

UK Charity Digital Index 2019

The sixth edition –
Benchmarking the
digital capability and
Essential Digital Skills
of UK charities



LLOYDS BANK

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The Charity Digital Index is now in its sixth year. It uses the behavioural and transactional data of charities to build a view of digital capability in Britain. This year it also includes the first measure of UK Essential Digital Skills.



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New in 2019



Six Year View of Data



Essential Digital Skills



Dedicated Charity Report

Foreword



Sara Weller

Non-Executive Director,
Lloyds Banking Group



“Digital skills do not just provide opportunities, they are necessary for survival”

Chair of the Lloyds Bank Responsible Business Committee, Trustee of the Lloyds Bank Foundation and Lead Non-Executive at the Department for Work and Pensions.

I am delighted to share the sixth Lloyds Bank Charity Digital Index with you.

I take a keen interest in the wellbeing of our communities, businesses and charities. Whether a charity looking to broaden funding streams, a small business seeking the ability to export, or an individual looking to improve their circumstances, digital skills do not just provide opportunities, they are necessary for survival.

This year shows that charities with full Essential Digital Skills are 11 percentage points more likely to have increasing revenues, compared to those without.

111,000 (56%) charities now have all six Essential Digital Skills and it is pleasing to see that there are now 24,000 additional charities who are practically digital by default. There are also more than twice as many charities now seeking digital support than last year – a positive sign.

Despite this, we are seeing an increased awareness that digital skills are playing a growing role, as four in ten charities identify their own organisation’s digital skills as a barrier. This has grown from one in ten in 2014.

As ever, we know there is more to do. Leaders must embrace the positive potential of digital to take the focus from the back-office to the beneficiary and reach more people, more effectively. Worryingly, 45% of organisations have leaders that don’t think digital is relevant to their charity. With demonstrable impact evidenced in this report, this simply must change.

And we must help them. The pace of societal change is quick, and without funding and opportunities, charity progress will continue to be held back.

With the recent launch of the Lloyds Bank Academy, and knowing how much free training is out there, it may come as a surprise that only two percent of charities are making use of free training courses. There is clearly more to do to explain and define the benefits of taking the time to invest in staff skills and infrastructure.

At Lloyds Bank we believe in the power of partnerships and I would like to thank the creators of the Charity Digital Code of Practice for building a framework to help charities take their first steps. I would also like to thank the members of the Digital Skills Partnership for their collaborative efforts and help in the digital capability space. I hope that in reading this report, you are encouraged to think about the impact you might make, however small, as it is vital.

Methodology

Index Score

The Lloyds Bank Charity Digital Index Score is the UK's sole measure of digital capability for charities which combines the following data:

1. Online behaviours of UK organisations

An analytical review of anonymised Lloyds Banking Group data provides an overview of the customer online banking activities at an aggregate level, as a representative proxy for the UK's charity-banked population.

2. Primary quantitative research

An in-depth questionnaire with 500 charities was carried out across the UK to reach a rounded view of their digital behaviours and perceptions.

Since the 2017 report, the Index Score range is between zero and 100 and is calculated using behavioural data and quantitative research.

Underpinning this score there are eight key indicators including advertising, security, mobile and infrastructure. Please see appendix for more detail.

It varies from the Essential Digital Skills measure, which is solely quantitative.

Essential Digital Skills

The new Essential Digital Skills (EDS) framework is a significant evolution from its predecessor 'Basic Digital Skills'. Since 2014, Lloyds Bank had measured the Basic Digital Skills of small businesses and charities in the annual Lloyds Bank UK Business and Charity Digital Index. This year Lloyds Bank, the Federation of Small Businesses, Be the Business and Google worked with the Department for Digital, Culture, Media & Sport and its Digital Skills Partnership to comprehensively update the framework to ensure it fully reflects the range of skills organisations need to safely benefit from the digital world of today and the future. Thanks to input from a range of stakeholders the new Essential Digital Skills measure is relevant to the significant majority of UK organisations.

Key changes to the framework include:

- The addition of a sixth skill 'Cybersecurity' with a comprehensive set of essential digital security tasks
- Updated language and examples to the tasks of the existing skills to reflect today's digital business needs.

Due to the improvements made to the framework, the results are no longer comparable to the previous 'Basic Digital Skills' measure. However the added detail, updated language and new skillsets allow for a more impactful view of organisations digital competencies which will facilitate more actionable insights.



Essential Digital Skills framework

Communicating

Communicate, interact, collaborate, share and connect with others

Creating

Engage with communities and create basic digital content

Managing Information

Find, manage and store digital information and content

Problem Solving

Increase independence and confidence by solving problems using digital tools and finding solutions

Transacting

Purchase and sell goods and services, organise finances, register for and use Government Digital Services

Cybersecurity

Protect the organisation and its customers from fraud and other harms through appropriate policies and best practice



The Lloyds Bank UK Charity Digital Index uses behavioural and transactional data to provide a unique insight into organisations' digital behaviours

Benchmarking

In this year's report, the data is often benchmarked against the first baseline Index report from 2014 and includes year-on-year comparisons between 2018 and 2019.

Appendix

The full appendix is available online at lloydsbank.com/businessdigitalindex

Charity Definition



Registered charities with annual income of up to £25 million and fewer than 250 employees.

Population Source

Throughout this report the UK population of charities has been aggregated using sources from; Charity Commission for England and Wales, Charity Commission for Northern Ireland, and Office of the Scottish Charity Regulator (OSCR).

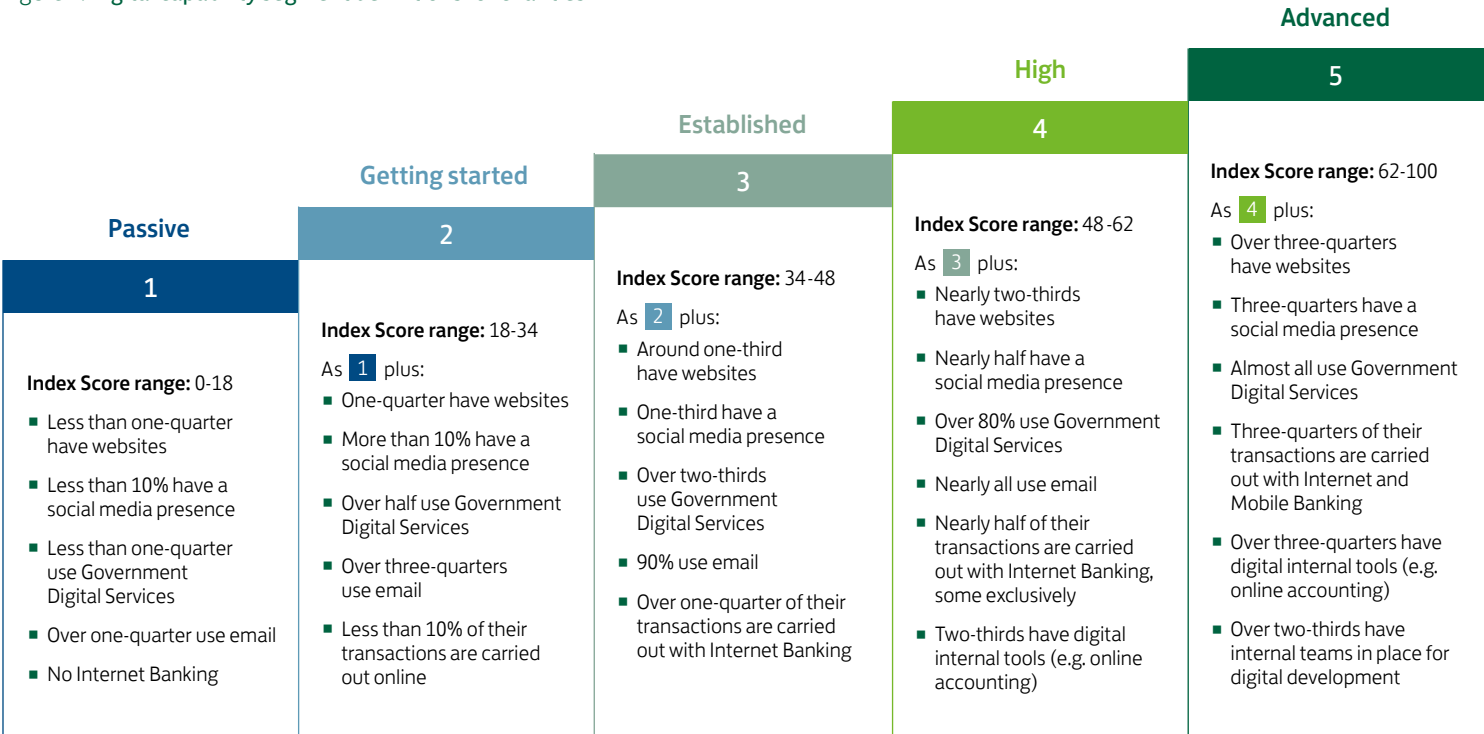
Index Segmentation

Charities are allocated into these digital capability segments according to their Index Score and ultimately their digital behaviours.

The segments are ranked from 1, which comprises of the least digitally capable UK organisations, to 5, which represents those with the highest levels of digital capability. Figure 1 illustrates the segment definitions and their corresponding traits.

This segmentation allows us to distinguish behaviours, tailor analysis and provide a more detailed profile of digital capability among UK organisations.

Figure 1. Digital capability segment definitions for charities



Throughout the report 'low' refers to Segments 1 and 2 combined. 'Least digitally capable' refers to Segment 1.

Throughout the report 'high' refers to Segments 3 to 5 combined. 'Most digitally capable' refers to Segment 5.

Key Findings

Polarising perspectives from the third sector

26,000 (13%) charities have shown almost no digital activity in 2019 (Segment 1); this is 10,000 more charities (five percentage points) than 2018. On the other hand, there are also 24,000 additional charities who are almost digital by default (Segment 5).

In total, 111,000 charities (56%) have the full Essential Digital Skills needed to operate in 2019. The digital tasks charities are most likely to be able to do are:

- Digitally communicate with customers and suppliers (91%)
- Keep software up to date (81%)
- Respond to customer queries (80%).

However, there are key opportunities being missed

When charities are digitally adept it translates into better outcomes for beneficiaries, and for the charities themselves, it enables them to:

- **Reach those that need their services most** – only 51% have accessibility procedures built into their websites. This means some of the most vulnerable people in society might be missing out on services designed to help them
- **Save time** – this is still the most recognised online benefit to charities. This year, one-third of charities (30%) recognise they now save at least one day a week thanks to digital practices
- **Grow their income** – charities with full Essential Digital Skills are 1.5 times more likely than those without to have had an increase in revenue, resulting in more resources for people and potential benefit for end users.

Nearly one-third of charities (30%) recognise they now save at least one day a week due to their digital practices



Younger charities are leading the charge

Younger charities (under ten years of age) are more digitally active and are reaping the rewards. They are more likely to be 'doing their business on the move' (47%) so they can place focus on their donors, supporters and beneficiaries.

Almost two-thirds of charities (63%) do not plan to adopt customer or data analytics skills in the future



Older charities are blocked by dismissive digital leaders

26% of charities have no interest in 'doing more online'; this rises to 49% amongst charities with very little digital engagement (Segment 1). The data shows that apathy amongst charity leaders is a defining factor; 45% of organisations have leaders that don't think digital is relevant, and this is 43% of established charities over ten years old.

Charities with full Essential Digital Skills are 1.5 times more likely to have had an increase in revenue compared to those without



Security is the first step, but is not a pathway to trying more online

The 2019 Index Score of 50 sees a four point increase from 2018. Transactional data indicates that this has been driven by increased security infrastructure and capability, which has shot up 15 points in the last 12 months. The majority of other capabilities have plateaued since 2018.

42% of charities want tech talent and digital proficiency

Organisations understand that they need employees with higher digital capability – this is an increasing issue for charities.

In 2014, ten percent of charities identified a lack of digitally skilled talent as a barrier within their organisation; in 2019 this is now 42%.

37% of charities do not understand which technologies they should invest in to drive their organisation forward and this, alongside a desire for digital talent, illustrates why more charities than ever are paying for external expertise. Despite this we know that only two percent of charities are making the most of free training. This shows there is a large opportunity for charities to access expertise for less.

63%

of charities do not plan to adopt customer or data analytics skills in the future



37%

of charities do not understand which technologies they should invest in to drive their organisation forward



26,000

(13%) charities have shown almost no digital activity in 2019



Charity Digital Index Score 2019

Since 2014, the Index Score for UK charities has more than doubled

The score increased by 108% from 24 to 50 indicating significant progress (figure 2).

Charities digital progress stems from online security and infrastructure

Analysis of the eight factors that underpin the Index Score* indicates that more charities than ever before are growing the use of digital infrastructure (use of digital systems and platforms) and online security measures. Both have seen over five fold increases since 2014 (figure 3). Online transactions have also seen a sharp increase in the past year.

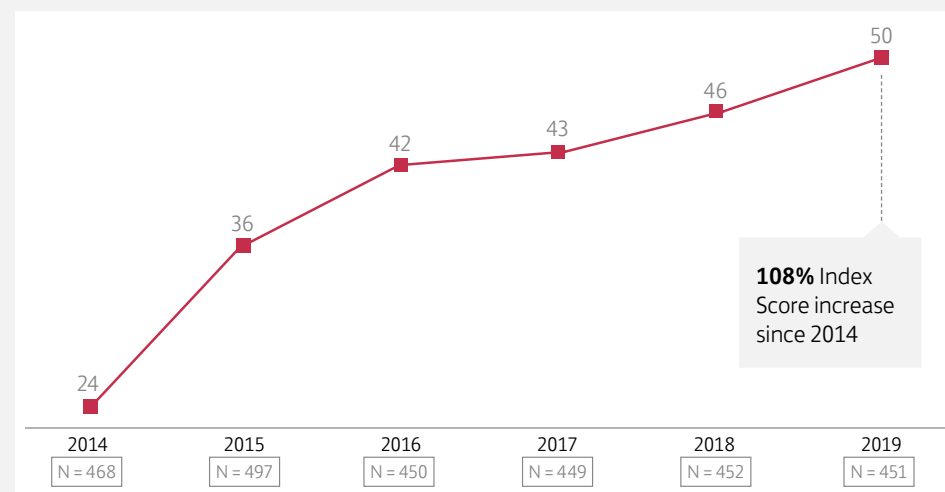
Of the eight Index Score components, there are two areas of decline since 2018; internal team (in-house digital development capability) and advertising Index (social media usage). The data shows the decrease in internal team capabilities is linked to an increased focus on external support, with charities seeking expertise from tech providers and digital consultancies ([see page 21](#)).

%

Since 2018, there are 24,000 more digitally advanced charities ([see page 9](#))

*See [appendix 1](#) for detail on the eight Index components

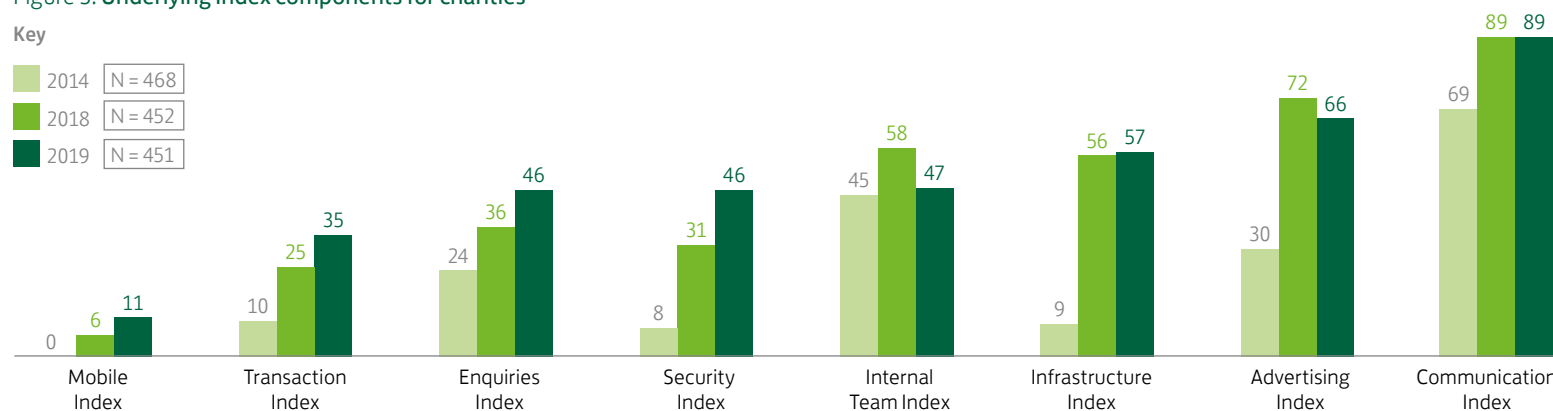
Figure 2. Index Score for charities, 2014-2019



Since 2014, charities have made the most progress with their online security and back-office infrastructures

Figure 3. Underlying Index components for charities

Key



Benchmarking Charities Digital Capability

The Index Score data is used to segment charities into five different levels of digital capability ranging from Segment 1 'Passive' (lowest capability) to Segment 5 'Advanced' (highest capability) ([see page 5](#)). Charities are allocated into these digital capability segments according to their digital behaviours.

Since 2018, 24,000 more charities are digitally 'Advanced'

The proportion of charities with the highest level of digital capability (Segment 5) has increased by over eight times since 2014 (4% to 33%). In just the last 12 months, the number of charities in Segment 5 has increased by 24,000 charities (figure 4).

Northern charities have seen the largest shift

Northern regions (Northern Ireland, Scotland and the North of England) have made a significant change with regards to digital capability, with the North of England driving the largest increase.

As shown in figure 5, this area has moved from being home to the largest proportion of charities with the lowest digital capability (47%), to now just 14% on par with the South West & Wales.

Demographic highlights:

- Nearly two-thirds (64%) of charities with annual revenue over £50,000 are in Segment 5 which compares to only one-quarter (23%) of those with less than £50,000 ([appendix 2](#))
- Compared to those with low digital capability, charities with high digital capability are 19 percentage points more likely to be confident they will be successful in the digital world (55% compared to 36%) ([appendix 19](#))
- Both charities with female or male digital leaders are equally likely to have the highest levels of digital capability ([appendix 3](#)).

Figure 4. Proportion of charities in each segment over time

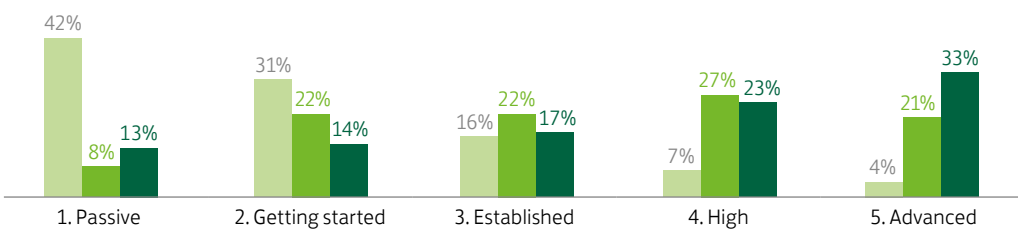
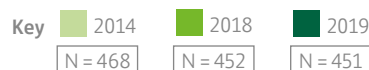
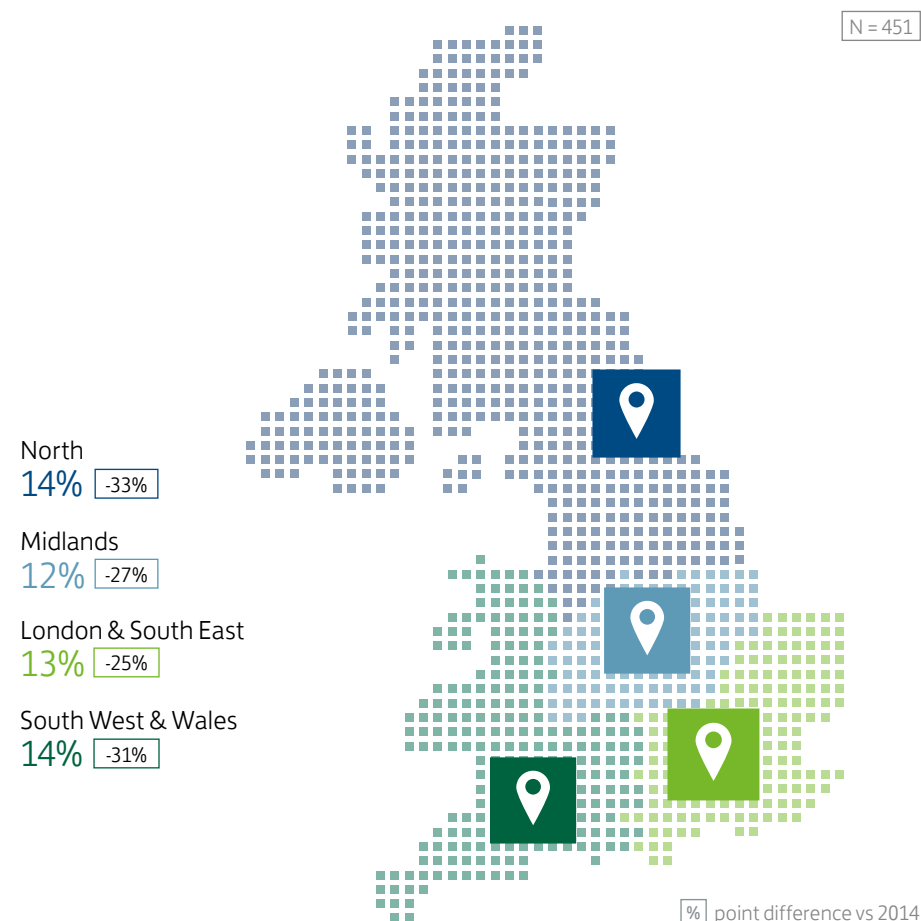


Figure 5. Proportion of charities in Segment 1, split by geography, 2019 vs. 2014



Digital Usage and Behaviours

Amongst third sector organisations, mobile app and browser use has remained incredibly low. 19% of charities utilise mobile banking (figure 6), yet only 11% log in three or more times a year (figure 3) and only 37% are set up to take digital payments (figure 6).

Charities using websites to reach a bigger audience

For those who are online, there has been a sizeable increase in charities having their own website. In 2018, the report showed half of UK charities offered their own webpage, this year we can see that 68% of charities offer their own website. Having an online presence allows charities to not only provide key information, engage with their audience and take online donations, but also to have a larger geographical reach.

Capitalising on Cloud IT capabilities

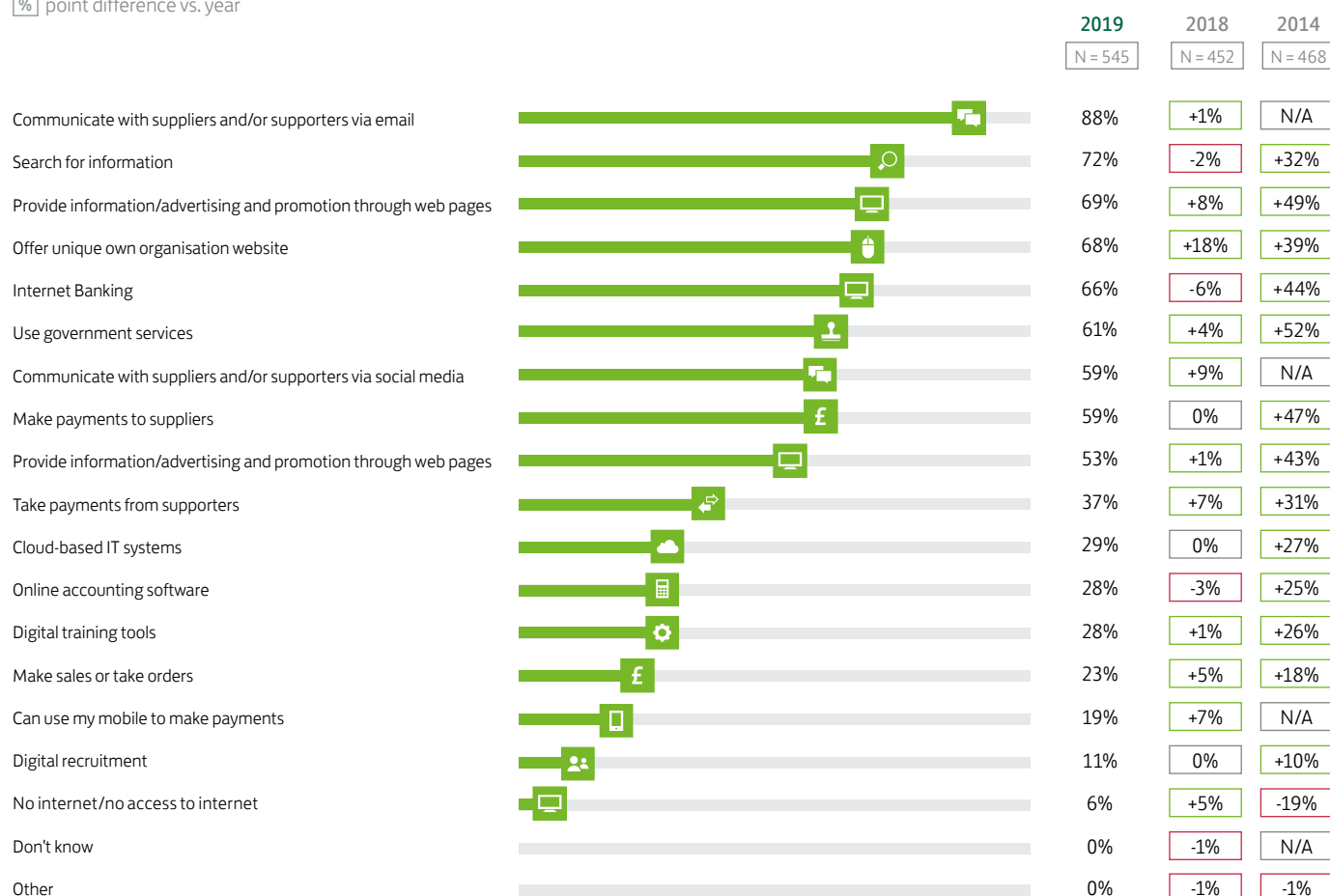
Page 14 shows that 51% of all charities now have the skills to use Cloud-based IT systems, however only one-third are actually making use of these skills. Whilst usage of Cloud IT has increased dramatically since 2014, there is still some way to go to ensure all charities are making use of the skills they already have. Cloud-based IT systems offer a range of benefits to charities, including remote working.



26,000 (13%) charities have shown almost no digital activity in 2019 (see page 9)

Figure 6. For which of the following purposes, if any, does your charity use any form of digital channels?

□ point difference vs. year



Charities receiving online donations are seeing the benefit

Three out of ten (29%) charities who take donations online have increased their funding ([appendix 4](#)). Although more charities are taking donations online, data on page 14 indicates that 40% of charities still lack the digital skills required to set up the ability to take donations online (figure 10).

Communication is the biggest driver behind digital usage for charities

The data shows that almost nine in ten charities use email to communicate with their suppliers and supporters and over half (59%) use social media (figure 6).




30% of charity respondents prefer to use social media for personal use but not for work ([appendix 5](#)). Charities who use social media this way are nine percentage points less likely than those who use social media for work purposes to report an increasing revenue ([appendix 6](#)). Social media is one important tool, among others, for growth

Social media

Website use is highly correlated with social media – 12% of charities with a website have Instagram, but charities without a website, do not have Instagram ([appendix 7](#)).

Charities with a website are also more likely to be active on the following ([appendix 20](#)):

 2.4 times more likely to have Facebook


 3.4 times more likely to use Twitter

Figure 7 shows charities adopting Facebook and Twitter platforms for their customers has increased (Facebook by eight percentage points and Twitter by nine percentage points), and this translates into income. Two-thirds of charities using social media have had an increase in income; this is an increase from 57% in 2018 ([appendix 8](#)).



Over half of charities (59%) now use social media to communicate with their suppliers and beneficiaries

Figure 7. Which of the following online facilities does your charity have or offer to users?

| | 2019 N = 515 | 2018 N = 449 |
|---|-----------------|-----------------|
| Organisation Facebook page | 59% | 51% |
| Registered on one or more online directories | 44% | 44% |
| Organisation Twitter page | 41% | 32% |
| Organisation LinkedIn page | 4% | 7% |
| Mobile-optimised websites and services | 12% | 7% |
| Cloud-based sharing sites e.g. DropBox/WeTransfer | 16% | 11% |
| Organisation Instagram page | 9% | 6% |
| Other social networking (e.g. Snapchat, Pinterest, Tumblr, Vine, Google+, etc.) | 5% | 20% |
| Organisation blog | 6% | 10% |
| Customer contact service i.e. live chat | 3% | 5% |
| None of these | 21% | 11% |

Essential Digital Skills

In 2019, 40 cross-sector organisations were consulted in a review of the small business and charity Basic Digital Skills framework. In light of the newly published UK Essential Digital Skills framework in 2018* (for consumers), a re-assessment of the skills small businesses and charities truly need in order to thrive in the UK, felt appropriate.

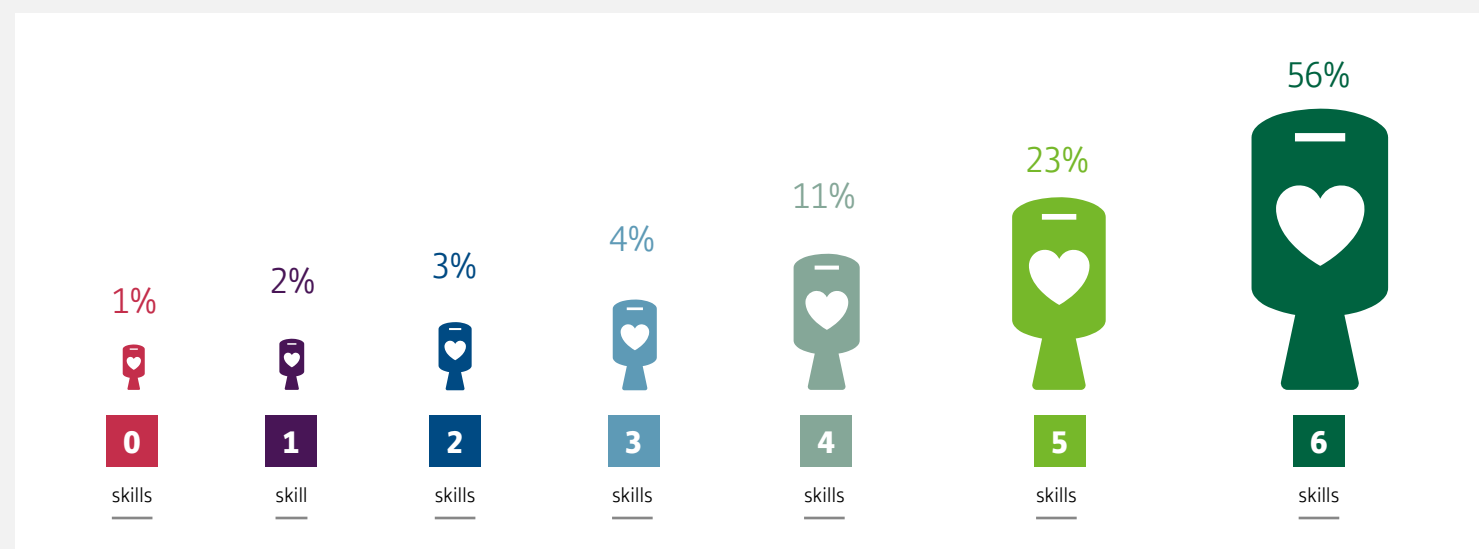
As such, Lloyds Banking Group convened inputs and opinions from organisations such as Be the Business, Federation of Small Business, Google, BT, UK Government and digital skills practitioners such as SCVO, Good Things Foundation, Upskill Digital and Citizens Online. The final output ensures greater understanding of organisational skillsets, and – complemented by the transactional and attitudinal analysis undertaken in the Charity Digital Index – illuminates the current mindset and motivations of the organisations too.

As the 2019 framework surveys on 26 new tasks rather than the 19 from previous years, there will be no year-on-year comparison for Essential Digital Skills throughout the report.

In order to qualify as having Essential Digital Skills, an organisation must be able to do at least one task within each of the skills categories; Managing Information, Transacting, Communicating, Problem Solving, Creating and, newly added, Cybersecurity.

Figure 8. Proportion of charities with one to six Essential Digital Skills, 2019

N = 545



For the first time the same proportion of both charities and small businesses have full Essential Digital Skills***



The Essential Digital Skills framework is used by UK Government to underpin the Adult Digital Skills entitlement which will become available to UK adults in 2020**. It is also the chosen framework for future.now; a coalition created between Lloyds Banking Group, BT, Accenture, the City of London, Good Things Foundation, Nominet and over 30 partners to empower and support organisations across the UK, to improve the digital skills of their workforces. To find out more visit: futuredotnow.uk

*Department for Education, Essential Digital Skills (for life and work) framework for people aged 15 and over, 2019, gov.uk/government/publications/essential-digital-skills-framework/essential-digital-skills-framework

**Department for Education, 2018, gov.uk/government/news/adults-to-benefit-from-digital-skills-overhaul

*** Please refer to the 2019 Business Digital Index report at lloydsbank.com/businessdigitalindex

111,000 (56%) charities have Essential Digital Skills

For the first time the same proportion of both charities and small businesses have Essential Digital Skills. Almost one-quarter (23%) of charities are on the 'cusp' and have five of the six required skills which is equal to 46,000 charities in total (figure 8).

Whilst the Essential Digital Skills framework is not comparable to Basic Digital Skills, a greater proportion of charities have all six of the new skills, than had all five skills in the previous framework. One could therefore infer that charities have made progress, due to the increasing complexity and number of skills in the framework. This progress is also reflected in our transactional data.

Charities who are able to do all six Essential Digital Skills are:

- Most likely to be from Northern Ireland, Scotland and the North of England (58%) ([appendix 9a](#))
- 11 percentage points more likely to have an increase in revenue, compared to those without (figure 13)
- Most likely to be under ten years old (61%) ([appendix 9b](#)).

Charities are just scratching the surface

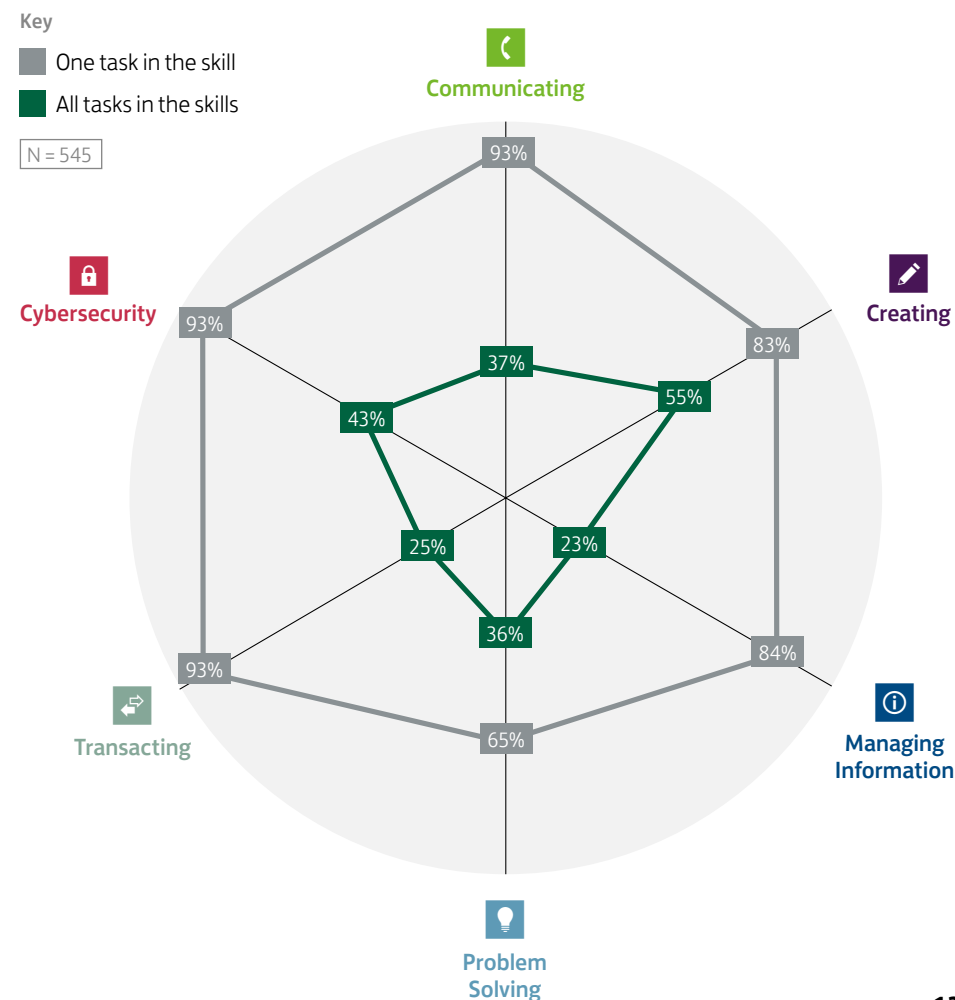
In 2019, for the first time, the data illustrates the difference between the proportion of charities who can undertake one of the framework tasks, compared to those that can do all (figure 9). This aids an understanding of where digital skills providers can support with broadening skills and confidence.

Regarding the Transacting skillset, 93% of charities are transacting online, but only 25% are able to; buy goods and services online, complete online forms, **and** utilise Internet Banking. The skill with the narrowest gap is that of Creating, indicating that these skills are more transferable.

%

111,000 (56%) charities have all six Essential Digital Skills

Figure 9. Proportion of charities able to do one or all tasks in the Essential Digital Skills categories, 2019



Charities place consistent focus on cybersecurity

Examining the task level data illustrates varied levels of adoption across the skills – the exception being cybersecurity which has consistent levels of uptake (figure 10). In 2019, charities are placing clear focus on the skills and tasks that will keep their organisation safe. Four-fifths (81%) of charities are keeping software up to date and 74% are protecting themselves from fraud.

Data-driven decision making

Three-quarters (78%) are backing up critical business data, recognising the need for timely actionable data, but of that group, only around two-thirds of charities are using their data to underpin site performance, products and services ([appendix 21](#)).

Charities with increasing funding are more likely to have Transacting and Communicating skills

Charities who report an increasing turnover are more likely than the average charity to be ([appendix 22](#)):

- Completing online forms (83% compared to 73%)
- Respond to customer queries online (88% compared to 80%)
- Buying goods and services online (83% compared to 71%).

Figure 10. Proportion of charities able to undertake Essential Digital Skills tasks, 2019


N = 545



*Website Content Accessibility Guidelines

Essential Digital Skills demographics

The data indicates there are key characteristics of the organisations with all six Essential Digital Skills.



Charities with full Essential Digital Skills are 1.5 times more likely than those without to have an increase in revenue (figure 13)

Figure 11. Proportion of charities with a number of Essential Digital Skills, split by gender of digital leader, 2019

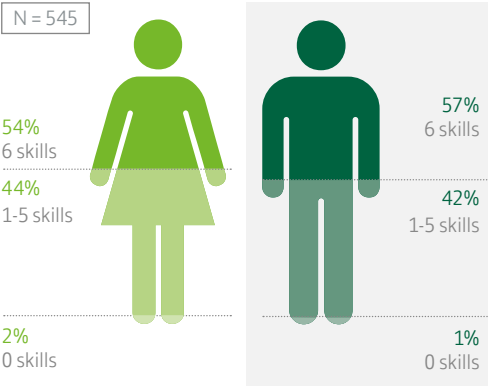


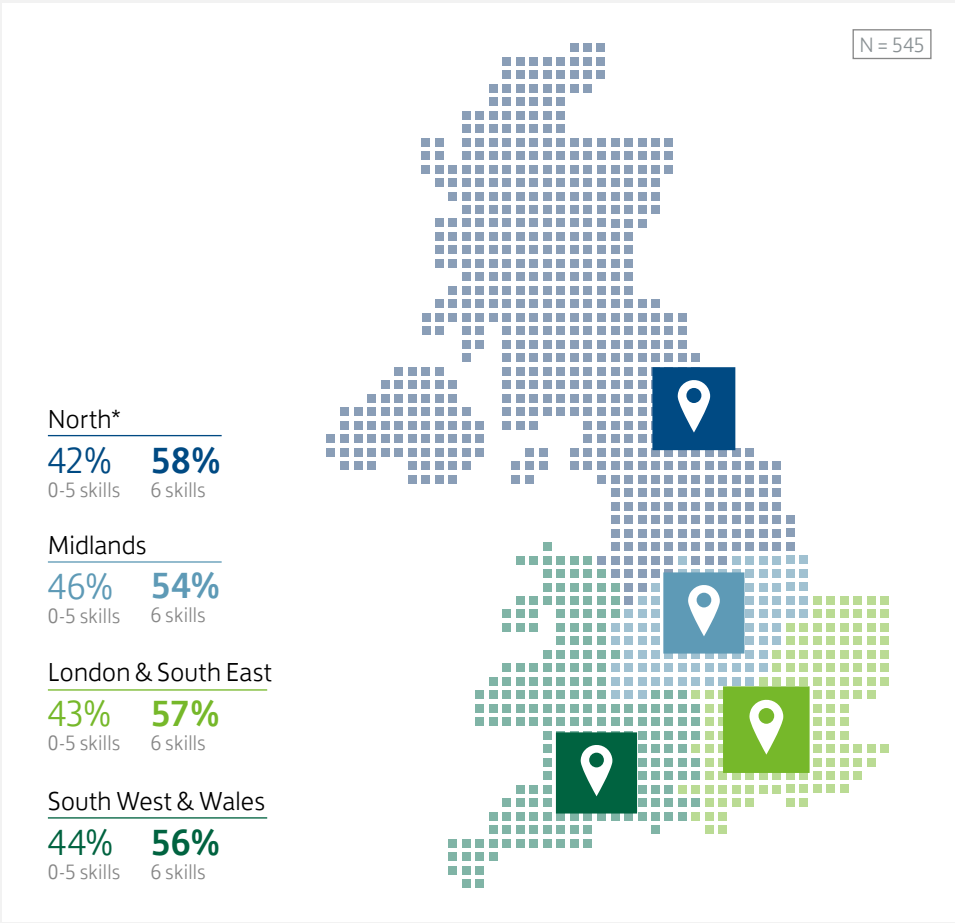
Figure 13. Proportion of charities who have had an increase in revenue in the last two years, split by the number of Essential Digital Skills, 2019

Key

- 0-5 Essential Digital Skills
- 6 Essential Digital Skills



Figure 12. Proportion of charities with 0-5 or all 6 Essential Digital Skills, split by region, 2019



North includes Northern Ireland, Scotland and the North of England

Benefits of Digital

In 2019, charities are reporting greater benefits from being online than ever before. Whilst saving time is seen as a key benefit for three-quarters of the third sector, increasingly it is the ability to attract and retain more customers that is having the most impact.

The 'Digital Dividend' is increasing at pace

Figure 14 shows that 'time saving' is still the most recognised online benefit to charities. This year, one-third of charities (30%) recognise they now save at least one day a week thanks to digital.

Compared to 2018, now nearly half (44%) of all online charities are making cost-savings and recognising it as a benefit (up from one-third in 2018) of their digital use. Over the last two years, with the increased popularity of online fundraising platforms and text-to-donate, there have never been as many channels for charities to receive fundraising*.

X

24,000 (12%) charities do not attribute any benefits to being online

Younger charities are seeing more benefits from digital usage

As younger charities (under ten years old) are more digitally active, it's perhaps no surprise that they are more likely to reap the benefits of being online compared to those over ten years. Particular areas of recognition are 'doing business on the move' (47% to 31%) and gaining 'wider geographic coverage' (50% to 35%). However, charities of all ages are equally likely to recognise time saving benefits (77% to 77%) and cost savings (44% young to 45% old) ([appendix 10](#)).

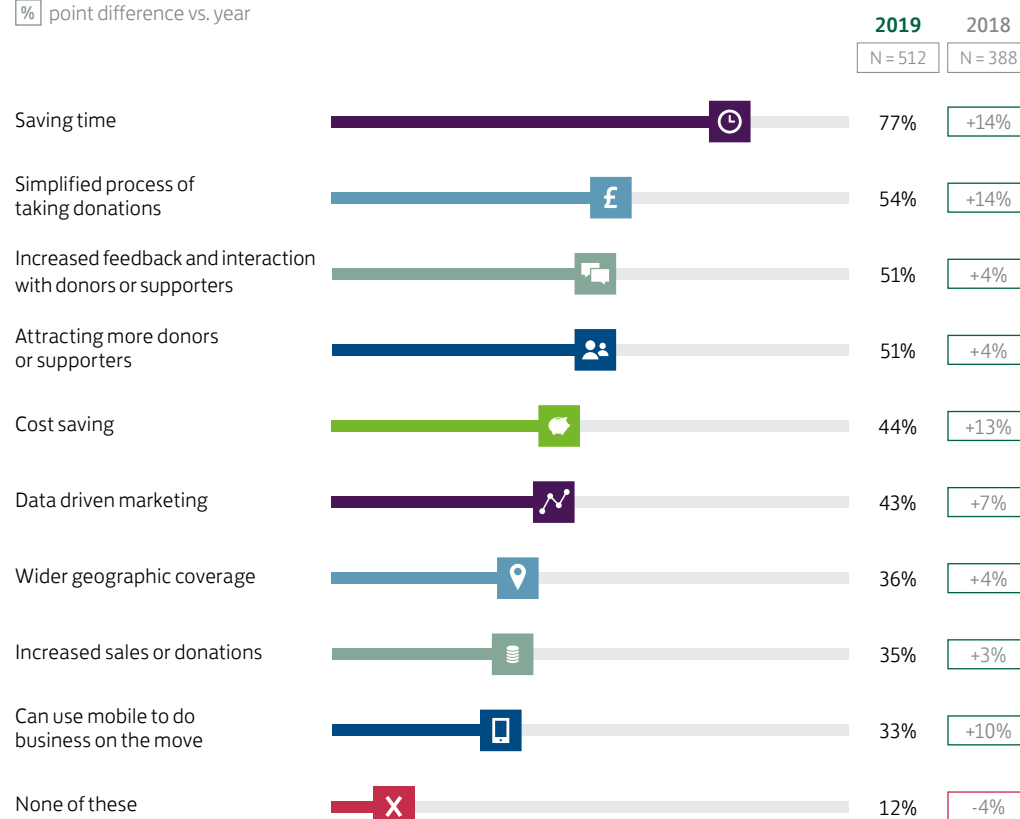
Data-driven downturn

In the past year 'data-driven marketing' has fallen out of the top five main benefits; this might be due to the complexities around GDPR and the speed of ever-evolving programmatic technologies. A report from Salesforce indicates that only 40% of charities in Europe utilise paid-for search activities and other data-driven activities**.

In 2019, more charities are acknowledging the benefits for donors with increased focus on 'simplified process of taking donations' and making it easier to interact with the charity (figure 14).

Figure 14. Benefits to charities of being online, 2019 vs 2018

% point difference vs. year



*Donr & Charity Digital (formerly Tech Trust), 2019, 44rt9812j4v61zr1k83d0x5g-wpengine.netdna-ssl.com/wp-content/uploads/2019/02/TEXT-GIVING-AT-A-GLANCE-infog.pdf

**Salesforce, 2019, salesforce.org/nonprofit/the-nonprofit-digital-marketer-report-5/

High digital capability reaps higher rewards

In overlaying the attitudinal research with transactional data, the Index illustrates that digital behaviours and activities, coupled with skills and confidence can lead to financial impact.

One-third of all charities with high digital capability saw an increase in turnover in the last two years compared to only one in five (19%) with low digital capability (figure 15).

Social media usage continues to drive benefits

Compared to those with lower social media usage, those with a significant level of social media usage benefit the most across all listed benefits, particularly for attracting customers, more effective marketing and increased interactions with their audience (appendix 11).

Northern charities seeing greater benefits

Regionally, there are some clear differences between realisation of benefits across the UK. Northern charities* generally benefit the most whilst those in the Midlands, the South West and Wales generally benefit the least (appendix 12). In particular, charities in the North are nearly twice as likely to be doing business on the move as those in the South West and Wales (44% to 24%).

Charities are more aware of the time saved by using digital channels

In 2018, 21% of charities saving time through digital were not sure how much time was being saved, this has reduced by seven percentage points to 14% in 2019 indicating that the time saving value of digital is becoming clearer (figure 16).

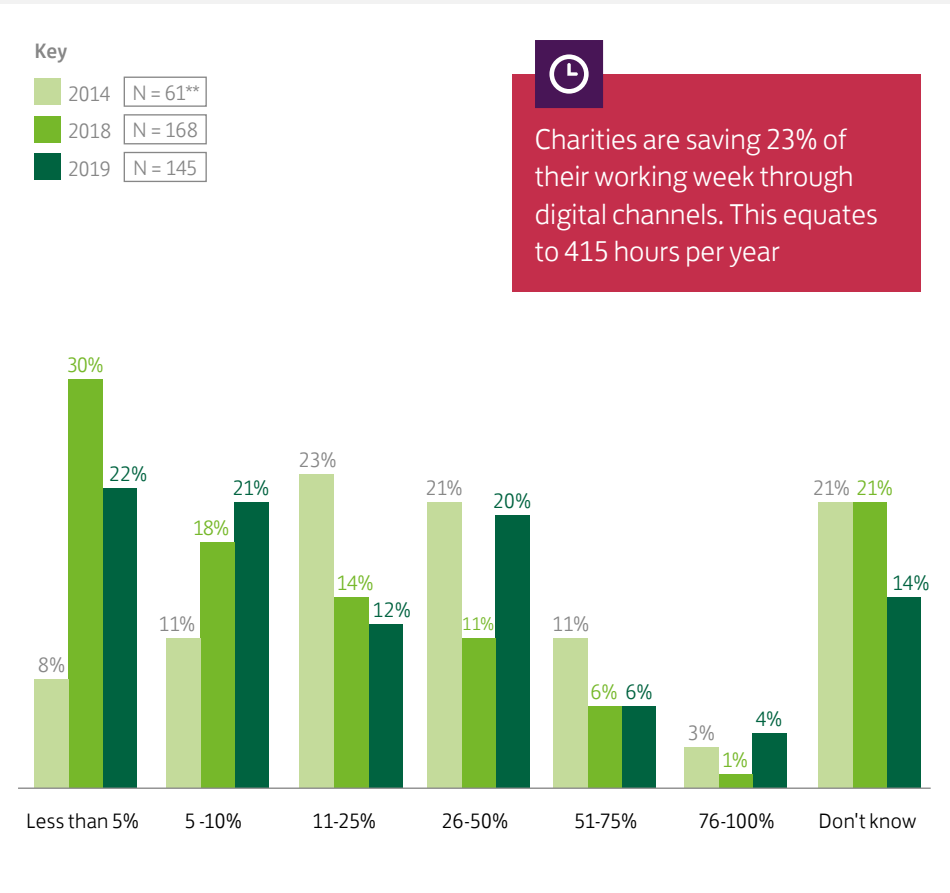
Figure 15. Change in charity turnover in the last two years, split by digital capability, 2019

N = 545

| | High Segments 3, 4 and 5 | Low Segments 1 and 2 |
|-----------------|-----------------------------|-------------------------|
| Increased | 33% | 19% |
| Stayed the same | 47% | 60% |
| Decreased | 16% | 20% |

*Includes Northern Ireland, Scotland and the North of England
**Small sample, use with caution

Figure 16. Percentage of time saved in an average working week due to use of digital channels



Barriers to Digital

In 2018, the Index report identified that almost a third of charities acknowledged that their lack of understanding was the main barrier – the data this year indicates that this is in fact not an organisational barrier but rather one driven by underconfident digital leadership.

Charity leaders dismiss digital

45% of charities have acknowledged that their inability to do more online is due to senior leaders not seeing technology and digital skills as relevant to their organisation (figure 17). With two-fifths (39%) of charities feeling that digital is just not worth the investment (this has almost doubled from 2018), perhaps leadership-specific interventions are the key to mobilising change.

Charities lack the skills to succeed

Four in ten charities identify their own organisations digital skills as a barrier. This has risen year-on-year from ten percent in 2014 to 42% in 2019, and is echoed in the Business Digital Skills Report 2019*. Whilst capability of employees is an increasing issue, this year the data also demonstrates that 37% of charities do not understand what the appropriate technologies are to invest in, proving a clear knowledge gap for those charities who are interested in improving their digital capability, but do not know where to start.

Digital leadership is not translating into a more digitally skilled workforce, as the data shows that charities with digital strategy embedded at a management level are almost equally likely to say that they lack staff with the digital skills needed to do more online ([appendix 13](#)).

Charities need to spend time, to save time

In just one year, charities are over one and a half times more likely to say that 'not enough time' is a key barrier to doing more online; 30% of charities now say this, compared to 18% in 2018. Surprisingly, the data shows that those organisations with higher digital capabilities deem time as more of a barrier than those with lower capabilities.



45% of charity leaders do not see digital as relevant to their organisation



37% of charities do not understand which technologies they should invest in to drive their organisation forward

Figure 17. Barriers preventing charities from doing more online, 2019 vs 2014 and 2018

| | 2014 N = 468 | 2018 N = 452 | 2019 N = 545 |
|---|-----------------|-----------------|-----------------|
| Leaders do not see it as relevant | N/A | N/A | 45% |
| Lack of staff digital skills | 10% | 31% | 42% |
| Not worth the investment | 11% | 20% | 39% |
| Not sure what the appropriate technologies are to invest in | N/A | N/A | 37% |
| Concerns about information security/fraud | 4% | 16% | 35% |
| No time to set up an online presence and go online | 9% | 18% | 30% |
| Just not interested in doing more online | 14% | 18% | 26% |
| Too expensive | 4% | 12% | 19% |
| Poor connectivity | 1% | 10% | 17% |
| Nothing, feel that we are doing all we can online | 29% | 13% | 7% |
| Other | 2% | 6% | 6% |
| Prefer interacting face-to-face | N/A | 2% | 2% |
| Bank is not compatible/not helpful/too complicated | N/A | N/A | 1% |
| Legal or regulatory reasons | N/A | 1% | 1% |
| Technical issues | N/A | N/A | 1% |
| We are in the process of doing more | N/A | 3% | 1% |
| Use word-of-mouth | N/A | 2% | 1% |
| Don't know | N/A | 4% | 0% |

* Skills Platform, 2019, skillsplatform.org/charity_digital_skills_report_2019.pdf

Cybersecurity confidence remains a challenge

Concerns around cybersecurity have more than doubled in the last year, as seen in figure 17. Charities with the highest digital capability are more concerned about security than those with the lowest digital capability ([appendix 14](#)). Compared to charities over ten years old, younger charities are more likely to be concerned with information security and fraud (42% to 33%) ([appendix 15](#)).

Charities in the North more likely to face barriers

Whilst charities in the Midlands are more likely to have leaders who don't recognise the relevance of digital (51%), it's charities from the North who are more likely to face a range of barriers (figure 18).

Compared to Wales and the South West, charities in the North are one and half times more likely to lack digitally skilled staff, and three times more likely to deem technology as too expensive.

Infrastructure issues increasing

The 2019 data suggests that infrastructure and processes are also having a direct impact on a charities ability to adopt digital. Poor connectivity and a lack of superfast broadband prevents one in five charities from adopting digital. This is being tackled by both public and private sectors, but as a challenge has increased year-on-year (figure 17).

Figure 18. Barriers preventing charities from doing more online, split by region

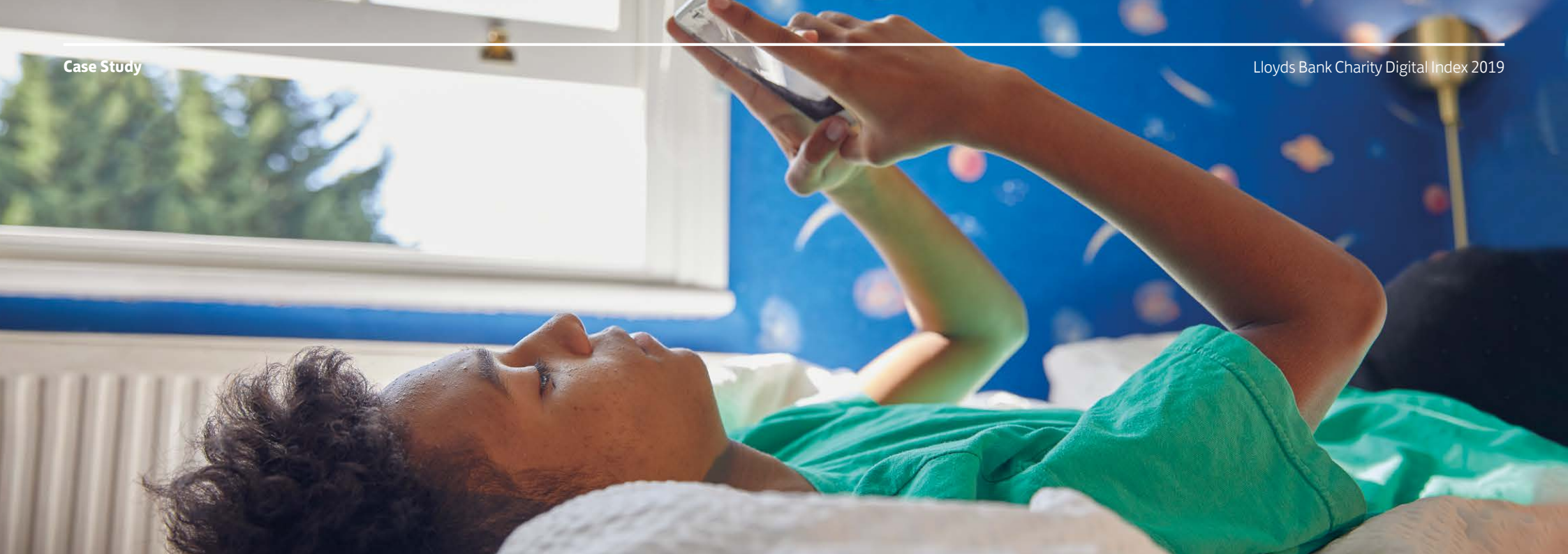
| | London & South East | The Midlands | The North* | South West & Wales |
|---|---------------------|--------------|------------|--------------------|
| Leaders do not see it as relevant for our organisation | 46% | 51% | 41% | 44% |
| Lack of staff digital/online skills | 43% | 45% | 49% | 32% |
| Not worth the investment | 37% | 33% | 46% | 38% |
| Concerns about information security/fraud | 31% | 33% | 40% | 33% |
| Not sure what the appropriate technologies are to invest in | 29% | 33% | 48% | 34% |
| Just not interested in going online | 26% | 27% | 28% | 26% |
| No time to set up and go online | 26% | 31% | 39% | 24% |
| Too expensive | 15% | 18% | 31% | 10% |
| Poor connectivity | 14% | 17% | 21% | 15% |
| Other | 8% | 6% | 3% | 8% |
| Nothing, feel that we are doing all we can online | 7% | 4% | 6% | 9% |
| Bank is not compatible/not helpful/too complicated | 1% | - | 1% | 1% |
| Don't know | 1% | - | - | 1% |
| Legal/regulation/legislation restrictions | 1% | 1% | 3% | - |
| Technical issues | 1% | - | 1% | - |
| We are in the process of doing more | 1% | 2% | 1% | 2% |
| Prefer interacting face-to-face | - | 5% | 1% | 2% |
| Willingness of customers to pay online | - | - | 1% | - |
| Use word-of-mouth | - | 1% | - | 3% |



£

Charities in the North are three times more likely to deem technology as too expensive than the South West and Wales

*'North' aggregates Northern Ireland, Scotland, North East, North West and Yorkshire & Humberside



NSPCC

 nspcc.org.uk

NSPCC uses technology to further its fight for every childhood and is working harder than ever to achieve even more. Too many children are still being abused – emotionally, physically, sexually and online.

NSPCC is determined to keep building a powerful movement to protect every child from abuse and neglect, and invests in innovative respected services and solutions including Childline (for children and young people) and Helpline (for adults).

Digital innovation continues to rapidly change and reshape the professional and personal lives and behaviour of almost everybody in the UK. NSPCC digitally delivers vital services and communicates and interacts with millions of people as part of its fight for every childhood. As a big, complex national charity NSPCC is fortunate to be well resourced digitally, with expertise in digital marketing, data and analytics, production and development and social media and content.

The multi-skilled digital team works across the whole organisation delivering and optimising campaigns to increase reach

and engagement, fundraising and income generation, change behaviour and provide help and support to a variety of audiences. The digital team also innovates in service delivery, reshapes ways of working and leads the growth of a digital culture based upon curiosity, collaboration and a commitment to continuous improvement.

NSPCC has pockets of sector-leading digital excellence including the award-winning 'For Me' app (that puts Childline into a young person's pocket); 'NetAware' (a parent's guide to social networks and platforms co-produced with O2); and numerous Alexa skills including 'Parents vs. Kids' (a game to test people's knowledge about the online world, delivered in partnership with O2). But NSPCC does not claim to be a completely digitally mature organisation yet.

"We operate in an increasingly digital world which has fundamentally changed how adults and young people interact with the NSPCC – to receive support, give us money or find out more about our services. While digital presents a tremendous opportunity, being able to change and adapt quickly enough, in an ethical way, to support safeguarding of young people is a constant challenge."

Sam Keith,
Acting Head of Digital Production

Advice and Guidance

There are more than twice as many charities now seeking digital support

In 2018, 19% ([appendix 16](#)) of charities were looking for advice outside of their own organisation on how to use technology, this year that figure is 40% (figure 19). The data shows this group are six percentage points more likely to have high digital capability than those who do not seek help externally and therefore may have a greater appetite for digital support, given they are further along with their digital development ([appendix 17](#)).

Charities are seeking support from informal, formal and paid for sources

Consequently the data shows large increases in the proportions of charities getting their advice from the listed sources in figure 20. As more charities continue to become more digitally capable, it is likely the proportion seeking external support will continue to increase.

Informal advice channels have grown the most

For those reaching out for digital support, informal sources of advice prove the most popular. Six in ten (60%) charities rely on friends and family (a 46% increase since 2018) (figure 20). This source of advice is the most popular regardless of how many years the charity has been operating, demonstrating the importance of trusted faces ([appendix 18](#)). However the biggest year-on-year increase for informal support has come from those accessing government services via GOV.UK which is now 40% of those seeking external support – 2.5 times greater than 2018.

Charities are not afraid to spend on digital support

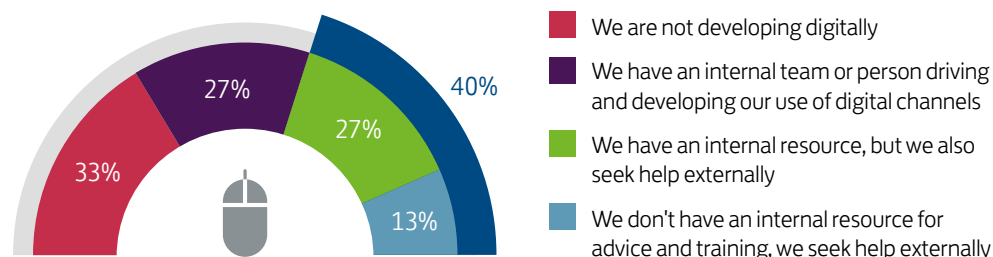
Receiving support from IT suppliers is the most common formal advice channel, nearly half (48%) of charities seeking support are working with suppliers to meet their digital needs – much of which will require investment.

Figure 20. Where do you go to get advice and training on how to use technology and the web?

| | 2018 N = 81* | 2019 N = 143 |
|---|-----------------|-----------------|
| Informal | | |
| Friend, relative or colleague | 41% | 60% |
| GOV.UK | 16% | 40% |
| Search online | 30% | 55% |
| Peers | 26% | 55% |
| Local network | 26% | 35% |
| Formal | | |
| IT supplier or business support company | 27% | 48% |
| Consultant | 23% | 35% |
| Recruit someone with the right skills | 19% | 29% |
| Local council/Local authority/Council for Voluntary | 19% | 22% |
| Bank | 15% | 18% |
| Free training course | N/A | 2% |

Figure 19. Which of these best describes your approach to digital development?

N 2019 = 375



Only two percent of charities are upskilling by taking free training courses. This represents a large opportunity for free digital skills providers like the Lloyds Bank Academy lloydsbankacademy.co.uk

*Small sample, use with caution

Tech Understanding and Adoption

Charities understanding of the different technologies available has increased since last year

A study by the Charity Aid Foundation claims that less than one-third of charities are using new technology effectively*. Despite this, the data in the report finds that charities are increasingly aware of and are adopting leading technologies.

The Index report seeks to increasingly understand the more complex technologies that charities are engaging with, and how this changes over time. Understandably, some aspects of this tech may not be wholly relevant to every organisation, but there is an aspiration for them to be able to make informed decisions.

Compared to the Index data in 2018, charities are indicating a growing understanding of tech such as connected devices, Cloud services and machine learning. Blockchain remains the least understood technology (figure 21).

Cybersecurity could be a tipping point for charities' digital skills

Nearly two-thirds (64%) of charities understand, use or intend to use cybersecurity in the next two years (higher than all other listed concepts in figure 21). Only 11% don't understand what cybersecurity is (lowest out of all other skills).

With cybersecurity as a tipping point, there could be an opportunity to utilise the growing appetite and interest to upskill on other tech.



Charities must not neglect Blockchain

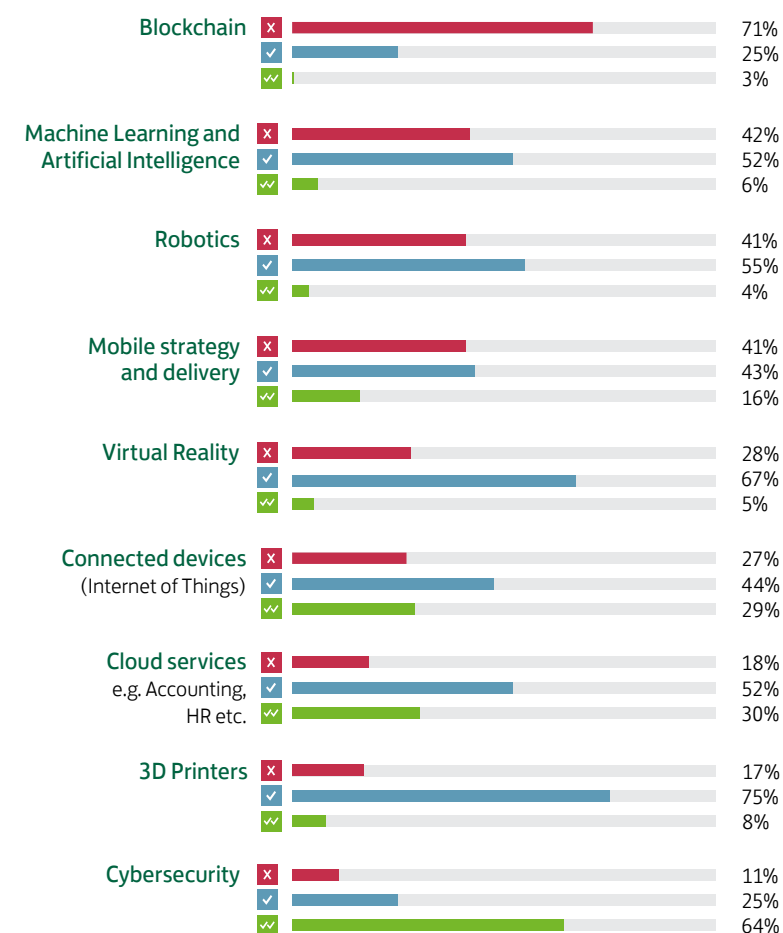
Figure 21 demonstrates the lack of understanding and adoption of Blockchain technology in the third sector. Whilst the organisational applications of Blockchain continue to evolve, it is important that charities do not dismiss the value it could provide them. Research has shown that it can have huge benefits for charities by creating greater transparency of payment tracking from the donor to the beneficiary**

Figure 21. Proportion of charities who understand and have plans to use the listed future technologies, 2019

N = 545

Key

- ✗ Don't understand it
- ✓ Understand it but don't intend to use it in the next 2 years
- ✓✓ Understand it and currently use it or intend to use it in the next 2 years



*Third Sector, 2019, thirdsector.co.uk/less-third-charities-using-new-technology-effectively-increase-giving-report-finds/digital/article/1581921

**Econsultancy, 2019, econsultancy.com/digital-technology-impacting-charity-sector/

Future skills

Few charities are implementing newer ways of working

As indicated by the data in figure 22, 'Agile methodology' skills are the least understood. More than one-quarter of charities (27%) don't know what this entails or how it is relevant to their organisations.

This is 20 percentage points higher than the next least understood skill. It is also the least adopted skill along with e-commerce.

If charities were to learn or hire talent with these skills there could be much to gain in terms of productivity across the third sector.

Digital content and design skills are among the top five most sought after skills by charities. The Essential Digital Skills data on page 14 shows that the Creating skill which relates to digital content has the second lowest competency level, compared to the other five skills at 83%. The data here shows that this is an area where charities are seeking to develop.

Nearly two-thirds of charities do not want data analytics skills

The data on page 14 highlights the opportunities many charities still have to use data in their decision making. However, figure 22 indicates a potential resistance to adopting data analytics as a skill with nearly two-thirds (63%) reporting that they do not want these skills.

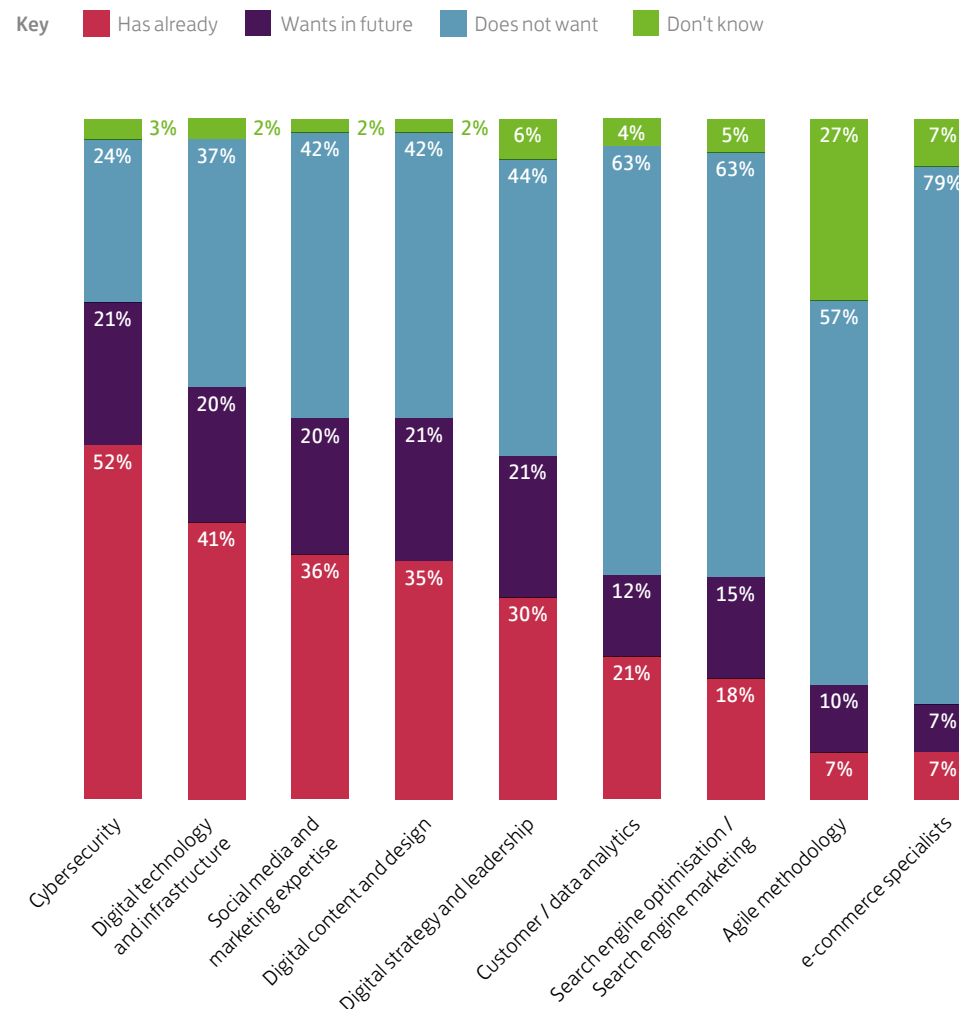


The biggest barrier preventing charities doing more online are their leaders who don't see the relevance of digital ([see page 18](#)).

Figure 22 shows that only 21% of charities want digital strategy and leadership skills in the future and nearly half (44%) do not want this at all


Figure 22. Proportion of charities and their plans to adopt new digital skills, 2019

N = 545





HUMEN

 wearehuman.org

HUMEN are an established charity with chapters in London, Manchester and Edinburgh. They provide vital anonymous and non-clinical spaces for men to talk on a regular basis, both online and face-to-face, anywhere and anytime.

Struggling with his own mental health, River Hawkins acknowledged a challenge around mental health support: “After resisting talking about it for so long, when I eventually asked for help I was told I could only continue to receive it if I was suicidal”. That’s when the idea for HUMEN began.

Recognising that 75% of all UK suicides are male, River created a support system that appealed to men and a space where they could be open and honest, whilst receiving support during difficult times. Alongside the face-to-face hubs, HUMEN also wanted to establish an online presence with a website and social media communities. The charity took a conscious decision to design the website with a ‘mobile-first’ approach, ensuring

it was accessible for everyone on the go, but optimising the desktop page to promote their video content.

HUMEN use social media to signpost to available support, engage with their audience and raise awareness of their charity. Understanding that their main audiences are on Instagram and Facebook, the charity have set up accounts to build online communities around upcoming events, male mental health stories and key support sites. HUMEN manage all of their social pages in-house and have created robust processes and brand guidelines to support volunteers. Creating a brand and gaining high profile endorsements from a range of celebrities has not only promoted the great work that HUMEN are doing, but also raised the profile of mental health and created a strong brand identity.

Using tools which allow the team to collaborate from anywhere, including Google Docs and Google Hangouts, the team manage their projects remotely. Using insight from social campaigns, the charity uses the data to test and learn, adapting their campaigns and adverts to be more effective.

HUMEN recognise you never know who can be in need and continue to support those who need it. The charity know social media is an incredible tool which allows them to create a movement through human connection.

Calls to Action

Created in partnership with Zoe Amar, Director at Zoe Amar Digital and Chair of The Charity Digital Code of Practice.



Zoe Amar runs a social enterprise and digital agency that helps charities and other non-profits lead change with confidence, developing strategies which increase their resilience, income and influence. Zoe was recently named as one of the top 25 most influential charity sector leaders as well as leading the development of the Charity Digital Code of Practice.

1. Leaders need to lean into digital

Leaders must embrace the positive potential of digital

This will require a mindset and a skillset shift. Without the expertise or the confidence to adapt, charity leaders may be reluctant and as a result, many charities are missing out on key benefits, including taking the focus from the back-office to the beneficiary.

Charities need to learn from other organisations with the highest digital capabilities and ensure there are methods of training and upskilling leaders. Leaders do not need to develop the in-depth technical skills themselves, however they must build a deeper understanding of digital.

Being open to change and able to influence the organisation before digital can be truly embedded.

2. Close the skills gap

Charities must take advantage of free training

With charities identifying their own skillset as a barrier to progression, the opportunity to use free training sources, which currently only two percent of charities do, there is a huge opportunity for charities to grow their capabilities.

We also know charities are spending money on third parties and on consultants, when free training for staff could provide a cost-effective, long-term solution. Charities with the highest digital capability are trailblazing by taking advantage of more free resources and realising the benefits.

With a wealth of advice available through the Charity Digital Code of Practice, charities can use the practical tools and advice as a framework to increase their impact, efficiency and sustainability through digital skills.

3. Pay it forward

Charities need to collaborate and share successes to progress

The report indicates charities value feedback and support from their friends, family and peers, with 55% of charities following informal routes to get support. The most digitally capable need to pay it forward by helping others, and larger charities could lead the charge.

Whether it's offering to mentor a smaller charity, or providing one-off advice, charities who are more digitally capable could make a real difference by becoming role-models and influencing the change that the industry needs to see.



Supporting Charities with their Digital Skills



97%*

of people learnt something new through the Academy

Using the Index research, we are able to understand and define the areas where charities need support.

The refreshed Essential Digital Skills framework provides more detailed insight into the skills charities have, allowing us to target support where it's needed most. Working with a range of partners through the Digital Skills Partnership, we can better understand the barriers charities are facing and work together to create effective training and support to improve their capabilities.

One way we are supporting charities with their digital skills at Lloyds Banking Group is through our partnership with the Charity Digital Code of Practice. Co-created with the Office for Civil Society, Zoe Amar, CAST and the Co-op Foundation, the Code launched in November 2018, and aims to support charities of all sizes, budgets or causes in progressing with digital, offering a consistent framework for the sector to work towards. The code outlines seven principals for charities looking to improve their digital activity.

Underpinned by the insight from the Consumer and Business and Charity Indexes, the Lloyds Bank Academy provides free content for learners both face-to-face and online. The courses are designed to improve the digital capabilities of charities.

Alongside the Academy, our Digital Knowhow Workshops help charities improve their organisation's digital presence and the digital skills across the country. We offer free half-day training for charities, working in partnership with Google to enable them to gain the expertise they need in digital marketing, search engine optimisation and data analytics.

Find out more about where the Lloyds Bank Academy can take you
lloydsbankacademy.com

Read about the Charity Digital Code of Practice
doit.life/charity-digital-code

YOUTH HOSTELS ASSOCIATION ENGLAND SAY...

"Digital is an opportunity for the whole organisation. We already knew this in a sense, but the Charity Digital Code provides the framework and 'permission' to continue our journey. Digital helps us to find more funding and allocate more resource and budgets, and accelerate our digital transformation programme with a guiding set of principles to keep us on track."

Thank you to our Partners

accenture

be the
business



Business &
IP Centre
London

CW CAMBRIDGE
WIRELESS

CHARITY
DIGITAL

CISCO



CitizensOnline

GlockworkCity

CORE PURPOSE

cosmic

Department for
Business, Energy
& Industrial Strategy

Department for
Digital, Culture,
Media & Sport

Department
for Education

Department
of Health &
Social Care

Digital Agenda

DIGITAL
LEADERS

DIGITAL SKILLS
PARTNERSHIP

dorset
growth
hub
inform - support - connect

fsb

future
.now

Good Things
Foundation
Improving lives through digital

Google

Gusto
RESEARCH

HM Revenue
& Customs

lep
network

LLOYDS BANK FOUNDATION
England & Wales

Microsoft

NOMINET

NSPCC

Online Centres
Network

peak b

SCVO

serco

SIX

TECHTALENT
CHARTER:

UPSKILL
DIGITAL

Llywodraeth Cymru
Welsh Government

zoe amar
digital

UK Charity Digital Index 2019 Appendix



Introduction

The report contains research from over 500 charities into attitudinal behaviours and uses of digital within their organisations.

To ensure published findings are statistically robust and meaningful throughout the report, care has been taken to only reference within the body of the report those year-on-year changes that meet statistically significant criteria.

Please note that within graphs, figures have been displayed as they are, meaning that minimal differences might not be statistically significant. In addition some graphs throughout this report do not total 100% due to rounding.

Appendix 1. **Summaries for all eight digital Index Score components, 2019** ([click to return to page 8](#))

Index score definitions

Enquiries Index

This Index is the proportion of enquiries that organisations makes online.

Transactions Index

This Index is the proportion of transactions the organisation makes online.

Mobile Index

An organisation scores 100 points if they have used the app three times in the reporting period, and 0 if not.

Infrastructure Index

There are two elements to this Index - using online government services and using internal digital tools. Organisations score 50 points if they have one element and 100 points for both.

Security Index

Organisations score 100 points if they either have robust anti-hacking measures or accept payments online (which require them to be secure). If they do none of these things they score 0.

Advertising Index

There are two separate elements to this Index. Organisations score 50 points if they advertise through websites or social media and 100 points if they do both.



Internal Team Index

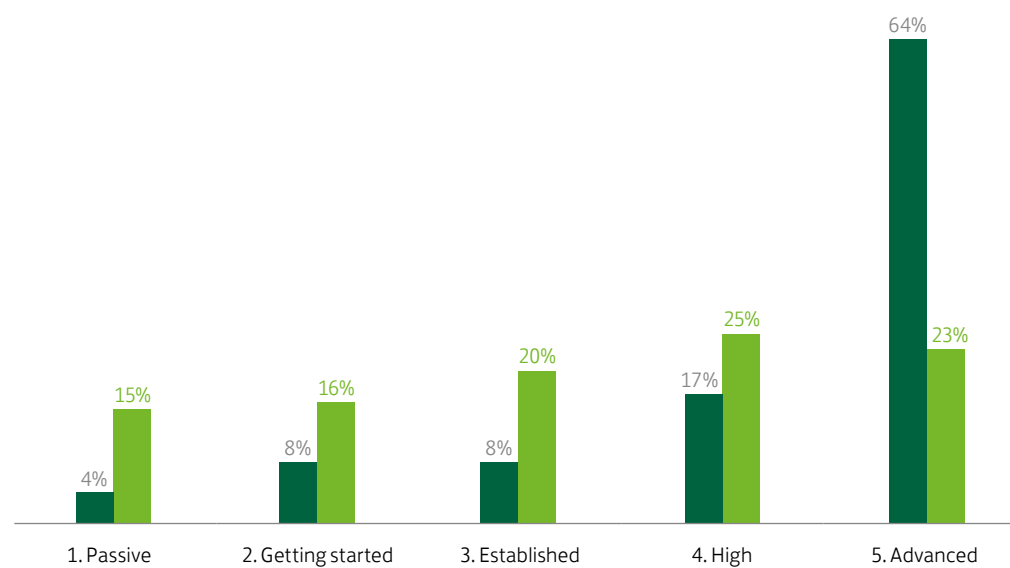
The first element is whether or not the organisation does its digital development itself, if it does they score 50 points, otherwise 0. The second element is whether they have the experience to be digital, scoring a max of 25 points. The third element is they know how to access information to become more digital, scoring a max of 25 points.

Communications Index

This Index awards 100 points if the organisation communicate via social media or email, 0 if not.

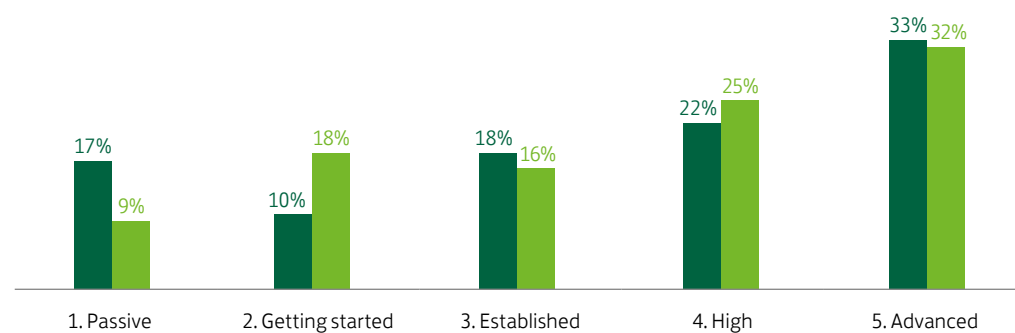
Appendix 2. Proportion of charities in each digital capability segment, split by revenue, 2019 ([click to return to page 9](#))

Key  Annual revenue over £50,000
 Annual revenue under £50,000



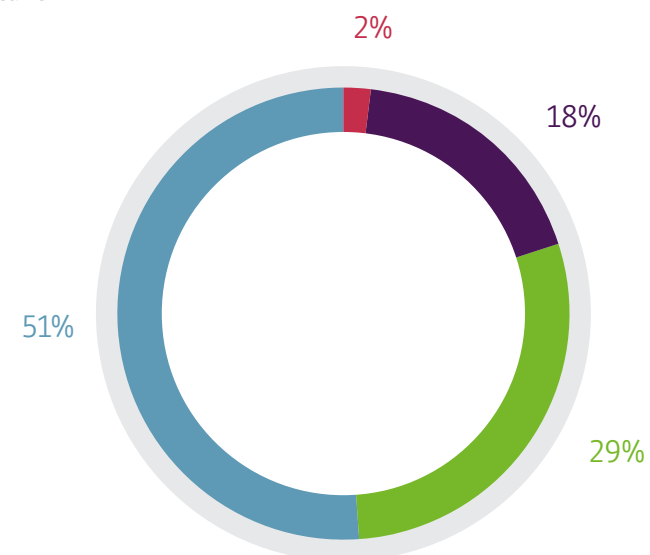
Appendix 3. Proportion of charities in each digital capability segment, split by gender of digital leader, 2019 ([click to return to page 9](#))

Key ■ Female
■ Male



Appendix 4. Proportion of charities that take online donations with their listed change in revenue over the past two years, 2019 ([click to return to page 11](#))

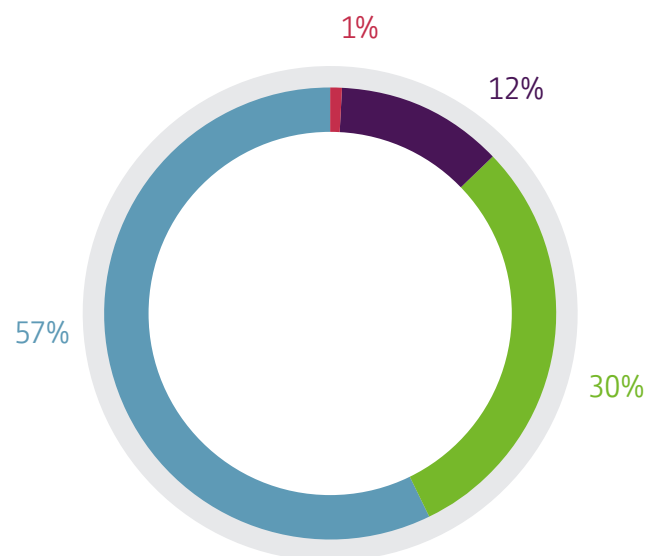
Key ■ Don't know
■ Decreased
■ Increased
■ Stayed the same



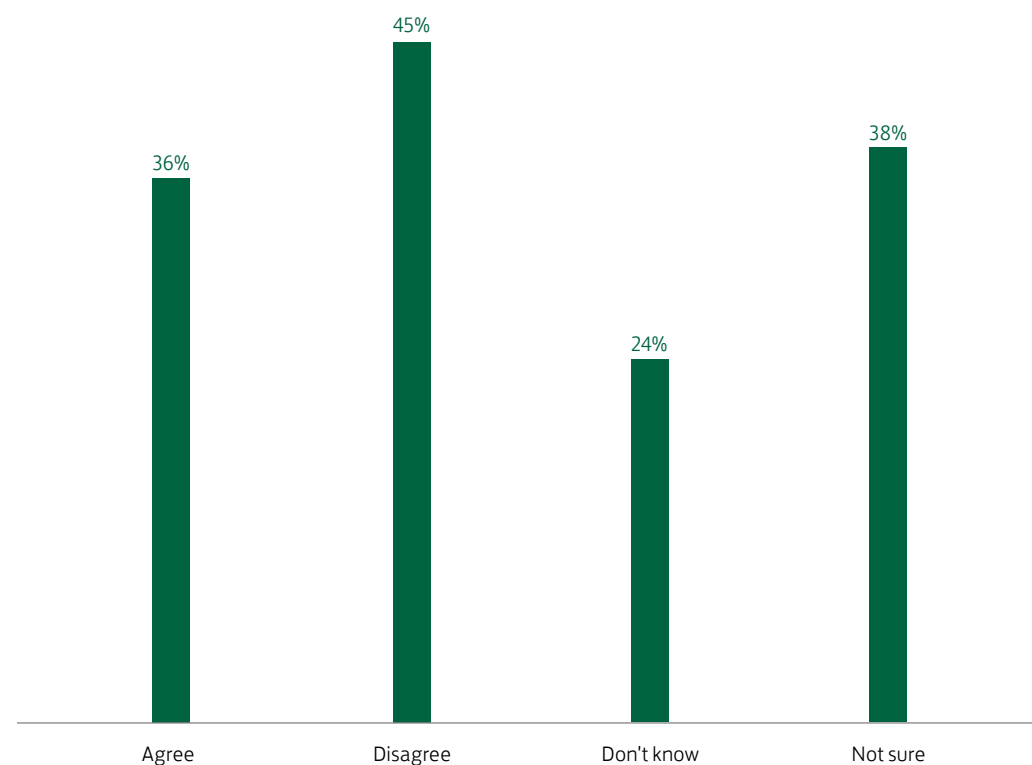
Appendix 5. 'I'm happy to use social media but only for personal use, not for my organisation', 2019
([click to return to page 11](#))

Key

- Don't know
- Not sure
- Agree
- Disagree

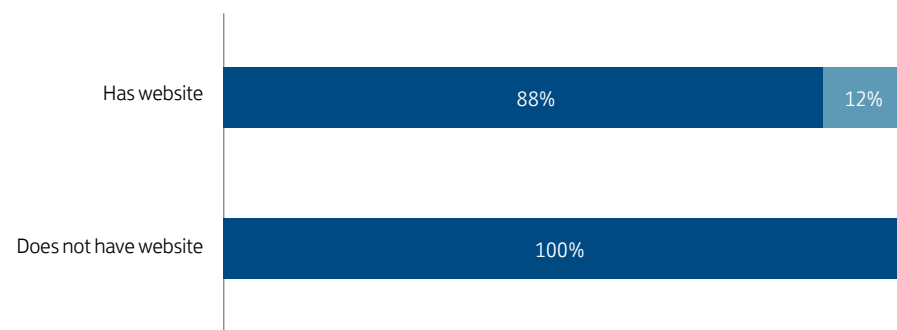


Appendix 6. Proportion of charities who have had an increase in revenue in the past two years, split by response to question 'I'm happy to use social media but only for personal use, not for my organisation', 2019 ([click to return to page 11](#))



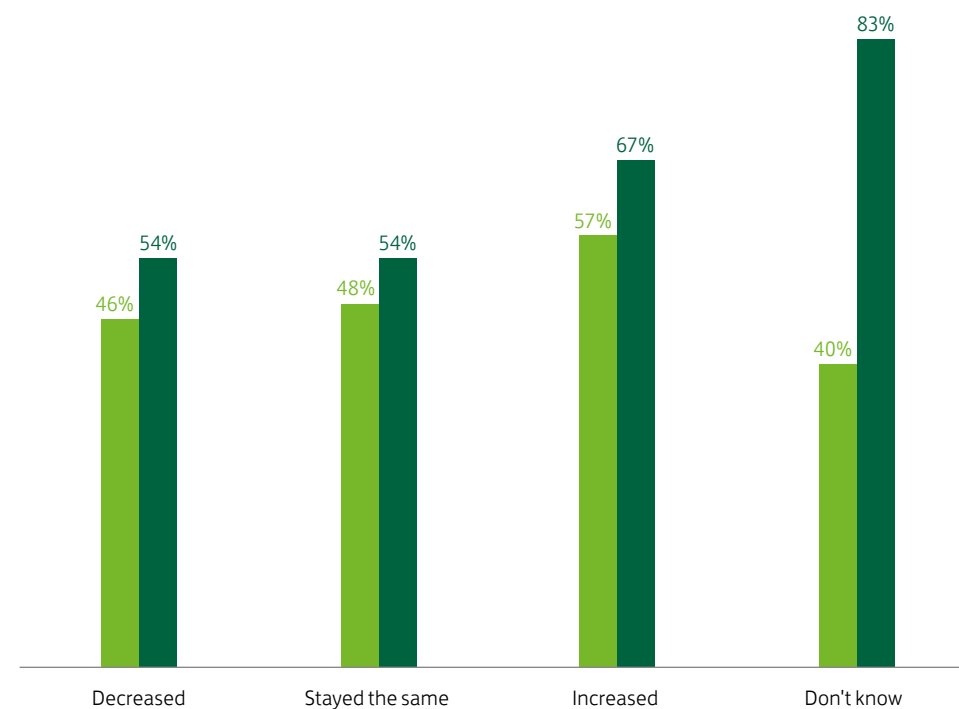
Appendix 7. Proportion of charities with and without websites, split by whether they also have an Instagram account or not, 2019 ([click to return to page 11](#))

Key ■ Does not have Instagram
■ Has Instagram



Appendix 8. Proportion of charities using social media and how their revenue has changed in the past two years, split by year, 2018 and 2019 ([click to return to page 11](#))

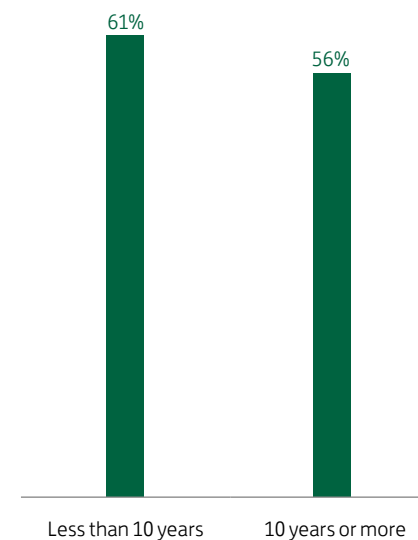
Key ■ 2018
■ 2019

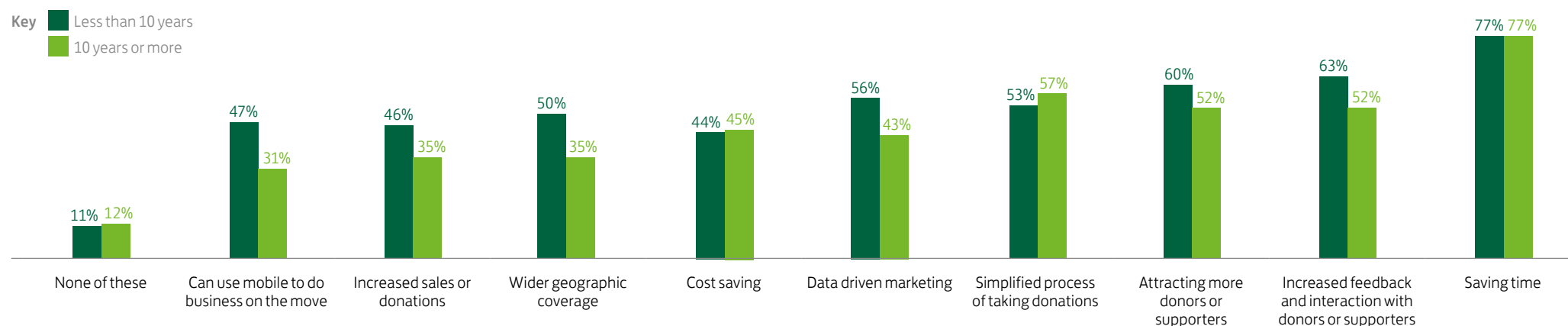
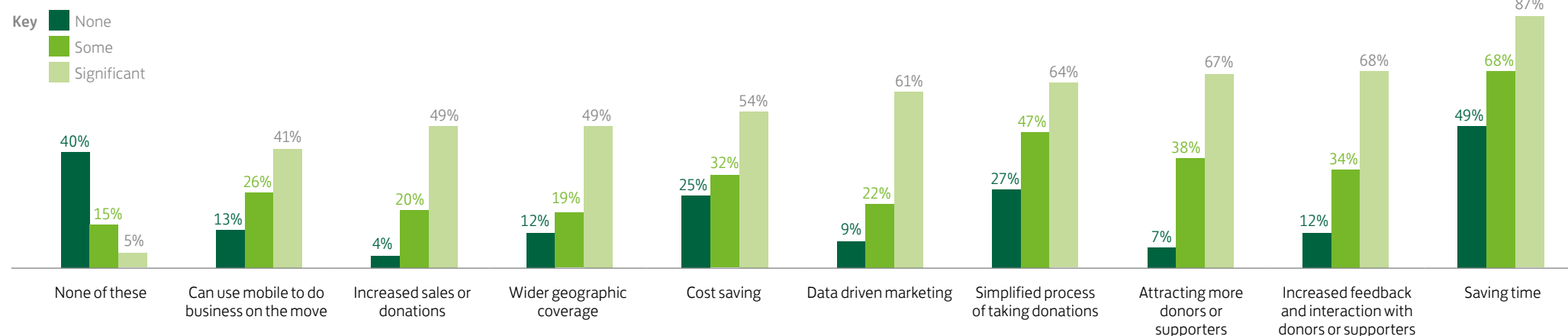


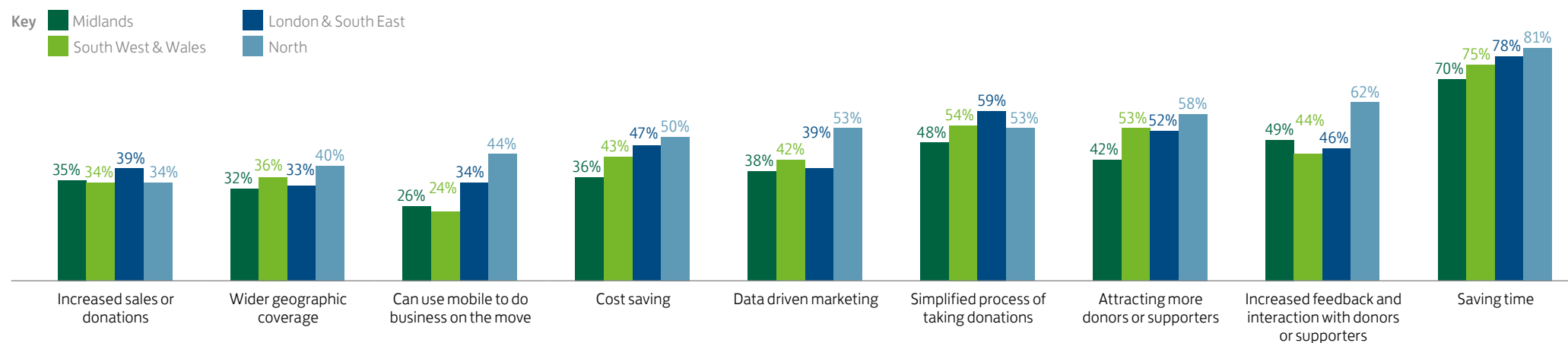
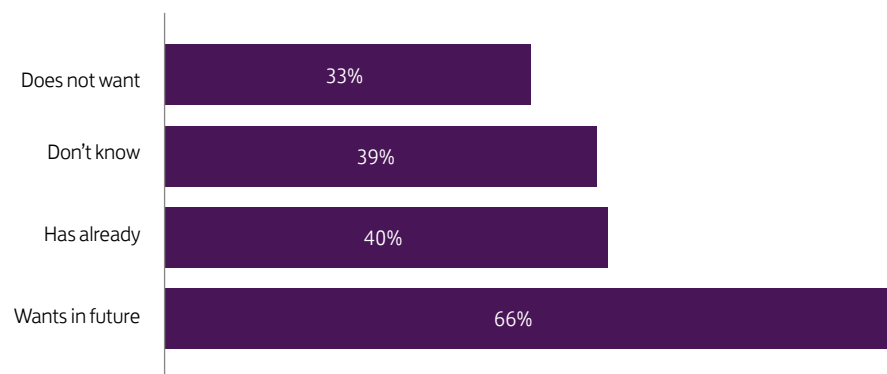
Appendix 9a. Proportion of charities with all six Essential Digital Skills, split by region, 2019
([click to return to page 13](#))



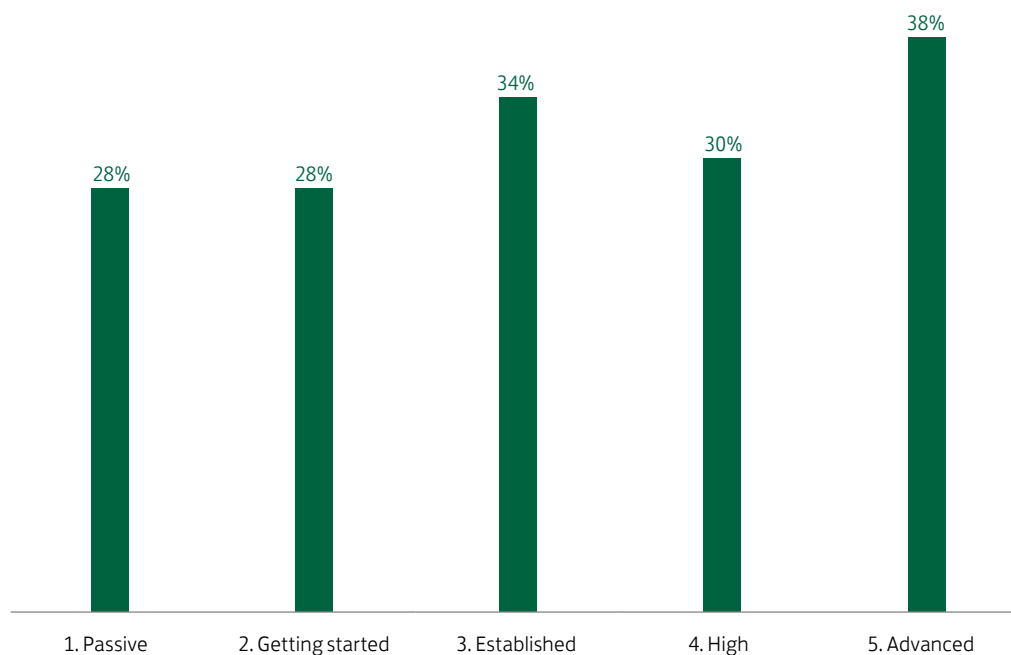
Appendix 9b. Proportion of charities with all six Essential Digital Skills, split by age of organisation, 2019
([click to return to page 13](#))



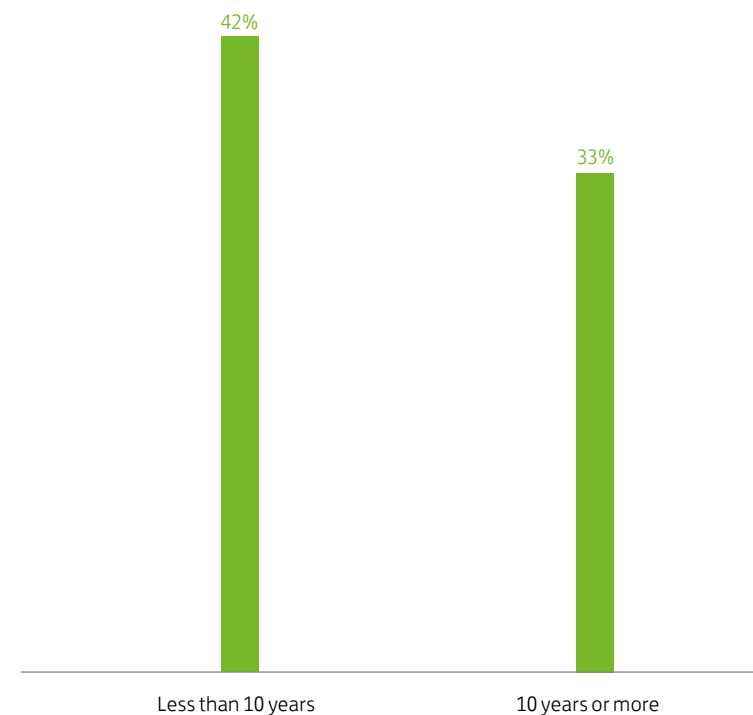
Appendix 10. Proportion of charities recognising listed benefits to being online, split by age of organisation, 2019 ([click to return to page 16](#))Appendix 11. Proportion of charities recognising listed benefits to being online, split by level of social media usage, 2019 ([click to return to page 17](#))

Appendix 12. Proportion of charities recognising listed benefits to being online, split by region, 2019 ([click to return to page 17](#))Appendix 13. Proportion of charities who say they lack staff with digital skills split by whether they have digital strategy and leadership or want it in the future, 2019 ([click to return to page 18](#))

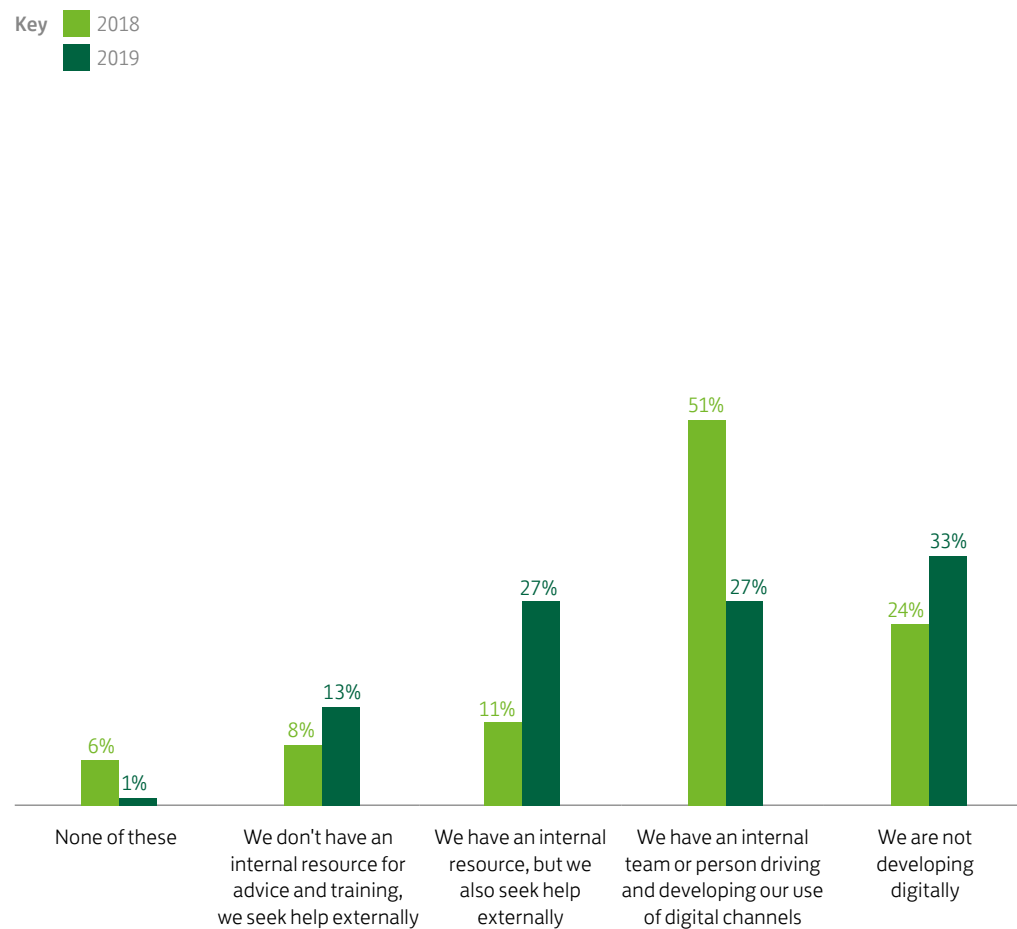
Appendix 14. Proportion of charities who are concerned about information security/fraud, split by digital capability segment, 2019 ([click to return to page 19](#))



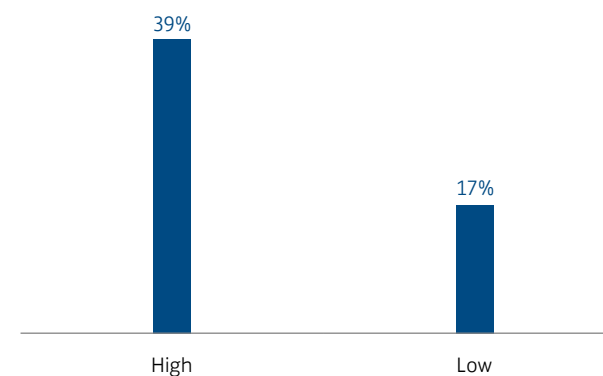
Appendix 15. Proportion of charities who are concerned about information security/fraud, split by age of organisation, 2019 ([click to return to page 19](#))

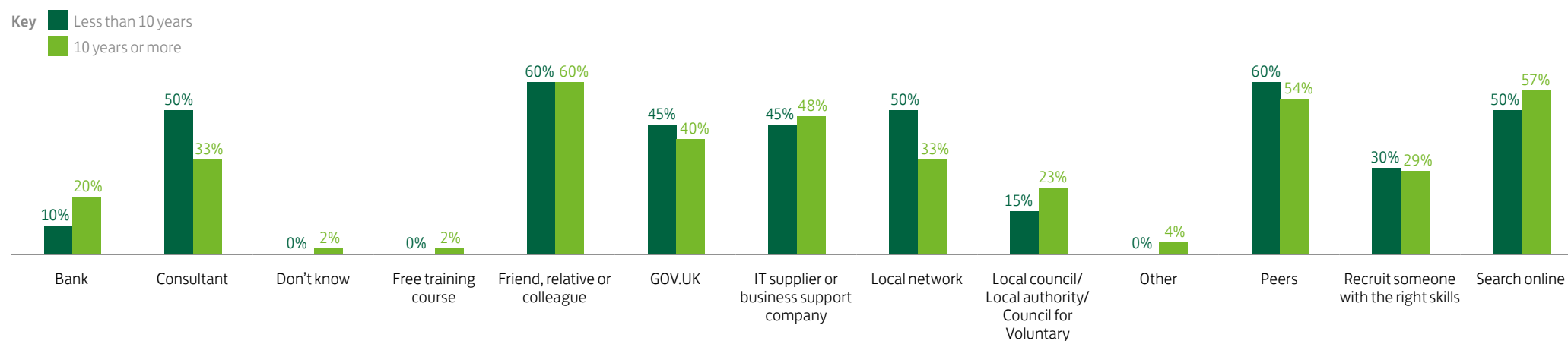
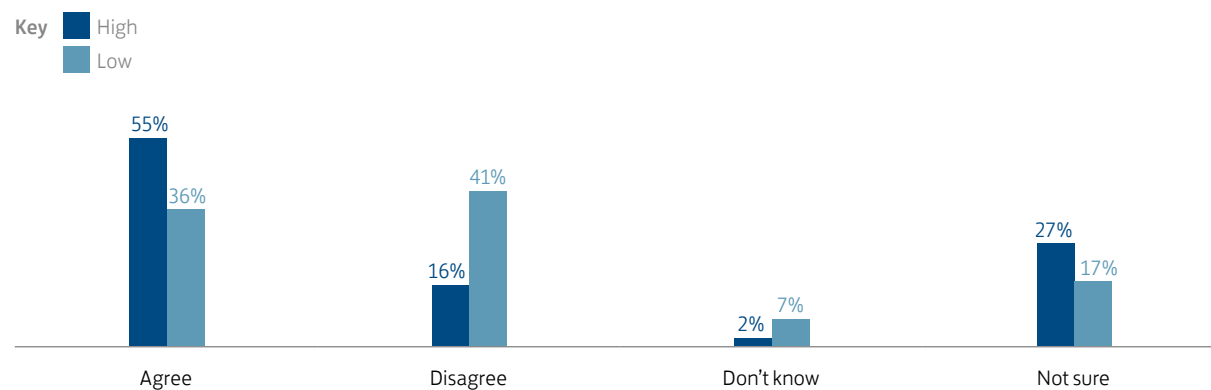


Appendix 16. 'Which of these best describes your approach to digital development?', split by year, 2018 and 2019 ([click to return to page 21](#))



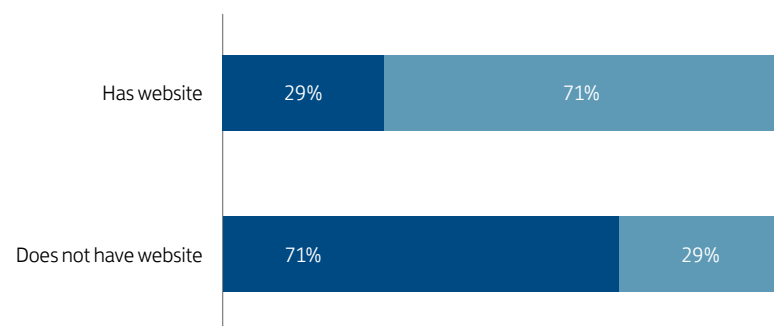
Appendix 17. Proportion of charities seeking digital support externally, split by level of digital capability, 2019 ([click to return to page 21](#))



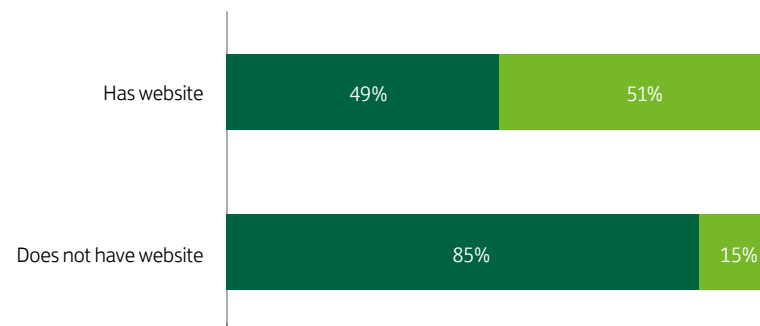
Appendix 18. Proportion of charities seeking digital support from listed sources, split by age of organisation, 2019 ([click to return to page 21](#))Appendix 19. 'I am confident that in a digital world I can lead my organisation to success', split by level of digital capability, 2019 ([click to return to page 9](#))

Appendix 20. Proportion of charities with and without a website, split by whether they have a Facebook or Twitter account, 2019 ([click to return to page 11](#))

Key ■ Does not have Facebook page
■ Has Facebook page

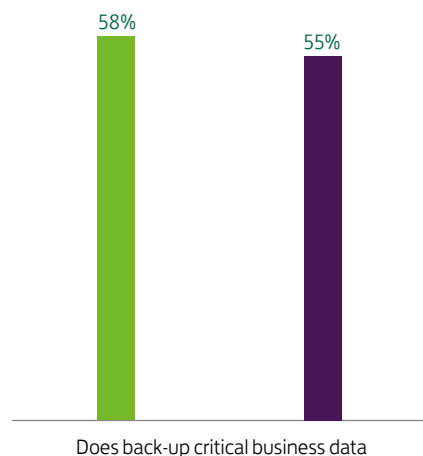


Key ■ Does not have Twitter account
■ Has Twitter account



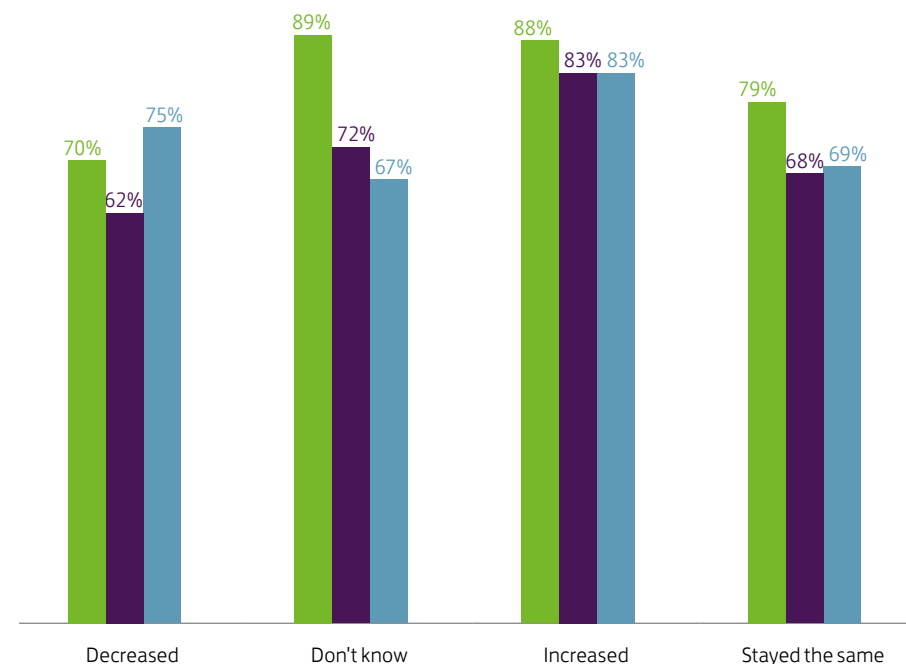
Appendix 21. Proportion of charities backing up critical business data, split by how they also use data, 2019 ([click to return to page 14](#))

Key ■ Use data to improve products and services
■ Use data to improve website performance



Appendix 22. Proportion of charities able to do the listed Essential Digital Skills tasks, split by the change in their revenue in the past two years, 2019 ([click to return to page 14](#))

Key ■ Respond to customer queries online
■ Buy goods and services online
■ Complete online forms (e.g. Tax Returns)



UK Charity Digital Index 2019

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-  The report and other content including the Business Digital Index, can be found online: lloydsbank.com/businessdigitalindex
-  Please refer to our website for appendices, national and regional data and helpful links and resources
-  Please get in touch at: DigitalSkillsInclusion@lloydsbanking.com
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Great care has been taken to ensure that the information used here cannot be in any way traced to a specific individual. This report has used aggregated data across social and demographic groups to highlight the trends and insights that will help consumers, charities and UK Government to understand more about our nation's digital and financial inclusion landscape.

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Written by Alex Caceres, Alex Owen, Jo Boosey and Jemma Waters.

Issue date: November 2019



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