

Report Price: £1750.00 | \$2834.04 | €2223.04

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.



"Awareness is crucial in connecting with existing and potential donors, and charitable selfie campaigns have proved to be effective at gathering large-scale support for marginal causes during 2014. However, it remains important for charities to continue building greater trust amongst donors."

Ina Mitskavets, Senior Lifestyles and Consumer
 Analyst

## This report looks at the following areas:

- Raising the engagement of younger donors
- · Charities responding to the modern need for speed and convenience

As the charitable sector in the UK continues to grow, it is presented with unique opportunities. Indeed, the rise of selfie charity campaigns in 2014 has likely changed the charitable giving landscape forever. This has coincided with the increased speed of digital and mobile innovation in the sector, as charities race to engage with younger donors.

This report will look at the ways in which people donate money to charity, the average amount donated and how it varies by demographics, charitable causes and methods of donating. It will look more closely at the growing influence of the internet and social media in the sector. The report will reveal motivations for donating to charities and various attitudes towards making charitable donations.

# BUY THIS <u>REPORT</u> NOW

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533

> Brazil 0800 095 9094

Americas +1 (312) 943 5250

APAC +61 (0) 2 8284 8100

EMAIL: reports@mintel.com

DID YOU KNOW?

This report is part of a series of reports, produced to provide you with a more holistic view of this market



Report Price: £1750.00 | \$2834.04 | €2223.04

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

#### Table of Contents

#### Introduction

Methodology

Abbreviations

#### **Executive Summary**

#### Donations in shops and in the street are the most common ways of giving to charity

Figure 1: Ways of donating to charities, July 2014

## Charitable spirit strong during church service

Figure 2: Average amount of money people donated in the past 3 months, by ways in which people donate, July 2014

#### Online giving marches on

Figure 3: Online charitable activities over the past 12 months, July 2014

#### Emotional connection as the top driver of donations

Figure 4: Reasons for donating money to charities, July 2014

What we think

#### Issues and Insights

## Raising the engagement of younger donors

The facts

The implications

Charities responding to the modern need for speed and convenience

The facts

The implications

## **Trend Application**

Trend: Guiding Choice
Trend: Moral Brands

Mintel Futures Trend: Generation Next

## Market Drivers

## Key points

## Charitable sector dominated by small- and medium-sized charities

Figure 5: Number of charities, total income and total spending, by annual income band, England and Wales, June 2014

## Charities' income continues to rise

Figure 6: Total annual charities' income, England and Wales, September 2013 - June 2014

Figure 7: Sources of charities' income, June 2014

## 'Big Society' impact on volunteering unclear

Figure 8: Trends in monthly participation in voluntary activities, England, 2005-2013/14

## Average donations on the rise again

Figure 9: Average amount given to charity in the 4 weeks prior to interview, England, 2005-13/14

## Strong community spirit boosts donations

BUY THIS REPORT NOW VISIT: store.mintel.con

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

EMALL: reports@mintel.com



Report Price: £1750.00 | \$2834.04 | €2223.04

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 10: Amount given to charity in the four weeks before interview, by how much people in neighbourhood are trusted, England, 2012-13

#### Catering to the time-pressed donors

Figure 11: Barriers to regular formal volunteering in the 12 months before interview, England, 2012-13

### Brand Communication and Promotion

#### Key points

## 'Christmas spirit' proves a draw for charity advertising

Figure 12: Total advertising spend by UK charities, January 2011-September 2014

#### Cancer charities dominate advertising

Figure 13: Total advertising spend by UK charities, by top 10 advertisers and other (based on top 10 for 2013), January 2011-September 2014

Figure 14: Total advertising spend by UK charities, by type of charity, January 2011-September 2014

### Direct mail appeals for the personal approach, but TV advertising is on the rise

Figure 15: Total advertising spend by UK charities, by media type, January 2011-September 2014

### Online advertising spend on the decline

#### The Consumer – Ways of Donating to Charities

#### Key points

#### Donations in shops and in the street are more popular, but less generous

Figure 16: Ways of donating to charities, July 2014

## Appealing to younger demographics via mobile and online channels

Figure 17: Ways of donating to charities, by age, July 2014

## Looking beyond direct mail to reach out to older donors

## Health of finances drives charitable intent

Figure 18: Ways of donating to charities, by current financial situation, July 2014

## Regular donations are more generous

Figure 19: How people prefer to donate, and average amount of money people donated in the past 3 months, July 2014

## The Consumer – Charitable Causes People Support

## Key points

#### Personal relevance of charitable cause drives donations

Figure 20: Charitable causes people support, July 2014

#### Religious causes attract few donors, but highest contributions

## The Consumer – How Much Money People Donate

## Key points

## Londoners are the most generous donors

Figure 21: Amount of money people donated in the past 3 months, July 2014

## Average donations rise amongst men and youngest adults

Figure 22: Average amount of money people donated in the past 3 months, by gender and age, July 2014

#### People feel most charitable during church services...

Figure 23: Average amount of money people donated in the past 3 months, by ways in which people donate, July 2014

## ...and also when donating to religious organisations



VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

EMAIL: reports@mintel.con



Report Price: £1750.00 | \$2834.04 | €2223.04

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 24: Average amount of money people donated in the past 3 months, by types of charitable causes people donate to, July 2014

#### Transparency increases size of charitable contributions

Figure 25: Average amount of money people donated in the past 3 months, by reasons why people donate to charities, July 2014

Figure 26: Screenshot illustrating Innocent's 'Chain of Good' stories, October 2014

#### The Consumer - Online Charitable Activities

#### Key points

## The rise of online charitable giving

Figure 27: Online charitable activities over the past 12 months, July 2014

### Younger donors appreciate the convenience of online donations

Figure 28: Attitudes towards donating online and on social media, by age, July 2014

### Online fundraising platforms going from strength to strength

#### JustGiving enters crowdfunding space

Figure 29: Screenshot from the beta version of yimby.com, October 2014

#### Selfie campaigns are raising charities' profile

Figure 30: #nomakeupselfie campaign celebrities' selfies, October 2014

Figure 31: Sharing badges for the macmillan ice bucket challenge, October 2014

Figure 32: #wakeupcall celebrity selfies, October 2014

## The Consumer – Motivations for Supporting Charities

## Key points

## Emotional connection as the top motivator to donate

Figure 33: Reasons for donating money to charities, July 2014

## Feel-good factor and guilt motivate younger donors

Figure 34: Reasons for donating money to charities, by age, July 2014

#### The Consumer – Attitudes towards Donating to Charities

#### Key points

## Nearly half of adults are annoyed if they are stopped in the street

Figure 35: Attitudes towards donating to charities, July 2014

Figure 36: Screenshot of Solar Aid's online social impact calculator, October 2014

#### Older donors are more sceptical about impact of their donations

Figure 37: Attitudes towards donating to charities, by age, July 2014  $\,$ 

#### Celebrity influence

## Charitable wills

Figure 38: Screenshot from the front page of Will Aid website, October 2014

## Weddings benefitting charities

Figure 39: Example of Oxfam's wedding favour, October 2014

## The Consumer – Brands and Charitable Giving

## Key points

Millennials are most positive about charitable brands

BUY THIS REPORT NOW VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

EMAIL: reports@mintel.com



Report Price: £1750.00 | \$2834.04 | €2223.04

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 40: Attitudes towards charitable brands, by generations, July 2014

Greater need to engage non-donors

Figure 41: Attitudes towards charitable brands, by whether or not people donated to charity in the past 12 months, July 2014

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094 Americas +1 (312) 943 5250 | APAC +61 (0) 2 8284 8100

EMAIL: reports@mintel.com