



# Adapting and innovating: How charities move forward post-pandemic

KEY FINDINGS  
13 OCTOBER 2021



What people think,  
feel and do

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# Current situation of the charity sector

**The COVID-19 pandemic has brought many challenges to the charity sector. Our last year's report – [How do charities adapt to the impact of COVID-19](#) looked at levels of support for the charity sector at that time and how it was affecting funding. Last year we saw that the public would be more likely to support more in the future by recognising the long-term support charities will need with the associated long-term repercussions. Awareness of the lived experiences of COVID has increased motivation to support among some, whilst others felt that once restrictions lift, they will be able to support in various ways, for example with charity shops re-opening. However, for some, there were feelings they may support less for reasons such as the pandemic being forgotten, suffering financially following the pandemic and thus having less to give, or simply having less time available due to going back to work.**

This year we wanted to follow up and see what the current situation is looking like. How are the public feeling and responding to charitable giving, in a COVID endemic world? This report looks at current levels of supporting and the most common causes supported. We explored the ways in which people have been fundraising, changing behaviours and opportunities for the future. We hear about how UK adults think charities can move forward and what they want to see to encourage support and participation.

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## A bit about the report...

**COVID-19 and its lasting impacts have had a dramatic impact on the charity sector; from increased demand for their services to support the nation, to difficulty fundraising due to the loss of income of many, and social distancing preventing charity events from taking place.**

**However, despite this, we have seen charities show considerable resilience in adapting quickly and finding new and innovative ways of engaging with donors.**

Following last year's report *How do charities adapt to the impact of COVID-19*, where we looked at levels of support for the charity sector and how it was affecting fundraising, this year we wanted to follow up to see what the current situation looks like.

A year and a half on from the initial lockdown, how is the nation feeling about charitable giving, and what types of fundraising opportunities and ways of donating are going to best support charities' ability to thrive in a sustainable way?

The COVID-19 pandemic has sparked profound and lasting changes in how we interact with each other, and with organisations and institutions, and charities are certainly not exempt from this. While there is no quick fix, charities understanding the best ways that they can adapt to the changing needs and lives of their beneficiaries is vital to allow them to continue to thrive in doing what they do best - supporting those in need at a time that they need it most.

**“ Charities understanding the best ways that they can adapt to the changing needs and lives of their beneficiaries is vital to allow them to continue to thrive in doing what they do best - supporting those in need at a time that they need it most. ”**

## We know that the appetite for giving is strong:



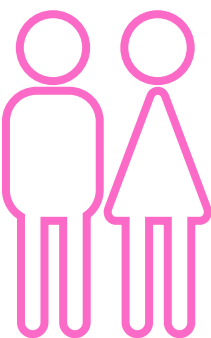
**63%**

of UK adults supported charities in August 2021



**64%**

plan to donate to charity in the next six months



**32%**

of 18–34-year-olds are donating more now compared to before the pandemic, compared to 13% of 55+ year olds

## So, what do charities need to know?



The appeal of fundraising events is shifting, for example

**26%**

now find individual runs/bike rides more appealing than large, organised events



Digital wallets are becoming ever more popular;

**52%**

of UK adults have one,

**21%**

of whom use them regularly. Those who use them feel they are fast, convenient, and easy



**24%**

of UK adults would be more likely to make a one-off payment to a charity if they could do so via a digital wallet

# Donating to charity post-pandemic

## Three in five UK adults supported charities in August 2021

In August 2021 63% of UK adults supported charities in some capacity, this has increased from 51% in 2020. Women are supporting charities more than men (69% versus 57% respectively).

With the easing of Covid-19 restrictions, the donation of goods has also increased from one in ten (11% in May 2020) to three in ten in August 2021 (31%). Purchase of a charity item has also increased (7% 2020 to 17% in 2021), as has setting up of regular donations such as direct debits or standing orders (10% in 2020 to 15% in 2021).

Just over three in five UK adults plan to donate to charity in the next six months (64%). The top causes that they are planning to donate to are specific diseases (36%), animals (32%), children (27%), mental health (26%), and homelessness (23%). Of those causes, children and mental health appear to have become more of a priority for support among the UK population, as they were not in the top five causes which were supported during the pandemic in May 2020.

### TOP 5 CAUSES SUPPORTED DURING COVID-19 PANDEMIC (2020)

Animals (18%)  
Specific diseases (18%)  
People in poverty (16%)  
Local services (16%)  
Homelessness (14%)

### TOP 5 CAUSES PLANNING TO SUPPORT IN THE NEXT 6 MONTHS (2021)

Specific diseases (36%)  
Animals (32%)  
Children (27%)  
Mental Health (26%)  
Homelessness (23%)

## Ways of supporting charity in the past month

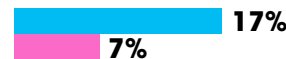
### Donated goods



### Gave a one-off or occasional donations



### Bought a charity item (e.g. a t-shirt where profits or a portion of the profits go to charity)



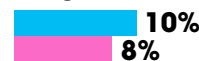
### Set-up regular donations (e.g. a direct debit / standing order)



### Donated to a fundraiser (e.g. a charity run)



### Lent my voice online / offline (e.g. sharing on social media, raising awareness in person, attending a demonstration)



### Volunteered my time



### Other (please specify)



### NA - I have not supported within the last month

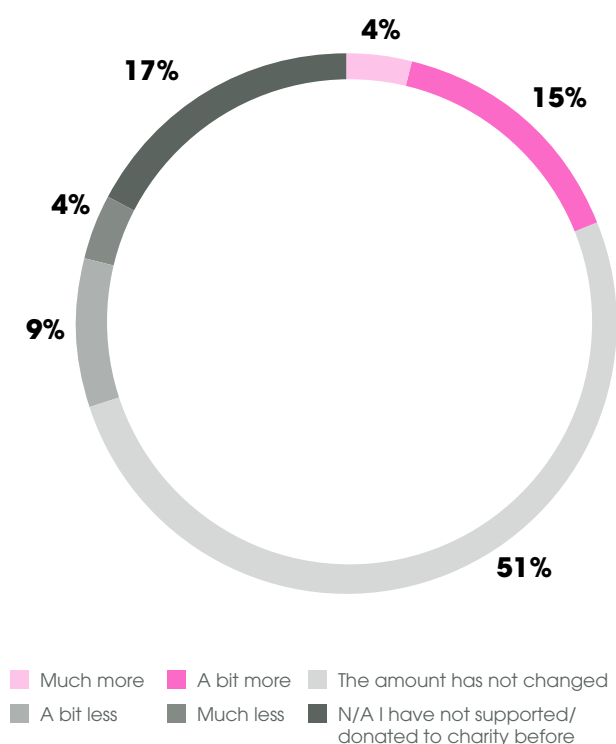


■ 2020 ■ 2021

## One in five are supporting charities more since the Covid-19 restrictions were lifted

Since the Covid-19 restrictions were lifted, one in five report that they are supporting or donating to charity more (19%). One in ten are supporting and donating to charity less (13%). For the majority though, the amount that they donate has not changed (51%).

### Supporting/ donating to charity since Covid-19 restrictions were lifted



Younger people are more likely to have increased the amount that they donate to charity since restrictions were lifted; 32% of 18–34-year-olds are donating more, compared to just 16% of 35–54-year-olds and 13% of 55+ year-olds. When probed on why they are supporting charity more, individuals referred to having more disposable income and time. Others cited that the pandemic has given them heightened awareness of the importance of showing kindness and solidarity to organisations and people who need it most, as well as the struggles faced by many charities throughout the course of the pandemic.

However, others have been donating less since Covid-19 restrictions lifted, many of these are due to concerns around social distancing and avoiding crowded places, as well as prevailing financial difficulties faced by many following the pandemic. The continued prevention of events where individuals could donate to, or support charities also has a role to play in donating less.

The charitable impulse of the nation runs deeply following the pandemic; there is heightened awareness of the necessity of supporting those around us, however the ways that individuals can do this has changed along with economic uncertainty and disrupted routines. The sector must innovatively and creatively continue to fill the gap created by these changing norms through a variety of approaches.



# Fundraising opportunities

While the pandemic has demonstrated that the spirit of charity is alive and well, it has also revealed just how dependent it is on the support of the public. The sector must embrace the changing habits of those it relies on, rather than falling back on wishful thinking.

## Appeal of fundraising opportunities

People doing individual runs/ bike rides rather than large organised runs



Online fundraisers on behalf of someone who has passed away



Buying a charity item



Personal appearance challenges



Online "pub quizzes"



Formal organised runs/ bike rides



Workplace/ office bake sales



Extreme sport or event



■ More appealing
 ■ No change
 ■ Less appealing
 ■ Don't know/NA

One in four find individual runs and bike rides rather than large, organised events more appealing compared to before the pandemic (26%). Online fundraisers and buying a charity item have become more appealing to one in five of the population (22% and 21% respectively). While there is not an overwhelming proportion who find any of the listed fundraising opportunities less appealing, workplace bake sales and extreme sports or events are the fundraisers which are most likely to have become less appealing (13% and 14% respectively). The key reason that individuals feel that office bake sales are less appealing now is predominantly concerns around social distancing (44%), whereas the key reason for deterrence from extreme sports or events is that they now think that there are better ways of raising money (49%).

We asked UK adults whether there are any charity initiatives or fundraising ideas that they have come across as ways to raise money in line with Covid-19 restrictions, that they believe are successful and should be taken up by other charities to encourage public support. Personalisation of causes is deemed vital; the challenge taken on by Captain Tom Moore appealed to many, and resonated with some of those who face physical barriers:

Publicising personal stories through social media has played an important role in fundraising since the beginning of the pandemic. This is either through fundraising pages being shared online, or digital events, such as a virtual coffee mornings or virtual mountain climbs, gaining traction.

**“ I like the individual challenges that people can sign up for, where you complete a certain distance of your choice to raise money. This appeals to me because as a disabled person I cannot take part in outdoor events where there are lots of people and I like the idea of being able to choose a distance that I can manage and complete it on a rowing machine or stationary bike if I choose to. I think these types of initiatives are far more inclusive and give more people the chance to take part. ”**





# Ways to donate

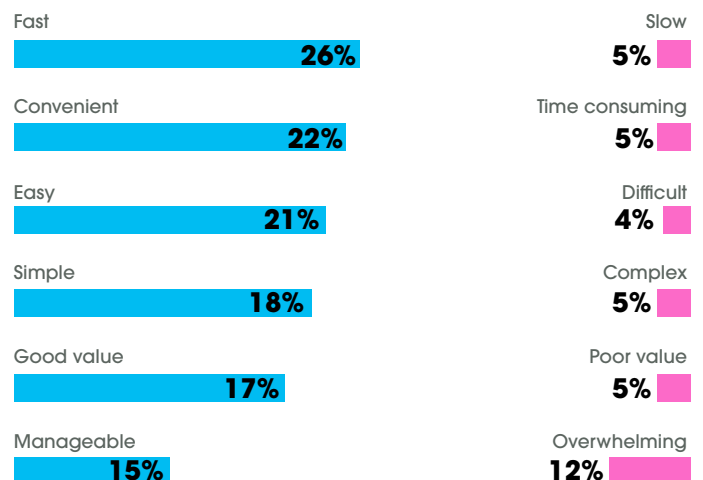
The past eighteen months has seen a change in the way that the world handles money, which unsurprisingly has impacted the way that charities can receive money. One way to adapt to the changing needs of potential supporters could be to continue to develop easy ways to donate; by offering a range of options to suit the individual. This could include the use of digital wallets for those who no longer wish to use cash. By digital wallet, we mean paying with a smart phone using Apple Pay on iPhones or Google Pay for Android mobile phones.

52% of UK adults have a digital wallet, with 21% who have a digital wallet which they use regularly. Unsurprisingly, use of digital wallets is higher among younger adults, those 42% of 18–34-year-olds who are aware of digital wallets that use one regularly, compared to 19% of those aged 35–54 and 6% of those aged 55+. One in four UK adults who have a digital wallet have used it to donate to charity (24%).

There are still barriers to widespread use of digital wallets. Among those who do not use their digital wallet much or at all, two thirds prefer to use a physical debit card (66%). Despite young people being the ones most likely to use a digital wallet, preference towards using a physical debit card is a more common barrier among those aged 18–34 (73%). Four in ten prefer to use a physical credit card (40%), this is higher among those aged 55+ (47% compared to 33% of those aged 18–34 and 34% of those aged 35–54). One third prefer to use cash (37%), this is slightly higher among those aged 55+ (39% compared to 30% of those aged 18–34). Despite barriers, those who use digital wallets feel that they are fast, convenient, and easy:

Fundraising operations being updated to focus on digital wallets as a means of donating will ensure that donors can give in the way that they want to give, with the process being kept simple and straight forward.

## Perceptions of digital wallets (T2B vs. B2B)

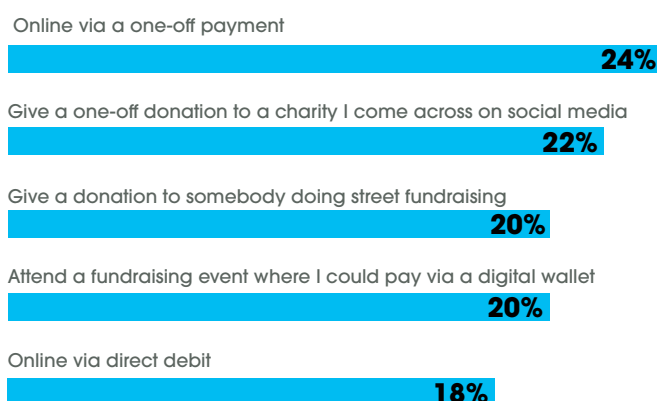


## One in four would be more likely to make a one-off donation online if they could do so via their digital wallet

We asked UK adults how their likelihood to donate to charity in a variety of methods would change if they were able to make a payment via a digital wallet. We found that for most donation methods, more than one in five would be likely to donate to charity more if they could do so using a digital wallet. The types of donations most likely to see an increase if digital wallets are made available to use are online via a one-off payment and a one-off donation to a charity which an individual has come across on social media (24% and 22% respectively NET likely to donate more).

Availability of digital wallets are particularly likely to encourage donations among younger UK adults; 44% would be more likely to donate online via a one-off payment if they were able to do so using a digital wallet (compared to 24% at a total level), and 47% of 18-34 year olds would be more likely to make a one off donation to a charity that they come across on social media if they were able to do so via a digital wallet (compared to 22% at a total level).

### Methods more likely to donate to if able to pay via digital wallet (NET more likely)



There is hope of a new digitally engaged donor base in young people as digital transactions continue to become ever more normalised. Whilst it remains to be seen whether accelerated digital wallet use will remain permanent post-pandemic, it does highlight the fact that charities' ability to collect donations digitally is more important than ever. The charities which have digital foundations for donation in place will be at an advantage.

Despite the advantages of digital means of payment, other forms of payment must not be disregarded. When probed on preference towards cash versus card, 14% of UK adults prefer cash (Top 2 Box), which is lower among 18-34-year-olds (7%) and higher among 55+ year-olds (19%). When probed on the reasons for a preference towards cash, UK adults mentioned that it helps them budget as they have a specific amount of cash in their possession at any given time and are therefore unlikely to spend more than the value of that cash. Individuals also have safety concerns around card use which encourages them to use cash more; they feel that using cash is safer as it reduces the risk of fraudulent activity.

On the other hand, one in five prefer card (20% Top 2 Box); this is similar across all age groups. When probed on the reasons for their preference towards card, there were mentions of the convenience of cards versus cash, as cards are quick and easy to use; they are always on hand and do not require preparation for use, such as cash withdrawal. On top of this, there were also mentions of the safety of using cash, firstly in terms of fraudulent activity; as if there is an issue with spending on a card, individuals feel reassured by the security that they have with their bank against any activity of this nature. Secondly, there were mentions of the safety of using cash for hygiene reasons, in relation to Covid-19. Individuals appreciate that by using a card rather than cash, they can minimise human contact and therefore ensure that they are minimising risk of transmitting or contracting Covid-19.

# The future of giving

**Charities are still going through some challenging times from the impact of Covid-19. As we are facing a new era of Covid-19 where it is here to stay, how can charities adapt to this endemic and where do the opportunities lie?**

## Transparency is key to instil trust

There is a heightened prevalence of society wanting charities to remain transparent and show how donors' money is being used and showcasing personal stories of how their money has helped. Much of society has taken a financial hit during the pandemic. This has reduced the ability to donate for some, but for others the pandemic has given them heightened awareness of those in need, and the support they require. This is combined with a charity sector which has become increasingly competitive, and donors who are becoming increasingly tech savvy. The rise of social media is giving more and more power to individuals who expect control and transparency, so that they can understand where the money that they choose to donate goes before they trust a charity with their donation. This is understandable in a society where tracking shopping orders precisely along their route to delivery has become the norm. Individuals now have the same expectations when it comes to charitable donations; wishing to track their donation through to the ultimate point of beneficiary receipt.

**“ Charities need to provide true transparency about how funds are being used and their impact ”**

## Ensure personalisation

There is a renewed interest in personal involvement when addressing societal issues following the pandemic, which raises questions on how charities attract new donors and communicate with current donors. There is an increased prevalence in donors wanting the relationship that they have with the organisations that they support to be less transactional. Aside from ensuring transparency, as suggested above, personalisation is key. This is both in terms of fundraising opportunities, and encouraging events to take place which promote inclusivity, but also in terms of the cause being donated to. Donors are increasingly keen to understand the personal stories behind the cause they are donating to.

**“ They must continue their social media engagement. They must allow people to see their presence in the local area and hear personal stories from those. People mostly use social media platforms and thus social media is a good way to make people realise the charity's good works. ”**

## Focus on digital transformation

We have seen through the pandemic that charities have had to change the way they approach gaining support from members of the public. The way in which donor's fundraise and support needs to change. Charities need to embrace and transform to more of a digital world both for donating and fundraising. The use of digital wallets is increasing and providing this way to donate will make it more efficient and effective in increasing donations. Contactless is increasingly vital for fundraising as donors carry less and less cash. Tap-on-phone is a gamechanger for contactless fundraising. Charities can empower huge networks of professional and casual fundraisers, without large upfront costs or logistical headaches.

Promoting the benefits of digital wallets via communications to help overcome some of the perceived barriers is vital in maximising its effectiveness once adopted by a charity. However, it must also be remembered that digital wallets are not for everyone; there is a substantial donor base who will continue to prefer to give via more traditional payment methods, such as cash and card.

**“ Let people donate digitally as more people use that now ”**

## Adapting a hybrid model for fundraising

A more hybrid strategy to fundraising offers a way forward for the charity sector, where events can fuse both face-to-face and online fundraising opportunities. The online approach has provided a lifeline to many charities through the pandemic and has seen many benefits including increased reach and accessibility. However, there are also benefits to doing an in-person event where it has been shown that physical events create a change in routine and opportunity to network and / or socialise. Hybrid events offer that opportunity for charities to experience the best of both worlds, providing the accessibility of virtual and the experiences from face-to-face, thus increasing participation and engagement. Excitingly, we have seen this recently with the London Marathon event 2021 where combining traditional mass races with the virtual model will be the new norm for the iconic event, says Event Director Hugh Brasher; *“giving people a goal – we know it changes behaviour, it changes it for the good. It is a big day.”*

**“ Be accessible and give people choices – virtual/ physical events, distances, type of event etc. Find a variety of ways/options to reach people without digital access who may want to donate money. ”**

# Closing thoughts

**It has been a turbulent eighteen months for charities, facing the lingering impacts of Covid-19, and some of these impacts are here to stay. It is vital that charities understand how they can adapt to the changing needs and lives of their beneficiaries to allow them to continue to support those in need.**

In this report we have heard from the public on their current stance on charitable giving. We have explored the appeal of fundraisers, both traditional events and alternative opportunities for giving, as well as looking at the future of charitable transactions in an ever more digital world.

The pandemic has presented opportunities for charities, and many other organisations alike, to reassess how they can enhance their ways of operating. Ultimately, the sector can choose to return to pre-pandemic ways, or it can seize this moment and focus efforts on innovating and adapting to the needs of current and prospect beneficiaries, to refine what the world of 'giving' looks like.





# Authors



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Kate heads up our work within the charity sector at Opinionium and is heavily involved in our thought leadership practice area and social public policy work, recently winners of the ESOMAR Making a difference award 2021. Kate works with both smaller and larger charitable organisations across quantitative and qualitative methodologies. The projects span across work that has been commissioned, pro bono and on a partnership basis.

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## About Opinionium

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