Blue State x Fundraising Everywhere

2026: Trends, Challenges, and Opportunities for UK Fundraisers

BLUE STATE

Meet the team!

Hello 👋

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1 Giving Report

UK giving behaviours: 2025 key findings

More people are giving

Nine in 10 adults donated in 2024, representing an additional 4M+ donors year-over-year while mean donation value held steady at £169.

London, Scotland & Northern Ireland

The highest average gifts come from London, Scotland, and Northern Ireland.

Food donations are on the decline

In 2024, only 27% of respondents donated food (down from 37% in 2023), while the number of food insecure households grew.

Sector-wide donor growth

National UK organisations (+14 pts), International organisations (+12 pts), and Animal & Environmental organisations (+11 pts), all saw substantial increases in donor volume.

Continued global generosity

Whilst the majority of adults prefer a local or national cause, those preferring international causes & NGOs gave two times the value of the national average (£341 vs. £169).

Activism on the rise

Attendance at protests and demonstrations has more than doubled since 2022 (3% to 7%), largely driven by youth activism.

The rise of young donors

Younger donors have the highest propensity to donate in the next 12 months and a rising mean gift value; those between 25 and 34 years of age gave £309.

Donors of faith

Faith-based donors are more likely to continue their generosity in the year ahead. Muslims in the UK gave an avg. gift of £373, more than double the national average.

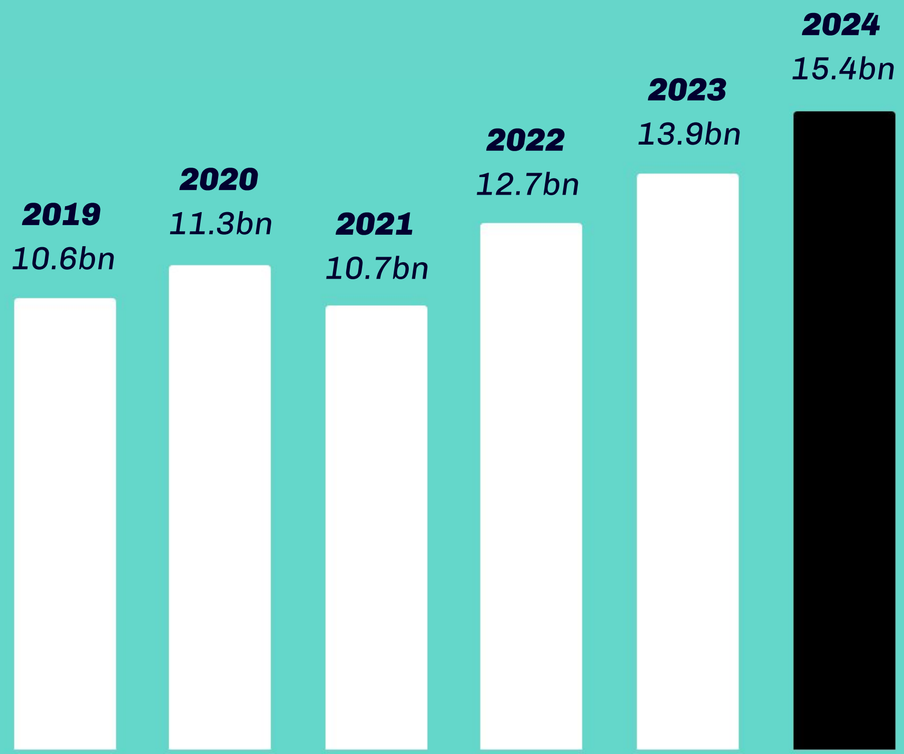
Giving while gaming

Gaming continues to grow at an increasingly fast pace, particularly amongst those 34 and younger (17% gave via streaming).

The pie gets bigger:

Individual giving rose by +11%/ +£1.5Bn, a 41% increase over 2019

Total individual giving in the UK in recent years



Charities Aid Foundation, UK Giving 2025

Charitable giving in the UK

	Value	*Volume*
2024	**£169** *mean value donated by an adult in 2024*	**90%** *of adults donated in 2024*
2023	**£165** *mean value donated by an adult in 2023*	**81%** *of adults donated in 2023*

UK Nat Rep: Jan 2025, N: 2010 | Feb 2024, N: 2010

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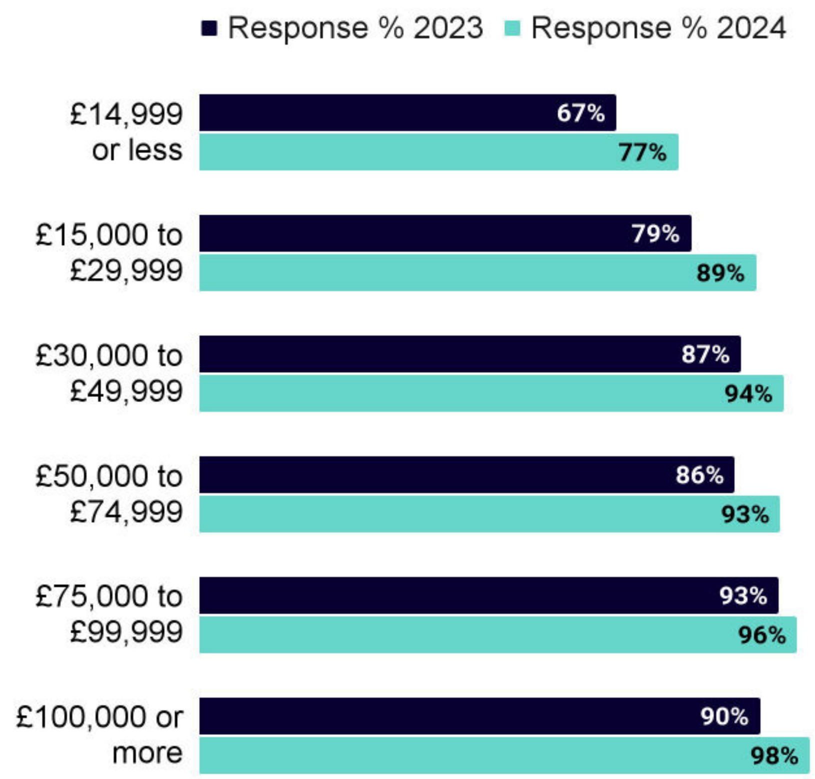
More people are giving, and donation value holds steady

Donor numbers are up across all income levels

with high-income households driving the surge in giving value

Percentage who donated in the last 12 months by household income



Household income	Mean donation value 2023	Mean donation value 2024	YoY % change
£14,999 or less	£140	£55	-60%
£15,000 to £29,999	£117	£125	+7%
£30,000 to £49,999	£159	£172	+8%
£50,000 to £74,999	£187	£170	-9%
£75,000 to £99,999	£138	£252	+83%
£100,000 or more	£583	£750	+29%

UK Nat Rep: Feb 2024, N: 2010 | Jan 2025, N: 2010

Donor volume increases across sectors, demonstrating the ongoing generosity of the UK public

Increases in the volume of those giving to:
(2023 vs 2024)

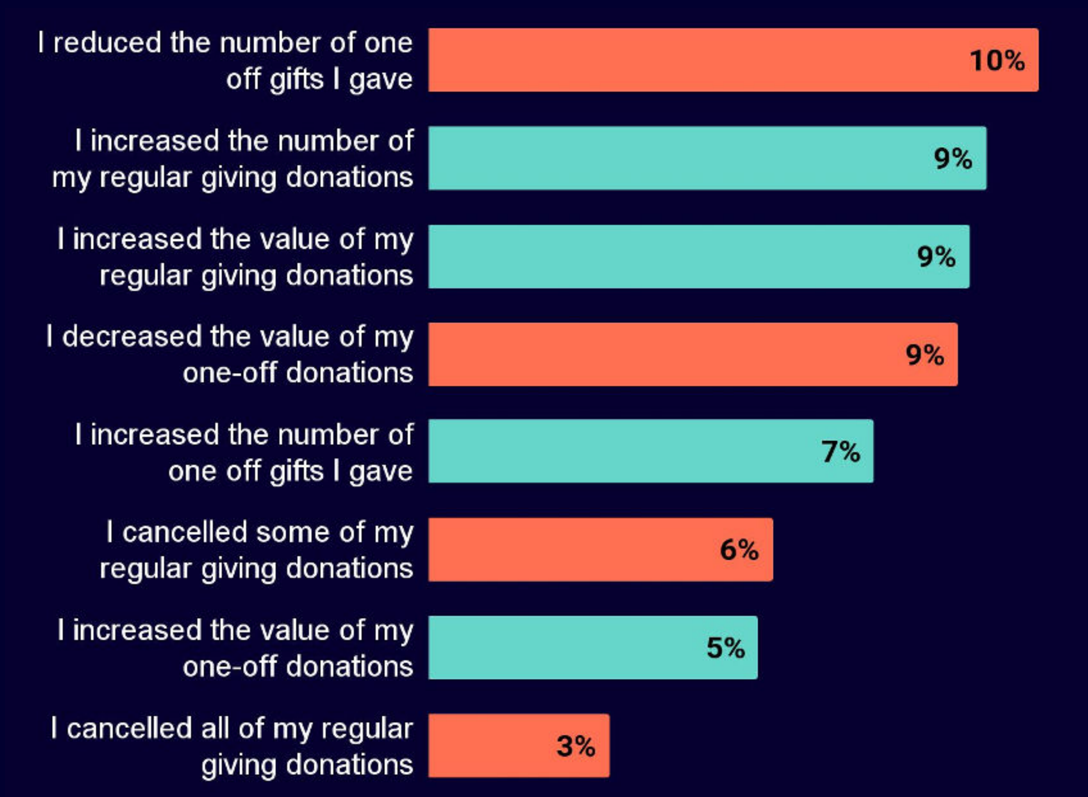
National UK organisations:
78% to 92%

International organisations:
48% to 60%

Animal & Environmental organisations:
53% to 64%

UK Nat Rep: Feb 2024, N: 2010 | Jan 2025, N: 2010

How people changed their donations in the last 12 months



UK Nat Rep: Feb 2024, N: 2010 | Jan 2025, N: 2010

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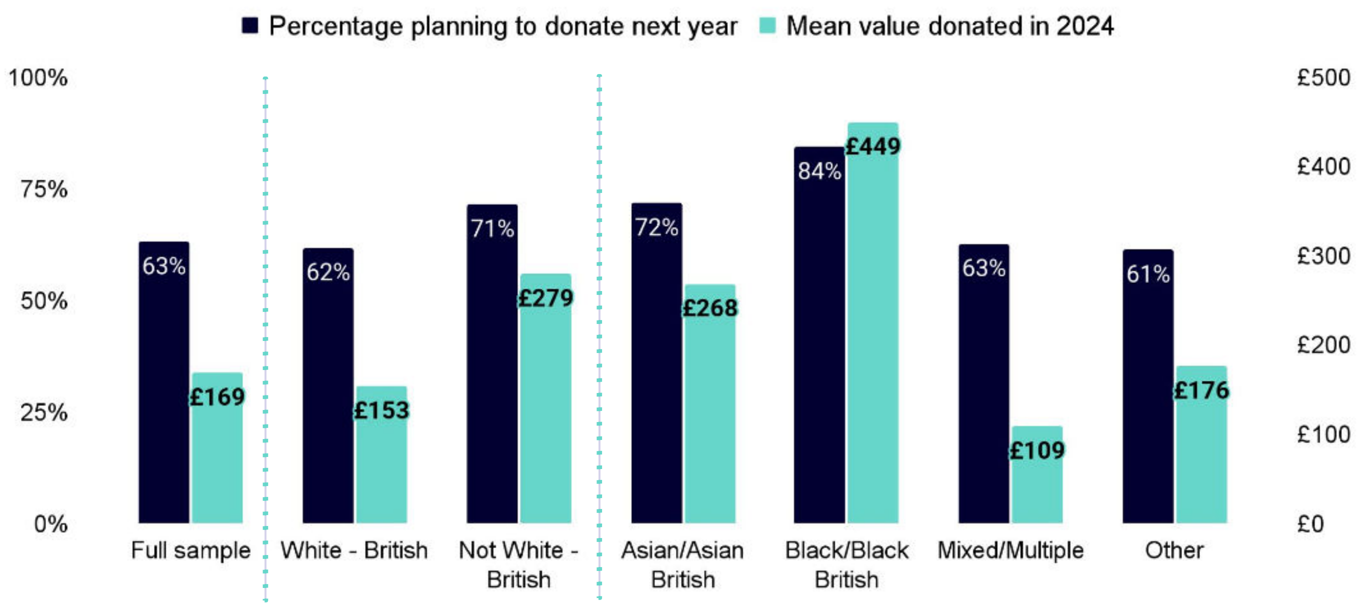
Donors who increased the value and volume of their donations offset the impact of those who decreased and cancelled theirs

Global causes draw more generous donors, while giving to domestic causes drops £65 year-over-year

Average donation value by preference to donate locally, nationally, globally *(N:2010)*

UK Nat Rep: Feb 2024, N: 2010 | Jan 2025, N: 2010

Donation intentions for 2025 and mean donation values in 2024 by ethnicity

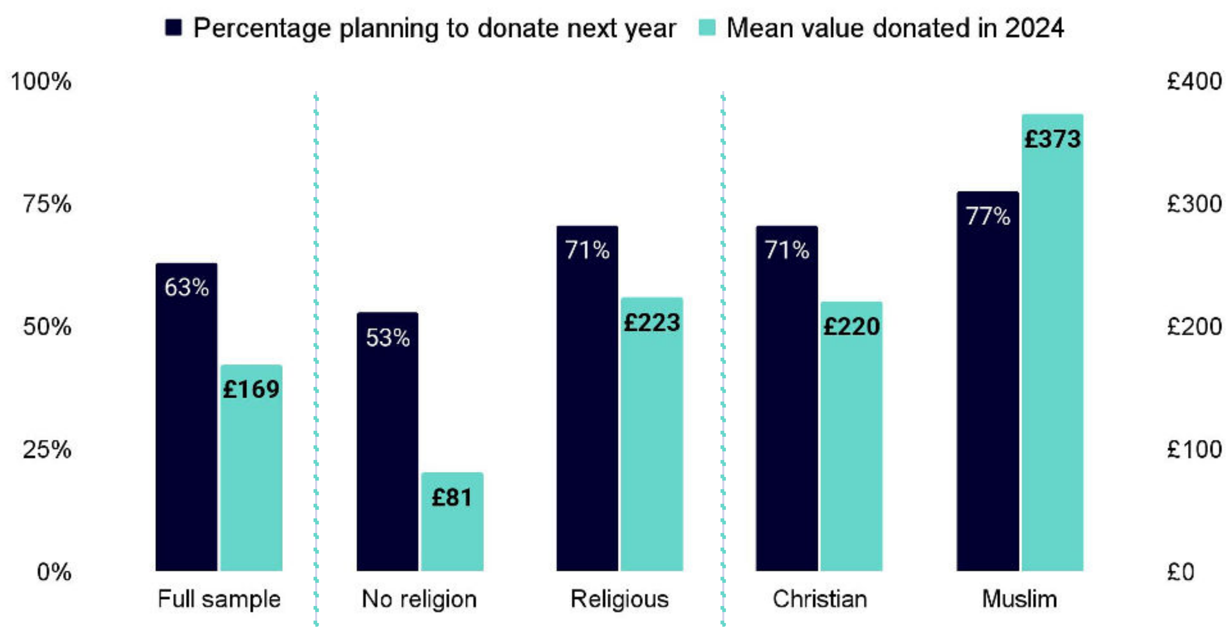


UK Nat Rep: Jan 2025, N: 2010

Ethnic minorities

an audience of 10.9 million people continue to be among the most generous

Donation intentions for 2025 and
mean donation values in 2024 by faith

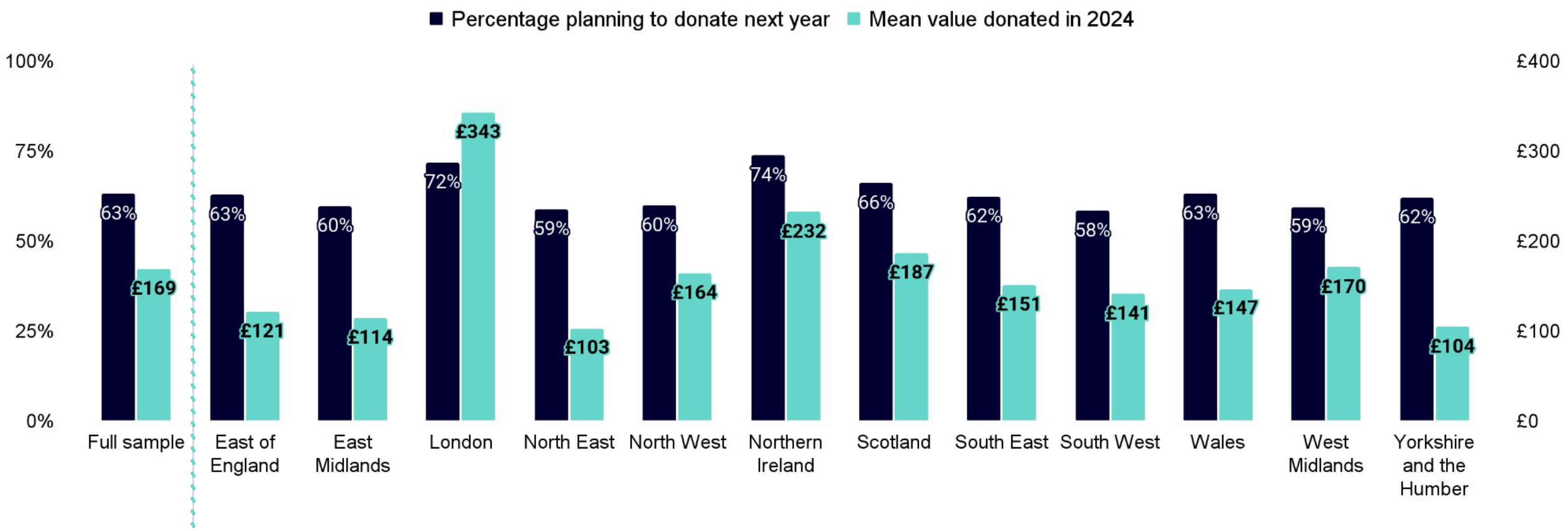


Note: Due to sample size, other religions have been added to the "religious" category together.

Donors of faith

continue to be among the most generous, with British Muslims an ongoing priority for fundraisers

Donation intentions for 2025 and mean donation values in 2024 by region



UK Nat Rep: Jan 2025, N: 2010

London, Scotland & Northern Ireland

are key locations of high-quality donors

Motivations vary across generations

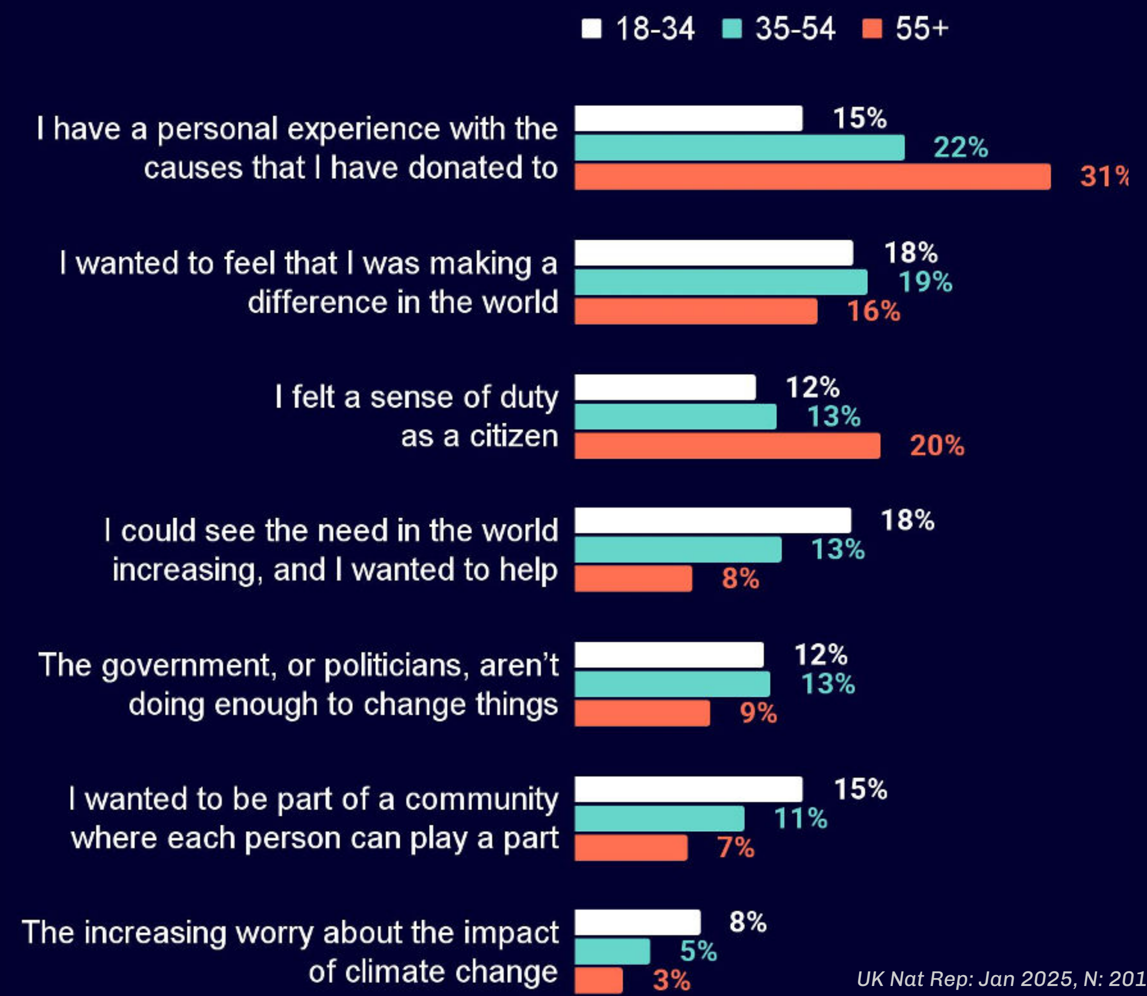
Younger donors are driven by impact, older donors by experience and duty

Donors aged **18-34** are more likely to be motivated by the need they can see in the world and the desire to make a difference. **They want to do what they can to help.**

Donors aged **35-54** are more motivated by personal connection to a cause and wanting to make a difference. **They personally relate to causes and hope things can be better for those struggling.**

Donors aged **55+** are much more likely to be motivated by personal experiences with a cause and feeling a sense of duty as a citizen. **They give because they feel personally connected and feel a sense of moral obligation to act.**

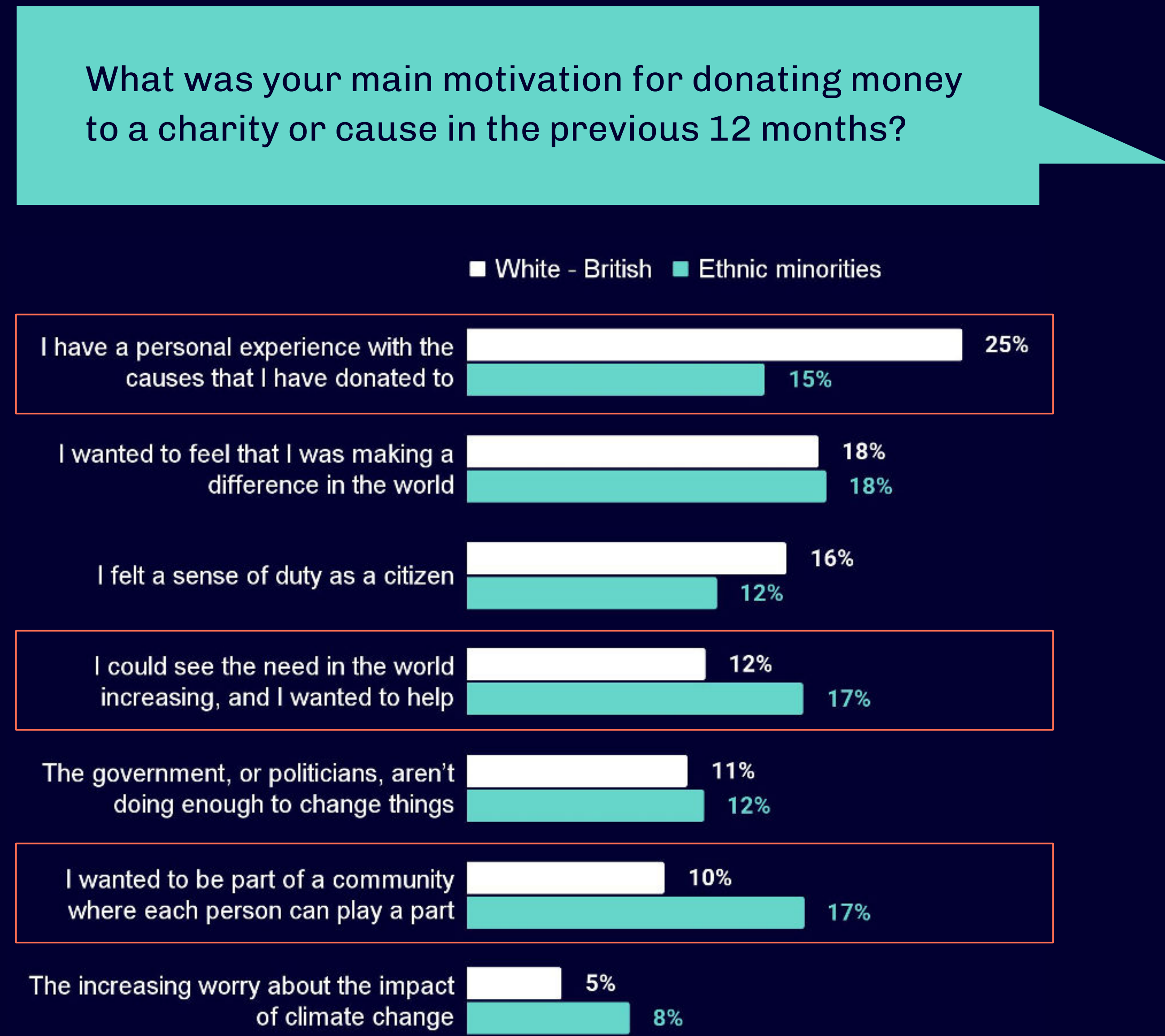
What was your main motivation for donating money to a charity or cause in the previous 12 months?



UK Nat Rep: Jan 2025, N: 2010

Ethnic minorities

are more likely to be motivated to donate by looking at the world, seeing a need, and supporting community



UK Nat Rep: Jan 2025, N: 2010

Household income

Giving motivations vary by income level, with higher-income households more often connecting their giving to agency and identity.

What was your main motivation for donating money to a charity or cause in the previous 12 months?

UK Nat Rep: Jan 2025, N: 2010

Health or medical research & animal welfare remain the UK's most loved causes.

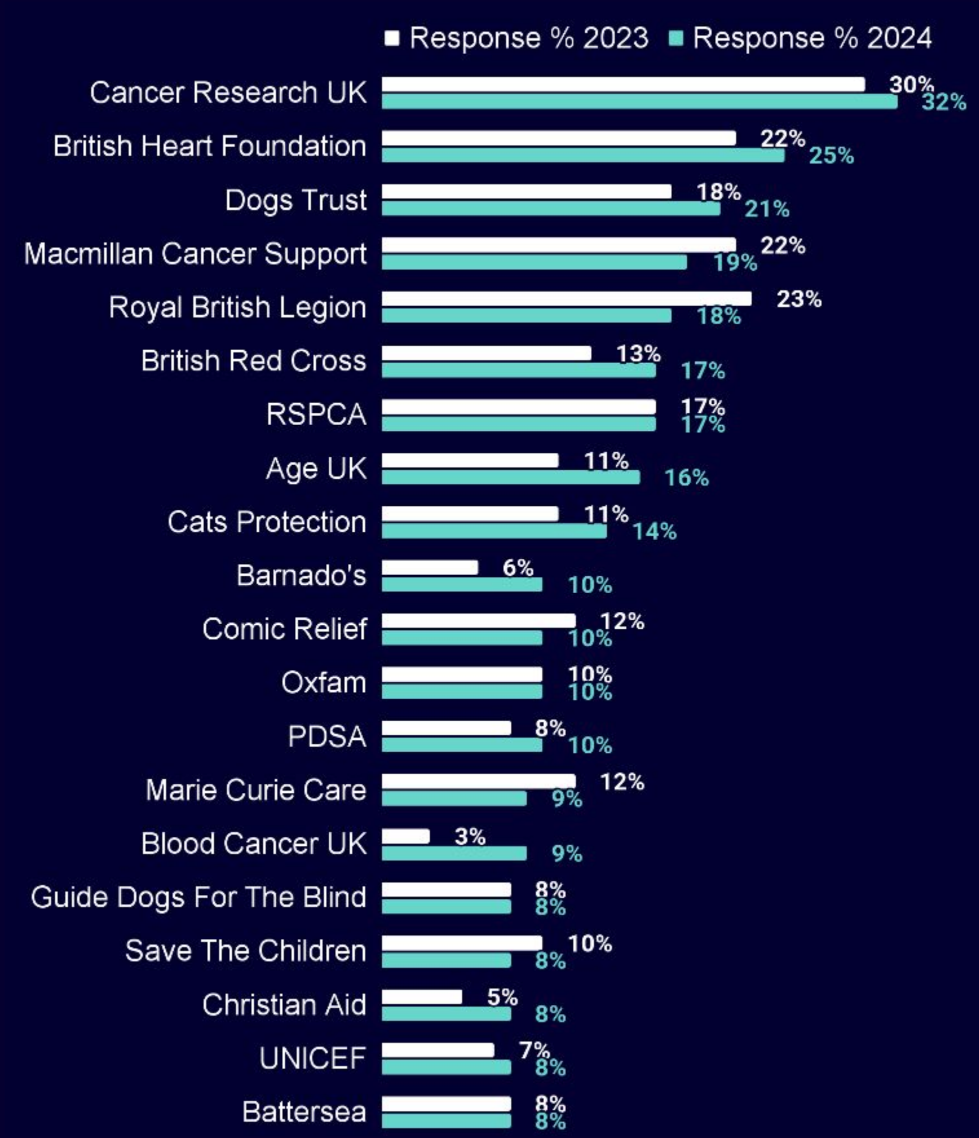
Meanwhile, support for the elderly is on the rise.

Percentage of people who have donated to specific causes/sectors in the past 12 months? *2023 vs 2024*

Causes / sector	2023	2024
Health or medical research	36%	37%
Animal welfare	26%	24%
Children, or youth	22%	21%
Homelessness	18%	20%
Mental Health	19%	18%
Elderly people	11%	14%
Poverty	12%	12%
Humanitarian emergencies	12%	11%
Hunger	8%	10%
Disability	8%	8%
Education	5%	7%
Environment and climate	8%	7%
Religious activities	6%	6%
Human rights	5%	6%
Refugee support	6%	6%
Gender rights and equality	2%	4%
Arts, culture, or heritage	4%	4%
People of particular ethnic/racial origin	2%	3%
LGBTQI+	3%	3%

UK Nat Rep: Feb 2024, N: 2010 | Jan 2025, N: 2010

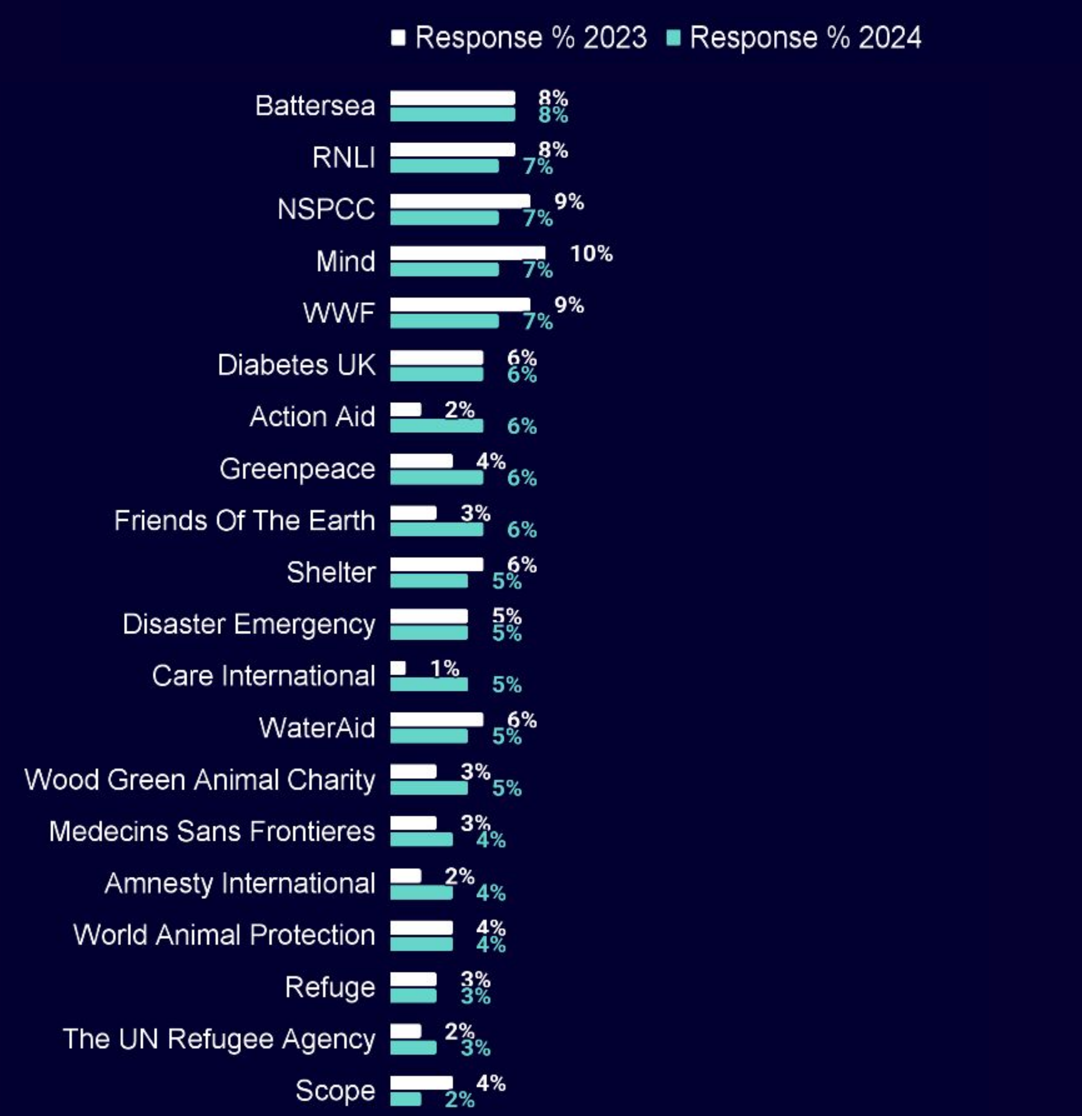
Percentage of UK Adults who have donated to organisations in the past 12 months



UK Nat Rep: Feb 2024, N: 2010 | Jan 2025, N: 2010

National UK organisations are still winning on volume and market share, while animal-related charities continue rising in popularity.

Percentage of UK Adults who have donated to organisations in the past 12 months

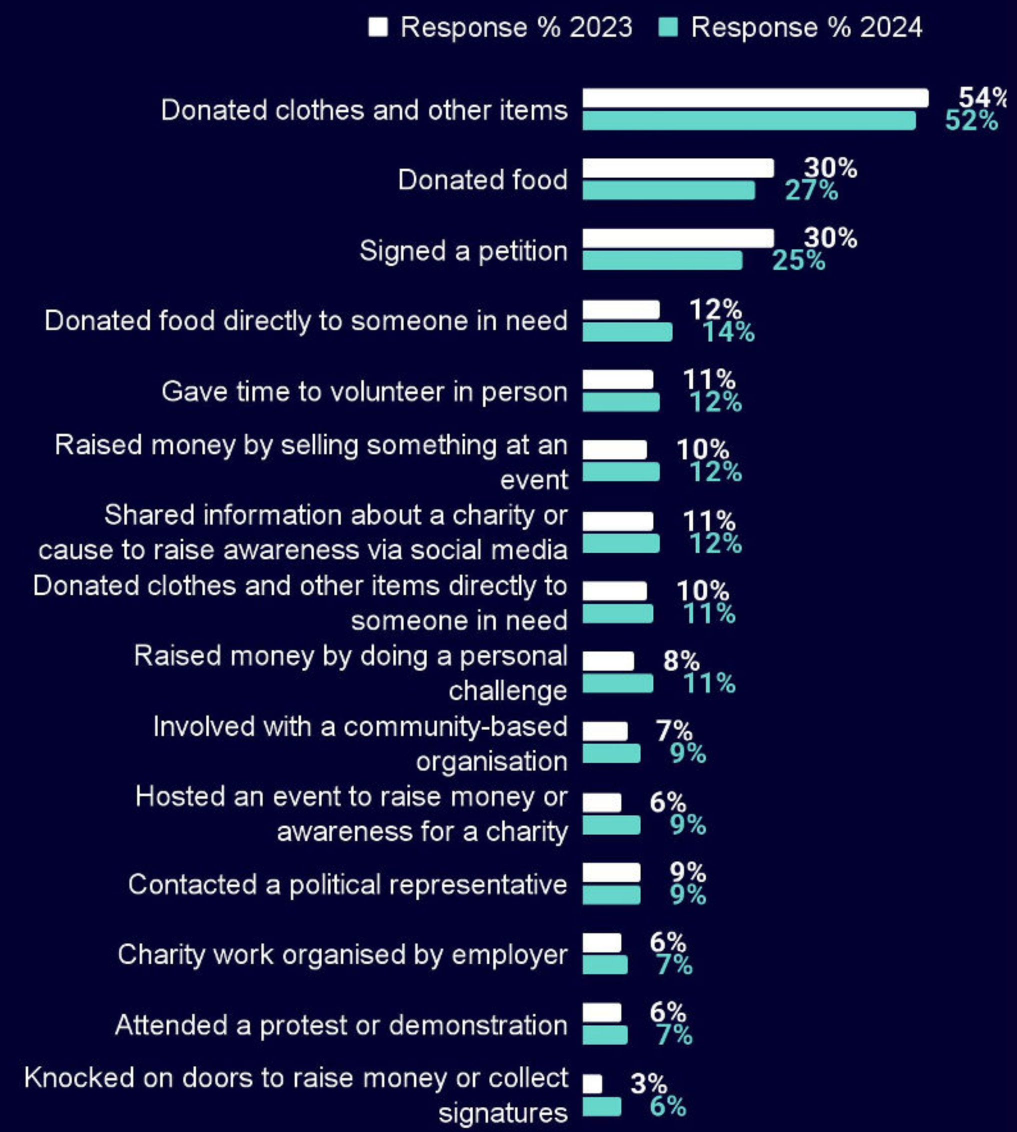


UK Nat Rep: Feb 2024, N: 2010 | Jan 2025, N: 2010

We continue to see international organisations growing in support, but still trailing behind national domestic organisations.

Donating clothes, food, and signing petitions are trending downwards, while protest attendance is trending upwards

Percentage of UK Adults who have taken a non-financial action in the past 12 months



UK Nat Rep: Feb 2024, N: 2010 | Jan 2025, N: 2010

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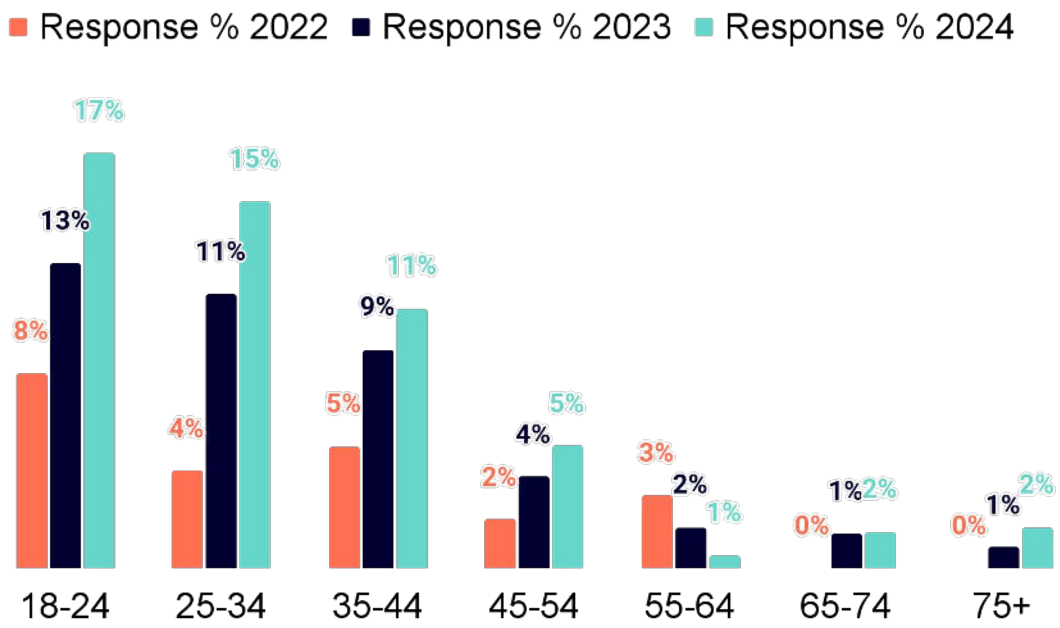
Percentage of UK Adults who attended a protest / demonstration in the past 12 months by age (N.2010)

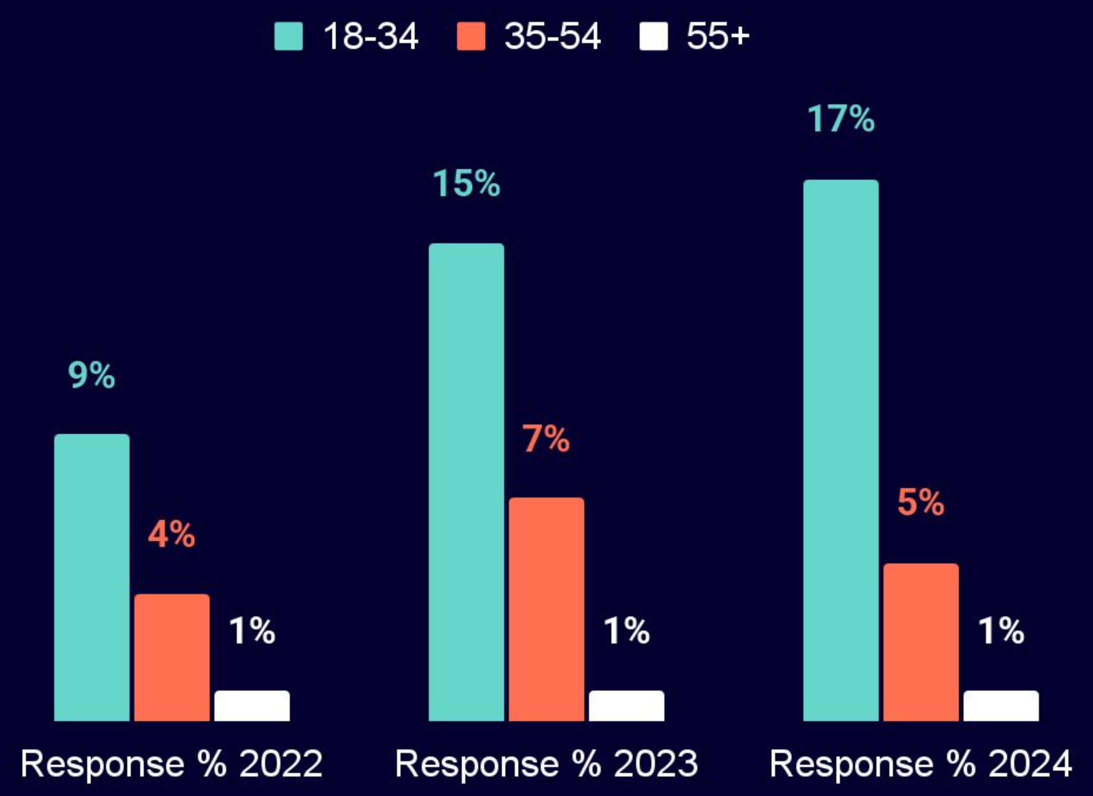


UK Nat Rep: Jan 2023, N: 1540 | Feb 2024, N: 2010 | Jan 2025, N: 2010

Increase in protest attendance is most pronounced in the 18-34 year-old cohorts, although it can be seen across all ages under 55

Gaming & live streaming are growing giving channels for young donors

Percentage of UK Adults who gave money to charity through computer games or livestreams in the past 12 months



UK Nat Rep: Jan 2023, N: 1540 | Feb 2024, N: 2010 | Jan 2025, N: 2010

2 Trends & Opportunities

Trends

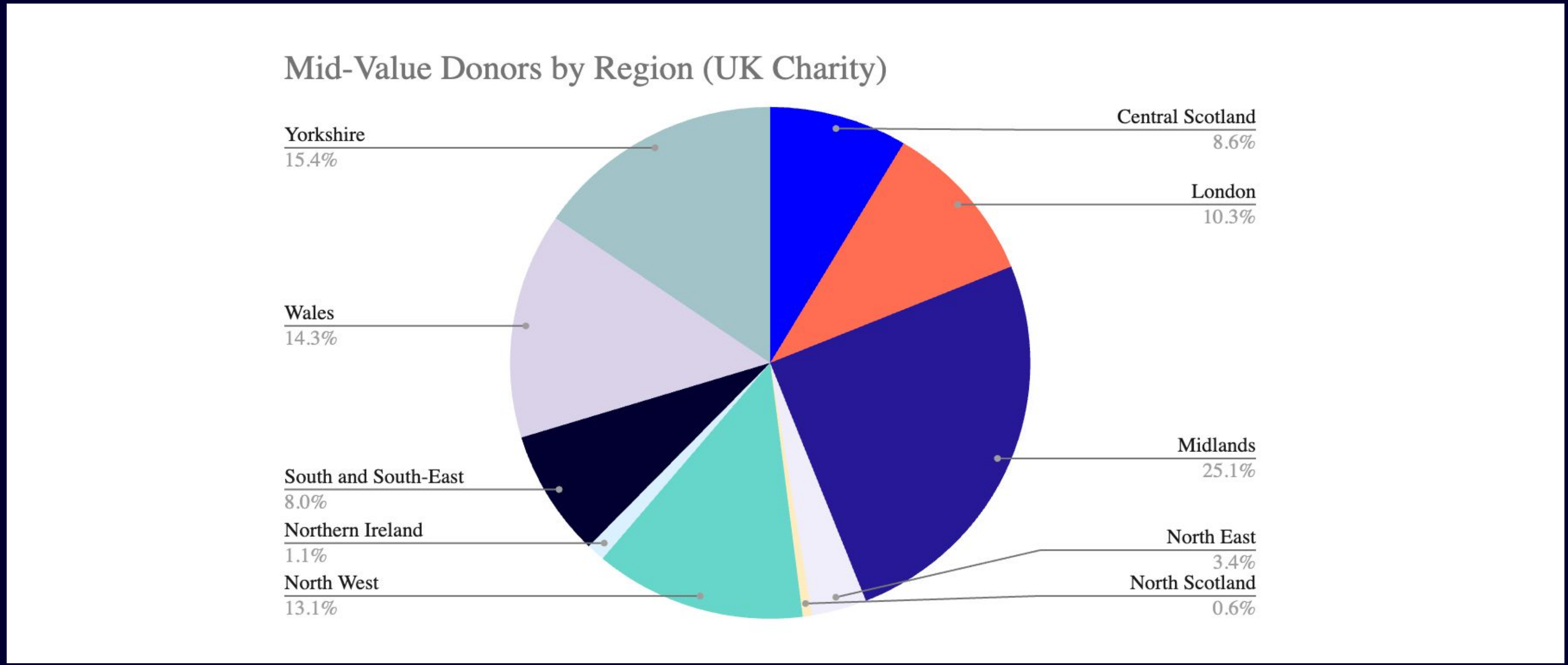
Opportunities

We should challenge the assumption that high value comes from London and the South

For a UK based INGO, 10% of their mid-value donors live in Scotland. For them, in 2025, the London skew is less prominent than it once was.

London, Scotland & Northern Ireland

Are sources of high quality donors and have the largest average gift values by location across the last 12 months.



How much do you know about the value of your donors per region?

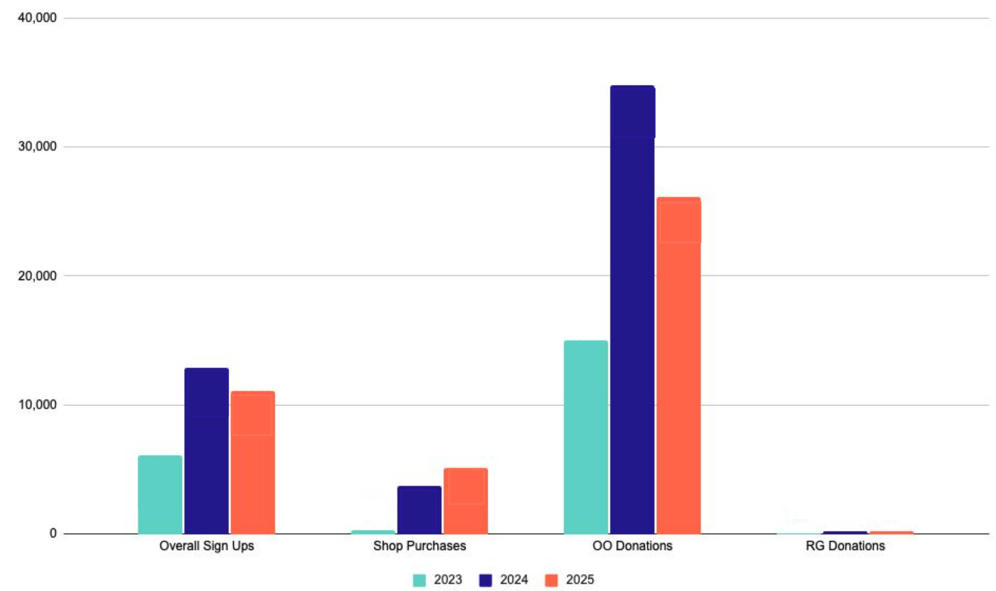
Is your strategy tailored to their average gift amount and potential value in any way?

Domestic vs international: volume vs value?

It's acknowledged throughout the sector that the UK wants to support local, but does gift value even out volumes?

Continued global generosity

Whilst the majority of UK adults prefer a local or domestic cause, those preferring international causes & NGOs gave 2x the value of the national avg.



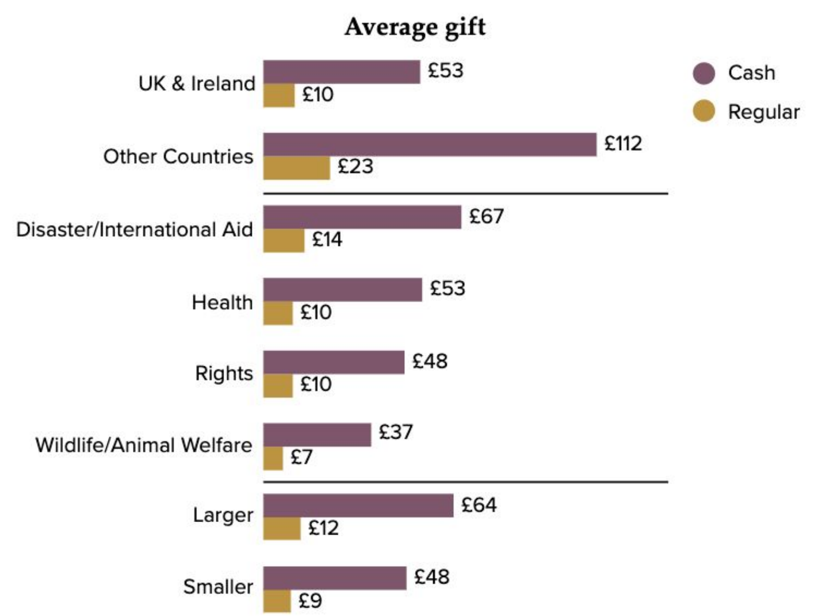
A UK charity working both locally and globally demonstrates that while donation volumes are down for them, their average value has increased.

Behind these numbers, response rates are higher against messaging for their domestic work.

Finding the balance is key to your scalability

It's acknowledged throughout the sector that the UK wants to support local, but does gift value even out volumes?

Are you focusing your optimisations on the right key metrics? Think conversion rate vs average donation value vs donation type.



As M&R also validates each year, average donation value varies by sector, which is usually balanced out by an inverse trend in donation volume.

Continued global generosity

Whilst the majority of UK adults prefer a local or domestic cause, those preferring international causes & NGOs gave 2x the value of the national avg.

Do you have a key focus, or are you spreading your resources too thin and trying to improve every fundraising metric at once?

2 Trends & Opportunities

Trends

Opportunities

With a tough 18 months behind us, the reality should give organisations hope

Generosity in the UK isn't waning. The need is ever-growing. We are a population of people ready to give, if and where the message resonates.

Key questions to prompt donor growth in 2026:

- Do you know which audience segments are ready to give to your organisation at first touch, and which need a longer journey to support?
- Are you focusing on the right key motivators to grab audience attention in the first place?
- Does your organisation prioritise donor volumes or the average value of the first gift? Are you trying to achieve too much in a difficult moment for fundraising?

More people are giving

9 in 10 UK adults donated in 2024, marking a rise in volume. Mean donation value held steady at £169.

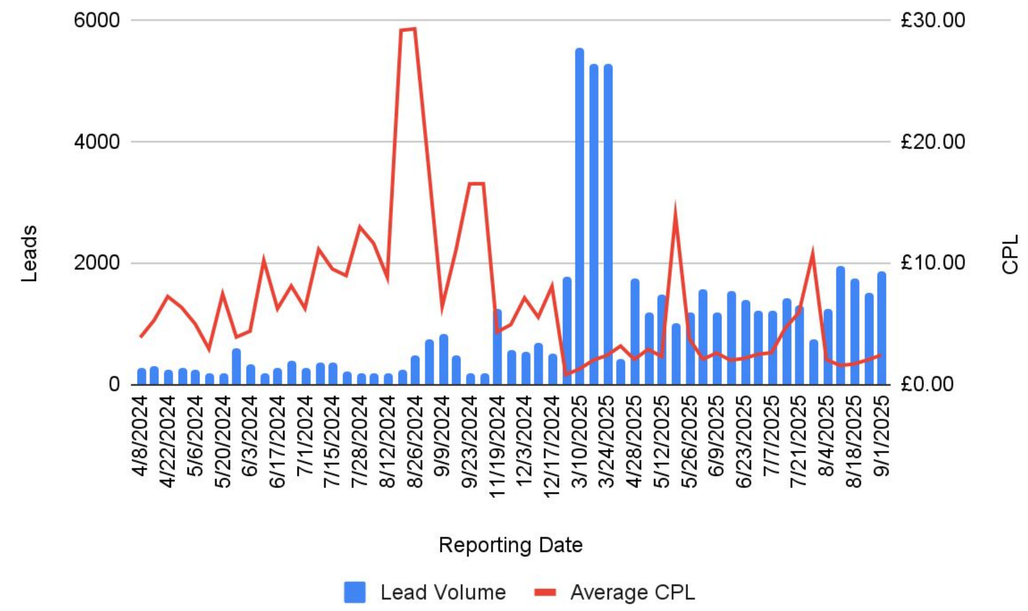
Sector wide donor growth

UK, International, and Animal & Environmental organisations saw substantial increases in donor volume.

Are you clear on where you can align mindset with digital action?

Real-life impact is what is driving many young people to publicly support organisations.

Where does this insight align with your digital programmes? Can you scale your Lead Generation efforts or create two-step conversion journeys with this audience?



UK Non-Profit Organisation, 2024-2025 Data

Activism on the rise

Attendance at protests and demonstrations has more than doubled since 2022 (3% to 7%), largely driven by youth activism.

Is there room in your programme for engagement or advocacy in the form of data capture?

Can you use this to engage a different audience, and measure longer term financial value?

We only have to look to the US to see what the opportunity for income scalability is here

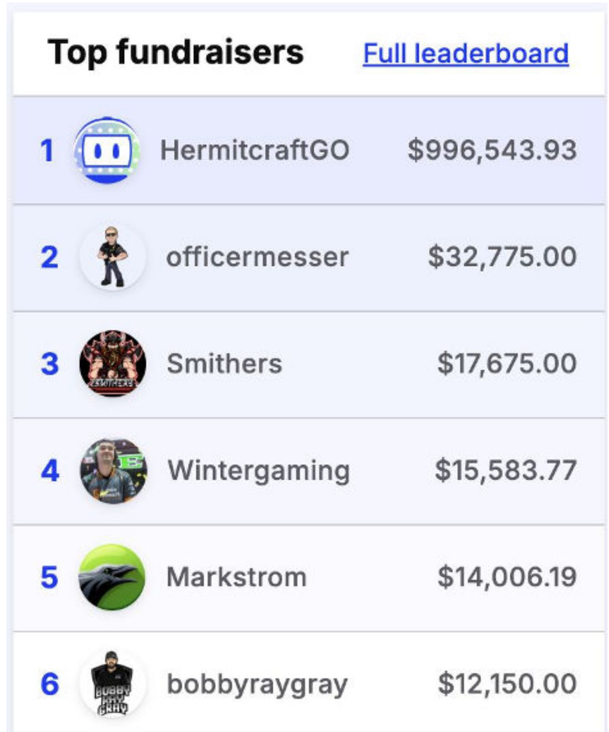
Year after year gaming appears on the list of income opportunities, but is the UK embracing the trend?

Tiltify Gamers Outreach programmes raise millions in a fairly passive manner.

Gaming for good activations often mirrors crowdfunding; they are the embodiment of social proofing, driving strong volumes of gifts of all value.

Giving and gaming

Continues to grow at an increasingly fast pace particularly amongst under 34s (17% gave via this mechanism within the last year).



Top fundraisers Full leaderboard

1	HermitcraftGO	$996,543.93
2	officermesser	$32,775.00
3	Smithers	$17,675.00
4	Wintergaming	$15,583.77
5	Markstrom	$14,006.19
6	bobbyraygray	$12,150.00

Have you had a conversation about Gaming and dismissed it as one for 'later down the line'.

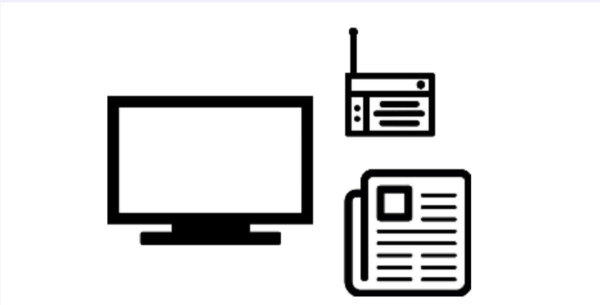
Is there anything that can be tested in the meantime?

Quick fire round: What’s working for our clients?

Broad Segmentation

Whilst we know that personalisation drives positive impact to a fundraising ask, we’re balancing this with the reality that small audiences don’t perform well on digital channels at the moment.

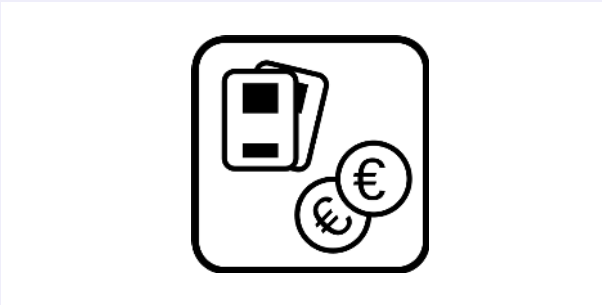
Don’t sacrifice personalisation, but keep that segmentation broad for the sake of your channel learnings.



Challenging the passive consumption

Some digital channels have been written off as conversion drivers because people consume them passively. E.g.: music & podcasts.

We see a surprisingly active audience when running direct response ads on streaming platforms. Supporters take the time to pick up their phone and engage.



Flexible Giving

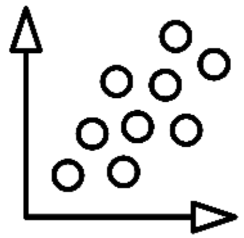
Regular giving rates are dropping for many organisations.

We’re citing the general state of the economy and the nervousness around financial commitments.

But are we looking to the e-commerce sector to see how payment methods are changing?

Are we letting our donors be flexible in the same way that the for-profit sector had to?

Two final challenges to us all....



CPAs are on the rise, or are they?

It's generally known that acquiring new donors online is increasingly expensive.

And this is true. But - this doesn't stop those unicorn campaigns that suddenly see CPAs back down at £50 or less on Meta and Google.

We need to keep challenging ourselves - both organisation and agency - and not assume that cost-efficient acquisition is a thing of the past.

Are we really listening to the information around us?

The average attention span of adults in 2025 is 8.25 seconds.

That's 8.25 seconds for someone to consume the message you're giving them.

We know this, but are we really tailoring our digital fundraising strategies to this insight, if we had to be really honest?

Thank you.

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