

# CAF CHARITY STREET SCOTLAND

The value of charity to Scottish households

#CharityStreet  
October 2018



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# FOREWORD

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It's common for people to say that charities form a vital part of everyone's lives. The problem is that many of us don't realise just how important they are to each of us every day.

I'm delighted that for the first time we have been able to chart the use of charities by millions of Scottish people. What our research shows is that nine in 10 people across the country have used a charity whether for advice, support, help in times of need, or just somewhere to visit for a day out.

That shows that whoever we are, and whatever part of the country we come from, charities are there to make our lives easier and fuller, as well as caring for the most vulnerable in society.

Our second Scotland Giving report earlier this year showed once again the extraordinary generosity of Scots, who gave an estimated £1.2billion to good causes in 2017. This research shows how much that generosity matters to people's everyday lives.

It's worrying for us all that around one in three people don't realise that a charity is behind the things that make such a difference and shows that we cannot take their work for granted. For while charities in Scotland have a proud history going back hundreds of years, we cannot sit back and assume they will always be valued and supported.

It's important that we remember the central role civil society plays in our country and do all we can to nurture and build that great tradition of generosity, of coming together in the common good, that makes our society what it is.



Sir John Low

Chief Executive, Charities Aid Foundation

# INTRODUCTION

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## About this report

In 2014, Charities Aid Foundation (CAF) produced a report, 'Charity Street', in conjunction with IPPR North on the usage of charitable organisations<sup>1</sup> across the UK as a whole. The aim of the report was to gain insight into the way households and individuals use charitable services and to understand whether or not these are perceived as charitable services. In 2016 CAF published the second instalment<sup>2</sup> for the UK as a whole and released the third UK instalment in September 2018<sup>3</sup>.

As part of our commitment to understanding the Scottish charity environment in its own right, and following on from our Scotland Giving reports in 2017 and 2018, we are delighted to be able to present for the first time a snapshot of the charity usage among Scottish households. This report is based on the same questions we ask across the UK as a whole.

## About the data

The data in this report is based on the Charity Street Scotland survey which collected information about service use from adults aged 18 and over in Scotland. The survey ran between 21st and 29th March 2018 as part of KANTAR TNS's online omnibus. 502 responses were collected from Scottish households and were weighted to be representative of the adult population.

## About CAF

Charities Aid Foundation (CAF) is a leading international charity registered in the United Kingdom, with nine offices covering six continents. We exist to make giving go further, so together we can transform more lives and communities around the world. We are a charity, a bank and a champion for better giving, and for over 90 years we've been helping donors, companies, charities and social organisations make a bigger impact. We are CAF and we make giving count.

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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 The 2016 Charity Street report can be found here [https://www.cafonline.org/docs/default-source/about-us-publications/160704\\_caf\\_charity\\_street\\_report\\_web.pdf](https://www.cafonline.org/docs/default-source/about-us-publications/160704_caf_charity_street_report_web.pdf)

3 The 2018 Charity Street III UK report can be found here <https://www.cafonline.org/about-us/publications/2018-publications/charity-street-3>

# KEY FINDINGS

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- **The use of charity is widespread** with nine in ten Scottish households having used a charity at some point, and four in five having used a charity service in the last 12 months.
- **Better off households are more likely to have used a charity service overall**, those of social classes ABC1 are also more likely to have used a number of specific services.
- **Younger people aged 18-24 use on average more charitable services** in the last 12 months (5.3), with the number decreasing the older you are, reaching 2.2 on average amongst those aged 65+.
- **Households which use charities perceive a wide range of benefits to doing so**, most commonly this is having an enjoyable / fun experience (19%), receiving emotional support or counselling from a charity service (16%) or legal advice or support (16%).
- **People are often not aware they are using a charity** with 27% unaware that the service they or someone in their household had used was provided by a charity. Younger people aged 18-34 were the most likely to be unaware, at 34%.
- **Charities are best placed and most trusted to speak on behalf of the disadvantaged** with 68% believing that charities were best placed to speak on behalf of disadvantaged people to government to help influence government policies.

# DETAILED FINDINGS

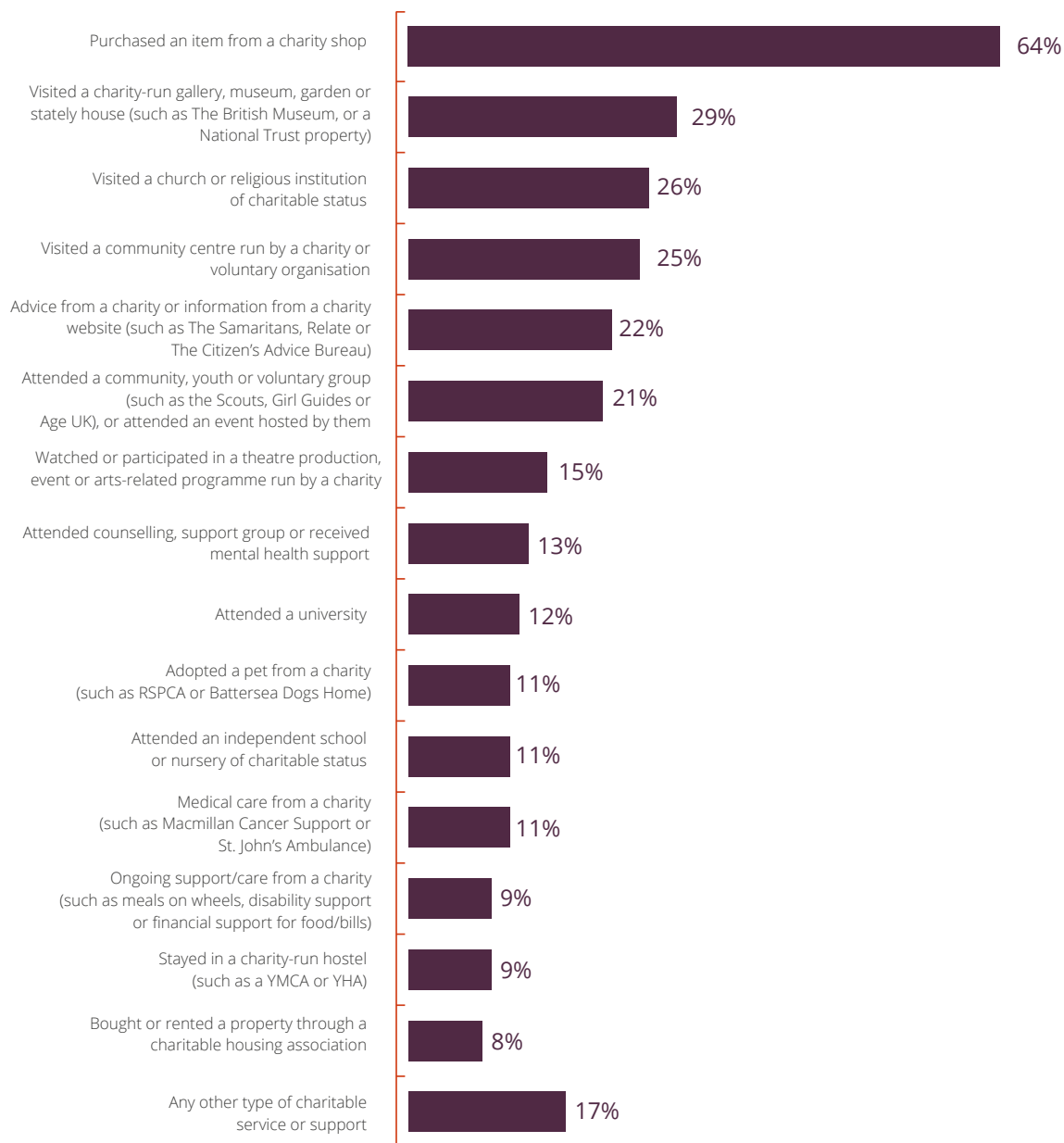
## Charity services used in 2018

### Household usage

In order to understand usage of charity services, we show respondents a list of services and ask whether they have used any. Figure 1 shows the number of households who have used each service in the last 12 months across Scotland.

The most commonly used charity service by households across Scotland is purchasing an item from a charity shop (64%), followed by visiting a charity run gallery/museum/stately house (29%), visiting a church or religious institution of charitable status (26%) and visiting a community centre run by a charity/voluntary organisation (25%). These are also the top services accessed across the UK as a whole.

Figure 1: Services accessed by Scottish households in the last 12 months

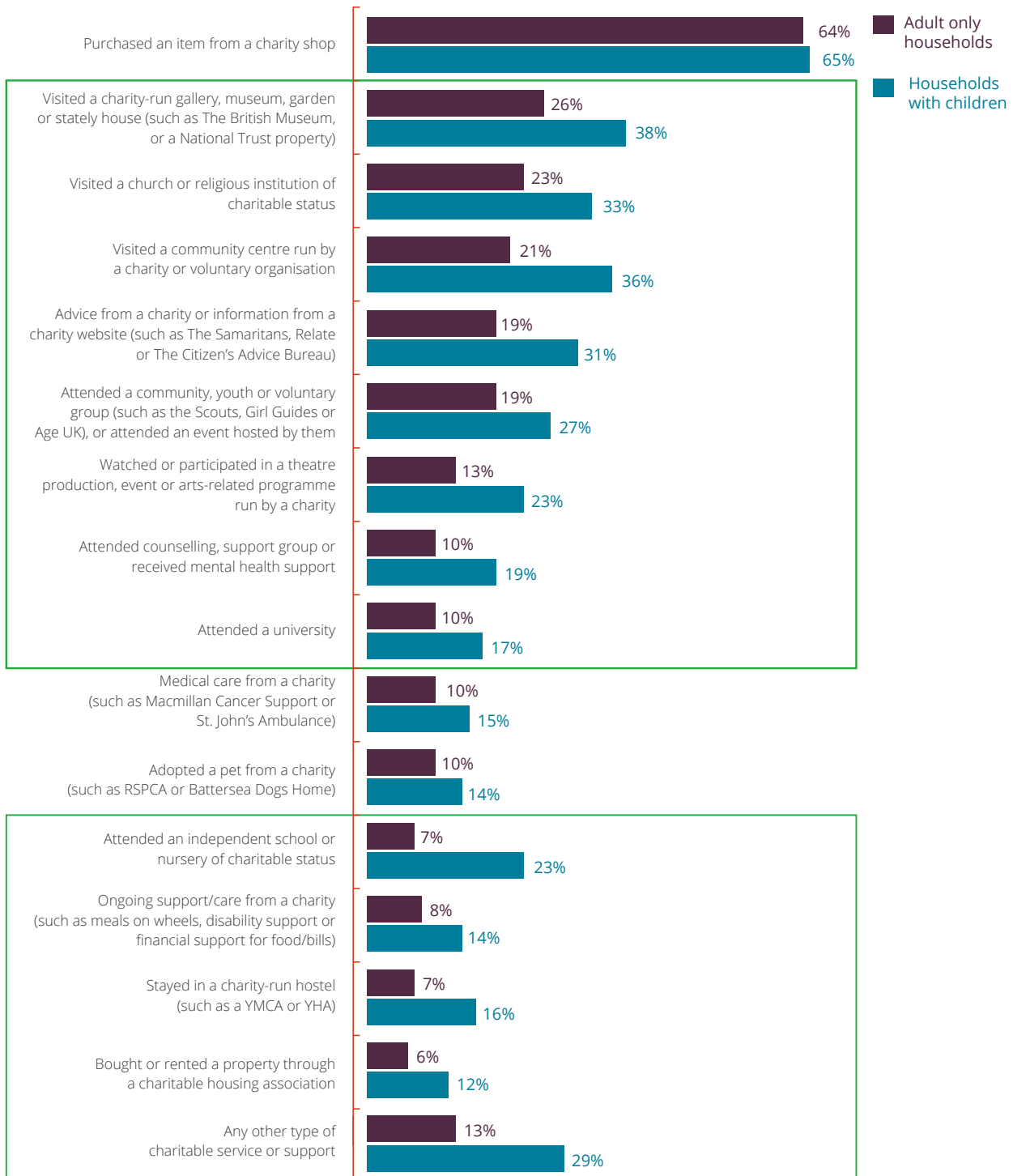


Base: All households aged 18+ across Scotland, n=502

Demographically, those households within social classes ABC1 are more likely than C2DEs to have visited a charity run gallery/museum/stately house (34% vs 24%), a church or religious institution of charitable status (30% vs 21%), and to have visited a community centre run by a charity or voluntary organisation (30% vs 19%). However, unlike across the UK as a whole where this year we saw that C2DE households were more likely to have used a number of services, including attending counselling and mental health support, and ongoing support from a charity, in Scotland this is not the case, with C2DE households no more likely to have used any of the services.

Households with children are more likely than households without children to have used almost all services in the past 12 months. The only exceptions to this are purchasing items from a charity shop, medical care from a charity and pet adoption.

**Figure 2: Services accessed by Scottish households in the last 12 months by households with/without children**

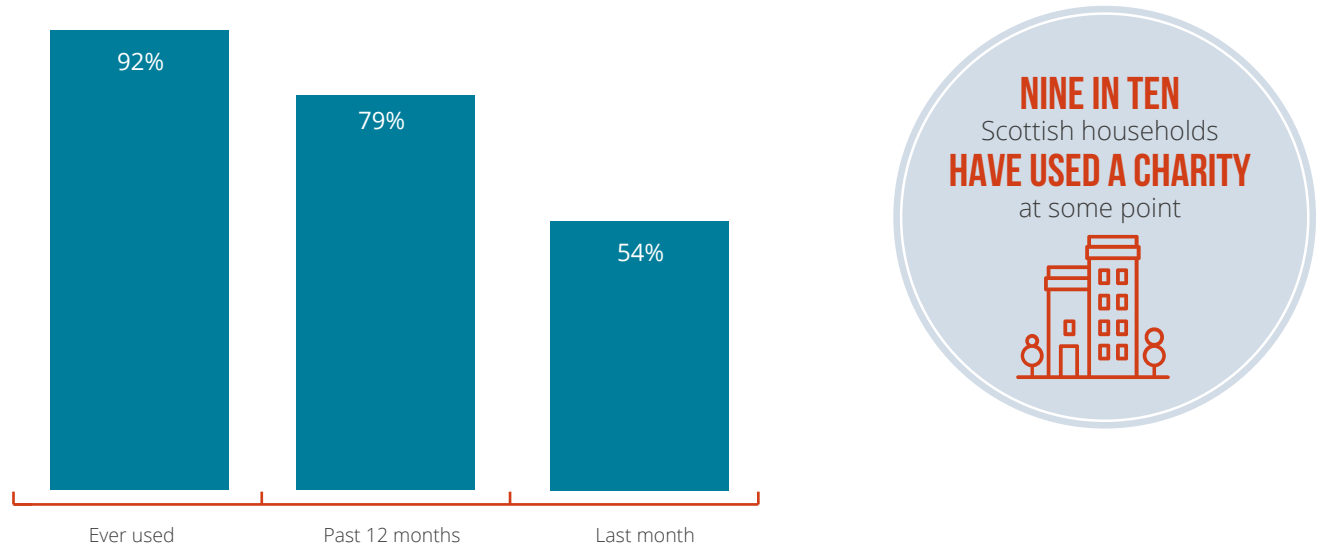


Base: Adult only households, n=330; Households with children, n=143

## Household use of charities in 2018

As the previous section shows, usage of individual charity services is quite high. When we look at the combined levels, we can see how widespread charity usage is across Scotland, with 92% of households having used a charity's service at some point, and 79% having used at least one in the last year. Over half (54%) of households said that they or a member of their household had used a charity service in the past month.

**Figure 3: Household usage of charities in Scotland**



Base: All households, n=502

When these levels are compared to the UK as a whole, usage in Scotland is slightly higher on each of these time periods. Specifically however, when it comes to usage in the last year, the level is significantly higher in Scotland, at 79% compared to 74% for the UK as a whole.

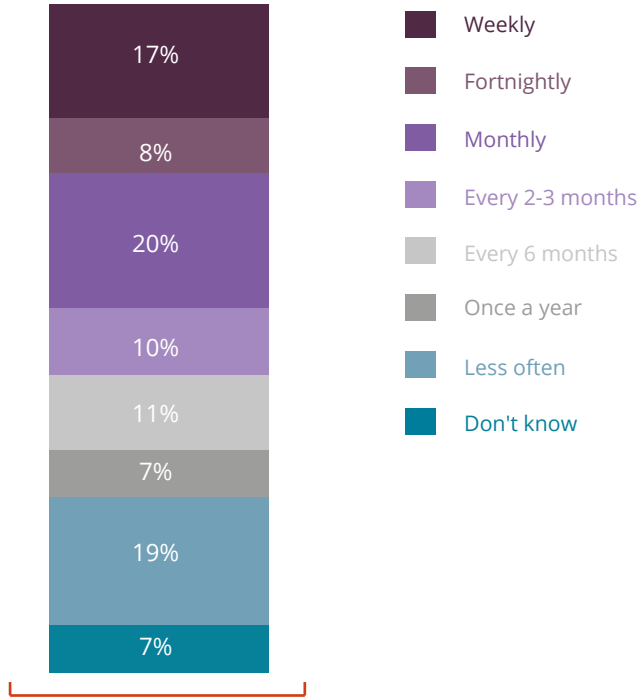
The only real demographic difference on usage can be found within social class. Not only were those in ABC1 households more likely to have used a number of specific services than C2DE households but they were in fact more likely to have used a charity service overall both in the last month (61% vs 47%) and ever (95% vs 89%) than their C2DE counterparts.



## Households are using charitable services frequently

Of households that have accessed a charity service in the last year, 17% have done so weekly and a quarter (25%) have done so at least every fortnight. At the opposite end of the scale, one in five (19%) are using charities less often than yearly.

**Figure 4: How regularly households use/access charity**

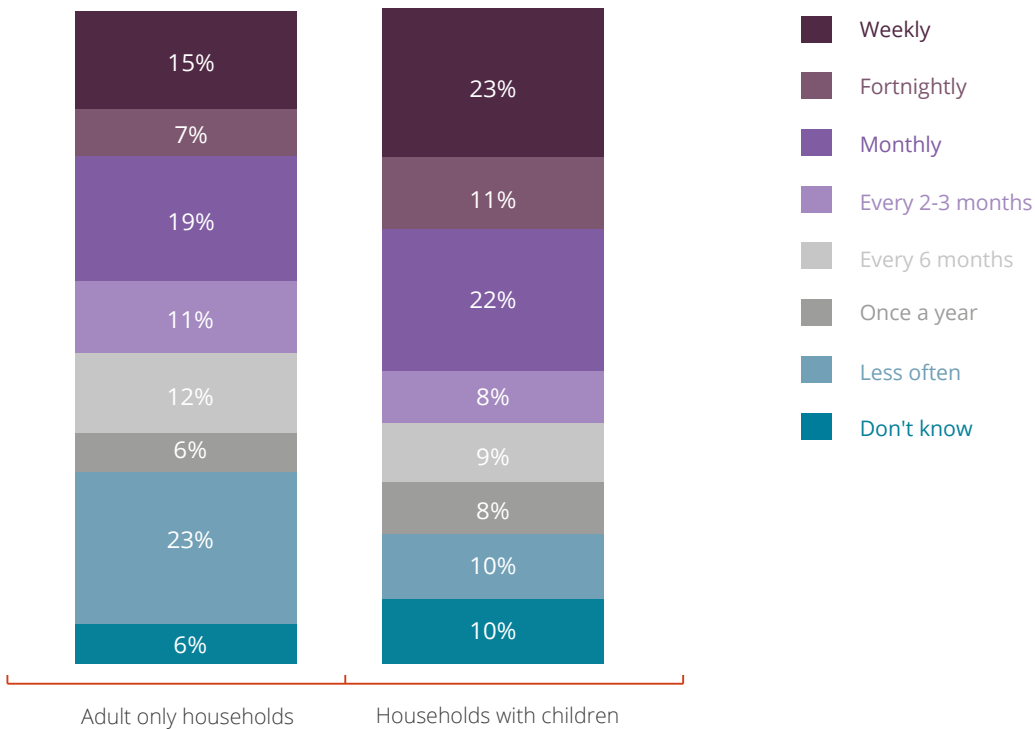


Base: All households that have used a charity in the past year, n=464

Frequency of usage of charity services compared to the UK as a whole is very similar.

Demographically there are no differences on frequency of use, with the one exception being between households with and without children, as shown overleaf.

**Figure 5: How regularly households use/access charity – households with/without children**



Base: Adult only households, n=330; Households with children, n=143

As Figure 5 shows, usage of charity services amongst households with children is much more frequent than adult only households. Usage of services at least fortnightly is just over a third (34%) for households with children, compared to just over one in five (22%) for adult only households. At the other end of the scale, 29% of adult only households use charity services once a year or less, compared to only 18% of households with children. Not only therefore are households with children more likely to use practically all charity services asked about, they also use them a lot more frequently.

### Charity service users are using more types of service

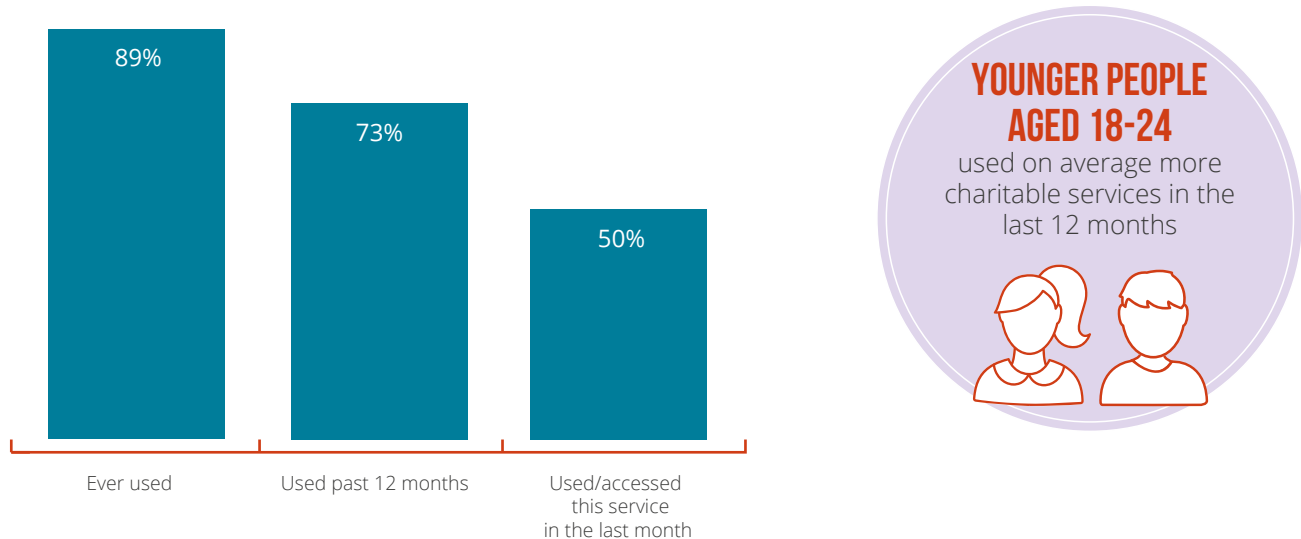
Households which have used a charity service in the past 12 months did so on an average of 3.8 times. This is exactly the same level seen across the UK as a whole.

Perhaps unsurprisingly given that we have already seen that households with children use more individual charity services, they have also used a higher number on average (5.02 vs 3.41 of adult only households).

## Personal use of charities

As well as asking about the overall household usage of charity services, we also ask about the personal use of the individual answering the questions in order that we can look at individual demographics such as age and sex. As with household usage, around 9 in 10 (89%) say that they have ever used a charity service, just under three quarters (73%) have used a charity service in the past year and half (50%) have personally used one in the past month.

**Figure 6: Services accessed by individuals in Scotland in the last 12 months**



Base: All adults aged 18+ across Scotland, n=502

Demographically, the only difference is women are more likely than men in Scotland to have ever used a charity service (92% vs 86%), in the past 12 months (78% vs 68%) and in the past month (58% vs 41%).

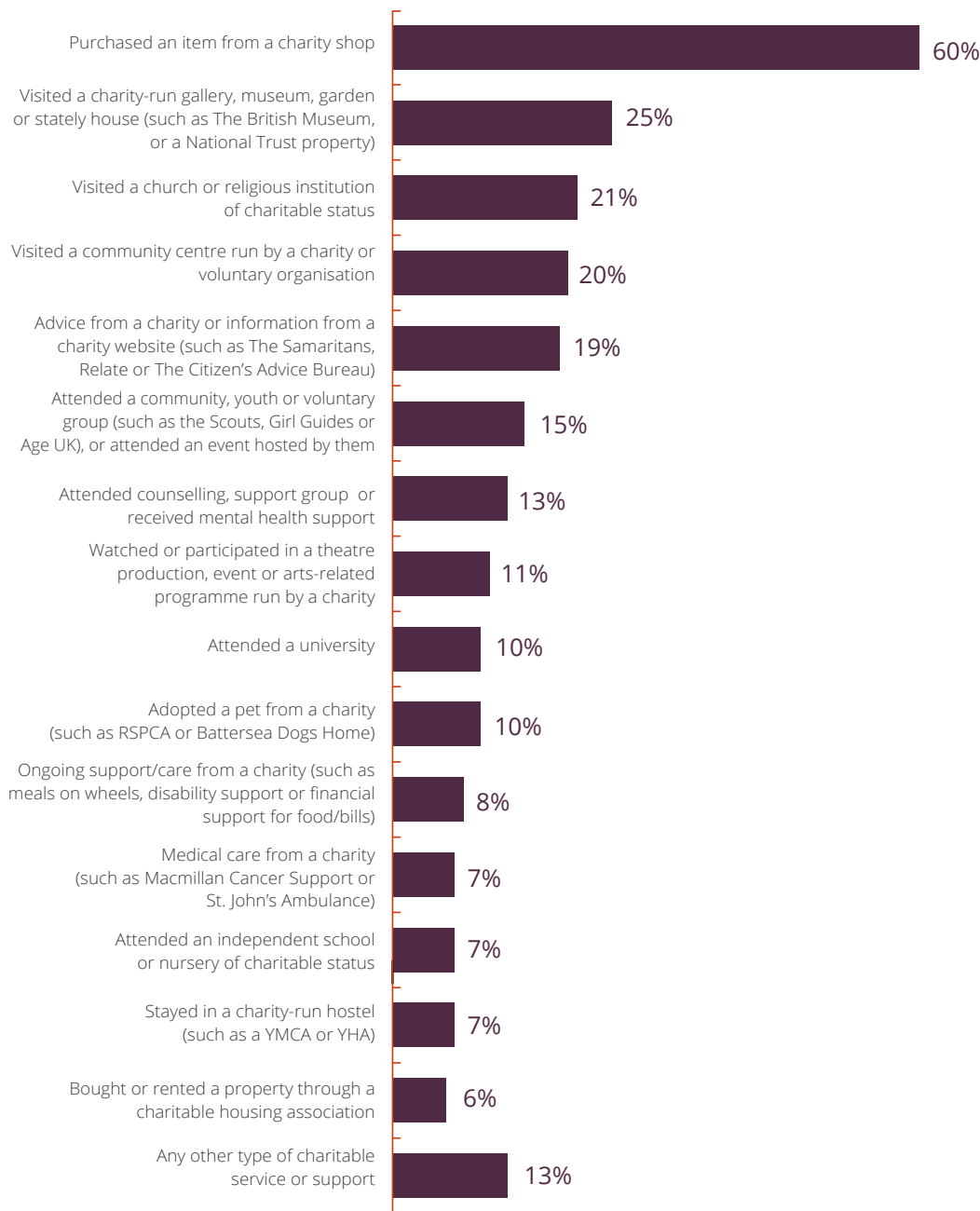
### Average number of services used

Amongst those individuals who had used a charity service in the past 12 months, the average number used was 3.4 services. As with household use, this is a very similar level to the UK as a whole. There is no difference between men and women on this although on age, it is the younger age group who are using more services than the older generations. This ranges from 5.3 services amongst those aged 18-24 through to 2.2 amongst those aged 65+.

### Charities used by individuals across Scotland

The top charity services used by individuals across Scotland are very similar to those used at the household level. Purchasing an item from a charity shop was the main service used, by three fifths (60%) of individuals. There is then quite a drop off to the next highest, visiting a charity run gallery, museum, garden or stately house (25%).

**Figure 7: Services accessed by individuals in Scotland in the last 12 months**



Base: All adults aged 18+ across Scotland, n=502

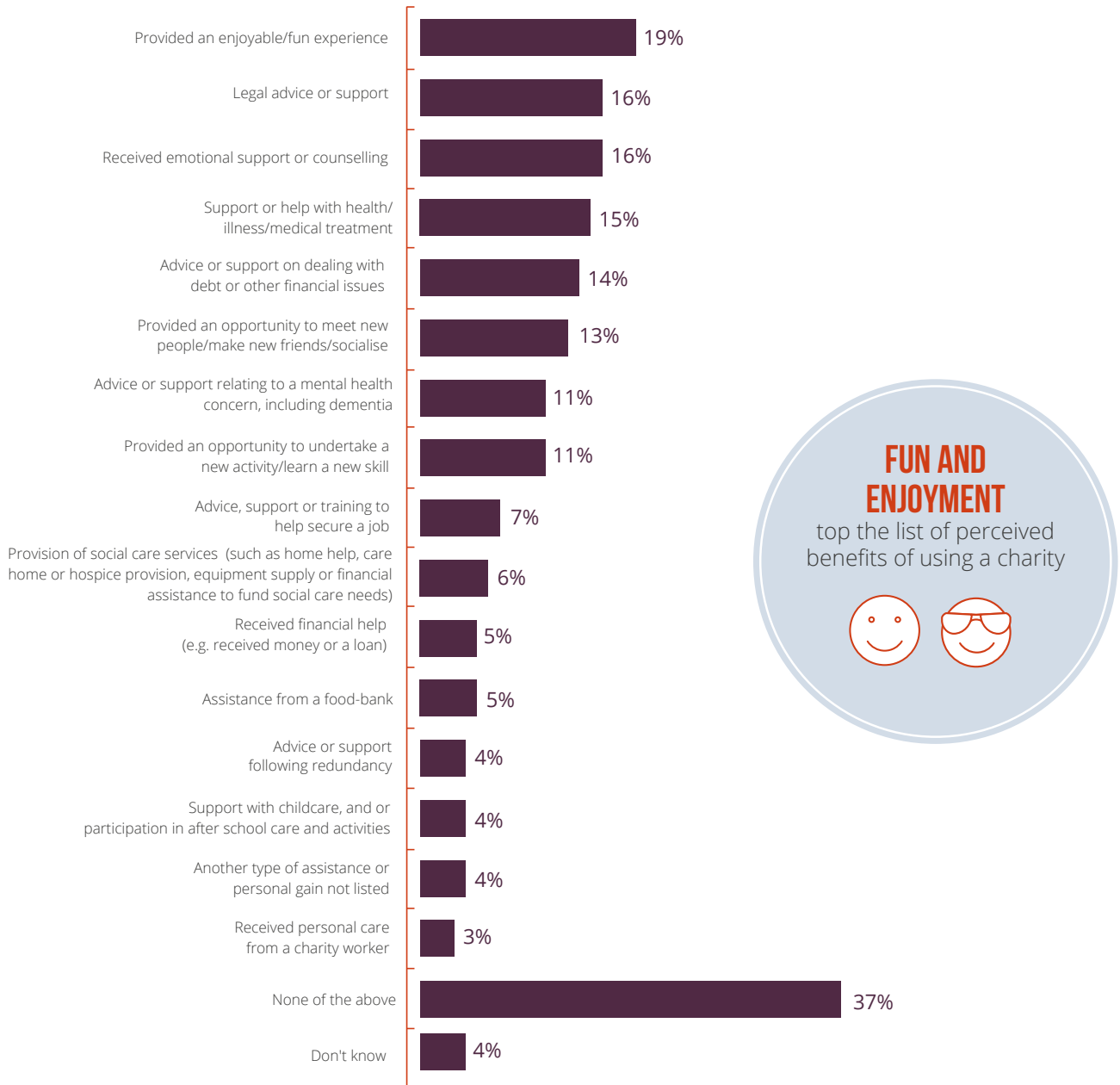
Women are more likely than men to say that they have sought advice from a charity or information from a charity website (23% vs 14%) and men are more likely to say that they had stayed in a charity run hostel (10% vs 4% of women). The only service women were more likely than men to have used was to have purchased an item from a charity shop (68% vs 50% of men).

Although the sample sizes are quite low, we can see that most services have higher uptake among younger age groups, with the exception of purchasing an item from a charity shop, which is more likely done by older age groups in the past 12 months. Besides charity shops, and visiting galleries/museums/gardens (which is flat across all age groups) those aged over 45 are far less likely to be using each type of charitable service. This links to the fact that younger people use on average more services than older people overall.

## Personal benefits of charity use

All those who have used a charity service personally or within their household were asked what they or the people in their household got in terms of support or personal gain from having used them. Fun/enjoyable experience came out on top at 19% followed by legal advice or support (16%) and emotional support or counselling (16%).

**Figure 8: Types of support or personal gain that individuals or households have received from charities**



Base: All adults across Scotland who have used a charity service in the past year, n=464

Women are more likely than men to receive support or help with health/illness/medical treatment (19%, twice as much as men at 9%), receive an opportunity to make friends/socialise (16% vs 9%), support for a mental health concern (15% vs 6%) and receive social care services (9% vs 4%).

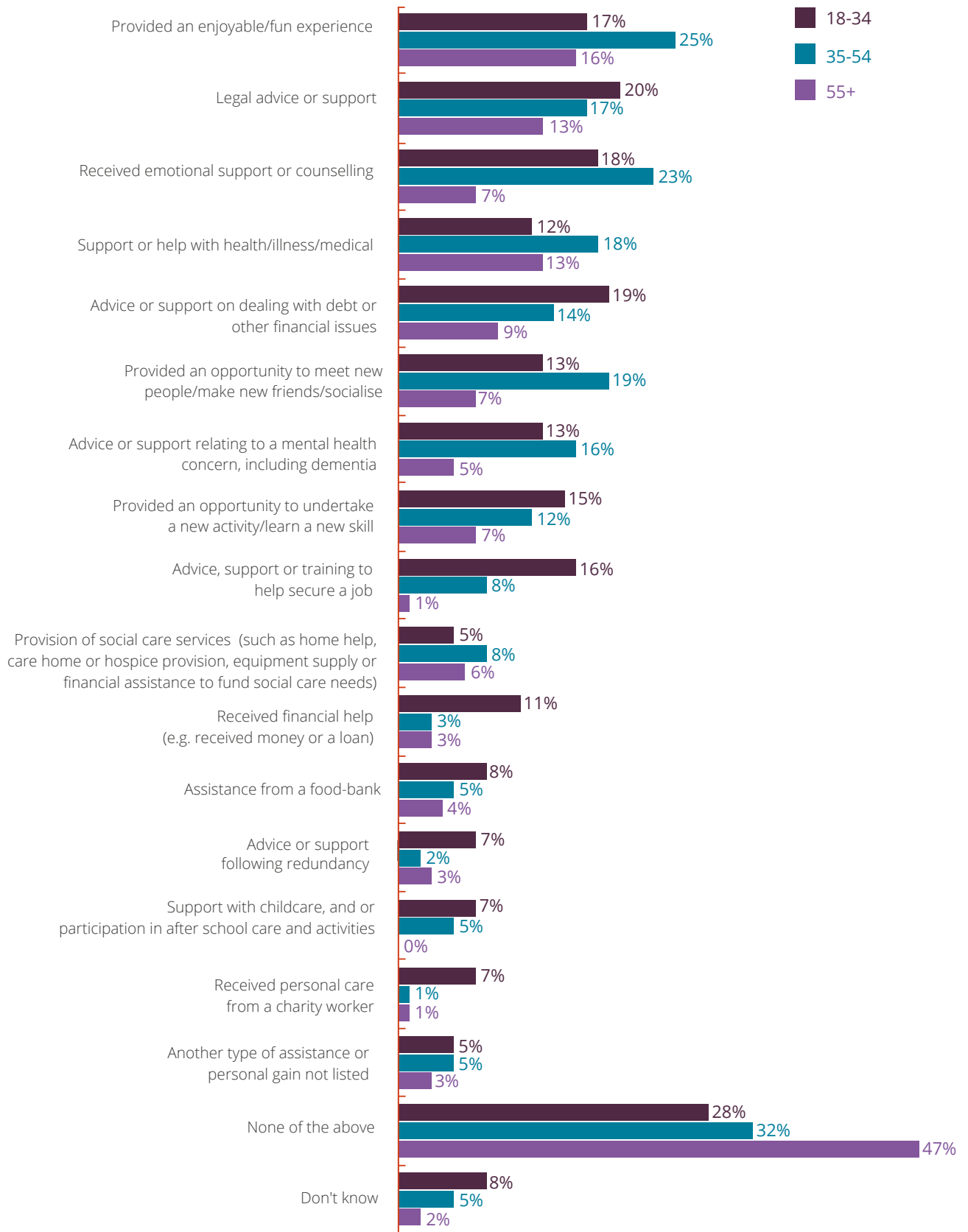
Those aged 18-34 were more likely than 35-54s and 55+s to receive advice, support or training to secure a job (16%, vs 8% 35-54s and 1% among 55+s), receive financial help like money or a loan (11% vs 3% among both

35-54s and 55+s), advice or support following redundancy (7% vs 2% 35-54s and 3% 55+s) or receive personal care from a charity worker (7% vs 1% among both 35-54s and 55+s).

Those aged 35-54 were more likely than those aged 55+ to have gained a fun or enjoyable experience from charity (25% vs 16% 55+s) or meet new people/make friends/socialise (19% vs 7% over 55s).

Over 55s were less likely than both younger age groups to receive emotional support or counselling (7% vs 18% 18-34s and 23% 35-54s), receive advice or support relating to a mental health concern (including dementia) (5% vs 13% 18-34s and 16% 35-54s), advice, support or training to secure a job (1% vs 16% 18-34s and 8% 35-54s) or get support for childcare/ participate in school care and activities (none, compared to 7% 18-34s and 5% 35-54s). Although some of these would be expected as they reflect life stage (e.g. childcare/school care), others are perhaps of more concern, such as mental health and emotional support/counselling.

**Figure 9: Types of support or personal gain that individuals or households have received from charity by age**



Base: All adults across Scotland who have used a charity service in past year, n=464

## Awareness of charity services

We ask about people's awareness of the services included in the survey being charities. This is explored on two levels: awareness of the services they/their household used being charities, and; awareness of all services asked about throughout the survey being charities.

### Awareness of charities being used by households

Amongst people who had said that they or a member of their household have ever used charity services, over a quarter (27%) were unaware that those services they had used were run by charities. Although this is slightly lower than the UK level (29%) it is nonetheless a low level of awareness and represents a real challenge for everyone involved with charities.

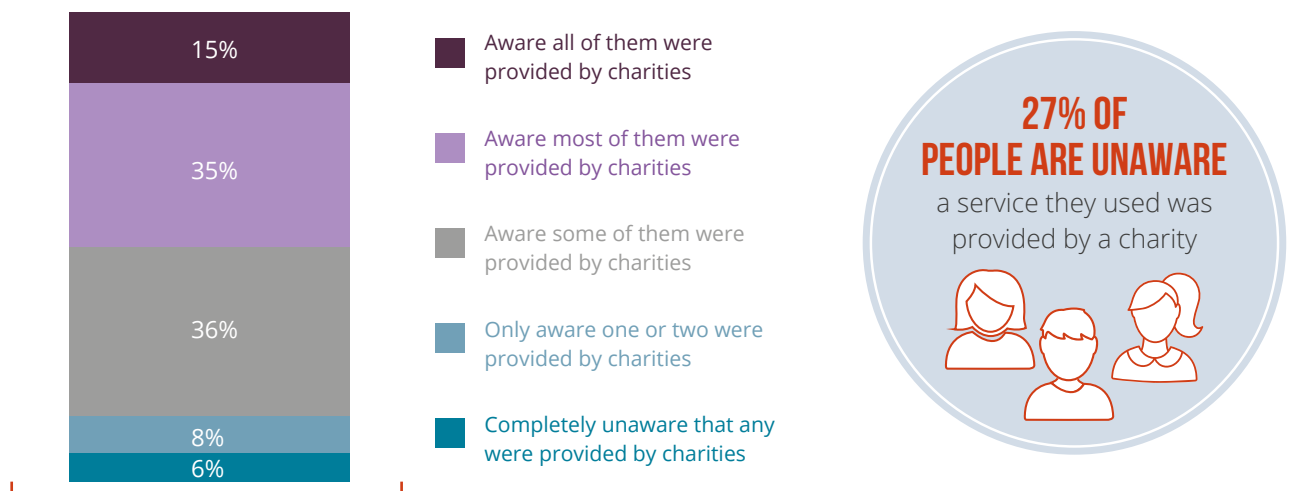
Those in the younger age groups are most likely to be unaware that the services used were provided by charities, and it does improve throughout the age groups. Specifically, 34% of 18-34 year olds are unaware, 31% of 35-54 year olds and 19% of 55+ year olds.

Perhaps unsurprisingly, those who use charity services more frequently are more aware that the services they use are provided by charities. Amongst those who use charity services at least fortnightly, 16% were unaware they were run by charities whilst amongst those who use them less than quarterly, the level was 34% unaware.

### Awareness of all charities shown

Amongst the general population (whether users of a charity's services or not) awareness that the services included in the survey questionnaire are provided by charities was 50%. As with the UK as a whole, this means that for half the population, there is not universal awareness that these are charitable services.

Figure 10: Individual awareness that all charity services were of charitable status



Base: All Adults aged 18+ across Scotland, n=502

Demographically, men are less aware than women that at least most of those listed are charities (44% of men vs 55% of women).



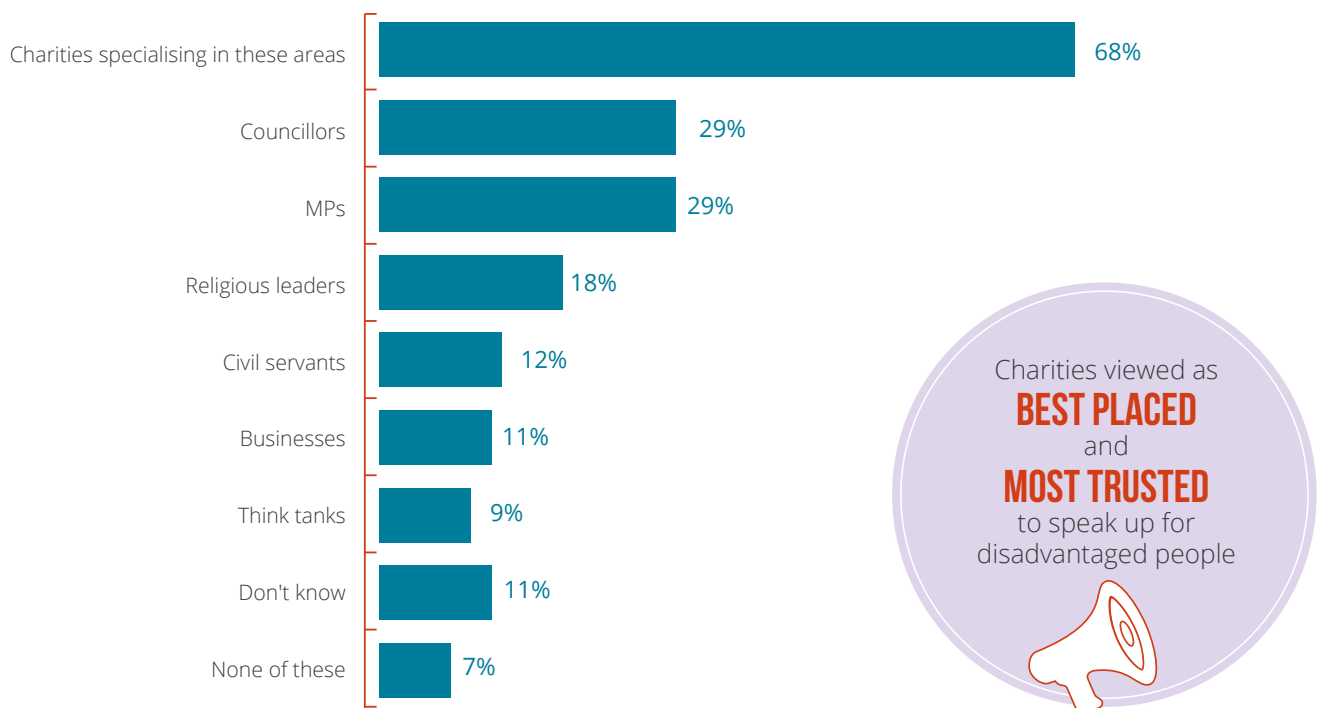
## Advocacy

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.

### Who is best placed to speak on behalf of disadvantaged people

When asked who they think is best placed to speak on behalf of disadvantaged people to government to help influence government policies, around two thirds of people (68%) think it is charities who specialise in that area.

**Figure 11: Who is perceived as best placed to speak on behalf of disadvantaged people to government to help influence government policies**



Base: All adults aged 18+ across Scotland, n=502

Identical levels perceive councillors and MPs<sup>4</sup> to be best placed to speak on behalf of disadvantaged people. There is then a drop off, to 18% who said religious leaders.

Most of these results are similar to the UK as a whole, with charities specifically perceived to be best placed by 67% across the UK as a whole. The only differences were that fewer people across the UK as a whole said civil servants (9%) and more said religious leaders (21%).

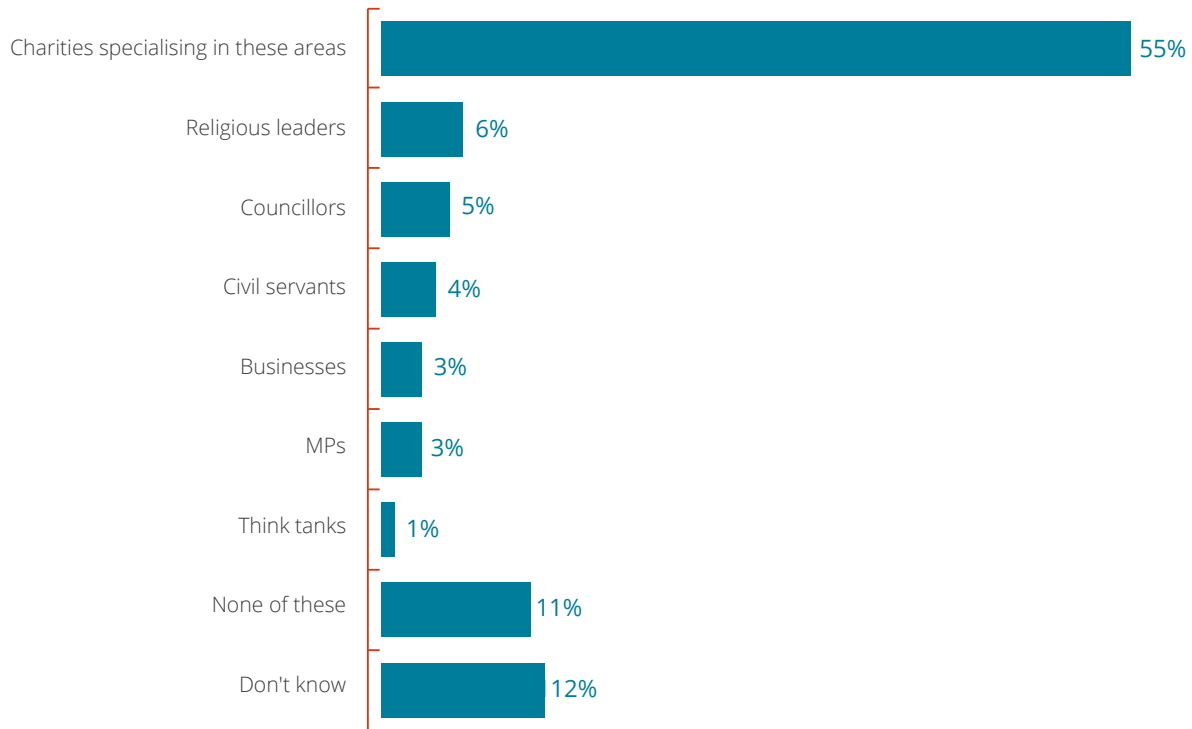
Young people are less likely to think that charities, religious leaders and political roles such as MPs or councillors will be best placed compared to older age groups. They are however more likely than older age groups to think that businesses are best placed.

<sup>4</sup> It should be noted we only asked about MPs and not MSPs in order to be able to compare results across the UK.

## Who is most trusted to speak up for disadvantaged people

The previous question asked about who people thought were best placed to speak up for disadvantaged people. We also asked who people thought was most trusted to do this and Figure 12 shows the results.

**Figure 12: Who is perceived as most trusted to speak on behalf of disadvantaged people to government to help influence government policies**



Base: All adults aged 18+ across Scotland, n=502

The overall picture presented is clear: charities are both viewed as best placed and most trusted to speak up for disadvantaged people. Indeed, 55% of people trust charities most to speak out on behalf of disadvantaged people, almost double the level of all the other groups combined.

Older people (55+) are more likely than younger age groups to say that charities (68% vs 53% among 35-54s and 43% among 18-34s) and religious leaders (8% compared to 3% among 18-34s) are most trusted to advocate for the disadvantaged.

# RECOMMENDATIONS

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Charities are a central facet of society. This report has shown how widespread their use is, and that they are considered a key voice in tackling some of the biggest issues that society is facing.

Whilst the purpose of this report is to improve our understanding of how people are using the charity sector, there are a number of recommendations we think would improve the operating environment for the sector:

For Government and policy makers:

- Charities have a trusted status in regards to representing disadvantaged people. It is important that the Scottish Government continues to utilise the expertise and on-the ground experience of charities and work collaboratively with them.
- The lack of awareness amongst much of the public about their interaction with charities shows that more needs to be done to champion its role. 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.
- Fun and enjoyment topped the list of reasons for stated benefits of using a charity. This demonstrates the social role of charities to society, and should be seen as a key way of tackling loneliness, not only in the services charities provide but in the social interaction it provides. CAF's Post-Careers Advice Service (PCAS) report highlighted the opportunity of volunteering with charities in later life as a potential route to encourage more involvement with charities. The Scottish Government's strategy for reducing loneliness and isolation should consider the social value that charities provide.

# HOW CAF HELPS CHARITIES

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Charities can:

- Manage their day to day banking through our current and savings accounts or apply for secured loans via CAF Bank.
- Take control of their investment portfolio through the CAF Investment Account, the UK's only secure, digital trading platform for charities.
- Apply for short term funding through CAF Venturesome, our pioneering social investment arm.
- Fundraise with ease and speed online through CAF Donate.
- Reduce the burden of Gift Aid, as we can claim Gift Aid on donations made through CAF on their behalf.
- Receive guidance on all areas of governance, fundraising, finance and grant making through our team of experts.
- Reap the benefits of CAF's successful campaigning work to get real change to policy and celebrate the great work of the sector with #GivingTuesday.
- Grow knowledge and awareness of UK and international giving trends, through our ground-breaking research such as UK Giving and CAF World Giving Index.

*Facts are correct as at April 2018*



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