



CAF SCOTLAND GIVING 2017

*An overview of
charitable giving
in Scotland*

October 2017

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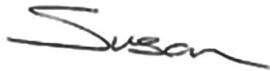
Foreword

We are delighted to be publishing the first CAF Scotland Giving report. For many years we have been taking the temperature of giving and attitudes towards charities across the whole of the UK. It has long been our ambition to build upon our UK Giving work by digging deeper into the detail and learning more about the different trends and attitudes towards giving across the whole of the UK. Our commitment to understanding the landscape for charities means that, for the first time, we are in a position to provide a detailed analysis of giving in Scotland.

This report is purposely designed to inform our colleagues in the charitable sector, policymakers, commentators and the public alike. It gives all audiences the information needed to understand current trends in giving – how people choose to give, what they give, and the causes they like to support. Although there are many similarities between giving in Scotland and giving in the UK as a whole, there are some clear differences in attitudes and forms of engagement that are reflective of the culture of giving that is so deeply embedded within Scotland.

Charities in Scotland contribute so much to civic life, providing the support and services that millions of people rely on, including some of the most vulnerable people in society. That people in Scotland are extremely generous is no surprise, and we welcome the opportunity to celebrate the generosity of people in Scotland and their commitment to supporting good causes. We look forward to continuing to work with Scotland's Government, charities, businesses and donors to further cement the reach and influence of Scotland's charities.

Our aim is to make this an annual fixture in the Scottish charity calendar. CAF is committed to using our unique experience and perspective to provide a comprehensive, insightful and useful contribution to debates and discussions about how we can continue to grow the strong culture of giving that is a source of such pride.



Susan Pinkney
Head of Research
Charities Aid Foundation

Introduction

CAF has been producing the UK Giving report since 2004, and has been tracking giving in the UK as a whole for several decades. We are delighted to be launching our first ever 'CAF Scotland Giving' report, the first in what will be an annual look at charitable giving in Scotland.

Our data now allows us to focus exclusively on giving in Scotland, as from May 2016 we switched to a UK Giving methodology based on conducting 1,000 interviews every month to help charities understand UK giving behaviour in much more detail. This means that within this larger sample base, we interviewed 712 individuals in Scotland across 2016, giving us enough data to analyse giving specifically in Scotland.

As we commenced interviewing via the new approach in May 2016, this report contains data for eight calendar months (through to December 2016). We have worked with our market research agency, YouGov, on the statistics and factored up results for 2016 so that we can confidently present the findings as a full calendar year.

We believe that this is the only study of giving behaviour in Scotland made freely available to charities, and we hope that this report will be able to inform debate around charitable giving in Scotland. We are really thrilled about the fact that we can now produce a bespoke report for the Scottish environment and would like to make this a yearly resource made available by CAF. In future years, when we have 12 months of tracking data, the sample size will increase in Scotland to over 1,000 and we will be able to dig even deeper into subgroups of interest. We hope you find this report useful and if you do have any comments, we would love to receive any feedback from those reading this report at research@cafonline.org.

About CAF

Charities Aid Foundation (CAF) is a leading international charity registered in England and Wales, with a presence in nine countries, covering six continents. Our mission is to motivate society to give ever more effectively and help transform lives and communities around the world. We do this by working globally to increase the flow of funds to the charity and non-profit sectors through the provision of philanthropy advice and services.

In Scotland we work with a number of charities in providing loans, bank accounts, advisory services and fundraising platforms, as well as working with individuals and corporates to make the most of their charitable giving, and working with government and political representatives to ensure a climate in which charities can thrive.

Key findings

The six key findings, as we see them, from this year's CAF Scotland Giving report are:

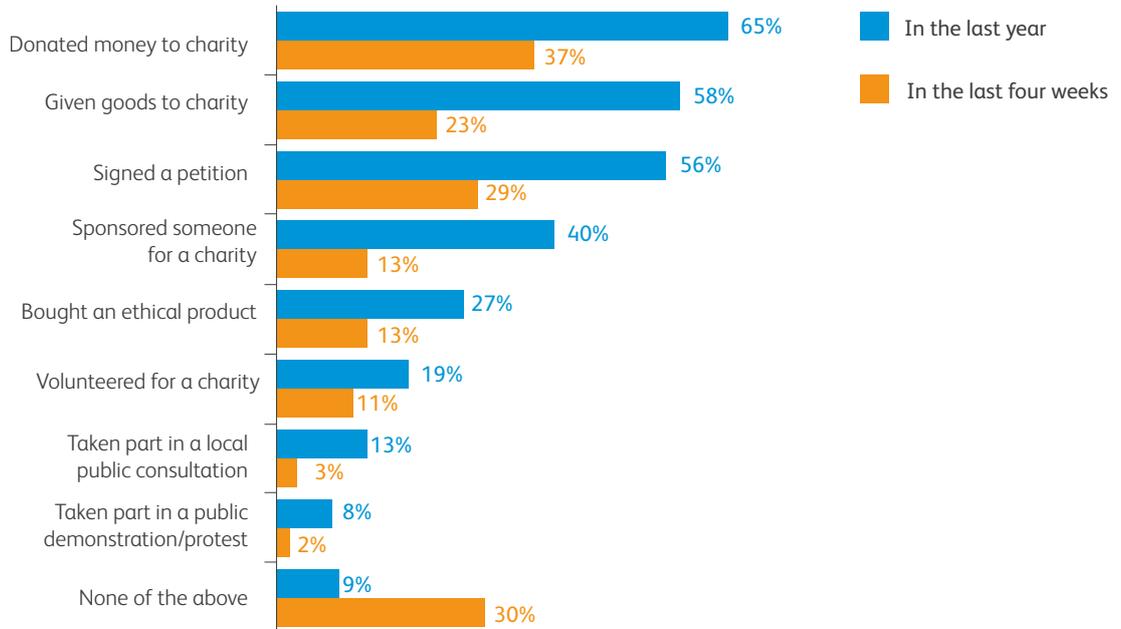
- Two thirds of people in Scotland donated money to charity in the last year, with November being the peak month due to a number of national fundraising campaigns
- A total amount of £813 million was donated to charity by those living in Scotland in 2016 – accounting for 8.4% of the UK total
- The main causes donated to were:
 - medical research
 - animal welfare
 - children and young people
- One in five people in Scotland have volunteered in the last year, and this is higher amongst women than men
- Over half of people in Scotland (56%) had signed a petition in the previous year – likely to be a result of tumultuous events in 2016
- Women (94%) are generally more likely to have participated in any charitable or social activity than men (88%) in the last year.

Detailed findings

1.0 Overall picture of how people get involved

All those interviewed were shown a list of behaviours and asked whether they had done any of these a) in the last four weeks; b) in the last 12 months. These include a range of charitable and social actions.

Figure 1: Which, if any, of the following have you done in the last year/four weeks?



Base: All adults 16+ (n=712)

At an overall level, an incredibly high number of people in Scotland (91%) have participated in at least one charitable or social action over the previous year. This is a very similar level to that recorded across the UK as a whole (89%). When people are asked about their behaviour, 70% say they have participated in the last four weeks, similar again to the UK average of 68%.

2.0 How people get involved – detail

This section of the report looks at people's charitable behaviour in more detail.

2.1 Giving money

In 2016, almost two thirds (65%) of those living in Scotland claimed to have donated money to charity in the last 12 months, whilst 37% claimed to have done so in the last four weeks. Both of these figures are higher than the UK average of 61% and 33% respectively, indicating that those living in Scotland are more likely to make charitable donations than those living elsewhere in the UK.

Two-fifths (40%) claimed to have sponsored someone for charity in the last 12 months, whilst 13% had done so in the last four weeks, with each of these figures higher than across the UK as a whole (37% and 11% respectively).

Although base sizes are small, we are able to look at the results on a month-by-month basis to some degree. As was the case with the UK as a whole, the peak month for giving in Scotland was November, when 52% claimed to have donated money to charity. The November figure coincides with a number of major national charity events in the lead up to interviewing: Children in Need, Movember and the Poppy Appeal. Although this was also the peak month for giving across the UK, the corresponding level of giving was lower than in Scotland at 41%.

Of those who donated money to charity, over half (53%) said they used Gift Aid on their donation, a similar level to the UK as a whole (52%). Thus whilst it is encouraging that over half of those living in Scotland use Gift Aid to boost the value of their donations, it would be beneficial to charities across Scotland and beyond to increase usage of it further.

TWO THIRDS

of people in Scotland
donated money to charity
in the last year



2.2 Volunteering

In 2016, just under a fifth of people in Scotland (19%) said they had volunteered for a charity in the previous year, with one in ten (11%) saying they had done so in the last four weeks. For each of these, they are in line with the UK overall figures.

Demographically, there are some interesting differences of note, with females more likely than males to have volunteered in the last year (23% vs 15%). This difference is much more pronounced than in the UK as a whole, where the difference between males and females was only three percentage points.

Although not significantly higher than other groups, directionally, those aged 16-24 are those most likely to have volunteered (26% vs 19% across all age groups). This is also the case across the UK as a whole, with younger people, and specifically students, more likely to have volunteered than their older counterparts, and is indicative of the ways in which people's support for charities changes throughout the different stages of their life.

Amongst those aged 65+, 17% had volunteered for a charity in the last year. In 2016, CAF spoke to a number of retirement age people across the UK about retirement and produced a report¹ which included ideas on how more older people could be given opportunities to volunteer. One of the key recommendations was to provide people with information about volunteering opportunities as they transition out of employment and into retirement, to give them ways of continuing to use their skills as well as accessing the health and well-being benefits associated with volunteering.

The report called for the establishment of a Post-Careers Advice Service, and the principle of government, business and charities coming together to provide volunteering opportunities to retirees was included by multiple political parties in their manifestos ahead of the 2017 General Election. The fact that only 17% of retired people claim to volunteer demonstrates that there is scope for this service. It is something that CAF has discussed with policymakers at the highest level, and would welcome the opportunity to speak about it with the Scottish Government.

2.3 Giving goods

Behind donating money, giving goods to charity is the second most common form of engaging with charities. 58% claimed to have given goods in the last year, and 23% in the last four weeks. As with the UK as a whole, giving goods increases with age, peaking amongst those aged 65+ (31%). However, at the lower end of the age spectrum in Scotland, only 4% of 16-24 year olds have given goods to charity in the last four weeks, compared to 10% of this age group across the UK as a whole, suggesting that younger people in Scotland are less likely to support charity in this way.

As with many other charitable activities, women are more likely than men across Scotland to give goods to charity (29% vs 18%).



1 IN 5

volunteered in
Scotland



WOMEN

are more likely
to volunteer
than men

**A THIRD OF
65+ YEAR OLDS**

have given goods to
charity in the
last four weeks



¹ A post-careers advice service – Giving people the tools to go on giving <https://www.cafonline.org/docs/default-source/about-us-publications/a-post-careers-advice-service-giving-people-the-tools-to-go-on-giving.pdf>

2.4 Protesting and petitioning

Over half (56%) of those interviewed in Scotland in 2016 had signed a petition in the previous year whilst 29% had done so over the previous four weeks. These figures are similar to those recorded in the UK as a whole and would appear to be quite high. This may however be explained by some of the tumultuous events that took place in 2016, including the EU referendum vote towards the end of June. These events may go some way to explaining the levels recorded for this type of activism.

Almost three quarters of
16-24 YEAR OLDS
have signed a petition in
the last year



In terms of age groups, we see that younger people are much more likely to have signed a petition in the last year (72% of 16-24 year olds vs 47% of over 65s). This is in fact the charitable or social action most undertaken by this younger age group in Scotland in 2016.

Eight per cent of those interviewed in Scotland had taken part in a public demonstration or protest in the previous year. This is again higher amongst the youngest age group of 16-24 year olds (12%) and lowest amongst those aged 65+ (1%). Perhaps more interestingly, however, is that those aged 45-64 in Scotland are as likely to engage in this activity as the youngest age group (13%) – something which was not the case when we looked at signing a petition, which was much more likely to be undertaken by the younger group. This is also not a phenomenon we saw across the UK, which suggests that 45-64 year olds in Scotland are more likely to join demonstrations than their UK counterparts.

3.0 Who engages most?

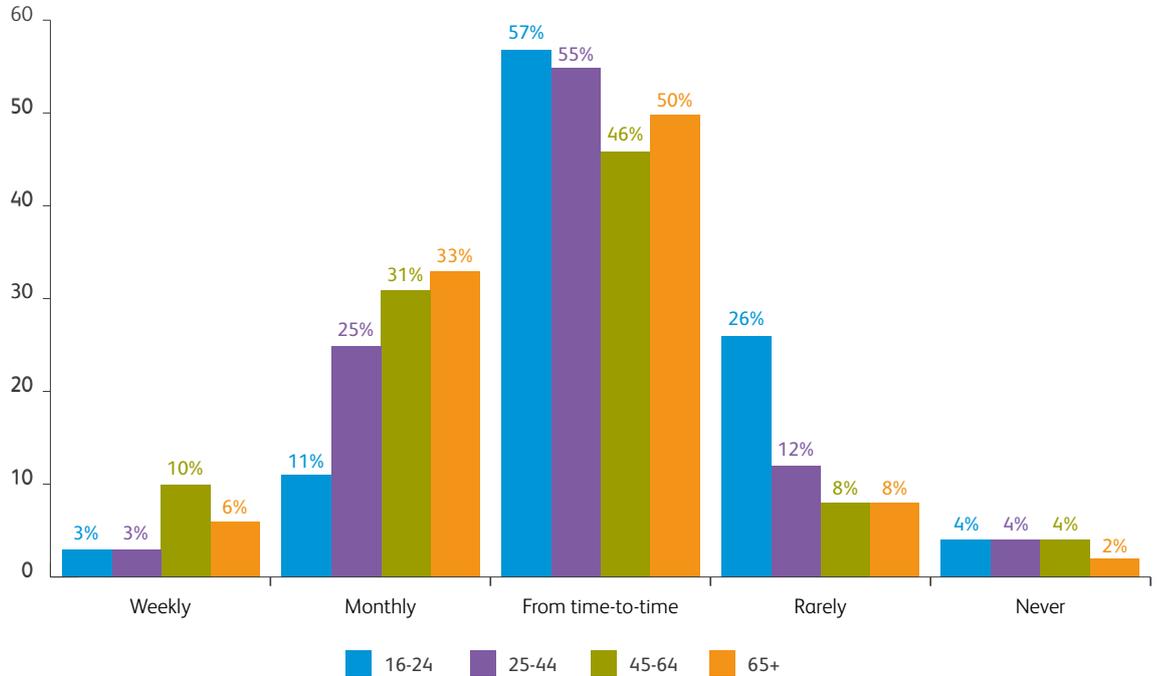
Throughout this report, we have aimed to pull out any key demographic differences. However, there are overall patterns which we can identify. Overall, women are more likely than men to engage in charitable or social activities, with 94% having done so in the last year compared to 88% of men.

Whereas in the UK as a whole we see a pronounced difference in overall charitable and social activity across different age groups, with the oldest age group most likely to participate, in Scotland this is not the case. Whilst 94% of 65+ year olds have participated in a charitable and social activity, this is exactly the same level as 16-24 year olds, suggesting that younger people in Scotland are more engaged than their UK counterparts. Indeed, it is those aged 45-64 in Scotland who are least likely to engage in charitable and social activity (88%).

4.0 Frequency of giving

When asked about how often they give to charity, the majority of people say that they usually give to charity from time-to-time (51%), with a further quarter (27%) giving monthly. Around one in twenty (6%) give weekly.

Figure 2: Which of the following best describes how often you give to charity?



Base: All adults 16+ (n=712)

Weekly giving peaks amongst those aged 45-64 which may reflect their levels of disposable income. This age group is in fact the most likely to give money regularly in Scotland, with 41% giving monthly or more often. Giving monthly is something that increases with age, with one in ten (11%) 16-24 year olds giving monthly, rising to a third (33%) of those aged 65+. The opposite pattern appears in terms of age with those giving 'rarely'. However, as already noted, younger people in Scotland are very engaged overall in charitable and social activities. The Growing Giving Parliamentary Inquiry that CAF led explored the importance of giving across different age groups, including how giving young people an opportunity to experience charity at an early age can drive a lifetime commitment to supporting good causes. For the future of giving, this strong engagement with charities at a young age across Scotland is extremely encouraging².

Men are more than twice as likely as women to say that they rarely or never give to charity (21%) compared to women (10%). Those in the lowest social grades (DE) are more likely to never give than those in the highest social grades (AB)³, likely due to having less disposable income available to them. Giving weekly, and from time-to-time, is fairly consistent across all social grades.

² <https://www.cafonline.org/docs/default-source/about-us-publications/gug-part-web.pdf?sfvrsn=6.pdf>

³ 1% of ABs vs 6% of DEs never give to charity

5.0 Total amount given

As mentioned in the introduction, on certain measures we have factored up results to account for a 12 month calendar year. We have applied this to calculate the total amount donated to charity in 2016. Our research suggests a total amount for 2016 of £813 million for Scotland alone. This compares to a total UK figure of £9.7 billion over the same period. Given that Scotland accounts for 8.2%⁴ of the UK population, it is therefore accounting for around 8.4% of overall individual giving.

£813 MILLION

donated to charity
in 2016



It is important to note that the Scotland Giving estimate for total giving is calculated from reported giving, as recalled and relayed by individual survey participants, and so is subject to respondent reliability, as well as other considerations that apply to all surveys based on a sample of a population rather than a census.

6.0 Typical amount given

The typical (median) monthly amount given by a donor in 2016, either donating or sponsoring in the last four weeks, was £20, while the mean donation was £36.16. The mean is on a par with the UK as a whole but the median is £2 higher in Scotland.

Typical monthly
amount given in
Scotland:

£20

6.1 Sponsorship

Looking just at sponsorship shows a lower monetary level of giving than through direct donations when we look at the mean (£24.64 compared to £33.26 for direct donations).

The lower amount for sponsorship may be because when people are sponsoring a person they are giving to that person's choice of charitable cause, whereas with a direct donation they are giving to a cause that they personally have chosen.

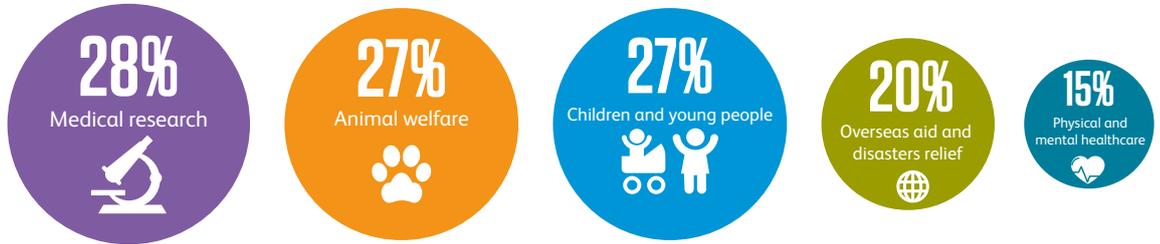
In terms of the causes people are most likely to sponsor others for, medical causes are the most popular, with medical research (37%) being the most common cause, followed by physical and mental health care (26%), children and young people (26%) and disabled people (20%). There is then a drop off to the fifth main cause at 13%.

⁴ <https://www.ons.gov.uk/peoplepopulationandcommunity/populationandmigration/populationestimates/bulletins/annualmidyearpopulationestimates/mid2016>

6.2 What people give to

When people are asked which cause area they have given to in the last four weeks, the top five is shown in Figure 3 below.

Figure 3: Which of the following causes did you donate to?



Base: All those who have donated in the last 4 weeks (285)

Medical research (28%), animal welfare (27%) and children and young people (27%) were the most popular causes to donate money to across Scotland in 2016. These are the same top three causes across the UK as a whole. Following these three, there is then a slight drop to one in five (20%) who have donated to overseas aid and disasters relief and then 15% who have donated to physical and mental health care.

The least popular causes given to by those in Scotland are the arts (3%) and sports and recreation (2%), which are also the least popular across the UK as a whole.

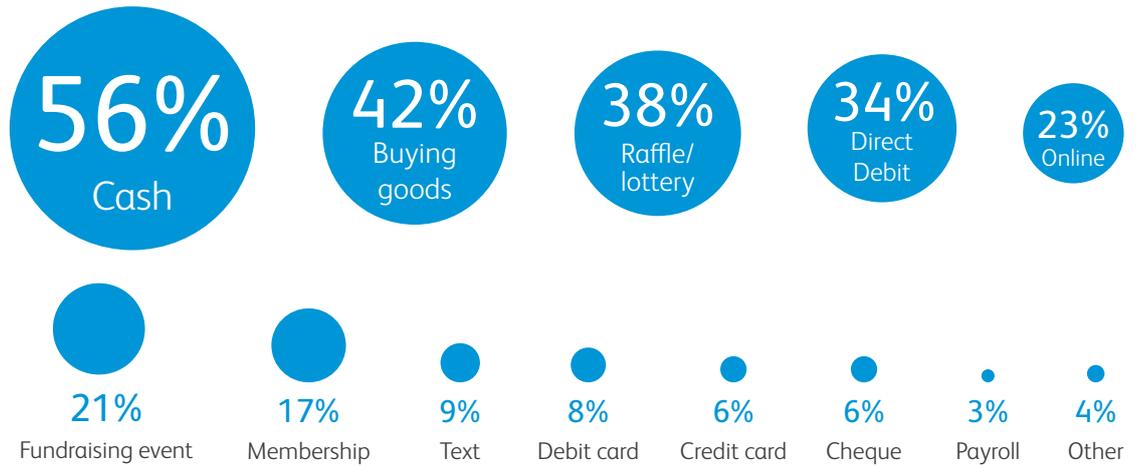
6.3 Who gives to what?

There are actually very few demographic differences in terms of who gives to what causes across Scotland. Women, however, are twice as likely as men to donate to children or young people (34% vs 17%), a difference that is more pronounced than for the UK as a whole (26% vs 22%).

Older people are more likely to give to religious organisations, with 26% of 65+ year olds giving in this way, compared to just 3% of 16-44 year olds.

7.0 How people give

Figure 4: In the last 12 months, have you given to charity by any of these methods?



Base: All those who have donated in the last 12 months (464)

Cash is the most common way of giving to charity, at 56%. Across the UK as a whole, using cash has consistently been the most common way to give to charity over the years, and remained so in 2016. Buying goods is the second most common way of giving, by over two fifths (42%). The only other two methods mentioned by more than a third of those in Scotland were raffle or lottery tickets (38%) and Direct Debit (34%). After that there is then a drop off to the next highest at 23% (online). It is therefore still the traditional methods of giving that come out on top in Scotland.

It is important to remember the various ways in which people choose to conduct their charitable giving, and to offer them multiple ways to do so. Although a relatively low percentage, at 3% of giving, payroll giving is the method chosen for some. 2017 marks the 30 year anniversary of payroll giving and over this period, payroll giving has generated £1.3 billion via CAF's Give As You Earn scheme alone across the UK. Payroll giving offers a way for employees to give at work, and can be a particularly effective way for people who are time-poor to support good causes during their working lives.



7.1 Being asked to give

We asked people how they had been asked to give to charity. Regardless of their giving behaviour, people claimed that they were most commonly asked to donate to charity on the street (38%), followed by via direct mail (31%) and television (28%). These were the same top three methods as the UK as a whole.

However, despite the fact on the street was the most common way to be asked overall, there were some notable differences across the age groups. Younger people are most likely to claim to have been asked to give online, and are also much more likely to have been asked to give via this method than any other age group (44% vs 23% overall). Direct mail on the other hand was the most likely way those 65+ claimed to have been asked. Specifically, 50% of 65+ year olds had been approached to give in this way compared to only 31% overall.

DONORS

are most commonly asked to give on the street



8.0 Trust in charities

Trust in charity has become a key topic of debate over recent years following various crises and media coverage of the sector. We therefore took the decision to track levels of trust in charities. Although the base size for Scotland does not permit us to look at this month by month, we can see that 52% either 'strongly' or 'tend to' agree that charities are trustworthy. This figure is around the same as the UK overall figure of 50%.

Although we cannot yet see how trust in charities in Scotland varies on a month by month basis, there are likely to be lessons from the UK as a whole which equally apply to Scotland. At the UK level, we saw that trust was relatively consistent across the year. However, it is important to note the peak in trust in November, the same time of year when we see a peak in giving at the UK level (53%) due to the number of campaigns in that month. It does then drop off in December, as engagement decreases slightly.

Research shows that those who engage with charities are the most likely to trust them, and the increased level of trust seen in November may be reflective of that symbiotic relationship. By comparison, the lower level of trust seen in December 2016 may be as a result of a prominent ruling about charities by the Information Commissioner, and a prolonged negative media narrative towards international development spending.

It is a challenge for charities to increase this level of trust amongst the public and this measure will be important to track over time.

Method

CAF has been producing the UK Giving report since 2004, and has been tracking giving in the UK for several decades. In that time, there have been a number of changes to how the study is conducted in terms of approach and questions asked.

During 2016, the UK Giving survey transitioned from a quarterly face-to-face survey with 1,000 responses each time, to a monthly survey with 1,000 responses conducted online using the market research agency, YouGov. This has enabled us to cut the data in order to be able to look at Scotland within its own right.

The new method of interviewing began in May 2016 and so this report contains data from eight months to December 2016. This monthly approach will enable us to level out seasonal effects as well as those established spikes in charitable giving that occur around particular high-profile events, or as a result of humanitarian disasters or specific appeals.

We plan to make Scotland Giving an annual report which in subsequent years will be produced earlier in the year, closer to the time when interviewing was conducted.

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