WORLD GIVING REPORT

# FRANCE — CHARITY INSIGHTS

2025





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# Welcome.

Earlier in 2025, we published 'Giving in France', a report that explored the generosity of the French public, both through their time and financial contributions. Building on that knowledge, this new report delves deeper into the current landscape of France's charities, aiming to enhance our understanding of the unique challenges and opportunities they face. As part of the World Giving Report 2025 series produced in collaboration with the Charities Aid Foundation (CAF), this study expands on global insights with a specific focus on how French charities navigate their unique environment. It is a testament to their resilience and adaptability in the face of evolving societal needs and immense challenges.

While demand for the services of charities is on the rise, one of the key findings is the stark reality of funding challenges, as charities mention finances as their top concern. In France, 72% of charitable funding is restricted, contrasting with the 60% observed in other high-income nations. This indicates a significant challenge for French charities, who must innovate to maximise impact within these constraints. Despite this, an overwhelming majority demonstrate confidence in managing changing demands, highlighting their agility and resilience.

The more we learn, the clearer it becomes that further research and strategic reflection are essential in supporting a resilient and innovative charity sector in France. We extend our gratitude to the charities as well as the teams and partners that have shared their knowledge and expertise in producing this report. By reflecting on these insights and sparking strategic conversations, we hope to better understand France's charity sector, and to cultivate further resilience and innovation in an ever-changing world.



**Axelle Davezac**CEO, Fondation de France

"The more we learn, the clearer it becomes that further research and strategic reflection are essential in supporting a resilient and innovative charity sector."

# About us.

### **FONDATION DE FRANCE**

### FRANCE'S LEADING PHILANTHROPY NETWORK

Each and every one of us has the power to act in the public interest. For 55 years, this conviction has been the driving force behind the Fondation de France's action. As an independent and private entity, Fondation de France relies on the generosity of its donors.

Every day, it encourages, supports and transforms the desire to act into impactful action to build a more peaceful, united and sustainable world. Fondation de France leverages unique expertise, drawing on experts, hundreds of volunteers, and thousands of field workers, across all areas of public interest: aid for vulnerable people, medical research, the environment, culture, education, and more.

Fondation de France supports more than 12,000 promising and innovative initiatives every year, both in France and beyond — through the efforts of the 982 foundations under its auspices.

### **CAF**

The Charities Aid Foundation (CAF) exists to accelerate progress in society towards a fair and sustainable future for all. Over the last 100 years, we have led the way in developing innovative approaches to giving. Annually, we distribute over £1 billion to social purpose organisations around the globe.

As a leading charity operating in the UK, US and Canada, alongside an international network of partners, CAF works at the centre of the giving world. We collaborate with corporate and individual donors to enable them to give more effectively, strategically and impactfully. This includes connecting them to charities globally and providing access to our in-depth sector knowledge, governance expertise and innovative giving solutions.

We help social purpose organisations to strengthen their resilience and do more of their life changing work, through strategic advisory services from our Impact Accelerator, tools to support charities' fundraising activities, and charity financial services from CAF Bank Limited and CAF Financial Solutions Limited. Using our research, policy and campaigns work, we understand and influence the wider environment for charities and donors.

Together, we give more.

# The World Giving Report captures the public's attitudes and behaviours around giving in 101 countries across the world and — working with local partners — the state of the charity landscape in 27 of these countries.

- This report is one of 16 country-specific Charity Insights reports and is produced by CAF in partnership with leading social purpose organisations around the world.
- You can access all our global and country-specific insights from both donors and charities at: www.worldgivingreport.org

# Our methodology.

The results described in this report were collected as part of the Charity Landscape aspect of the World Giving Report between March and June 2025.

All fieldwork was conducted by Fondation de France, which reached out to charities in France with an online survey. The survey was done in the French language.

The sample collected is an indicative snapshot of charity perspectives in France.

### A note on 'Charity'

Across the report, we use the words 'charity' and 'charities' to represent any organisation that works to try and improve issues that are affecting individuals, communities, animals or the natural environment, and society as a whole.

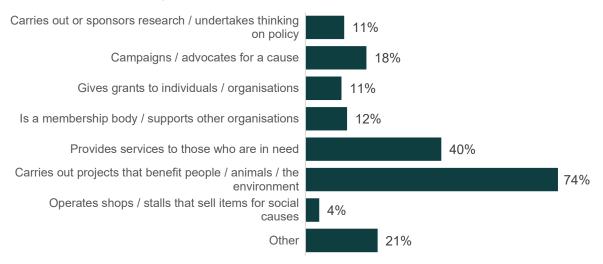
In doing so, we recognise that these terms and their definitions differ around the world, with this type of organisation also described as: non-governmental organisations (NGOs), non-profit organisations (NPOs), community organisations, social purpose organisations, associations, foundations and other names.

www.worldgivingreport.org



# The organisations in the sample: 123 in total.

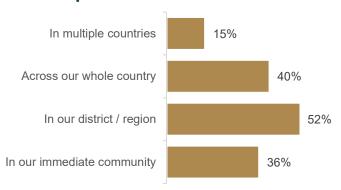
# The role of the organisation:



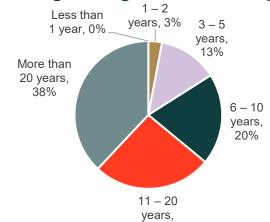
# Size of organisation:



## The scope of their work:



# How long the organisation has operated:



26%

### The main cause area supported:

In total, 15 different main cause areas were represented within the sample, with the five most common being:

- 1. Arts, culture, heritage or science (13%)
- 2. Disabled people (13%)
- 3. Children or young people (11%)
- 4. Human Rights / equality / diversity (11%)
- 5. Mental health (11%)



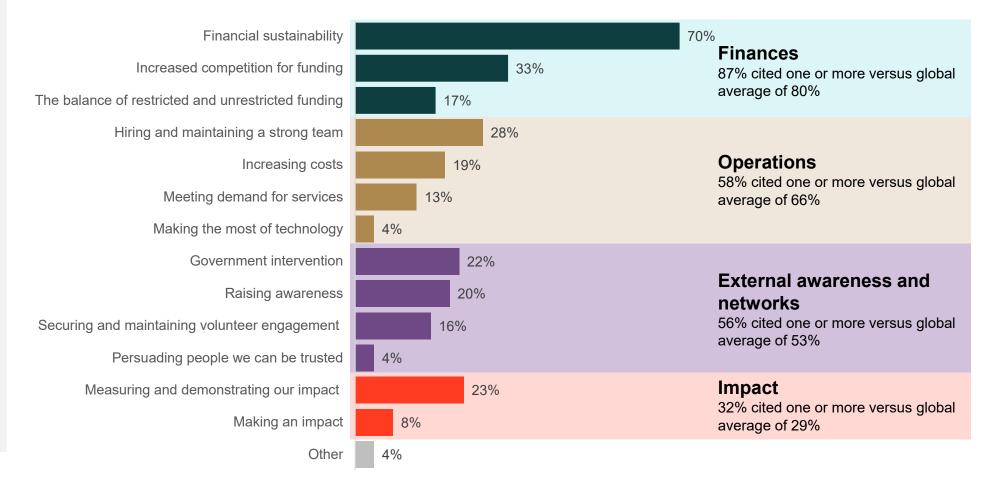
# The biggest challenges for the sector.

# Funding is the top challenge for charities.

The survey reveals that charities in France are mostly concerned with finances, with nearly nine out of ten charity leaders citing at least one finance-related challenge, such as financial sustainability, increased competition for funding, and the balance of restricted versus unrestricted funding. This indicates a critical need for more stable and sustainable funding sources.

Additionally, most charity leaders identify operational aspects, such as putting together a strong team, increasing costs, keeping up with demand for services, and making the most of technology. They also express concerns related to their ability to work with external actors, most notably government entities.

Q. Below is a list of challenges that charities might be facing. Please select the three that are most pressing for your organisation: (All charities answering, n = 98)



# Perceptions on overall sector health.

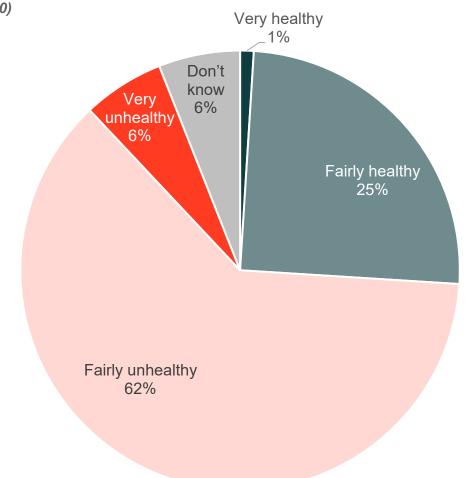
# According to charity leaders, the sector is mostly unhealthy.

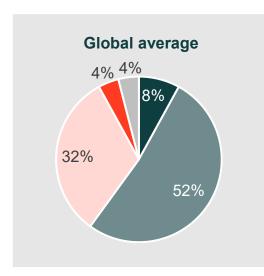
When asked about the health of the charity sector in France, 68% of surveyed charity leaders answered it is Fairly or Very unhealthy, compared to just 36% globally, showing low confidence in the French sector's future.

Only 26% of French charity leaders believe their sector is healthy, compared to 60% globally and 55% in high-income countries, which includes France.

Reflecting the current financial situation in France, this underscores the challenges faced by many charities amid the ongoing decline in public funding.

Q. Overall, would you say the charity sector in your country is... (All charities answering, n = 100)





# Deep dive: sector health.

Based on insights gathered from surveyed charity leaders, the charity sector in France is experiencing unprecedented levels of uncertainty, primarily driven by financial instability and a decline in public support. A significant decrease in subsidies from both local authorities and the state is a recurrent theme. Many organisations report that they must rely more on private donations and philanthropy, which are not always sustainable.

This financial strain forces charities into competing for limited funds, further exacerbating their operational difficulties. Several respondents highlighted the persistent delays and ongoing budget cuts, emphasising that while subsidies shrink a little more each year, demand for services continues to grow. Many also reported knowing charities that have had to lay off staff or, in many cases, cease operations due to a lack of funding.

This funding crisis is compounded by broader sociopolitical issues that undermine the sector's effectiveness. A lack of recognition and support from the government, combined with a perceived conservative shift in society, as reported by many leaders of cultural charities especially, has led to increased difficulties. The challenging landscape results in precarious employment conditions, exacerbated by low salaries and an overreliance on volunteers who are increasingly difficult to mobilise. As one respondent put it, "The situation leaves many always on the 'qui vive' (high alert) to know if we will be able to function from one year to the next." This environment fosters a sense of insecurity and discourages strategic long-term planning, further undermining the sustainability of charities and their ability to fulfill their missions.

Despite these challenges, many charity leaders say that the sector remains resilient and vital. The sector's diversity and expertise, along with the rise in collaborative networks, demonstrate a dynamic and adaptive landscape. Additionally, many respondents highlight the sector's role in addressing social needs unmet by public services, noting that charities, "Come in to help and support causes and populations that are not covered by the state." While financial stability is a big concern, the sector is resilient and is able to adapt.



Archipel de Kembs, Anne Lienhart / Fondation de France

"From a financial standpoint, the health of the charity sector in France is alarming."

Richard Diot, Director of Point d'eau

# Demand for services.

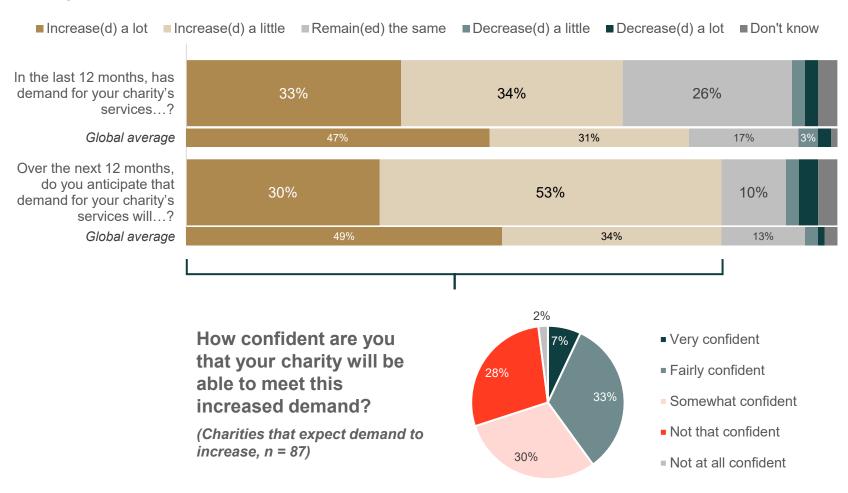
# Demand for charity services is on the rise.

While two-thirds of surveyed charity leaders reported an increase in demand for their charities' services over the past year, 83% predict that demand will continue to rise over the next twelve months — a level of expectation that aligns with the global average.

Of the charities that foresee an increase in demand, 70% are confident they will be able to manage it, reflecting adaptability and resilience when confronted with changing needs.

"We are asked to always do more with less." Charity leader





# Optimism for the future.

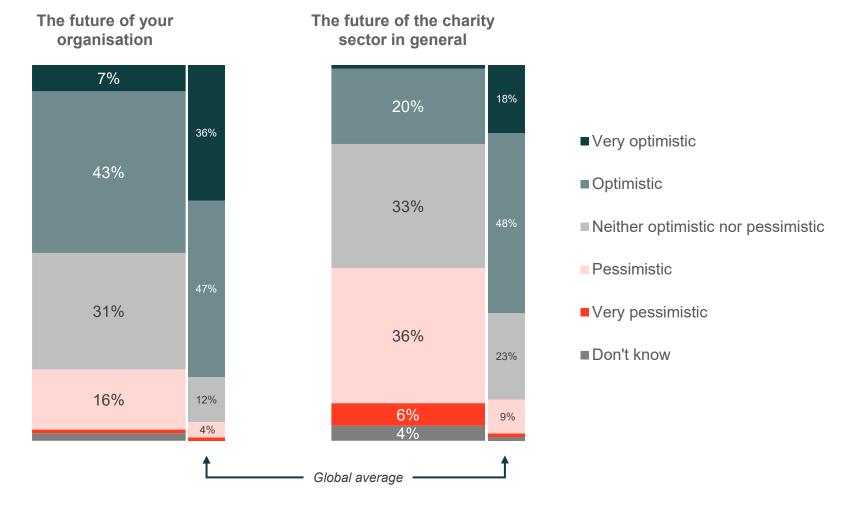
# In France, charity leaders are not optimistic about the future of the sector.

Just 21% of surveyed charities are optimistic about the future of the charity sector in France, compared to 66% globally.

When asked about how hopeful they are about the future of their own organisations, half of charity leaders feel optimistic. Similar to sentiments about the sector's future, the French level of optimism about one's own organisation is much lower than the global average (83%), which again communicates the difficult financial situation the sector is currently going through.

At the European level, 15% of charities report being very optimistic about their own future — more than double the French level.

# Q. How optimistic or pessimistic are you about...? (All charities answering, n = 98)



# CAF's six characteristics of a resilient charity.

Through our extensive research and advisory work with charities, we have identified six characteristics that show an organisation has the potential to be resilient.



# **Purpose**

Understanding what the organisational purpose is, and just as importantly, what it is not.

# Evidencing impact

The ability to identify and communicate the needs being met, and the impact that is having.

# Well networked

Being well connected and able to get support from working in partnership with others.

# Financially & operationally fit

Being financially and operationally fit with sufficient income from a diverse range of sources.

# People & culture

Having the right staff and

# **External awareness**

Awareness of the political, economic, local and national context. Horizon scanning for threats and opportunities.



prioritising their development and wellbeing with effective leadership.

The questionnaire included a number of questions that, when taken together, give each organisation a score for each of the six characteristics. Please see page 16 for France's scores.



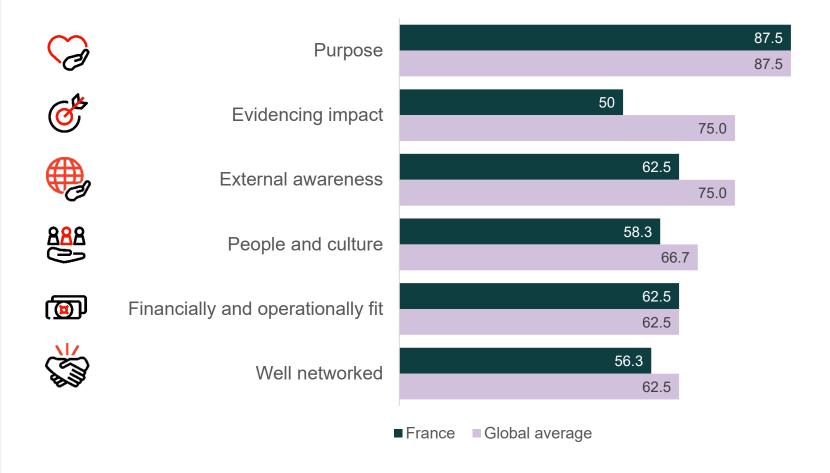
# Levels of resilience.

Overall, French charities have a clear sense of purpose but struggle the most with evidencing impact.

Charities in France scored lowest for Evidencing Impact, with a median score of just 50/100, unveiling a lack of confidence and/or capacity in effectively communicating on their actions and impact on society.

However, they scored the highest for Purpose, with a median score of 87.5/100 — the same score as the global average. Two aspects of resilience rank second with a score of 62.5/100: External awareness and Financial and operational fitness.

Scoring lower, aspects related to people and culture, as well as networking seem to pose some challenges for charities. Resilience scores showing the median score for each aspect: (All charities answering, n = 105)





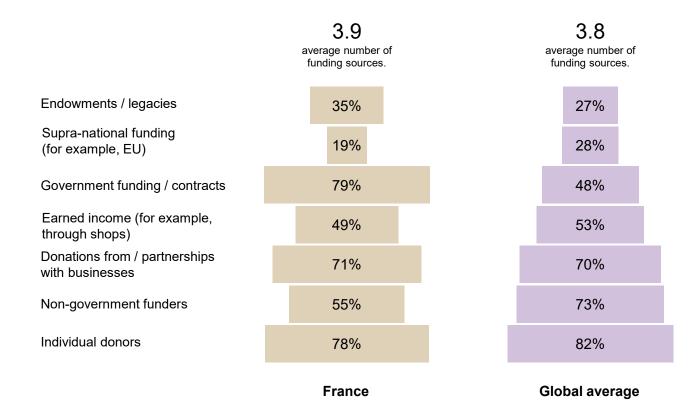
# Diversity of income streams.

# The government and individual donors are the top sources of funding.

While individual donors, nongovernment funders and businesses are the most common sources of funding for charities globally, the top three sources in France are: the Government, individual donors and businesses, respectively.

This could explain the low optimism shared by charities for the sector, as political instability and government budget cuts threaten the survival of many civil society initiatives and organisations.

The least common sources of funding for charities in France and globally are endowments and supra-national organisations. The proportion of charities that receive each type of funding: (All charities answering, n = 118)



# Where funding comes from geographically.

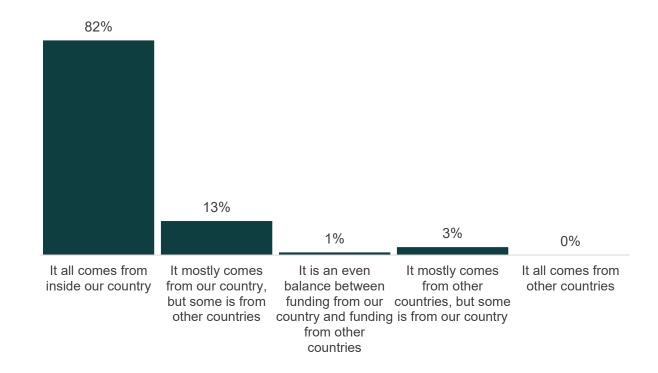
# Funding for most charities comes from within the country.

For about four out of five charities, all funding is received from national sources, and for 13% of them, most funding is from French sources and some is from abroad.

Only 1% of French charities report a balance between national and international sources of funding.

No charities report getting the entirety of their funding from foreign sources.

Q. Geographically, where does your funding come from? (All charities answering, n = 117)

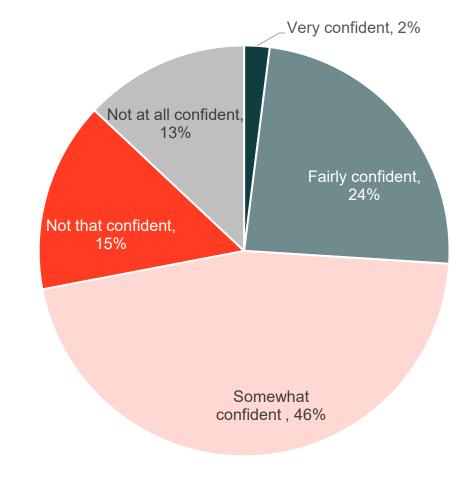


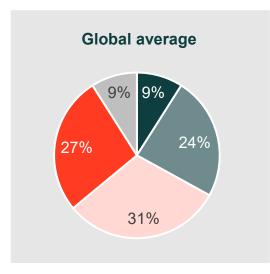
# Confidence in the diversity of income streams.

# Charities are mostly satisfied with the stability of their revenue streams.

Nearly three-quarters of surveyed heads of charities are satisfied with the diversity of their revenue streams and confident (46% Somewhat confident, 24% Fairly confident, and 2% Very confident) that their organisations can easily manage a sudden drop in one of their funding sources, which again highlights the charities' resilience and high adaptability in difficult contexts.

Q. How confident are you that your income streams are diverse enough to cope easily with sudden decreases from any one of them? (All charities answering, n = 123)





# Restricted versus unrestricted funding.

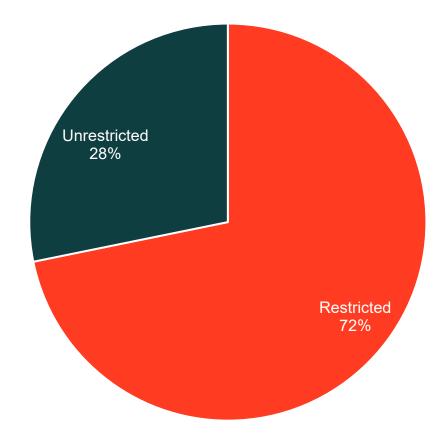
# Restricted funding is the predominant source of income for charities.

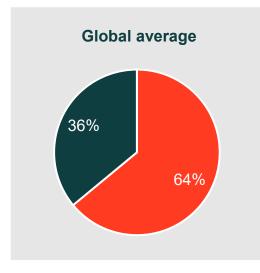
Charities surveyed in France report receiving most of their funding as restricted funds, meaning money that can only be spent for a particular project or issue.

In France, a high-income country, the share of restricted funding is higher than the 60% reported by other high-income countries and the 64% global average — and is close to the 72% observed among charities in lower-income countries.

This suggests that the extent of restricted funding in France is comparable to that in lower-income contexts, highlighting potential common challenges in funding flexibility across different national income levels.

Q. How much of your funding is given as 'restricted' funds (for example, only able to be spent on a specific project / purpose)? (Charities that were able to provide an answer, n = 102)



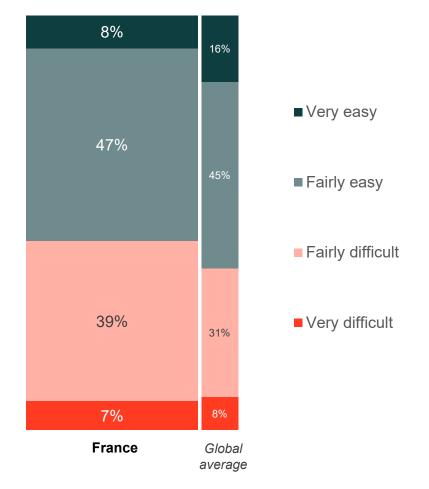


# Satisfaction with their funding mix.

Despite the high level of restricted funding, most charities believe that their funding mix enables them to easily achieve their goals.

When asked about the impact of their funding mix on their ability to achieve their goals, 47% of charities respond that it is Fairly easy and only 8% respond Very easy — half of the global 16% who share this sentiment.

Q. Does this mix of funding make it easy or difficult for you to achieve your goals? (All charities answering, n = 105)



"Fortunately, some foundations and patrons support the sector, but it is difficult to maintain these sources of funding over time, as it is often a one-shot or support over 3 years maximum, after which you have to find other sources of funding. It's quite exhausting for small teams."

Charity leader

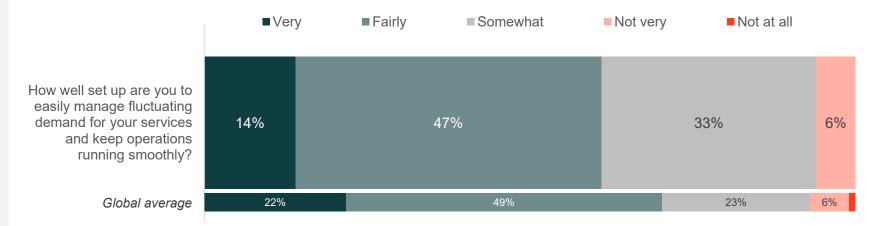
# Operational fitness to meet demand.

# French charities seem reasonably confident as to their ability to keep up with fluctuating demand.

In France, only 6% of surveyed charities believe they are 'not very' well set up to easily manage changing demand – the same estimate as the global average.

The remaining majority, an overwhelming 94%, believe they are Very (14%), Fairly (47%) or Somewhat (33%) well set up to face fluctuating requests for their services, indicating a general satisfaction with their capacity to adapt to changing circumstances.

This high level of confidence may reflect effective planning and capacity capabilities within these organisations, despite the broader challenges associated with funding sources and restrictions. How they would rate their charity: (All charities answering, n = 105)



"We've never had such a large audience, yet we've never had such financial pressure. We've never had so few shows per year, yet our workload has never been this heavy."

Chloé Tournier, Director of the La Garance Theater Association



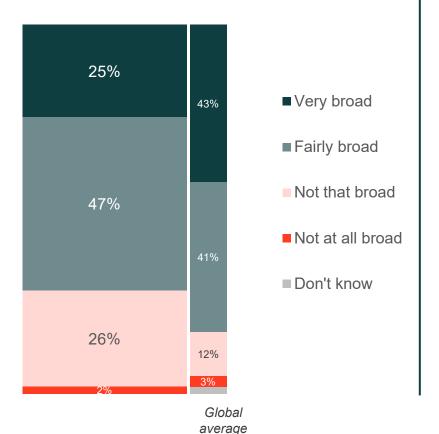
# The senior team.

## Day-to-day problems often take over strategic and long-term planning.

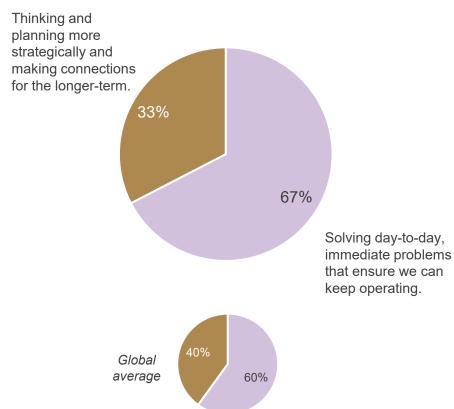
French charities' leadership teams spend on average two-thirds of their time dealing with immediate issues to ensure operational continuity. Strategic and long-term planning, however, only takes 33% of their time and energy — compared to 40% globally.

Regarding backgrounds, the senior teams of French charities bring to the table a broad range of skills and experience, with 72% reporting that their skills are Fairly broad to Very broad. Meanwhile, 28% view their teams' skills as Not that broad or Not at all — compared to just 15% globally — pointing to opportunities for greater diversity within leadership teams.

How broad are the skills and experience of the most senior leadership team in your organisation? In some cases, this might be your board, an external board of trustees or a C-suite team. (for example, CEO, CFO) (All charities answering, n = 104.)



Roughly speaking, what proportion of time does your senior team spend on each of the following? (All charities answering, n = 103.)



# Recruitment and retention.

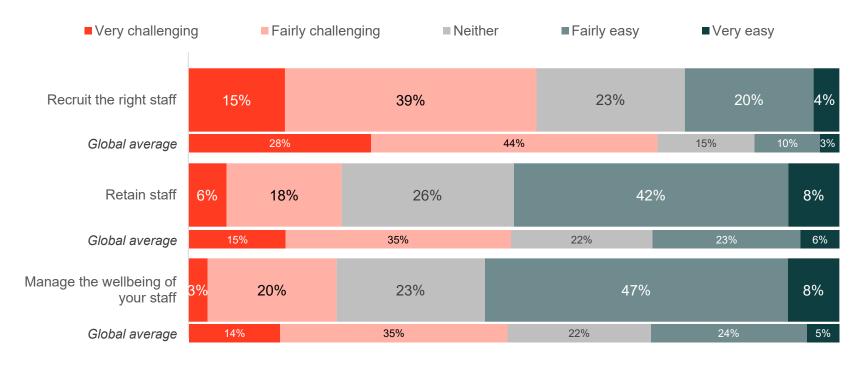
### French charities experience fewer difficulties in staffing and supporting their employees.

While most French charities (54%) find it difficult to recruit the right people, the challenge seems bigger elsewhere as 72% of charities surveyed across 27 countries report this as a challenge.

Overall, recruiting and retaining employees, as well as maintaining their wellbeing, are perceived as less challenging in France compared to the global trend, with a higher percentage of French charities rating these tasks as easy.

This is likely influenced by the strong culture of civic engagement and community support fostered by the 1901 Law on associations, which shapes the values and outlook of many who work in the sector.

## How challenging is it to do the following? (All charities answering, n = 102)



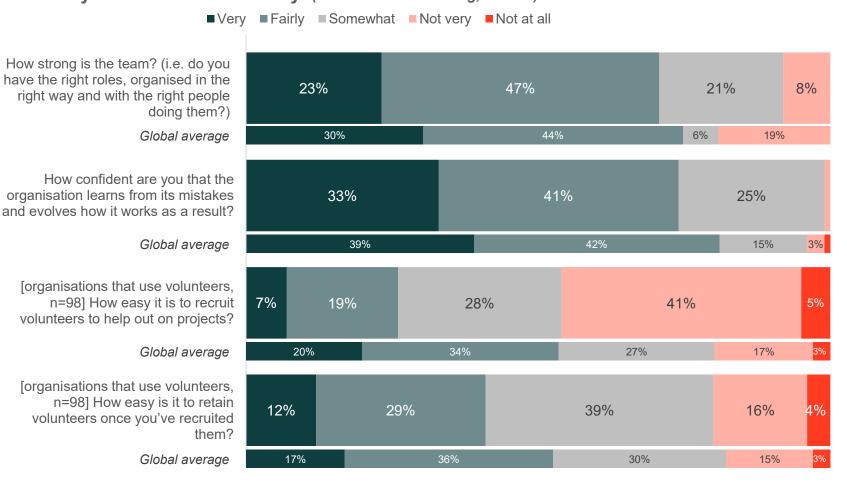
# Strength and depth of the team.

French charities have high levels of confidence in their teams' strength and ability to grow.

Seven in ten (70%) of surveyed French charities report that their teams are properly organised and 74% of them say they are confident in their organisation's ability to learn and grow.

On volunteer engagement, only 26% of French charities report that it is Fairly easy or Very easy to recruit volunteers, versus 54% globally. Additionally, French organisations seem to have slightly less ease in retaining volunteers, with 41% of the charities that use volunteers finding it Fairly easy or Very easy to retain them, versus 53% worldwide.

These findings may be shaped by a recent crisis in volunteerism, where challenges related to generational renewal are affecting both recruitment and retention of volunteers. How they would rate their charity: (All charities answering, n = 107)



# Deep dive: flexible work for staff wellbeing.

To ensure employee wellbeing and retention, many charities focus on creating supportive and flexible working conditions that prioritise wellbeing and work-life balance. This includes offering reduced workweeks and flexible hours that allow employees to manage personal responsibilities, such as caregiving or health issues.

For example, Chloé Tournier, Director of the La Garance Theater Association, highlights that having a four-day week is attractive and a key factor in retaining staff, especially those seeking better work-life balance or facing personal vulnerabilities.

Additionally, according to Sabrina Aït-Aoudia, Executive Director of the Association Parcours d'Exil, allowing flexible working hours and investing in staff development through training and fostering a positive organisational climate have proven effective in reducing the high turnover she found when first assuming her post.

Many charity leaders emphasise that

recognising staff's social vulnerabilities and providing a nurturing environment — such as professional training, transparent communication, and policies that support societal diversity — are instrumental in maintaining long-term commitment, even amid financial constraints and external challenges.

Overall, these non-monetary strategies, combined with a human-centered approach, are vital to cultivating wellbeing and stability within the charity sector.



Réveillon - Association Espoir 78, Jérémy Piot / Fondation de France



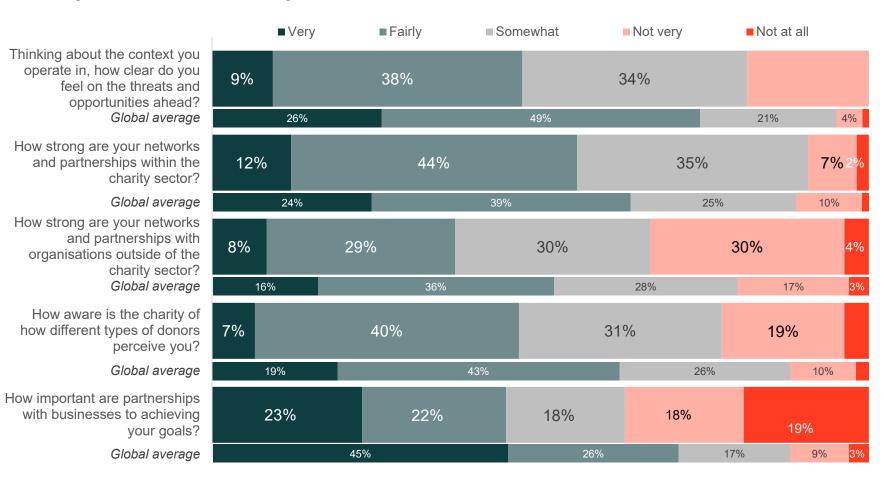
# External awareness & partnerships.

# Charities in France have solid networks but limited business partnerships.

While 47% of French charities are Very clear or Fairly clear on threats and future opportunities — compared to 75% globally — they also report having solid networks, with 56% considering theirs Very strong or Fairly strong, compared to 63% worldwide.

However, when it comes to partnerships with businesses, only 23% of French charities see them as Very important, lower than the 45% global average. Conversely, 19% consider such partnerships Not at all important, compared to just 3% globally.

This indicates a relatively low level of engagement and collaboration between the nonprofit and for-profit sectors in France, which may limit opportunities for strategic alliances and resource sharing. How they would rate their charity: (All charities answering, n = 105-108)

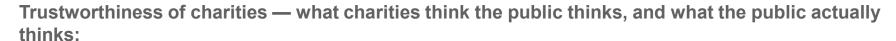


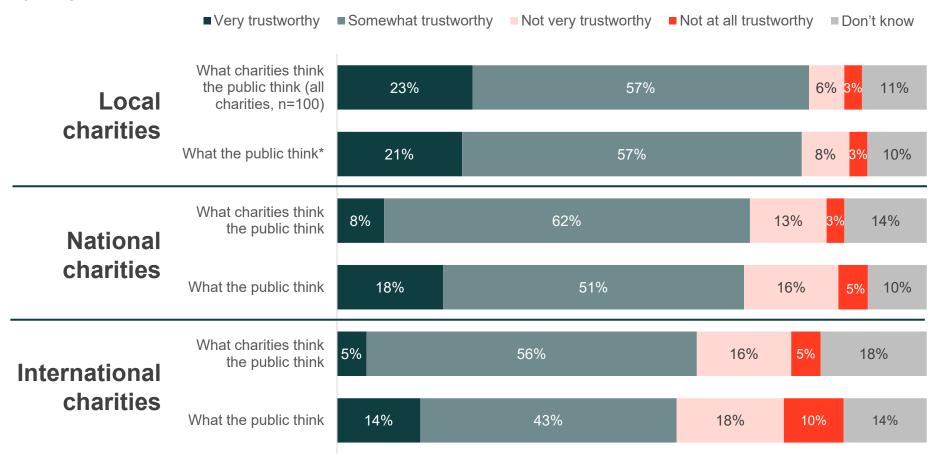
# Trust in charities.

# The French public trusts local charities the most.

Generally speaking, the French public trusts charities, believing charities are Very trustworthy or Somewhat trustworthy, whether they are local (78%), national (69%) or international (57%).

When asked about the proportion of the public that finds charities Very trustworthy, French charity leaders provide a good estimate when it comes to local charities (23% versus 21% in reality) but tend to underestimate it for national (8% versus 18%) and international structures (5% versus 14%).





<sup>\*</sup>Data from CAF World Giving Report – Donor Insights, 2025.

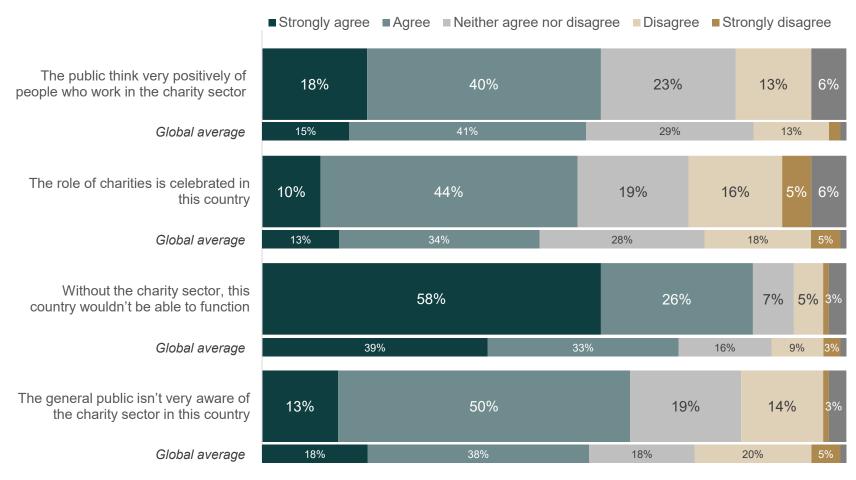
# Charities' perceived role and reputation.

Although the charity sector is seen as crucial for society, it is not celebrated enough.

The majority of respondents (58%) Agree or Strongly agree that the public thinks positively of charity workers, slightly surpassing the global average of 54%.

While there is a notable belief in the charitable sector's importance, with 84% agreeing it is crucial for the country's functioning, only 54% agree that the role of charities is celebrated in France.

Although these findings highlight a generally positive perception, they also hint at a disconnect, underscoring the need for increased public awareness, engagement and recognition. Do you agree or disagree with the following statements about the charity sector? (All charities answering, n = 100.)



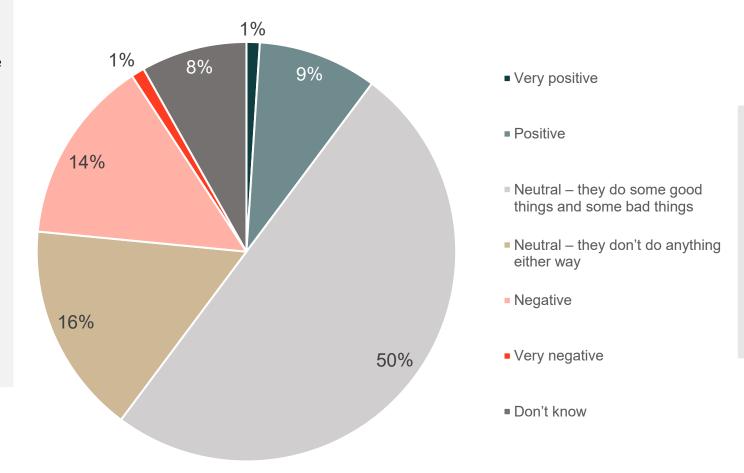
# Overall influence of government on charities.

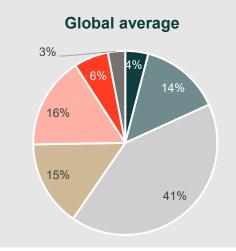
### Charities believe the Government's influence on their sector is mostly Neutral.

Two-thirds of charities consider the Government's impact on the sector is Neutral, with 50% acknowledging both good and bad aspects and 16% viewing it as Neutral because they see no significant impact either way. While 10% see the Government's influence as Positive or Very positive, 15% see it as Negative or Very negative.

Conversely, globally, charities' perceptions tend to be more critical, with 41% viewing government influence as Neutral, but 16% seeing it as Negative and 6% as Very negative.

Overall, do you think the Government is a positive or negative influence on the charity sector? (All charities answering, n = 98)





# Specific opinions on the role of government.

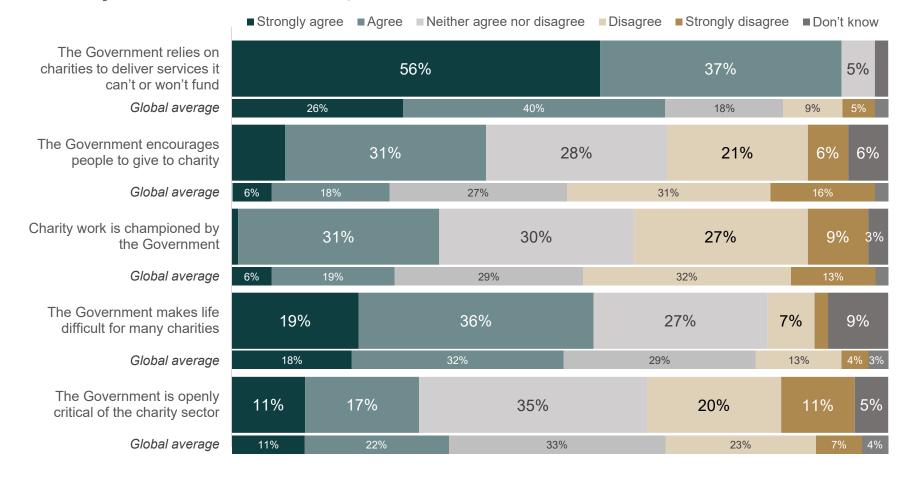
### French charities feel greater government reliance compared to global trends.

French charities perceive a strong reliance from the Government on their services, with 93% strongly agreeing or agreeing that the Government depends on them for services it can't or won't fund, significantly higher than the 66% global average. Additionally, the majority (55%) believe the Government makes life difficult for them, which aligns with the global average of 50%.

In contrast, 28% of French charities feel that the Government openly critiques the sector, slightly lower than the global 33%.

These observations suggest that while French charities are heavily relied upon by their Government, they also face more obstruction than their global counterparts.

Do you agree or disagree with the following statements about the Government's involvement in the charity sector? (All charities answering, n = 98)



# Effectiveness of regulation.

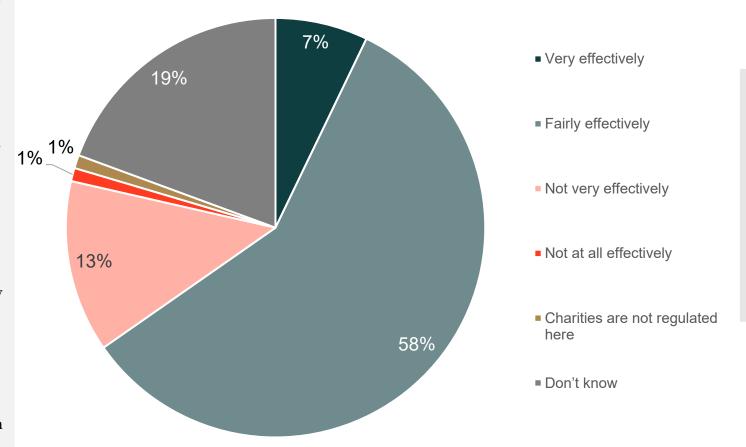
# The majority of French charities believe they are effectively regulated.

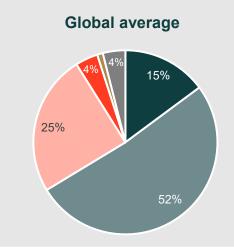
French charities are more likely than their global colleagues to view their sector as effectively regulated, with 58% rating regulation as Fairly effective, compared to 52% globally. Conversely, a smaller proportion of French charities (7%) believe sector regulation is Very effective, versus 15% worldwide.

Additionally, 19% of respondents are not sure whether charities are well regulated or not, compared to just 4% globally, and 13% think charities are Not very effectively regulated in France, compared to 25% globally.

This shows that while French charities mostly perceive their regulatory environment as adequate, many are unclear on its efficacy, uncovering a certain hesitation or distance with public authorities.

Overall, how effectively do you think charities are regulated in your country? (All charities answering, n = 98)







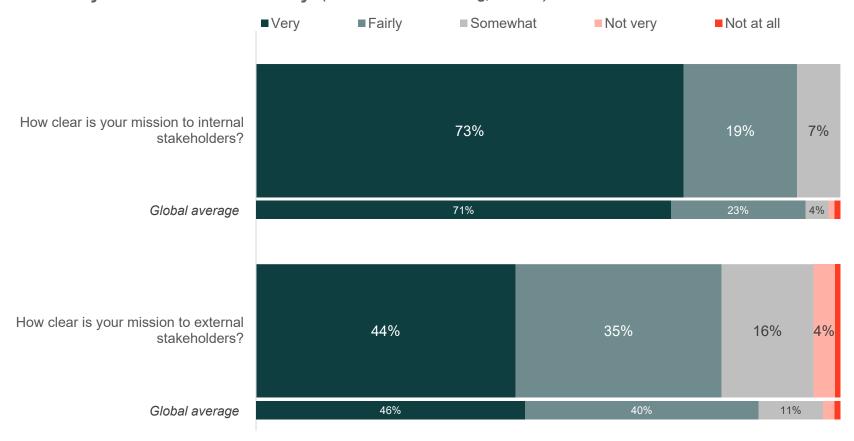
# Clarity of purpose.

French charities see their internal mission as clear, but face challenges in clearly communicating their mission to external stakeholders.

French charities overwhelmingly view their mission to internal stakeholders as clear, with 92% rating it as Very or Fairly clear. This is close to the global average of 94%.

However, 79% of respondents consider their mission to external stakeholders to be equally clear, which is below the global average of 86%.

This discrepancy indicates that while internal communication and understanding are strong, external communication and stakeholder engagement may require further development. How they would rate their charity: (All charities answering, n = 108)



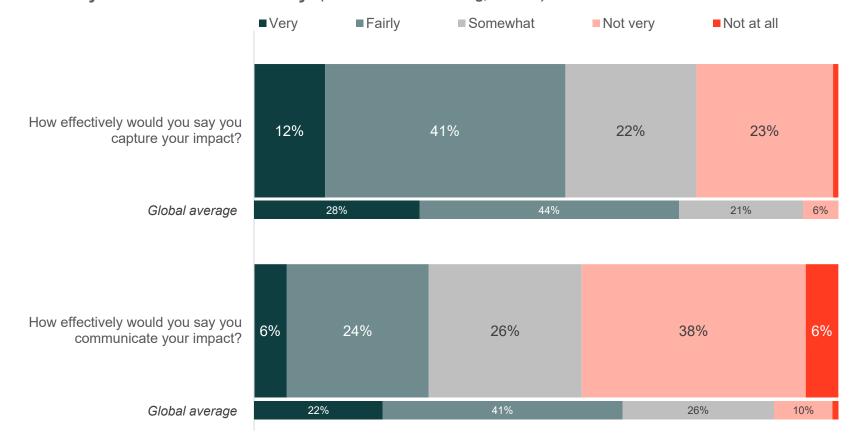
# Translating purpose into impact.

### French charities highlight a need for better impact measurement and communication.

Echoing the findings on slide 16, on challenges in Evidencing impact, French charities feel less confident in their ability to effectively capture and communicate their impact, with only 12% rating their impact capture as Very effective compared to 28% globally. Furthermore, only 6% believe they communicate their impact Very effectively, which is significantly below the global average of 22%.

A large proportion of organisations rate their communication as Not very effective or Not at all effective (44%), indicating substantial room for improvement in how they showcase their work and impact to stakeholders and the public.

How they would rate their charity: (All charities answering, n = 107)





# Civil society in France.

# The charity sector is under immense financial pressure but remains engaged and resilient.

The wealth of insights gathered from the French charity leaders sheds light on both the resilience and the ongoing challenges faced by charities in France. While the sector remains vital, innovative, and deeply rooted in addressing unmet societal needs, its sustainability is increasingly threatened by declining public funding, heavy administrative procedures, and a growing competition for resources.

Charities are demonstrating adaptability through the development of collaborative networks, diversified funding strategies, and enhanced internal practices to mitigate financial risks. However, to secure long-term stability, there will be a need for a concerted effort from policymakers, donors, and charities themselves to prioritise stable, multi-year funding, streamline administrative processes, and recognise the sector's unique social value.

The sector's capacity to retain and motivate employees is also crucial for its future effectiveness. Organisations that offer decent salaries, opportunities to grow, and flexible working conditions are better positioned to maintain engaged and committed teams. These strategies are essential to cultivate supportive organisational cultures.

Looking ahead, the future of the charity sector in France lies in its ability to adapt to evolving societal needs and political environments. This will require a shift in funding models toward longer-term and more flexible support that allows charities to focus on impact rather than survival.

Strengthening partnerships across public, private, and philanthropy actors and advocating for policy reforms that recognise and support the unique value of non-profit organisations will be critical.

Embracing these changes will enable French charities not only to weather current challenges but also to thrive and expand their essential role in building a more inclusive and resilient society.



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