UK Giving Behaviours Tracker: 2024

Trends and insights into UK donors - how, why & when they give

September 2024

BLUE STATE

In this report

- Welcome 3
- Key findings 6
- The continuing trend of value over volume 7
- The growth opportunity of a more diverse donor pool 16
- Wider trends in giving 27
- Conclusions & closing note 31
- Appendices 32

Hi there.

It has been a rollercoaster few years in the fundraising sector - with multiple domestic and global crises, changes in giving habits and behaviours and an audience becoming increasingly more digital in how they engage. Charities and causes are working to attract the attention of fewer donors, while operational costs keep rising.

Every year, we speak to donors across the UK to understand how, why, when and where they give. This analysis allows us to understand shifts taking place as organisations head into an important winter giving season.

Our work is grounded in data, insights and audience behaviour and we believe that the trends we uncover should be accessible to all. That is why earlier this year we also unveiled our first Muslim Giving Behaviours report, and why we carry out this review of giving trends every year.

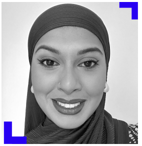
Our 2024 tracker features a UK-wide sample of 2,010 people.

The trend of "value over volume" continues with the total number of donors in decline by 7pts (88% to 81%) yet the mean avg. annual amount donated was up by around £46 per person (£165 from £119)*.

*Note: average gift figures exclude outliers above 2 standard deviations - e.g. major gifts.

We've seen a three fold increase in the number of people cancelling their regular gifts to charities (12%), yet only a 2% decline in one off donations. We're seeing generosity come from a more diverse donor pool - younger audiences (18-34 yr olds) and donors of faith.

We hope this report is as interesting to read as it was to write. And, as always, if you have questions, feedback or comments on what we've shared we would love to hear from you.



Jasmine Miah
Senior Strategist,
Blue State

Jai Bhambra
Principal Analyst,
Blue State

Anjali Bewtra
Global Strategy
Director, Blue State

Lizi Zipser
Executive Director,
Blue State

Our cross-sector experience

Save the Children
UNFPA
TESCO
unicef
HUMAN RIGHTS WATCH
PLAN INTERNATIONAL
MERCY CORPS
AMNESTY INTERNATIONAL
care
Habitat for Humanity
OXFAM
COMIC RELIEF
ONE
MEDECINS SANS FRONTIERES
UNHCR The UN Refugee Agency

A snapshot of our UK survey responses

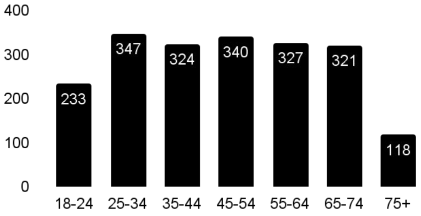
Sample collection, unweighted totals

Sample size

2,010

survey responses

Age distribution



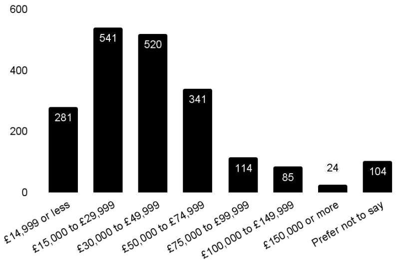
Regional representation

Region	Particip.
East of England	177
East Midlands	142
London	262
North East	81
North West	220
Northern Ireland	45
Scotland	185
South East	272
South West	165
Wales	120
West Midlands	181
Yorkshire and the Humber	160

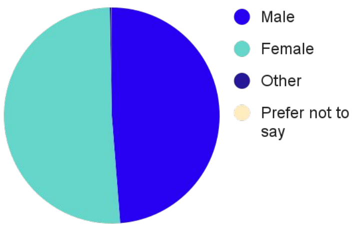
Representation by ethnicity

Ethnicity	Particip.
White - English/Welsh/Scottish /Northern Irish/British	1543
White - Any other White background	111
Black/Black British - African	80
Asian/Asian British - Indian	53
Asian/Asian British - Pakistani	39
White - Irish	36
Asian/Asian British - Chinese	18
Black/Black British - Caribbean	18
White - Roma	15
Asian/Asian British - Bangladeshi	15
Black/Black British - Any other Black / British Black background	14
Mixed/Multiple ethnic groups - White and Black Caribbean	12
Other - Any other ethnic group	11
Asian/Asian British - Any other Asian background	10
Mixed/Multiple ethnic groups - White and Asian	10
Mixed/Multiple ethnic groups - Any other Mixed/Multiple ethnic background	8
White - Gypsy or Irish Traveller	7
Mixed/Multiple ethnic groups - White and Black African	7
Other - Arab	3

Household income distributions



Gender distribution



Key findings

UK donors gave £165pp

A year on year increase of £46 gifted to charity, though a slight decline (7 pts) in the overall UK donor population who gave to charity.

1 in 4 UK adults

Are optimistic about their own financial outlook and have the capacity to give more often and higher avg. values in the next year.

Donors of faith

Have a higher likelihood of continued generosity in the year ahead. UK Muslims gave an avg. gift of £708.

Regular giving decline

12% of UK donors cancelled some form of regular giving - a 3x increase. However one off donations only declined slightly (2%pts).

More young donors

Have the highest propensity to donate in the last 12 months and a rising average gift value - 25-34 yr olds gave £256.

London and the East

Continue to be a source of high quality donors and have the largest average gift values by location across the last 12 months.

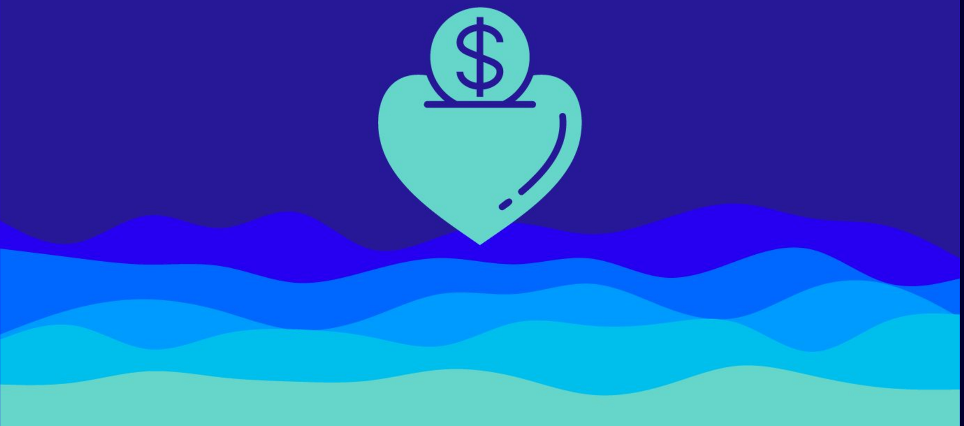
Global generosity

Whilst the majority of UK adults are likely to give to a local or domestic cause, those giving to international charities & NGOs gave 172% more than the national avg.

Giving and gaming

Continues to grow at an increasingly fast pace particularly amongst under 34s (15% gave via this mechanism within the last year).

1



The continuing trend of value over volume

The total amount donated by the UK public is up 9%, however charity is perhaps starting ‘at home’

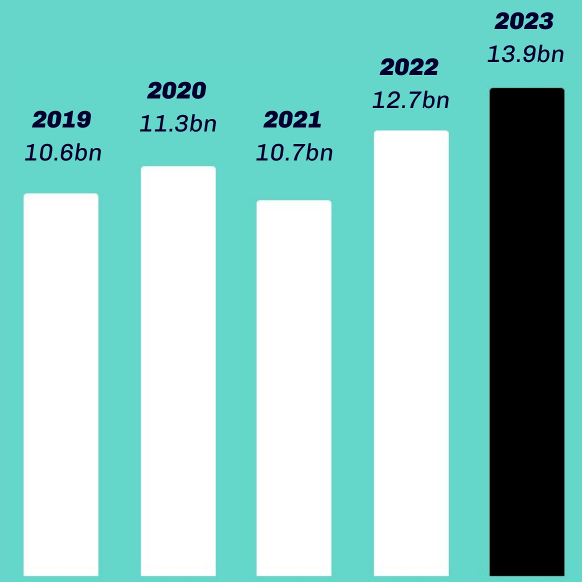
Despite economic uncertainty, giving continues to rise year on year - **with the British public generously donating £13.9BN in 2023** (CAF, 2024).

The highest cause areas associated with the total volume of donations given were health or medical research, animal welfare, children or youth, mental health and homelessness. Donations to charities that support disabled people increased in 2023 having declined during the pandemic. See slide 28-29 for specific breakdown by charity.

90% of those we surveyed were most likely to donate to a local or national cause (charity operating in their local area or across the UK).

As expected, our survey found local connection to be a powerful motivator for giving (over 51% of UK donors we spoke to were most likely to donate to a local cause).

Total individual giving in the UK in recent years



Charities Aid Foundation, UK Giving 2024

This aligns with the £46 increase we saw in the average amount donated by a UK adult in 2023, despite a decline in the total UK donor pool

	Value	Volume
2023	**£165** Mean value donated by a UK adult in 2023 (N: 2010)	**81%** Of UK adults donated in 2023 (N: 2010)
2022	**£119** Mean value donated by a UK adult in 2022 (N: 1541)	**88%** Of UK Adults donated in 2022 (N: 1541)

The trend of value over volume (discussed in our 2023 giving tracker at length) continues into a second year.

Whilst the number of UK adults donating has seen a slight decline to 81%, the average gift donated by a UK adult has increased to £165 (from £119) in the last year showing that those able to give more continue to give even more generously as they can see the need continuing to grow.

This increase in value is driven by a variety of segments such as higher income households, diaspora donors, faith based donors as well as younger donors which we will explore further in this report.

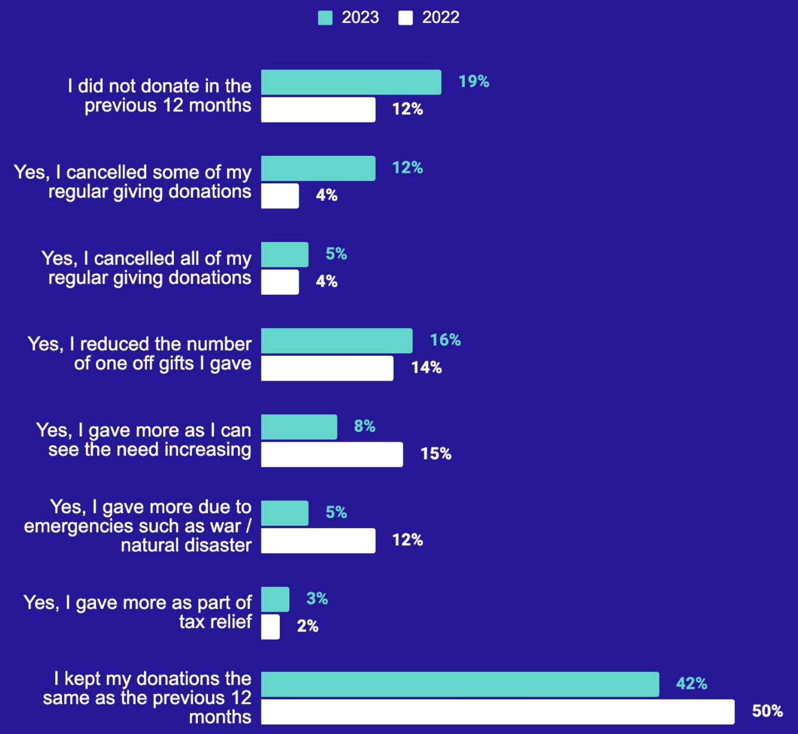
The number of donors who are cancelling some of their regular donations have increased three fold (from 4% to 12%)

The decrease in overall volume of donors is driven by a stark difference in regular giving versus one off giving behaviour.

3x more donors are cancelling some of their regular giving commitments, yet there has been a **much lower reduction** in the number of **one off gifts** being given **(2%).** Suggesting that UK audiences do want to give, but crave flexibility and more control in their giving. The most likely to keep their gifts were the over 65s (58%)

These changes in behaviour highlight the need for charitable organisations to address donor retention and engagement strategies in order to demonstrate impact and retain their existing base - particularly with rising acquisition media costs - and perhaps to explore more flexible giving models as well as repeat cash strategies for audiences who want to give on their own terms.

Q: Below is a list of ways that your charitable giving may have changed within the previous 12 months. Do any of these changes apply to how you donated? Please select all that apply.



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

Shrinking donor volumes persist as the cost of living crisis continues to impact the UK

"I haven't got enough money for myself let alone giving it away."

65-74, Male, East of England

"I do not have the spare money to donate this year."

45-54, Female, London

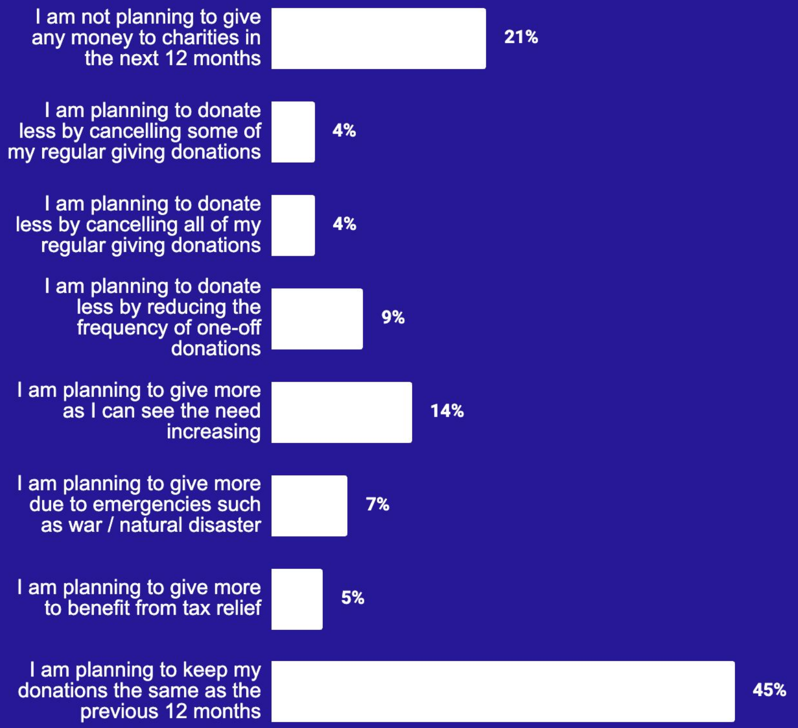
"I am currently unable to spare any money as I am struggling financially"

25-34, Female, South East

"Can't afford it due to rise cost of living, everything that we have goes on bills and food to survive don't have anything spare each month"

35-44, Male, Wales

Q: Compared to the last 12 months, is the amount that you donate changing in the next 12 months? Please select all options relevant to your circumstances.



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

Over 1 in 4 UK adults are optimistic about their own financial outlook and are likely to have the capacity to be generous

People in the UK who are optimistic about their own financial outlook over the next 12 months

UK Nat Rep: Feb 2024. Household income N: 2010

1 in 4 UK adults feel optimistic about their own financial outlook. This rises to nearly 1 in 3 (31%) in households with income of over £100,000.

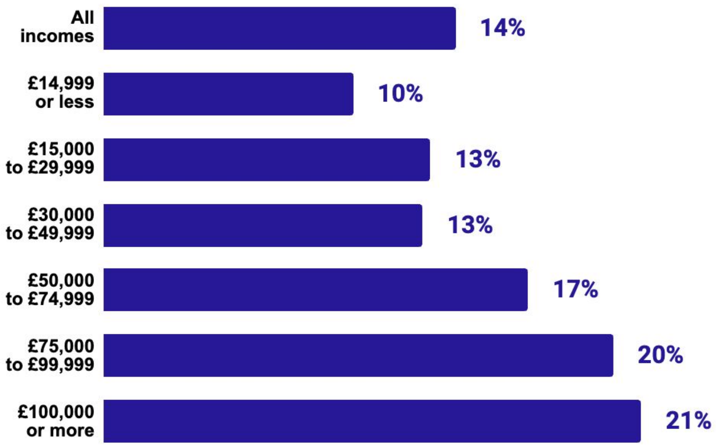
It is worth noting that over a fifth of UK households fall into this bracket which is over 5.6m. As a potential donor pool, this is a larger bracket than some organisations may recognise.

This shows the potential of considering your low and high value donor programmes and the exchange and opportunities you are offering such donors who may be seeking to be more than just a viewer. Perhaps consider how you are inviting their input whether it's to select an interest area they'd like to hear more about or an update on progress against an appeal they had given to before.

For some clients we've seen successes with 'donor communities' once individuals reach a certain giving threshold.

A growing wealth gaps means it will be *value, not volume*, that makes up the difference in income

Uk adults planning to give more as they can see the need increasing



UK Nat Rep Feb 2024 N: 2010

14% of UK adults across all incomes say they plan to give more as they see the charitable need increasing across the UK and around the world.

This rises to **1 in 5 (20%) planning to give more for households over £75,000.** Emphasising that higher income and value households will be key audiences to keep engaged and motivated as ongoing economic uncertainty continues.

There is an ongoing imperative to move from a volume strategy for donor acquisition and development to one more focussed on value, as well as a need to find a way to connect and appeal to these potentially lucrative audiences as it will be a very competitive environment with multiple organisations looking for share of mind, time and wallet.

Donors who plan to give more can see that the need across the world is increasing, particularly when it comes to global crises

To better understand donation intentions for 2024,
we asked people panning to give more, why?

*"People in **war torn countries need help more than ever**"*

35-44, Male, North East, HHI 30k - 50k

*"I'm putting into consideration the **increased devastations**, inflation as well as the satisfaction of contributing to people's survival"*

25-34, Male, London, HHI over 75k

*"There are **many humanitarian crises around the world that need our help.** Particularly, **the war in palestine** has left millions of children and families in desperate need."*

18-24, Female, West Midlands

*"With current events **there seems to be an even higher need** for supporting charities and NGOs."*

25-34, Female, South East, HHI under 30k

*"The world is changing and **things are getting tougher.** For me, It is important to do more in regards to donations."*

35-44, Male, West Midlands, HHI under 30k

*There is an **increasing need for relief as a result of wars** in Ukraine and Gaza.*

75+, Male, South East, HHI 50k - 75k

*"Because the **wars and discourse occurring around the world is worsening,** and I want to help at least a little bit"*

18-24, Female, Yorkshire & Humber

As we reported last year, individuals surveyed can see that the need across the world is increasing - particularly when it comes to ongoing conflicts in Gaza and Ukraine.

News coverage and the increased prominence of social media featuring 'frontline stories' are likely heightening this position from audiences. And this is confirmed by many of our clients who see spikes in giving during emergencies or increased news coverage.

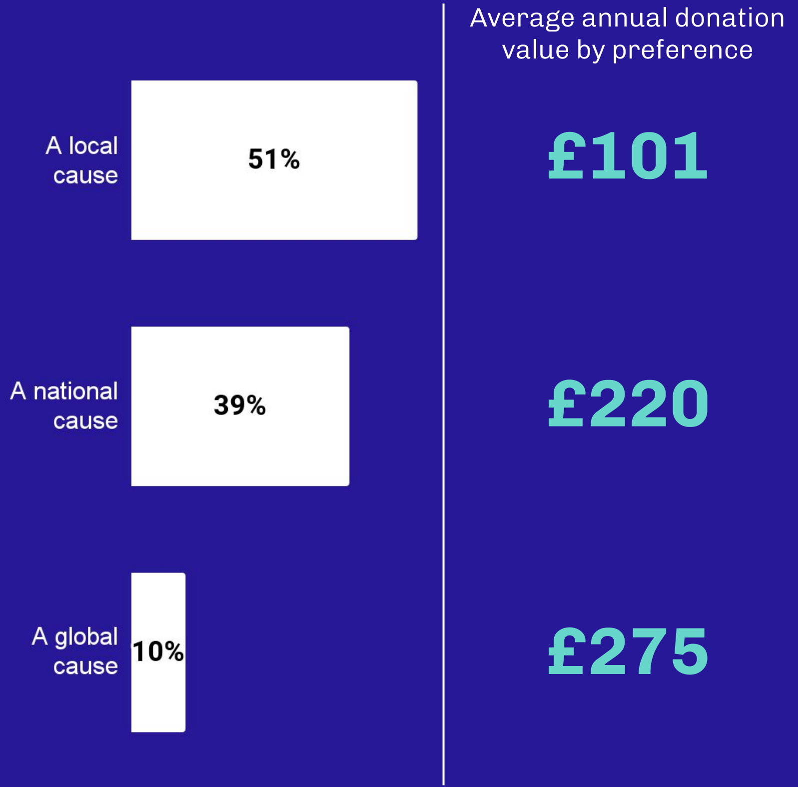
As a result, those who are most likely to donate to a global causes are by far the most generous

Whilst more of our sample of UK adults were likely to give to a local or national cause leaning towards charity ‘beginning at home’, we can see that those who donate to global causes are far more generous with **average gifts of £275 - 172% higher than those average gifts to more local causes**.

The ongoing humanitarian impact of global crises, the media coverage and the huge relief efforts needed are likely encouraging higher value donations. Though it is worth noting the total this group represented is in decline since its 2022 high (associated with the Ukraine war).

When it comes to local causes, the volume is higher (1 in 2) yet the average total gift is lower.

Percentage of UK adults who who are most likely to donate locally, nationally or globally



UK Nat Rep Feb 2024. N: 2010: Question - Are you most likely to donate to a charity if it is dealing with a local, national, or global cause?

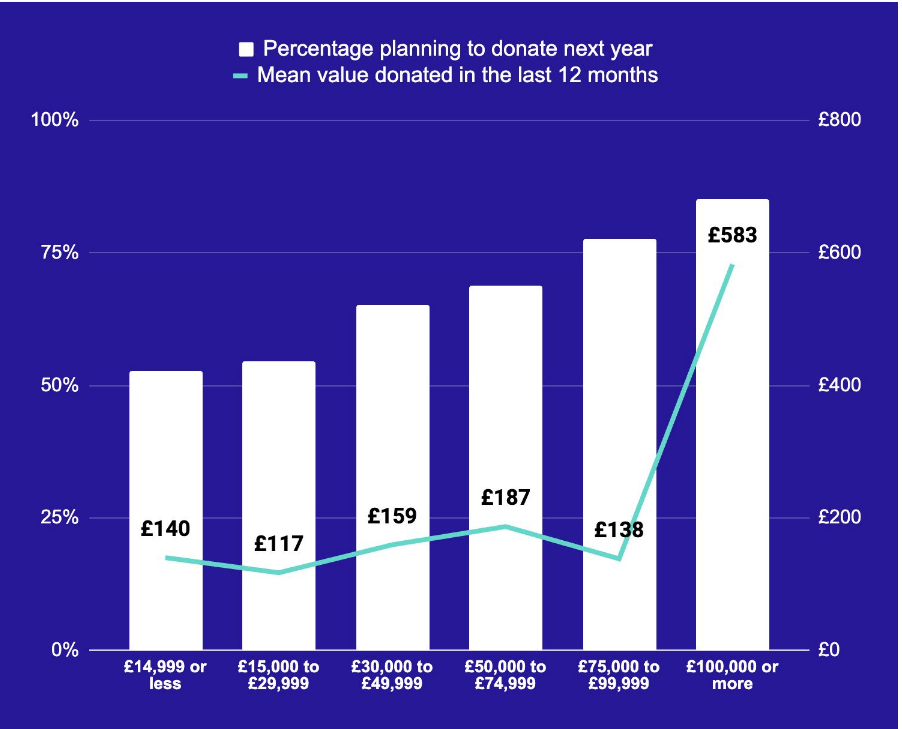
2

The growth opportunity of a more diverse donor pool

INCOME: Households earning over £100k hold the highest potential to become new mid-value donors and grow in value as an existing donor

Donation intentions for 2024 and average donation amounts in 2023 by household income.

UK Nat Rep Feb 2024, N: 2010



In our last report we noted higher earners in households with incomes over £100k are the most likely to continue and increase their giving. This findings is true again this year - **with 85% planning to donate next year.**

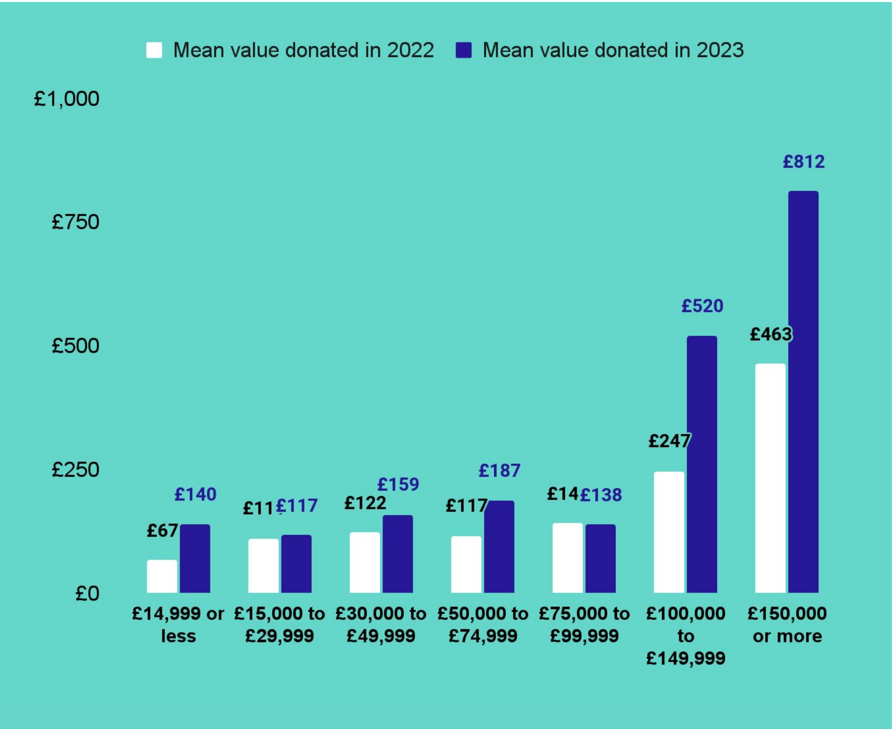
It is important to note that this spirit of generosity continues in lower income households as well, **with over half of households with less than £15k** saying they plan to give next year. This is echoed by CAF's giving report, which found some of the least affluent parts of the UK are among the most generous (proportional to their household income).

When asked about their giving in 2023, average gifts from households of £100k+ has **skyrocketed to over 3.5 times more** than the national mean average (£165) to £583.

INCOME: Across almost all incomes, those who are giving donated more in 2023 than in 2022 - with the increase largest among high income households

Mean donation value by household income over time.

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



Despite financial pressures, we have seen a surge of generosity across our sample **with almost all incomes giving more in 2023** than they did in 2022 - with the largest increase in high income households who have the capacity to give higher value donations.

It's important to note though that even **households with income of £14,999 and less have doubled their donations** - as have higher income households - so we can see that the UK public have continued a boom of giving in the last year.

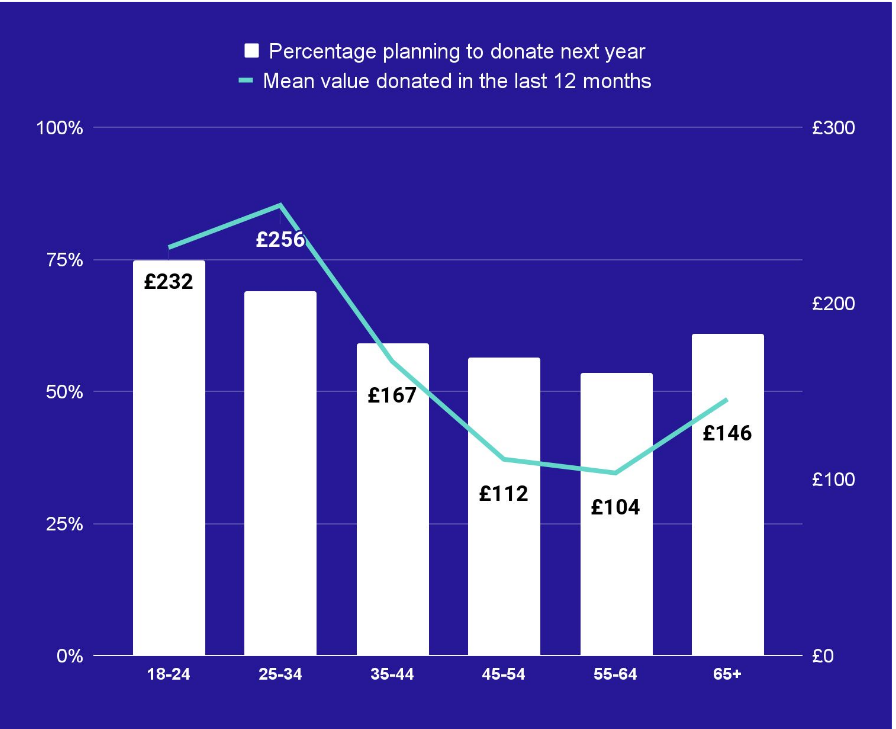
As noted throughout the report there are two trends that appear to be contributing to this increase in value:

Lower income brackets, community connection: those earning less are still seeing a need for charity and are contributing locally or nationally to help where they can

Higher income brackets, global crises: ongoing global conflicts and firsthand stories across news, social media and digital channels are helping to bridge the miles between donors and what's happening on the ground.

AGE: Surprisingly, younger donors had the highest average donation value of all ages, and were most likely to say they want to continue giving

Donation intentions for 2024 and average donation amounts in 2023 by age.
UK Nat Rep: Feb 2024



Our sample this year showed some surprising and interesting trends across younger donors. Out of all age groups younger audiences were the most likely to say they plan to give over the next year. This finding was paired with a significantly higher **average gift for 2023 (£244) across the combined 18-34 bracket.**

Much like the Charity Donor Pulse report acknowledged, renewed thought could be given into capturing the attention of younger audiences. This is a group that is growing in value but is still viewing donation as discretionary against a backdrop of a growing cost of living crisis and spiralling housing costs.

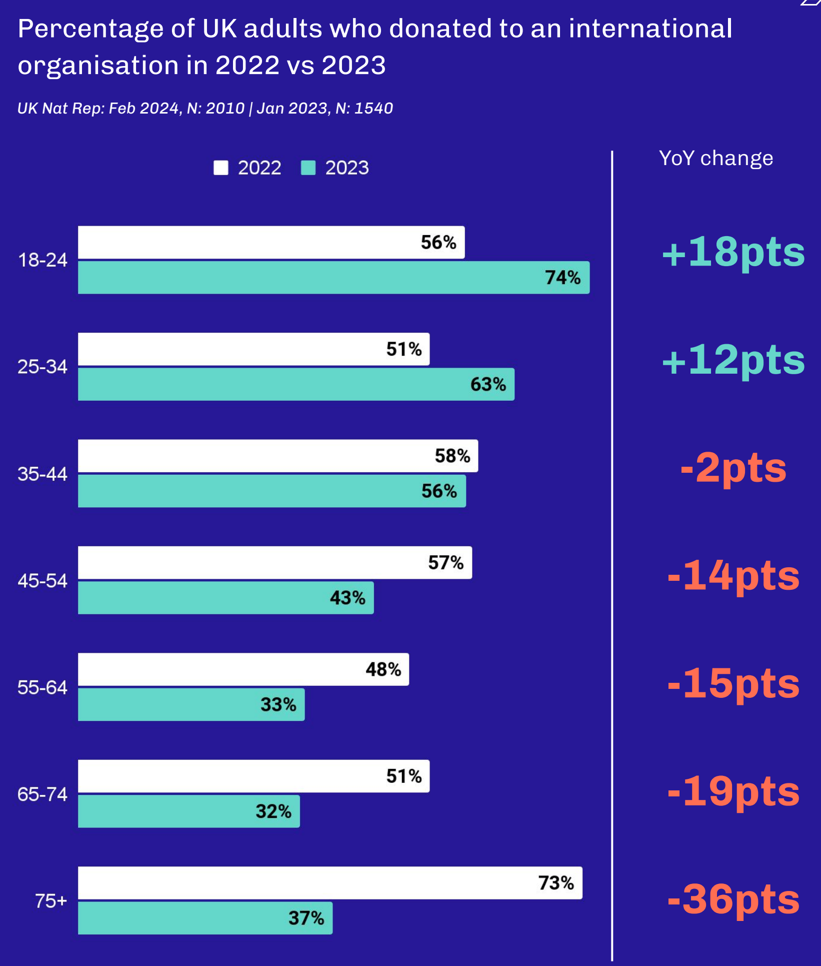
We meet a lot of fundraisers who struggle engaging younger donors, and our advice is still that older donors make up the bulk of giving and so focus should still be on them, with continued experimentation for the messaging and experiences that connect with younger donors. Millennials and Gen Zs account for more than a third of the UK population and **in the next two decades, Millennials could become the richest generation in history** with the transfer of assets and wealth set to take place - further broadening the wealth gap in the UK and the need to learn what works when it comes to engaging them.

AGE: This increase in donation intention for younger donors may have resulted from the high profile international crises and their prominence on social media

When looking at age groups giving to international organisations in 2023 versus 2022, we can see a direct increase among younger donors aged 18-34 and a large decline among donors aged 45+.

The decline in donor volume to international organisations among older age groups is likely a reflection of a return to normal giving patterns after an uplift at the start of the Ukraine war (discussed further in the next slide).

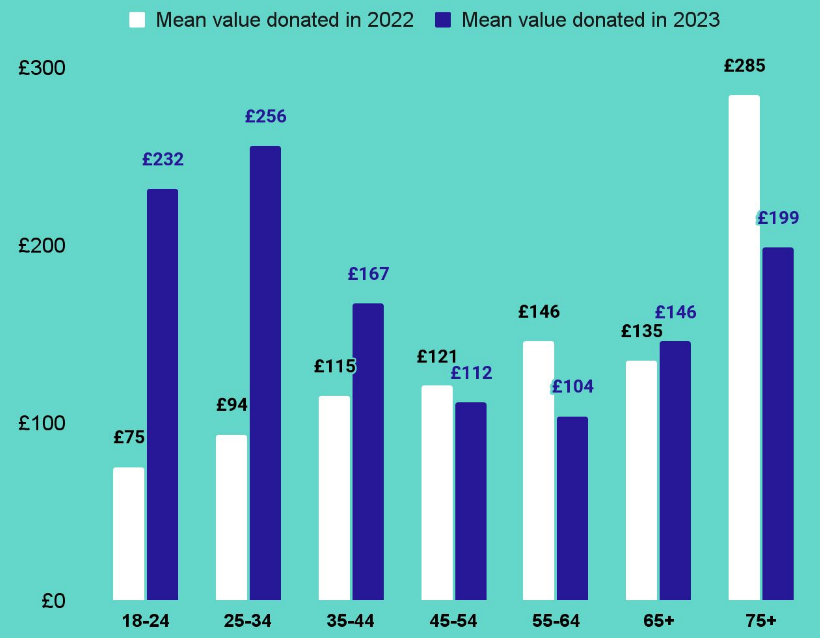
Based on our work, we assume the increase in giving to international orgs among younger age groups may reflect their increased awareness of the need in Gaza. Particularly as the amplified online sharing of information and on the ground footage has provided an unprecedented view of individuals affected by conflict. We have seen nonprofits subsequently shift their communications to match this approach, increasing direct to camera appeals from those on the ground and progress narratives relating to aid being delivered in response to crises.



AGE: From 2022 to 2023, younger donors have increased their average donation value almost three fold, while older donors have been reining in

Mean donation value by age over time.

UK Nat Rep: Feb 2024



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

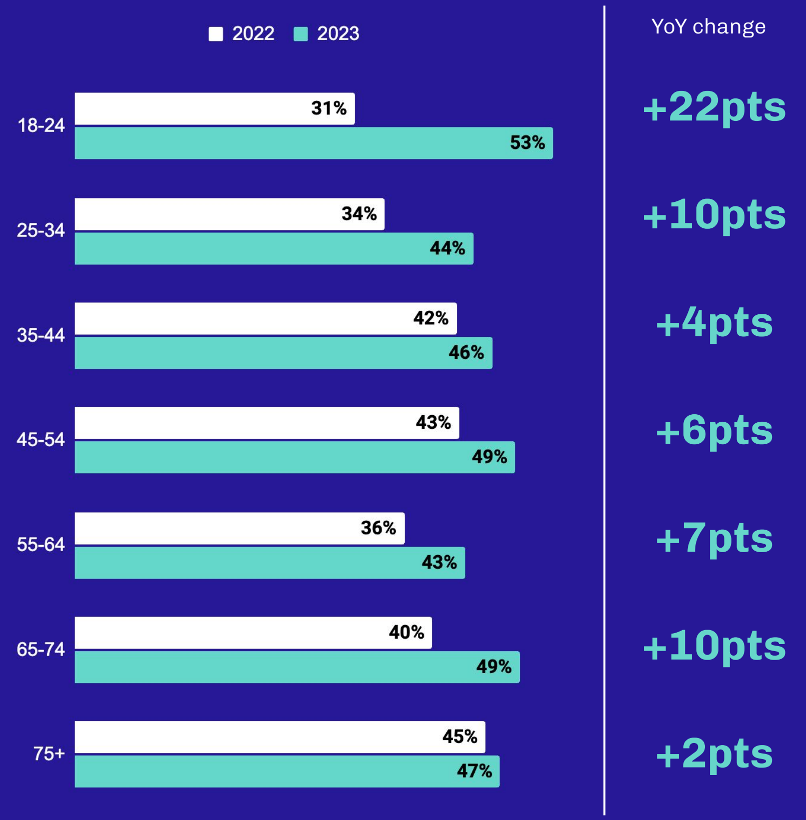
Average gift values have increased almost threefold among younger donors - particularly 18-24 yr olds, who were starting from the lowest baseline. Whereas older donor groups have largely been reducing their donation value over the last several years (based on our 2023 and 2021 tracker).

Meanwhile, younger donors have increased their giving value at a significant rate. While we can't speak for every initiative and cause in the sector, our working hypothesis is that this is **in response to a more values-driven approach from international organisations which have not shied away from taking a more political stance in the past year (e.g. demanding a ceasefire in Gaza).**

If organisations want to continue seeing engagement and donations from younger donors at this level, and continue developing a generation of newly acquired donors, it will be important to to keep communicating in a manner that resonates with this cohorts' core values.

Percentage of UK adults who donated through buying merchandise, 2022 vs 2023

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



AGE: Merchandise and value exchange giving is on the rise, especially in the younger age groups

We often talk about how younger donors engage more online, but our research also points to how physical aspects can also influence these donors. This can be seen in the 22% increase in 18-24 years olds buying merchandise in support of a cause in 2023 vs 2022.

It's important to note that while the largest uptick was among the youngest donor cohort, buying merchandise is a popular and growing giving action across all age groups.

This indicates a trend in donors wanting to display their support for causes / organisations that align with their values. Therefore, organisations should consider how they can speak to this donor need and maximise fundraising and awareness through creative merchandise.

If you're considering value exchange and merchandise, **it is also important to continually measure donor value and retention,** as value exchange acquisition tactics can sometimes attract low commitment donors.

FAITH : Donors of faith continue to be a group targeted by religious and secular organisations, with British Muslims a new priority for fundraisers

Across nearly all religions, donors of faith continue to have a higher likelihood of continued donations in the coming year as well as a higher average gift value.

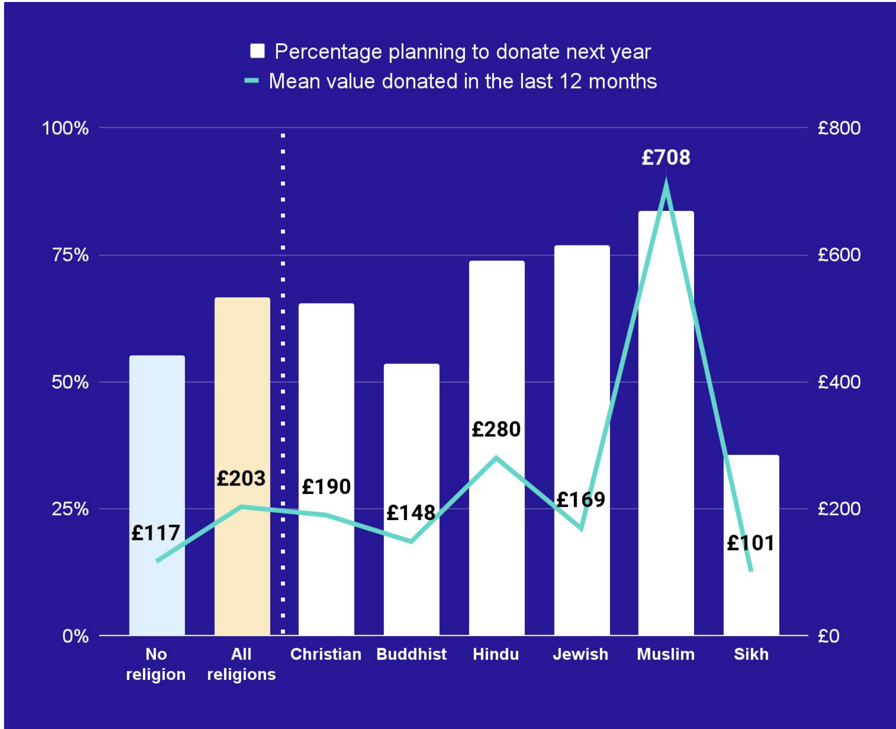
As we outlined in our British Muslim Giving Behaviours report, UK Muslims show the strongest generosity with 85% planning on donating in the next year (encompassing both Zakat and Sadaqah giving),

With an average gift of £708 Muslim donors are giving over x6 times more than the average of those donors who describe themselves as having 'no religion'.

The moral duty to give comes through strongly in donors of faith and organisations wishing to engage new audiences should be ready to demonstrate impact of where their donation has gone. Organisations should also be careful to authentically engage these communities at all times of the year versus only leaning in at key moments.

Donation intentions for 2024 and average donation amounts in 2023 by faith.

UK Nat Rep: Feb 2024



Data sources: Non-Muslim responses: cross breaks percentages from a nat. rep poll of 2,010 responses; Muslim responses: total percentages from a Muslim only poll of 1003 responses

FAITH: The majority of religious communities are continuing to increase the value of their charitable donations

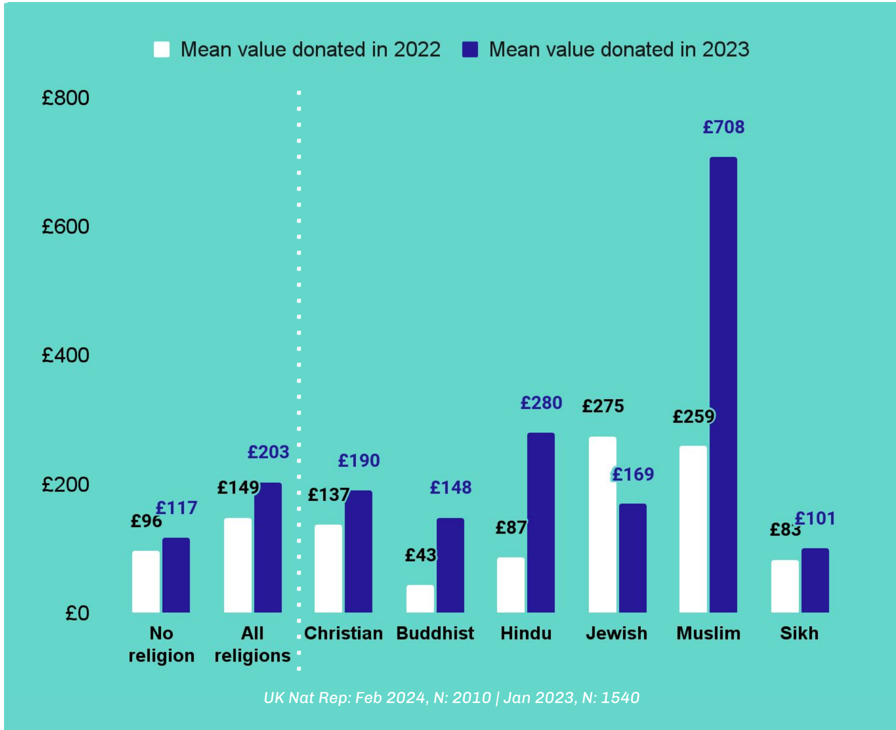
Religious communities are playing an increasingly important role in charitable giving. This ongoing growth highlights the deep-rooted commitment to philanthropy within these groups as they consistently prioritise supporting causes and communities in need, even when they're in lower income brackets.

The upward trend in donations from religious communities reflects a sustained dedication to making a positive social impact, further solidifying the importance of all faith groups for fundraisers.

The largest spike has been from **British Muslims who have increased their giving by over 2.5 times with an average donation value of £708.**

This will likely be linked to ongoing generosity through Zakat and Sadaqah, and the ongoing humanitarian crisis in Gaza.

Mean donation value by faith over time.
N: 2010



Data sources: Non-Muslim responses: cross breaks percentages from a nat. rep poll of 2,010 responses; Muslim responses: total percentages from a Muslim only poll of 1003 responses

ETHNICITY: Ethnic minorities are among the most generous donors, representing an audience of 10.9 million people[1]

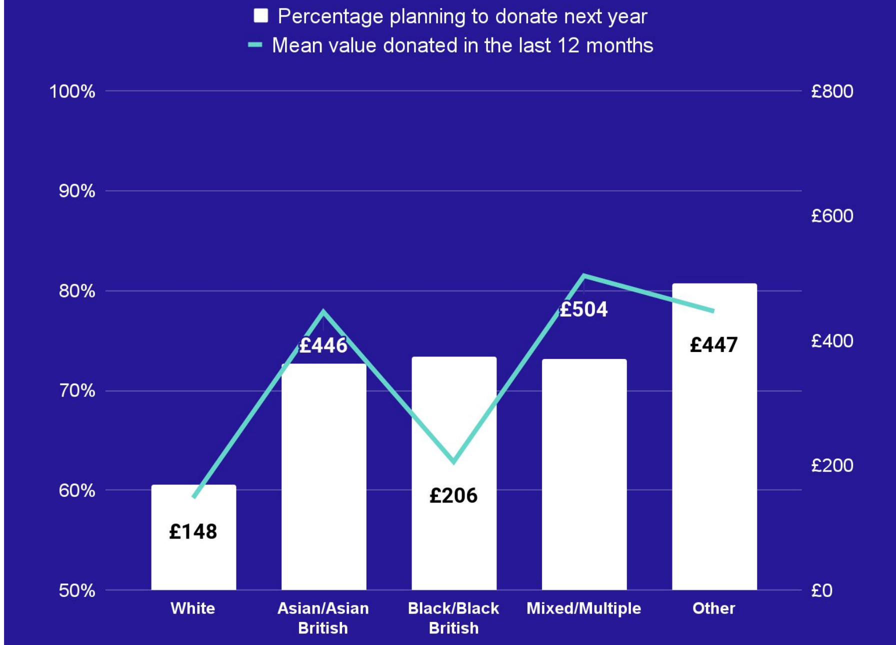
Representing a fifth of the UK population (18% according to the 2021 census), ethnic minorities stand out as some of the most generous contributors to charitable causes.

Our audience sample saw that audiences who identified as Asian / Asian British, Black / Black British and Mixed / Multiple communities were **12% more likely to intend to donate** and continue their support compared to audiences who self identified as ethnically White[2].

There were some interesting findings when it came to average gift value as well - with Asian / Asian British audiences giving **3x higher**, audiences who identified as Mixed / multiple ethnicities **giving 3.4x higher** average gift than our audience sample who identified as White. Audiences who identified as Other, which included Arab communities also gave **3 x higher**.

This highlights the philanthropic impact of these communities and suggests that ethnic minority communities in the UK play a vital role in the nation's charitable landscape.

Donation intentions for 2024 and average donation amounts in 2023 by household income. N: 2010



UK Nat Rep: Feb 2024, N: 2010

**(1) Based on figures from the 2021 census (2) categories offered in our survey matched the 2021 census and aggregated for this analysis.*

LOCATION: London and the East of England continue to be a source of high-quality donors, with the South West and Wales also priority areas

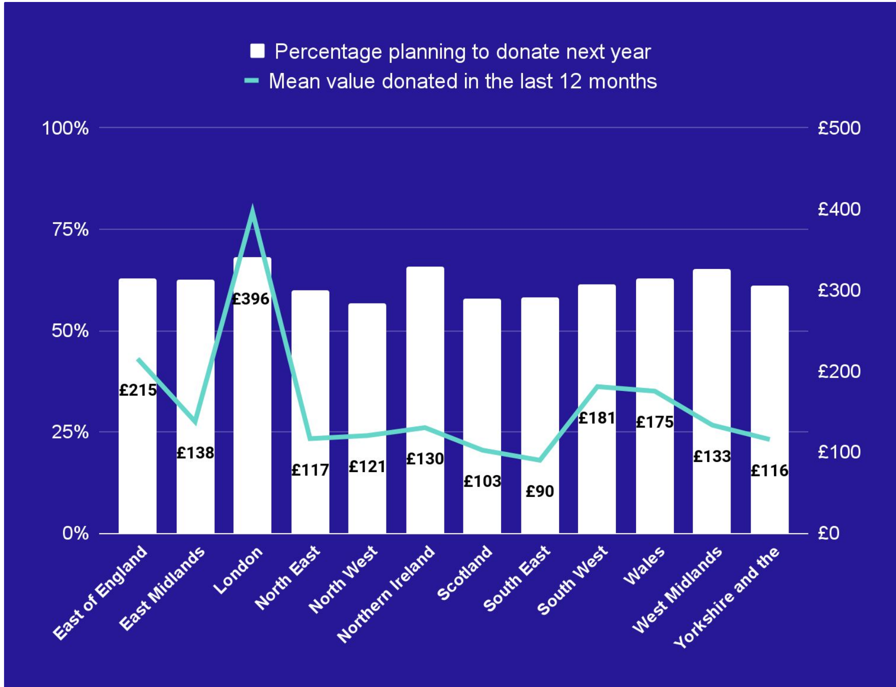
Our 2024 tracker shows that London and the East of England remain key regions for high-quality donors, consistently contributing significant charitable support.

These areas are known for their strong donor bases making them essential to fundraising efforts. They also indicated they are among the most likely to continue to donate in the next 12 months, as well as having the highest average gift values in the last 12 months - **£396 for London and £215 for the East of England.**

These higher average gifts continue to represent potential for mid value audiences in these regions.

In addition, the South West and Wales continue to be priority giving strongholds, showing growing potential for philanthropy. These areas are increasingly important in targeting and expanding outreach for charitable organizations looking to engage with generous and impactful donors across the UK.

Donation intentions for 2024 and average donation amounts in 2023 by location.

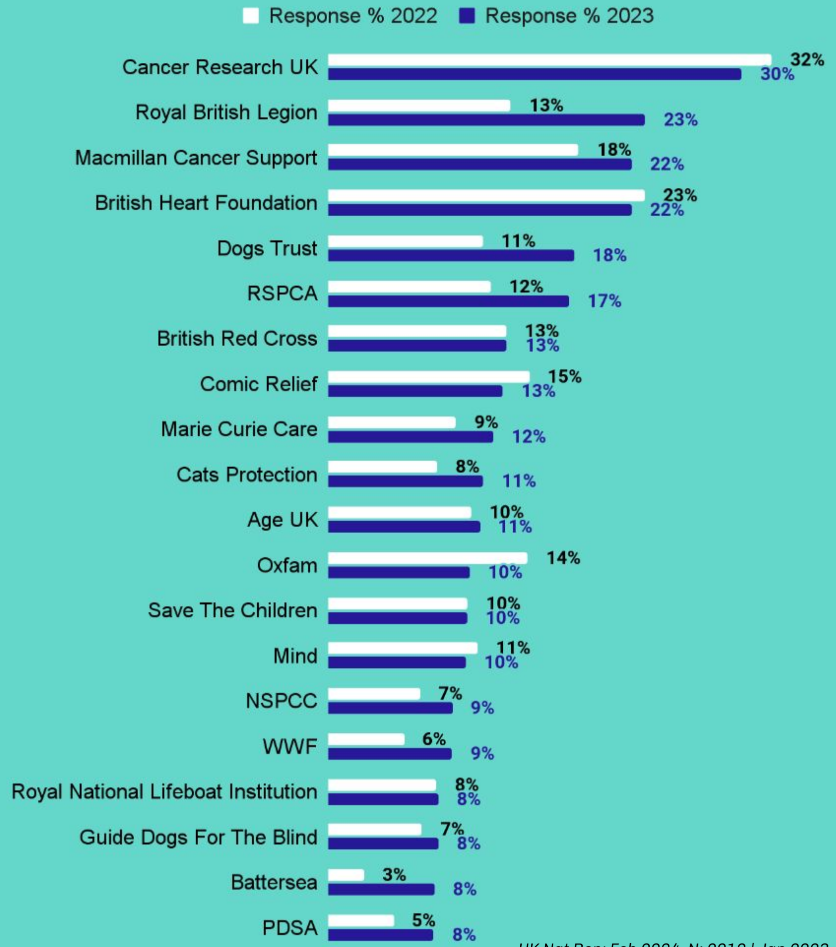


UK Nat Rep: Feb 2024, N: 2010

3

Wider trends in giving – from favourite causes to gaming

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



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

UK organisations are still winning on volume and market share. Meanwhile animal related charities are rising in popularity

Domestic organisations continue to lead in terms of donation volume and market share, with medical charities, particularly focused on cancer and heart health, remaining at the forefront of charitable giving.

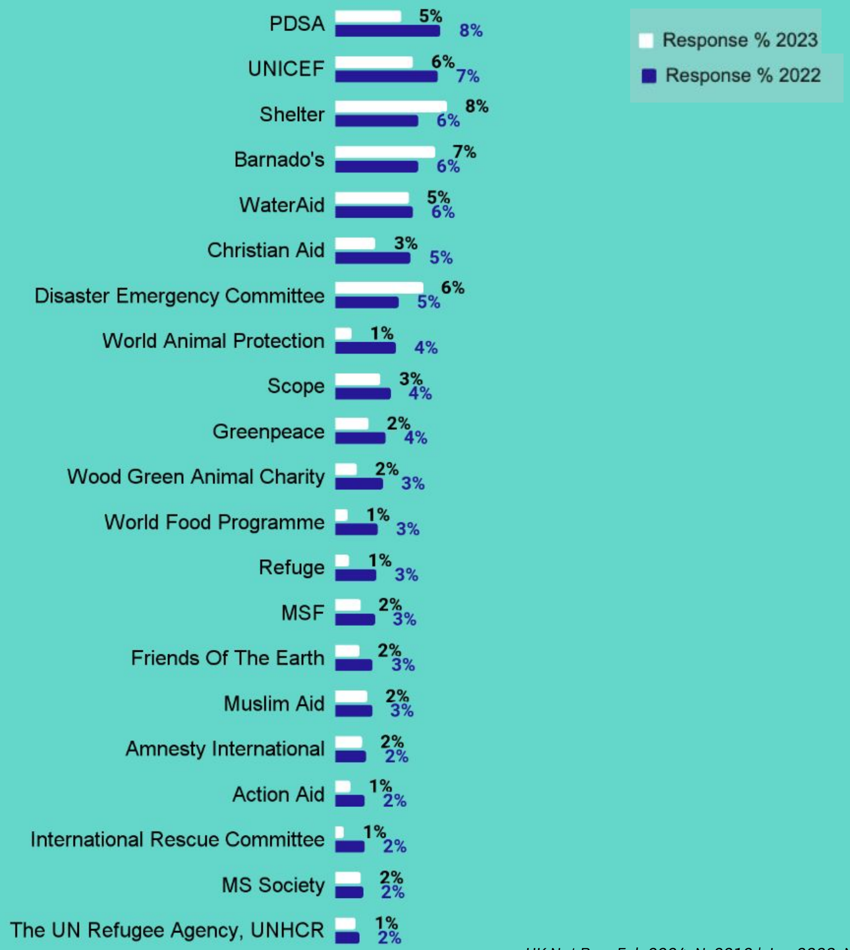
Their sustained success highlights the ongoing public commitment to health-related causes. Meanwhile, charities helping animals are gaining popularity, attracting a growing number of donors who are increasingly passionate about animal welfare, with more people donating to the Dogs Trust (+7pts) and the RSPCA (+5 pts).

This links to the CAF Giving report that noted personal experiences as the top motivation to donate - be that family members impacted by health or having an animal in your life.

Households with pets have now make up 60% in the UK (up from 40% before the pandemic). This is a unique opportunity for animal charities for greater engagement with new donors, as well as larger segments for new fundraising products.

Note: *in 2023 the option "Royal British Legion" was explained as "(including the The Poppy Appeal)". However, in 2022 this explanation was not provided.*

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



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

International organisations are growing in support, but still trail behind domestic support charities

As we look lower down the list, international organisations have also seen growth, but are engaging a smaller segment of society. This show the opportunity to grow market share, especially as donors to international causes tend to give higher average gifts, especially through emergencies.

Disability support charities, women's rights, refugee support, climate action and human rights organisations all have the potential to engage a wider audience in giving to these causes, showing the sector is far from a point of saturation.

We're very proud to help many of these sectors, and if you would like to discuss opportunities to broaden your support base, please get in touch.

Note: *in 2023 the option "Royal British Legion" was explained as "(including the The Poppy Appeal)". However, in 2022 this explanation was not provided.*

Giving while gaming is growing at an increasingly fast pace, around 15% of those under 34 are donating this way

Charitable giving through gaming is continuing to gain momentum with approximately 15% of individuals under 34 now donating via gaming platforms.

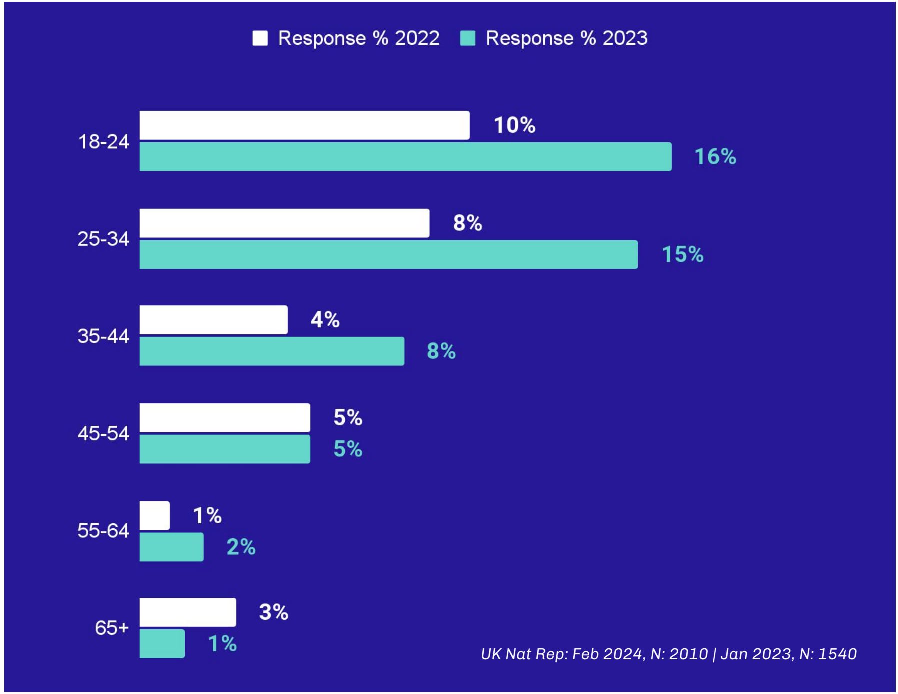
This growing trend reflects the evolving ways younger generations are integrating philanthropy into everyday activities. As gaming and streaming continue to be popular among this demographic, it presents a unique and expanding opportunity for charitable organisations to **engage with younger donors** in innovative and accessible ways.

Livestream fundraising continues to be a mainstay but with some key shifts in behaviour:

- Platforms such as Tiltify saw a 21% volume drop in the micro donations category
- The value trend increasing - with individual campaign totals increased by 7.3% and the average donation amount increased by 3.6% to the previous year
- Platform behaviour changing with Twitch creator fundraising down by 18% and YouTube up by 48%

[See more information about these trends from Tiltify]

% of people who gave money to charity through computer games or live streams in 2022



In summary...

We hope this report was helpful to you and your organisation. It has certainly sparked a lot of conversation amongst our teams as we consider the growing potential presented by younger donors giving for the first time and the mid-level opportunity amongst donors with higher household incomes.

It could be said that recent years haven't yet helped us tackle one of the largest questions we face in fundraising - how do we raise funds without emergencies - as we've seen more crises than ever before. However, the rise in one off donations as a proportion of income given, and the desire of donors to exert more control in how they give does offer some interesting insight as you look to plan your donor stewardship and fundraising creative approaches.

We always love to hear feedback on our reports and what we should release next. And as always, If you're looking for some advice or support on how to transform your engagement with potential or existing donors, we'd love to hear from you.

Anjali, Jasmine, Jai & Lizi
hellouk@bluestate.co

Appendix

Methodology notes & acknowledgements

Methodology notes & our thanks

Nationally representative polling data was weighted by age, gender, region, education, and ethnicity.

2,010 complete individual responses in total.

Fieldwork was completed between 08-11, February 2024.

Due to weighting and rounding, percentages may not add up to 100%.

Results for both samples were collected via online surveys.

Where size estimates for audiences in the UK are quoted, the following data sources are used:

- England and Wales true proportional data comes from the 2021 Census (England & Wales).
- Northern Ireland and Scotland proportions come from the Northern Ireland Statistics Research Agency and 2011 Census (Scotland) respectively.
- The 2011 Census is used for Scotland as the 2021 figures were yet to be released at the time of research.

Thank you.

hellouk@bluestate.co

BLUE STATE