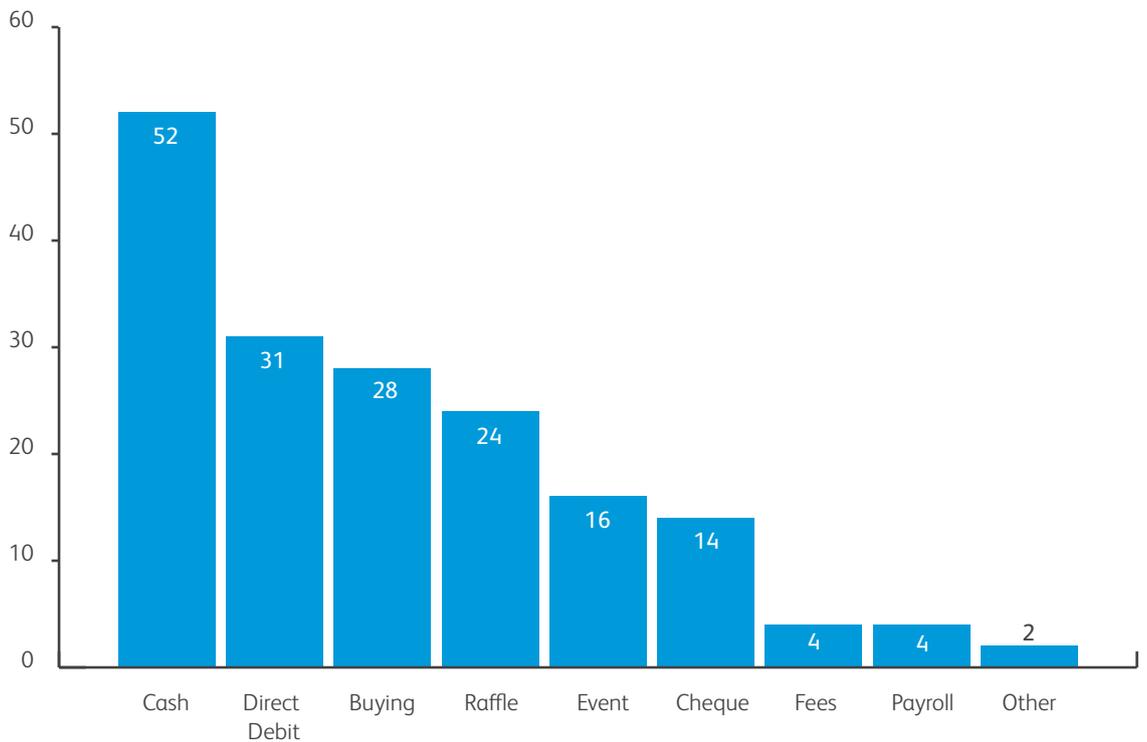
The total amount given by adults in the UK is calculated by multiplying the number of donors in our survey by the mean amount given per year. The number of donors is calculated by multiplying the proportion of donors by the estimated number of adults in the UK population as provided by the ONS. The mean amount given per year is calculated by multiplying the mean amount per month by 12.

<sup>4</sup> Prior to the 2012/13 data revisions being made, the mean individual donation level was still higher than that reported in 2011/12 at £28

### 3. How do people give?

Cash donations continue to be the most common method of giving, used by over half of donors in 2012/13. Indeed, there has been little change across the giving method picture year-on-year: the three most popular giving methods remain the same (cash, direct debit, buying goods), whilst membership fees/subscriptions and payroll giving remain the least prevalent.

Figure 3: Methods of giving: proportion of donors, 2012/13



In terms of value, direct debit continues to account for the largest proportion of total donations made (29%). The total value of cheque/card payments remains stable again this year (18%), whilst the most commonly used donation method, cash, only accounts for 15% of the total value of donations.

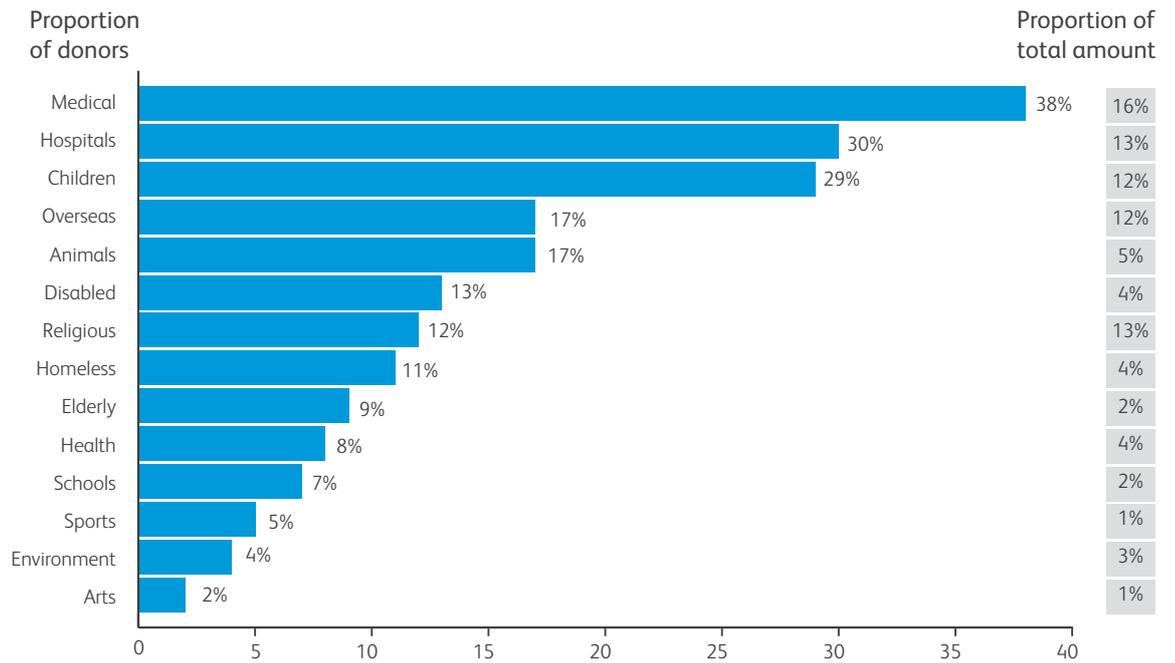
In 2012/13, 9% of those surveyed made donations online and 2% via text, both channels experiencing an increase on levels reported in 2011/12 when they stood at 7% and 1% respectively. Indeed, since tracking of these channels began in 2008/09, online donations have increased by five percentage points.

42% reported using Gift Aid – a return to 2010/11 levels following the dip in 2011/12 when only 39% claimed usage.

#### 4. What causes do people give to?

'Medical research', 'hospitals and hospices' and 'children and young people' continue to attract the highest proportion of donors. Indeed, 'medical research' also received the largest proportion of total monies donated (16%), followed by 'hospitals and hospices' and 'religious causes' (both on 13%).

Figure 4: Proportion of donors giving to different cause and proportion of total amount donated by cause, 2012/13

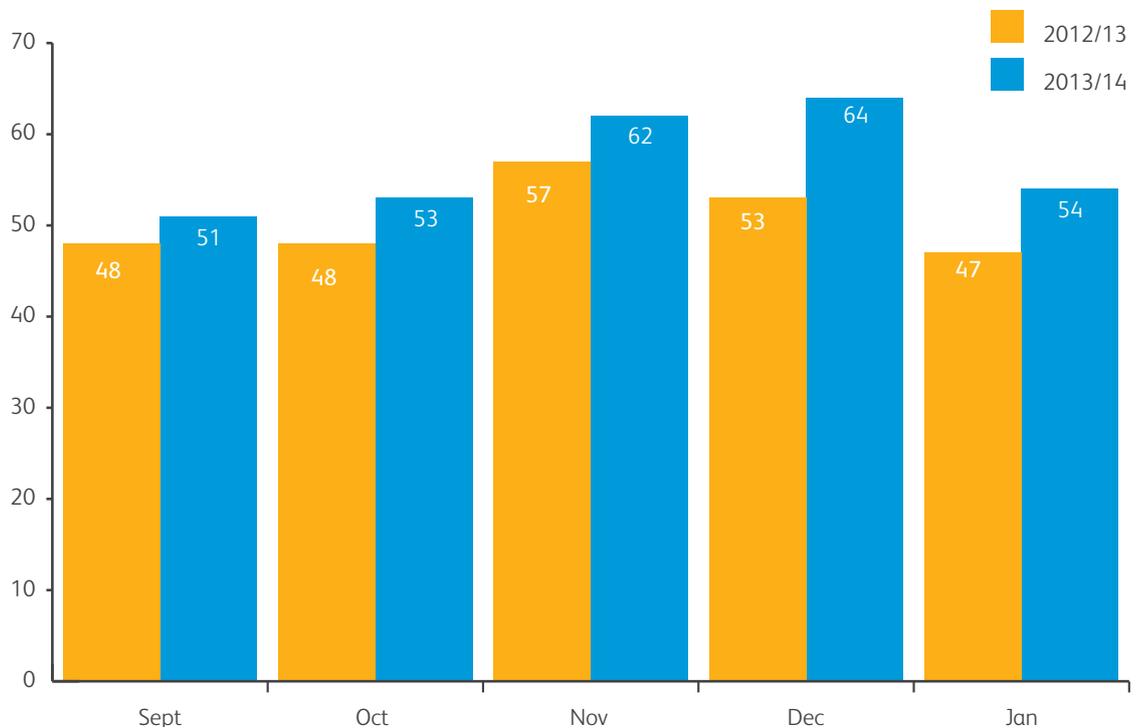


## Conclusion

As highlighted already, this document aims to provide our best estimate of the UK Giving picture for 2012/13, and whilst the absolute numbers may not be completely definitive (although it could be argued that any survey only provides estimates), we are confident in the direction of travel.

CAF has also tracked levels of giving via an online survey.<sup>5</sup> Whilst not directly comparable to UK Giving in terms of audience and methodology, the results from this study show a consistent improvement year-on-year in the proportion of people claiming to have given to charity in the previous month.

Figure 5: Proportion of people donating to charity in the previous month, CAF 'Year of Giving' study



GfK Roper Reports® Worldwide<sup>6</sup> shows that more British consumers cut back on charitable donations in 2011, with 26% saying they had done so, than was the case last year (only 22% claiming to have cut back in 2013). Even more recently, the Halifax Giving Monitor<sup>7</sup> reported that both the total number of consumers giving to charity in the last year has increased (75% cf. 70% in the previous 12 months), and that 76% of donors claim to be giving the same or more in monetary terms than before the economic downturn. All indicators are therefore pointing towards an improving picture for charitable giving.

<sup>5</sup> This survey formed the basis of CAF's Year of Giving study, and was conducted by ComRes, with c.2,000 online surveys completed each month

<sup>6</sup> GfK Roper Reports® Worldwide, January 2014

<sup>7</sup> Halifax Giving Monitor 2014, conducted by ICM Research and based on 2,044 online interviews

A recovery in giving by the UK public is clearly good news for the sector, particularly as securing funding from other channels becomes increasingly challenging. Official statistics such as GDP<sup>8</sup> and employment levels<sup>9</sup> continue to paint a picture of economic recovery throughout 2013 and into 2014, which appears to be influencing consumer confidence positively<sup>10</sup>. Against this background, we would hope that our estimated rise in total giving is borne out – and improved upon further – as tracking continues throughout 2014.

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8 In 2013, the UK economy showed its strongest growth since 2007 - ONS

9 The employment rate for those aged from 16 to 64 for October to December 2013 was 72.1%, up 0.3 percentage points from July to 10 September 2013. There were 30.15 million people in employment aged 16 and over, up 193,000 from July to September 2013 - ONS

10 GfK's Consumer Confidence Index now stands at -7, which is higher than it has been since September 2007

## Looking back...

Since its inception in 2005, and with over 25,000 interviews completed, the UK Giving study has captured a wealth of information...

- Just over half of people give, a relatively consistent proportion since 2005 (an average of 56% over the life of the study), with an average gift of £30 (mean)
  - Women are more likely to give to charity than men (60% cf. 52% respectively)
  - Women aged 45-64 years are most likely to give (66%), and typically donate the largest amounts
  - Men aged 16-24 are least likely to give (41%) and typically donate the smallest amounts
  - Regionally, the Welsh are most likely to give (60%), but gifts tend to be at the lower end of the value scale (£24 mean). Londoners are the least likely to give (52%), but typically give more when they do donate (£42 mean)
- Throughout the life of the survey, cash has consistently been the most common donation method. The use of direct debit has increased over the eight years from 26% in 2005/06 to 31% in 2012/13. The level of online donations has also increased by five percentage points (4% in 2008/09 cf. 9% in 2012/13)
- Medical research is consistently the most supported cause
- Whilst women and men broadly give to the same causes (both genders have the same top three causes of 'medical research', 'hospitals and hospices' and 'children & young people'), more women give to these causes than men, reflecting the higher levels of engagement of women with giving generally
  - Only with 'sports' related causes are men more likely to donate than women (5% for men vs. 2% for women)
- Some differences in the relative strength of support for individual causes are apparent dependent on age. Those aged over 65 years are much more likely to support 'religious' causes than those aged 16-24 years (20% cf. 7%), whilst younger people are more likely to support 'children's causes' than those in the oldest age band (16-24 yrs, 28% cf. over 65yrs, 17%)

## *Moving forward – an enhanced research project to track UK giving*

The Charities Aid Foundation is updating the UK Giving survey, building upon the long-running study, but reworking it to also take better account of changing patterns of giving such as mobile and online giving.

CAF aims to continue publishing annual information on the amounts given, the methods used and the causes supported, and build towards a quarterly view of donor behaviour and attitudes, to provide charities, policymakers and the public with more regular insight into trends and current issues. We intend to provide analysis showing how this relates to the older versions of the UK Giving study, so that a view can be taken of changes over time. The research will provide valuable information for fundraisers and others working within charities, as well as helping to inform public debate.

CAF is committed to seeking the views of a wide range of organisations, in order to ensure that our research best meets the needs of the charitable sector as well as providing a robust and independent analysis of trends in giving.

We plan to publish the results of our enhanced research project in early 2015.

# Methodology

## 1. UK Giving

The data in this report is based on the UK Giving 2012/13 survey, which collected information about charitable giving from adults aged 16 and over in Great Britain<sup>11</sup>. For 2012/13, the survey ran in August, November and February as a module in the Omnibus survey carried out by the Office for National Statistics (ONS). 1,472 interviews were conducted in 2012-13.

The ONS Omnibus survey is carried out face-to-face in people's homes, using Computer-Assisted Personal Interviewing (CAPI). The Omnibus survey uses random probability sampling, with the sample stratified by region, car ownership, socioeconomic status and the proportion of people aged over 65 years.

One person in each sampled household is interviewed (the 'respondent'). At the start of the interview, the interviewer determines the household composition and then selects the respondent from among all those aged 16 and over<sup>12</sup>. The data is subsequently weighted to correct for the unequal probability of selection that this causes<sup>13</sup>, as well as for certain types of non-response bias.

Those interviewed are asked about their donations to charity over the previous four weeks. People interviewed are shown a card and asked whether they have given to charity in the last four weeks by any of the nine methods shown. For each of the methods that they report using, respondents are shown another card and asked which of the fifteen types of causes listed on the card they have donated to. The respondents/donors assign charities themselves to a cause group from the list at their own judgement. Then for each cause donated to by each method, respondents are asked how much they gave and whether they used Gift Aid.

The data collected from respondents are carefully checked before analysis is carried out. The data are amended where appropriate to remove obvious reporting/recording errors. Checks are made particularly on higher-value donations, especially where they seem inappropriate to the method of giving.

## 2. UK Giving 2012/13 revisions

To meet the charity sector's need for more regular insight, a decision was made in 2012 to increase the data capture points for UK Giving from three to four. Previously, the survey ran in June, October and February to capture a spread of months across the financial year. In 2012/13, this was amended to August, November and February – the intention being to transition to a new quarterly survey which will be conducted in February, May, August and November.

The difference in the interviewing months of June-August and October-November therefore has implications for the direct comparability of the 2012/13 data-set with previous years<sup>14</sup>. The impact of a number of high-profile charity campaigns in November (particularly Children in Need and the Poppy Appeal) is known to increase donations significantly during this month<sup>15</sup>.

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11 To generalise to the UK, we check that the results of NICVA's giving survey in Northern Ireland are similar: so far, they always have been

12 This selection is performed at random using a Kish grid

13 For example, individuals in smaller households have a higher probability of selection

14 In reviewing the data, the differential between June-August was within existing error margins

15 CAF's 'Year of Giving' study indicates a consistent 9 percentage point increase between giving levels in October 2012 and November 2012, and those between October 2013 and November 2013.

In order to understand if the uplift seen since 2011/12 represented a 'real' increase in reported giving levels or if it was merely due to the inclusion of additional November givers, CAF tasked the Marketing Sciences team at GfK NOP to undertake a series of data analysis, comprising a review of the longitudinal track of UK Giving since 2004/05 in terms of:

- the specific cause(s) given to: this confirmed a November 2012 peak in those claiming to give to 'children's causes' and to 'other causes' (which includes veteran / military causes)
- the value of the typical donation: this confirmed an increase in the reported average donation made to children's causes in November 2012. 'Other causes' did not experience an uplift in the typical donation, probably reflecting the relatively nominal amounts traditionally given for a poppy
- the giving method(s) for those giving to children and other causes: this confirmed a November 2012 peak in those stating that they gave via cash, cheque, events & raffles – the channels more likely to comprise 'one-off' giving

On the basis of these findings, we excluded those individuals from the November 2012 data that only gave to children's causes, and only gave via these 'non-regular' giving methods – the hypothesis being that these were 'Children in Need extras' that would not have been present if interviewing had taken place in October, as in previous years. Those only donating to 'other (veteran/military) causes' and only giving by non-regular methods were also removed to address the increased participation from supporting 'veteran' charities as part of the Poppy Appeal/Remembrance Day events. Those donating to both 'children's causes' and 'other causes' (but no others) by non-regular methods were also excluded. In total, data for 55 respondents was removed from the 2012/13 analysis.

Thus, the figures presented in this report are estimates based on a partial suppression of the November uplift to provide a 2012/13 picture which is more comparable to previous years. The exclusions made result in a participation adjustment of -12 percentage points for November 2012 from that actually recorded in the survey – slightly higher than the nine percentage point October-November differential recorded by CAF's 'Year of Giving' survey. The November revision results in a -4 percentage point adjustment in the overall 2012/13 participation rate from that recorded in the survey (61%) to that reported (57%).

A high proportion of those excluded from the November 2012/13 data were lower level donors, which will have had some impact on the mean amount calculated. The mean amount per donor following the data exclusions is £29, and prior to exclusions was £28, both figures being higher than the £27 recorded in 2011/12.

The total amount given by adults in the UK is calculated by multiplying the number of donors in our survey by the mean amount given per year<sup>16</sup>.

If we substitute the re-calculated £29 with the original £28, but still use the revised lower participation level of 57%, we still see a slight upward movement in the estimated total donation levels since 2011/12 (£9.9bn in 2012/13 cf. £9.3bn in 2011/12), although this increase remains within existing error margins.

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<sup>16</sup> The number of donors is calculated by multiplying the proportion of donors by the estimated number of adults in the UK population as provided by the ONS. The mean amount given per year is calculated by multiplying the mean amount per month by 12.



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