

2021: A YEAR IN REVIEW

As the new year is firmly underway, we wanted to reflect back and review the statistics and trends we've seen over the last year with our charity partners to help you as you move into 2022.

Legacy Giving

9 in 10 wills written were online

We offer online, telephone and face-to-face services, giving people the opportunity to pick the best option for them. We find that the majority of people need a simple will, making online will writing an easy route for them to take.

35% average legacy inclusion rate

The majority of our charity partners also promote the service internally to staff and volunteers, so we drilled down further and found that **the average inclusion rate for internal audiences was 20%**. When looking at supporter/external audiences the inclusion rate increased to **43%**. Even though internal audiences have a lower pledge rate, they have proven to be good legacy prospects for many charities, and can help build internal buy-in.

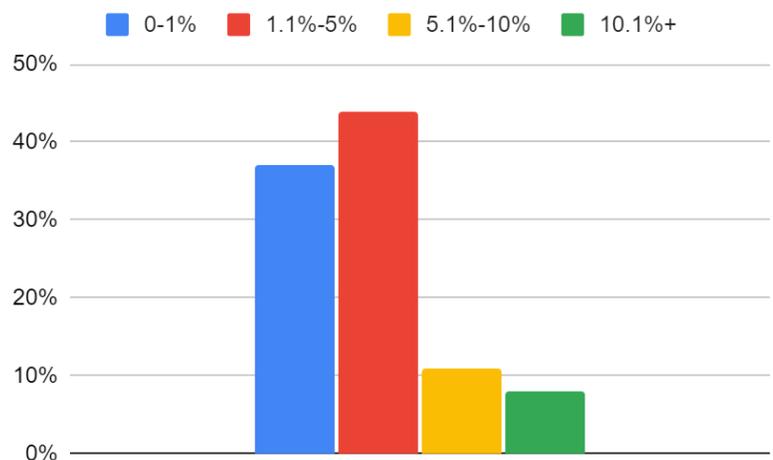
On average 1.6 charities were included per will

The average residuary gift left to charity was 6%, with an estimated value of £16,800*

**based on estate value of £280k*

This graph shows a breakdown of the percentage of residuary gifts left by value.

The majority of residuary gifts that were left last year were between **1- 5%**.



The average pecuniary gift left to charity was £1,578



This graph shows a breakdown of the percentage of pecuniary gifts left by value.

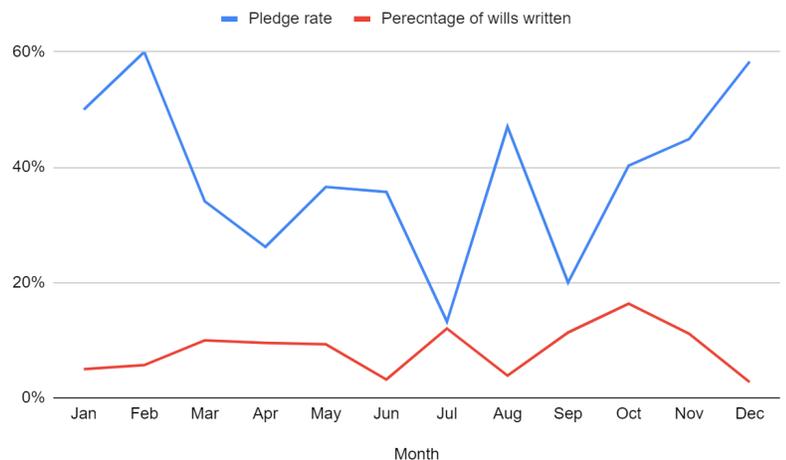
Most people left gifts between **£250 - £1,000**.

Average pledge rate and percentage of wills written per month:

The most generous months across 2021 for legacy giving include **January, February, August** and **October - December**.

There could be various reasons for this. At the beginning of the year the UK was still in a lockdown, which could have motivated people to reflect back and think about the causes they care about.

In addition as we move into Autumn through to Winter we enter into a period of gift giving and thinking about family, which also could be a strong motivator.



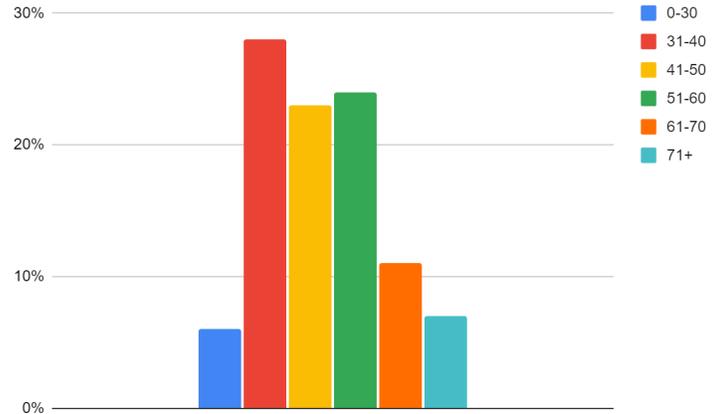
The peak months for writing a will include **March-May, July** and **October**, which shows that even though most people are writing their wills during these months, that doesn't necessarily correlate with high pledge rates. It's therefore important to drip feed your legacy message across the year and ensure you have a strong legacy proposition.

Demographics

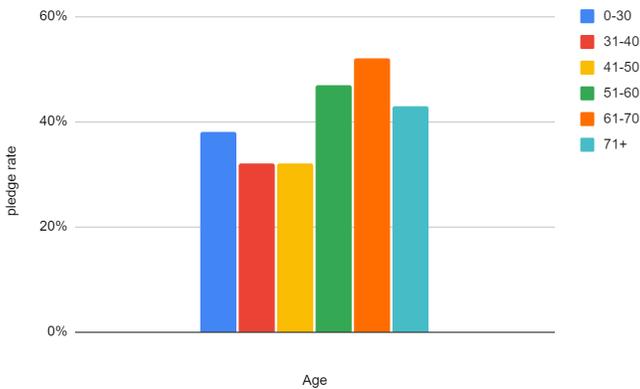
Percentage of will writers by age group:

The majority of people writing their will in 2021 through our services were between **40 – 60 years old.**

The oldest person to write their will with us was **94 years old.**



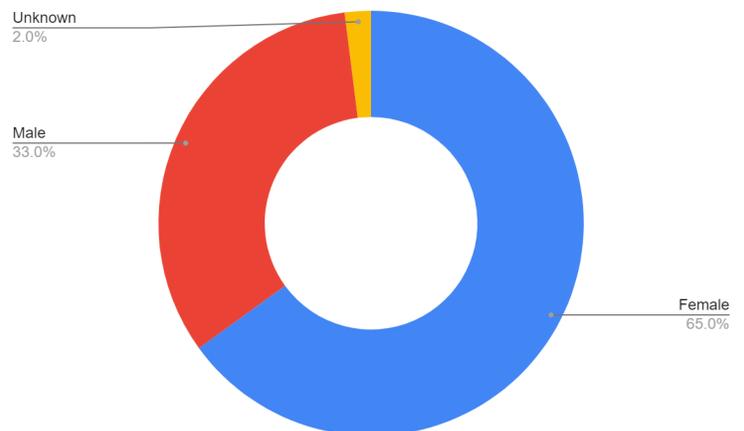
Pledge rate by age group:



Legacy giving across different ages stays relatively consistent, with a peak between **50 – 70 years old.** Traditionally legacy teams have targeted those who are 55+, however this indicates that expanding your age group could prove effective.

Percentage of will writers by gender:

65% of wills completed during 2021 were written by those who identify as **female.** When comparing legacy pledge rates between genders, this remained the same at approx. **48% for males and females.**



Percentage of will writers and pledge rate by city:



The majority of wills completed during 2021 were written within the **South and South West of England.**

When looking at legacy pledges made to charity during 2021, the majority were made within the **South and North West of England.**

About our data

We collated this data from wills written in England and Wales by Guardian Angel via our charity partners between 1st January and 31st December 2021.