CAF WALES GIVING 2019

An overview of charitable giving in Wales

#WalesGiving
August 2019
It is a true pleasure to be able to introduce you to our first ever dedicated report into charitable giving in Wales. Nearly all of us turn to charity at some point in our lives, often without us even realising that we are using one of the thousands of charities operating across Wales. Our charities are part of the fabric of who we are, they underpin our way of life and cut across so many of our cultural, social, religious and educational activities.

Our inaugural Wales report joins Scotland Giving in breaking out and helping to identify trends of generosity among the Welsh. Unsurprising to anyone who has spent any time in Wales, this report details a level of commitment to community and to helping our neighbours of which the people of Wales can be rightly proud.

But it is not something that charities, politicians and wider communities can ever take for granted. As we have noted across the United Kingdom, Wales Giving provides us with a picture of giving that includes some bright spots when it comes to the willingness of the Welsh people to respond to seasonal charity appeals more so than the UK as a whole and the robust level of participation in charitable or social activities undertaken by the Welsh. But the report also identifies some trouble spots such as a lower rate of people claiming the Gift Aid credit in Wales than elsewhere and overall smaller amounts being given, most likely reflecting lower average earnings.

Our hope here at CAF is that this information will help raise public awareness of some of the challenges facing charities and also assist charities by identifying areas where they might be able to direct resources in order to raise even more for good causes.

People give because they are inspired, because they are touched by a charity’s work and because they know that their donations make a tangible difference. It rests with all of us to make the case on behalf of our charities, be they small groups gathering in a village hall to address a local need or a national organisation tackling widespread issues. In Wales, charities provide invaluable services, but they also serve to bring our communities together in a bid to make the world a better place. In times of economic and political uncertainty, those bonds are more important than ever and are worth fighting to protect.

Sir John Low
Chief Executive
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. With a clear goal of assisting charities, government and wider society to better understand charitable giving, we are delighted to be launching our first dedicated ‘CAF Wales Giving’ report.

Since 2016 on our UK Giving study, we have been interviewing c.1,000 individuals monthly across the UK about their giving behaviour. In 2017 we began producing annual Scotland Giving reports and are now in a position to publish our inaugural CAF Wales Giving report to add to the series. This is as a result of increasing our monthly sample size in Wales to 100 since January 2018. This ensures a minimum of 1,200 interviews across the year and enables us to report on Wales within its own right.

We believe that this is the only study of giving behaviour in Wales made freely available to charities, and we hope that this report, which will be an annual event, will be able to inform debate around charitable giving in Wales.

We produce a number of research reports each year and all of these are freely available; you can receive them straight into your email and you can sign up at: www.cafonline.org/about-us/research. We do hope you find this report both topical and useful – if you do have any questions, comments or suggestions, please contact the CAF Research team at research@cafonline.org

ABOUT CAF

CAF exists to make giving go further, so that more lives and communities around the world can be transformed.

CAF is a charity and a champion for better giving, and for over 90 years has helped donors, companies, charities and social organisations make a bigger impact. Through CAF Bank, it offers simple and straightforward day-to-day banking, designed exclusively for charities.
KEY FINDINGS

Our analysis provides these key findings for individual giving in Wales in 2018:

- 67% of individuals in Wales say they have participated in a charitable or social activity in the last four weeks, higher than the UK average of 64%.

- Three fifths of people in Wales donated money to charity within the last year, with November being a peak month due to a number of major national charity events, and higher in Wales than the UK as a whole (48% vs 39%).

- An estimated £454 million was donated to charity by those living in Wales in 2018 – accounting for 4.5% of the UK total of £10.1 billion.

- The average amount of money donated in Wales was lower than the UK as whole.

- Those claiming Gift Aid on their donations in Wales is lower than the UK as a whole (47% vs 51%).

- The top three causes that people chose to support in 2018 were medical research, animal welfare and children or young people.

- One in six people in Wales have volunteered in the last year, with the level of volunteering being higher amongst students.
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 in the last four weeks or the last year. 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?

- Donated money to charity: 59% in the last year, 32% in the last four weeks
- Given goods to charity: 57% in the last year, 27% in the last four weeks
- Signed a petition: 52% in the last year, 26% in the last four weeks
- Sponsored someone for a charity: 37% in the last year, 10% in the last four weeks
- Bought an ethical product: 29% in the last year, 13% in the last four weeks
- Volunteered for a charity: 17% in the last year, 9% in the last four weeks
- Taken part in a consultation about local services or problems in your local area: 15% in the last year, 4% in the last four weeks
- Taken part in a public demonstration or protest: 5% in the last year, 1% in the last four weeks
- None of the above: 33% in the last year, 11% in the last four weeks

Base: All adults 16+ (n=1,293)

At an overall level, around nine in ten (89%) people in Wales have participated in at least one charitable or social action over the previous year. This is a similar proportion compared to the UK as a whole (87%). When asked about participation in the last four weeks, 67% say they have participated, higher than the UK average of 64%.

We will look at each of these measures in more detail in subsequent paragraphs.
This section of the report looks at people’s charitable behaviour in more detail.

**Giving money**

Giving money is the number one way in which people in Wales have participated in a charitable or social action, with 59% claiming to have donated money within the last year and just under a third (32%) claiming to have done so in the last four weeks. Both of these figures are in line with the UK average of 57% and 31% respectively.

Just under two fifths (37%) of people claimed to have sponsored someone for charity within the last year, whilst 10% had sponsored someone within the last four weeks. People in Wales appear to be more likely to sponsor someone for charity than across the UK as a whole, where 32% and 8% respectively had done so.

The peak month for giving in Wales was November, when 48% claimed to have donated money to charity. Although November and December were the main months for giving across the UK as a whole, neither of these months recorded as high a level as in Wales in November (39% for the UK as a whole). The November figure coincides with a number of major national charity events in the lead up to interviewing such as Children in Need, Movember and the Poppy Appeal.

Of those who donated money to charity, 47% said that they used Gift Aid on their donation, a lower level than the UK as a whole (51%). This may at least in part be due to the higher level of people giving via cash in Wales. This is something which could be looked into as it would be beneficial to charities across Wales and beyond to increase usage of Gift Aid further.

**Volunteering**

One in six people within Wales (17%) said they had volunteered for a charity over the last year, with 9% saying they had done so in the last four weeks. These figures are consistent with the UK as a whole.

Whilst women appear more likely to have volunteered than men within the last year (18% vs 15%), this is not a significant difference. As with the UK as a whole, volunteering is most prevalent amongst full time students (28%), which is likely due to the higher level of free time available, as well as the encouragement schools and universities give to volunteer.

**Giving goods**

After donating money, giving goods is the second most common form of engaging with charities. 57% claimed to have given goods in the last year, and 27% in the last four weeks, both of which are in line with the UK as a whole. Giving goods is largely prevalent among older people (39% of 65+s vs. 7% of 16–24s within the last four weeks) and women (36% vs. 19% men), which is the same pattern seen within the UK overall figures.
Protesting and petitioning

Signing a petition is the third most popular charitable activity to be undertaken in the last year. Over half (52%) of those interviewed in Wales in 2018 had signed a petition in the previous year whilst 26% had done so over the previous four weeks. These figures are slightly higher than those recorded for the UK as a whole where 49% had signed a petition in the last year.

Women are more likely to have signed a petition than men in the last year (55% vs. 49%), whilst 45–54 year olds are the least likely age group to have done so (43% vs. 52% on average across Wales).

16-24 year olds are more likely to attend a protest (10% vs. 5% average), however this is the least common charitable activity to take part in of all those asked about.

Who engages most?

Overall women are more likely to engage in charitable or social activities, with 73% having done so in the last year compared to 63% of men.

Among all adults aged 65+, only 7% have not participated in at least one charitable or social action in the last year compared to 15% of 16–24s. These again are similar to the figures for the UK as a whole.

Frequency of giving

When asked about how often they give to charity, over half of people in Wales state that they usually give to charity from time to time (53%), with a further quarter (24%) giving monthly. One in twenty give weekly (5%).

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

<table>
<thead>
<tr>
<th>Frequency</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Weekly</td>
<td>5%</td>
</tr>
<tr>
<td>Monthly</td>
<td>24%</td>
</tr>
<tr>
<td>From time-to-time</td>
<td>53%</td>
</tr>
<tr>
<td>Rarely</td>
<td>11%</td>
</tr>
<tr>
<td>Never</td>
<td>5%</td>
</tr>
</tbody>
</table>

Base: All adults 16+ (1,293)  ‘Don’t know’ responses not displayed

We would define ‘regular giving’ as those who give weekly or monthly and when looked at in this way, fewer than one third (29%) give regularly. Regular giving is highest amongst those aged 65+, with two fifths (40%) saying they give with this regularity. Men are twice as likely as women to say that they rarely or never give to charity (22% vs. 10%) which is in line with the UK average (26% vs. 13%).

8 | CAF WALES GIVING 2019
Total amount given

An estimated £454 million was donated to charity by those living in Wales in 2018. This compares to a total UK figure of £10.1 billion over the same period. The level in Wales therefore accounts for around 4.5% of overall individual giving across the UK.

It is important to note that the Wales 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.

Typical amount given

The median\(^1\) monthly amount given by a donor within Wales in 2018, either donating or sponsoring in the last four weeks, was £15, while the mean amount given was £36. These are both below the figures for the UK as a whole, where the median was £20 and the mean was £45. This means that although similar numbers of people are giving in Wales as across the UK as a whole, people in Wales are giving lower amounts. This is likely to be, at least in part, due to lower levels of average salary in Wales compared to the UK as a whole (£509 median gross weekly earnings for full time employees vs. a UK average of £569 in 2018)\(^2\).

What people give to

When people were asked which cause area they had given to in the last four weeks, the top five causes are shown in Figure 3 below:

![Figure 3: Which of the following causes did you donate to?](image)

<table>
<thead>
<tr>
<th>Cause Area</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Medical research</td>
<td>30%</td>
</tr>
<tr>
<td>Animal welfare</td>
<td>29%</td>
</tr>
<tr>
<td>Children or young people</td>
<td>23%</td>
</tr>
<tr>
<td>Homeless people, housing and refuge shelters in the UK</td>
<td>20%</td>
</tr>
<tr>
<td>Overseas aid and disaster relief</td>
<td>16%</td>
</tr>
</tbody>
</table>

Base: All adults 16+ who have donated to a charity in the last four weeks (n=444)

Four cause areas all received 20% or above in support in 2018: Medical research (30%), animal welfare (29%) children and young people (23%) and homeless people, housing and refuge shelters in the UK (20%). There was then a drop off to the fifth largest cause, with 16% having donated to overseas aid and disaster relief. The least popular causes given to by those in Wales are sports and recreation (1%), arts (1%), schools, colleges, universities and other education (5%) and elderly people (6%). This again is a similar pattern to the UK as a whole.

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1 The Median = middle value of all amounts given by individuals. The Mean = average amount given across all individuals.
Who gives to what?

Animal welfare charities are the most popular cause for women to give to in Wales (37% vs. 19% men), seeing similar figures to the UK as a whole (31% women vs. 20% men). Whilst there are relatively few demographic differences in terms of who gives to what causes across Wales, those aged 65+ are more likely to give to medical research, with 39% of 65+ year olds giving compared to a low of 22% of 25–44 year olds and 30% on average.

How people give

Those who had donated were asked how they gave money to charity and what method they preferred. Giving using cash is the most common way of giving money to charity, with just under three fifths (58%) doing so within Wales in 2018. This is slightly higher than the UK average of 53% and may account for the lower level of Gift Aid use in Wales. Giving through buying a raffle or lottery ticket (42%) and buying goods (40%) are also popular methods of giving in Wales.

Just under a third of people (31%) opted to give via direct debit/standing order, whilst just under a quarter (23%) gave at a fundraising event. Credit card (5%), cheques (5%) and payroll giving (2%) are the least favoured methods of giving.
Being asked to give

Regardless of their giving behaviour, people were questioned on how they had been asked to give to charity in the last four weeks. Being approached on the street (35%) was the most common way that they were asked to give to charity, followed by television (28%) and online (24%). Unlike the UK as a whole, direct mail (23%) did not make the top three.

Although ‘on the street’ was the most common way to be asked overall, there were some demographic differences within Wales. Younger people are most likely to claim to have been asked to give online, with a third of 16–24 year olds (33%) claiming this, compared to 19% of those aged 65+ and 21% of those aged 45–64. Direct mail was the most likely way those aged 65+ claimed to have been asked (33% compared to 23% overall).

Trust in charities

Trust in charities has been discussed over the last few years, with a number of reports\(^3\) claiming that trust in institutions is at an all time low. In 2018, just under half (49%) of people within Wales either ‘strongly’ or ‘tend to’ agree that charities are trustworthy. This figure is similar to the UK overall figure of 48%.

There are some fluctuations in trust over the course of the year in Wales\(^4\) from a low of 40% seeing charities as trustworthy in March to highs of 53% in November and December, the months when giving levels were also at their highest.

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\(^3\) [https://www.edelman.com/trust-barometer](https://www.edelman.com/trust-barometer)


Due to low base sizes (c. 100 per month) these are not significant findings
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. We’ve now been reporting on this new boosted sample size for three years. This monthly approach enables 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. This has enabled us to produce additional analysis and produce our CAF Scotland Giving5 and CAF Wales Giving reports.

Further information on the detail of transitioning the survey to this approach can be found in CAF UK Giving 20176.

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HOW CAF HELPS CHARITIES

Charities can:

- Manage their day to day banking through our current and savings accounts or apply for secured loans via CAF Bank.
- Take control of their investment portfolio through the CAF Investment Account, the UK’s only secure, digital trading platform for charities.
- Apply for short term funding through CAF Venturesome, our pioneering social investment arm.
- Fundraise with ease and speed online through CAF Donate.
- Reduce the burden of Gift Aid, as we can claim Gift Aid on donations made through CAF on their behalf.
- Receive guidance on all areas of governance, fundraising, finance and grantmaking through our team of experts.
- Reap the benefits of CAF’s successful campaigning work to get real change to policy and celebrate the great work of the sector with #GivingTuesday.
- Grow knowledge and awareness of UK and international giving trends, through our ground-breaking research such as UK Giving and CAF World Giving Index.

Facts are correct as at April 2018