



Public trust and confidence in charities

Research conducted by Populus on behalf of the Charity Commission

2016

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Executive summary

This report presents the findings of the 2016 Charity Commission study into public trust and confidence in charities, conducted by Populus on behalf of the Charity Commission. As with previous surveys, the 2016 research monitors the level of public trust and confidence in the charity sector as well as other key questions. It also explores the issues that affect trust and confidence, variations in results by age, gender, region and socio-economic group and other key demographic characteristics.

- In 2016, the overall level of trust and confidence in charities has fallen to 5.7 out of 10. This is a significant decrease from a headline figure of 6.7 in 2012 and 2014.
- Nearly two thirds (61%) of the public say that their trust and confidence in charities has stayed the same, 33% say that their trust and confidence has decreased, while just 6% say it has increased, over the last two years. Amongst those who say their trust and confidence has decreased, a third attribute this to general media stories about a charity or charities and a further third cite media coverage about how charities spend donations. A fifth say their confidence has decreased because they don't trust charities or don't know where the money goes and a similar proportion say that their trust has declined because of charities using pressurising tactics to elicit donations.
- Statistical analysis reveals that trust in the charitable sector is driven by five 'key drivers':
 - Ensuring that a reasonable proportion of donations make it to the end cause
 - Being well managed
 - Ensuring that its fundraisers are honest and ethical
 - Making independent decisions to further the cause they work for, and
 - Making a positive difference to the cause they are working for.

The sector's performance across all of these key drivers has declined since 2014.

- Concerns about how charities spend their money are felt widely, not just by those whose trust has declined. More than half of the public agree that they know very little about how charities are run and managed and this, in turn, makes them question the decisions that charities make. Across the public as a whole, three-quarters agree that some fundraising methods make them feel uncomfortable and two thirds agree that charities spend too much of their funds on salaries and administration.
- In qualitative focus group discussions, the public also agreed that high-pressure fundraising techniques made them feel uncomfortable which, in turn, made them feel less inclined to give money. Examples of fundraising techniques that caused frustration included: 'incessant' phone calls asking for money, adverts that deliberately manipulate the emotional responses of donors, and street fundraising ('chugging'). However, around half conceded that adverts that seek to manipulate the

emotional responses of donors are also useful in showing the outcome of fundraising. Participants in the focus groups spontaneously raised the recent controversy surrounding Age UK and E.ON, as well as Kids Company, though many could not recall specific details.¹

- Familiarity, and a connection with the local community, are important when the public choose which charities to trust. Three-quarters of the public agree that they trust charities more if they have heard of them, and three-in-five agree that they trust charities more if they are providing services within their local community. The importance of familiarity with a specific charity is so strong that only 30% would feel confident donating to a charity they have not heard of previously.
- Respondents were also asked to choose between three pairs of characteristics: Large or small; those that operate abroad or only in the UK; and charities that receive some funding from government or none. Overall, the public are more likely to trust small charities (57%) over large ones (34%) and charities that operate in the UK only (61%) over those that operate internationally (31%). They are more evenly divided on the impact of government funding on trustworthiness.
- The loss of trust and confidence in charities over the past two years has had little impact on the importance that the public places on the existence of the charitable sector. When asked how important a role they think charities play in society today, 93% of the public think that charities play a role of either fair, very, or essential importance. The public also tend to agree that charities are trustworthy and act in the public interest. But falling trust has had some impact on how the public trust charities in comparison to other professions and types of organisation: since 2014, charities have fallen from third place (behind doctors and the police) to fifth place (behind doctors, the police, the social services and the ordinary man/woman in the street).
- When compared against private companies and public authorities, charities come out top for having a caring approach, and rank second for providing best value for money, but fare worst for providing a professional service. This hasn't changed significantly since 2014. Public authorities are thought most likely to be open and accountable while private companies rank first for providing a professional service and providing a high quality service. For many respondents, however, the type of service provider is not an important factor in their overall decision about which would be the best.

¹ In February 2016, *The Sun* newspaper alleged that Age UK had promoted tariffs with E.ON in return for £6.3 million from the energy supplier. Age UK recommended a special tariff to pensioners which cost more than E.ON's cheapest rate. The Charity Commission investigated these allegations and its conclusions can be found here: <https://www.gov.uk/government/news/commission-publishes-report-on-age-uk>

During the summer of 2015 Kids Company was the subject of allegations relating to financial management and governance issues. Despite high-profile interventions to find funding for the Kids Company, the charity closed in August 2015. The Charity Commission had been engaging with Kids Company from 17 July 2015 and opened an official inquiry into the events surrounding the charity's collapse on 20 August 2015: <https://www.gov.uk/government/news/new-charity-investigation-kids-company>

A police inquiry was also opened to investigate claims of physical and sexual abuse within Kids Company centres but found no evidence of criminality: <http://www.bbc.co.uk/news/uk-35429630>

Indeed, around half of the public think that the type of provider makes no difference across the whole range of indicators tested.

- Given their strong feelings about charities, it is perhaps surprising that few of the public are aware of the broad range of activities carried out by charitable organisations. When asked whether they, or any of their close family or friends, have ever received money, support or help from a charity, only a fifth say they have, and a third of the public say they, or their friends or family, have benefited from or used the services of a charity. These respondents, those who are aware of using a charity, have higher levels of trust and confidence in the sector, as do staff and volunteers for charities. Once they are given a list of examples, such as visiting National Trust properties, attending charity-run youth clubs, or calling charities for information and advice, the public recall a range of types of contact with charities. Indeed, only 6% say they have never done anything on the list.
- Half of the public have heard of the Charity Commission, and 27% of these say they know the Commission fairly or very well. Though they are not very aware of how it is achieved, three fifths of the public believe that charities are regulated effectively. When the role of the Charity Commission is explained, most (88%) say that this role is important, and 57% say the role is essential. This has risen consistently from 45% in 2005. Focus group participants were unanimous in their belief that a regulator for the sector is vital and welcomed more information about the Charity Commission.

Conclusions and recommendations

This 2016 edition of *Public trust and confidence in charities* is undoubtedly a sobering one for the sector. Public trust in charities has fallen lower than it has been since this study began in 2005 and the public are highly critical of both specific, individual charities and trends within the sector as a whole.

The public still value charities: they think that charities provide society with something unique and they are positive about the caring approach and value for money that charities can provide. However, fundraising techniques that seem aggressive, a perceived lack of accountability and transparency, alongside negative media coverage have had a big impact on trust and it is far harder to gain the confidence of the public than to lose it.

The sector and the regulator must take these developments seriously. This report raises issues which challenge both charities and the Charity Commission. The new Fundraising Regulator will also be central in formulating a response to falling trust.

Two themes recur throughout this 2016 edition of *Public trust and confidence in charities*: accountability and fundraising techniques. The second of these, fundraising techniques, has been brought into the spotlight by negative press coverage in 2015 and 2016 and is underpinned by growing public disquiet about the way in which they are approached by charities. Three-quarters (74%) of the public agree that some of the fundraising techniques used by charities make them feel uncomfortable. This is up from 60% in 2010 and reflects a concern that has been emerging for some time (it had risen to 66% by 2014).

While the public concede that charities do need to fundraise, they are tired of ‘incessant’ phone calls asking for money, adverts that they feel deliberately manipulate the emotional responses of donors, and street fundraising (‘chugging’). These are enormous challenges for the sector but they also demonstrate the opportunities available to those organisations that are innovating in this area. Respondents spoke about their choices to support charities that provided alternative ways in which to donate: for example, by sending goods rather than money, or by guaranteeing a one-off, no-reply interaction.

Interestingly, these innovative steps were often being taken by smaller charities. The vast majority of the charity sector is made up of small charities (94% of registered charities have an income of £500,000 or less, and 81% have an income of £100,000 or less) and they should take encouragement from this report: small, well-established, local charities are the most trusted of all; especially when they can clearly show where donations are spent. In contrast, larger charities with an international remit and wider scope are the focus of suspicion from those who are most cynical about the motives and efficacy of charities (see figure 4.7, page 34).

Of course, good financial management and a strong fundraising strategy will remain essential for all charities. But rectifying negative public reactions to fundraising will also require substantive collective action by the sector and the new Fundraising Regulator. The public believe that this has so far been lacking from the sector's response to events in 2015 – 2016.

Several of the new approaches to fundraising mentioned above were successful because they also tackled our other theme: transparency and accountability. News coverage of poor practice by some charities has led members of the public to question their own assumptions about how charity donations are spent across the whole sector. Talk of high salaries, lavish expenses and poor cash management led the public to worry about the competence levels in charities and made them question how much of each donation actually makes it to the intended recipient.

When the public are asked about the qualities that are most important to their trust and confidence in charities they show a clear preference for charities that satisfy their needs for transparency and impact. Ensuring that a reasonable proportion of donations make it to the end cause is the most important quality, followed by making a positive difference to the cause the charity is working for. However, these are not the only measures on which charities will be judged: the key driver analysis shows that in order to drive trust, the sector will also need to work particularly hard to improve public belief that charities are competently managed (see figure 3.3, on page 26).

While exact methodologies, samples, and questions vary, this research joins a growing literature concluding that public trust and confidence in charities is declining. Other research drawing broadly similar conclusions includes Ipsos Mori for New Philanthropy Capital finding that around half of the public distrust charity chief executives. Harris Interactive for Third Sector found that recent media stories have made 33% of the public think worse of charities, while NfpSynergy research finds a marked decline in trust in charities from 70% in early 2010 to 48% in late 2015.

While Kids Company may have been an unrepresentative and particularly unfortunate example, the widespread coverage has tainted the sector as a whole. In order to counteract this negative impression, charities will need to re-double their efforts to demonstrate the difference they make and to show progress towards their stated aims. It is no longer enough simply to do good, they must also be seen to do it.

This presents challenges for both the sector and the Charity Commission. Charities will need to think long and hard about the way in which they assess and publicise their progress towards their objectives. Positive steps have been made towards providing evidence in annual reports but this has evidently made little impact on the wider public. As a corollary, focus group respondents are keen for the Commission's register to make clear what each charity aims to achieve and how well it is progressing towards that end goal.

When asked whether they, or any of their close family or friends, have ever received money, support or help from a charity, only a fifth say they have (20%), whereas 79% say they have never received any support. However, when respondents are probed, many more of the public can provide examples when they, or their friends and family, have benefited, either directly or indirectly, from a charity. Only 6% say they have never benefited from a charity. There may be, therefore, merit in raising public awareness of the broad range of

organisations that have charitable status, and the wide range of ways the public come into contact with them.

Members of the public who say that they, or their friends or family, have benefited from or used the services of a charity are much more positive about charities across a range of measures, including giving higher trust and confidence scores. If those members of the public who do not automatically recall what they have gained from the work of charities were more aware of the sector's work, they too might be more positive.

Similar steps would also be positive for the Charity Commission: though 60% of the public believe that charities are regulated effectively and half agree that charities are regulated to ensure that they are working for the public benefit, only half of the public (50%) have heard of the Charity Commission, down slightly from 55% in 2014. However, when the role of the Charity Commission is explained, most (88%) say that this role is important, and 57% say the role is essential. This has risen consistently from 45% in 2005. Working to increase public understanding of the Commission's role and of the 'public benefit test' would be a positive step, creating a more informed context in which to debate the behaviours of individual charities.

Public trust and confidence in charities

Key findings

- Public trust and confidence in charities has fallen from 6.7 in 2014 to 5.7 in 2016
- Younger adults, and people who are either beneficiaries or staff of charities, are most trusting of charities across a range of measures
- The public are more likely than ever to say that their trust in charities has fallen over the past 2 years
- Only two-fifths of the public trust charities to make a positive difference to the cause they are working for

Background

This report presents the findings of the 2016 Charity Commission study into public trust and confidence in charities, conducted by Populus on behalf of the Charity Commission.

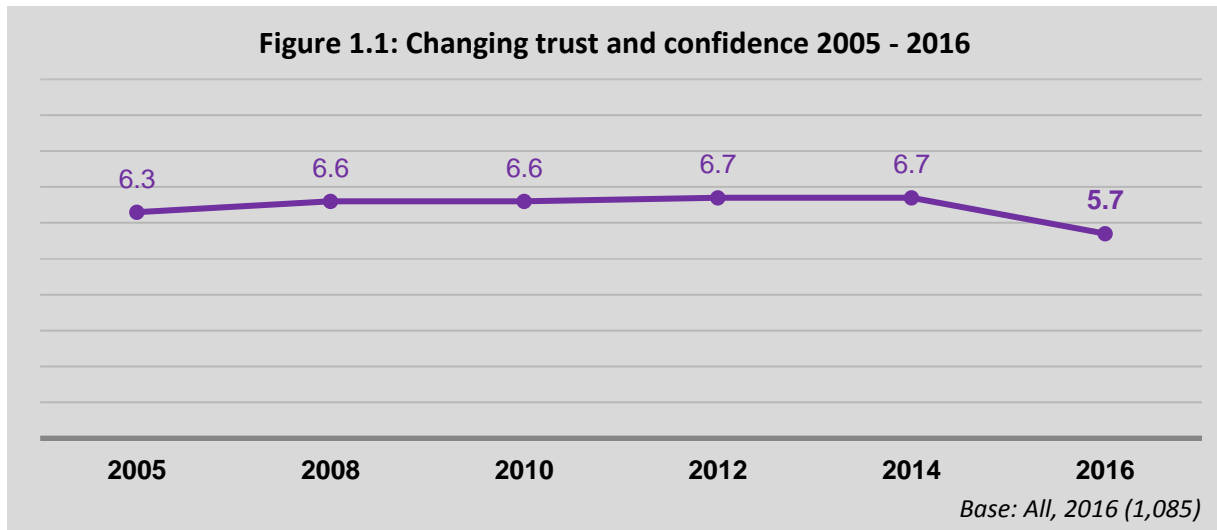
The main objectives of the 2016 research were to investigate public trust and confidence in charities, explore general attitudes towards charities, and reflect on changes since previous research was conducted in 2014. The telephone surveys and the focus groups therefore addressed:

- overall trust and confidence in charities
- changes in public trust and confidence in charities
- levels of involvement with, and benefits from, charities
- charities in comparison with other sectors
- trust in relation to specific aspects of a charity's performance
- trust in charities to provide public services
- awareness and understanding of the Charity Commission

The research also explored the key drivers of overall trust, variations in results by age, gender, region and socio-economic group and other key demographic characteristics.

Changes in public trust and confidence in charities

In 2016, average trust and confidence in charities has fallen to 5.7 out of 10. This is a significant decrease from the headline figures in previous years; in 2012 and 2014, the score stayed steady at 6.7. It is also the lowest trust and confidence figure ever recorded by this study (see figure 1.1).

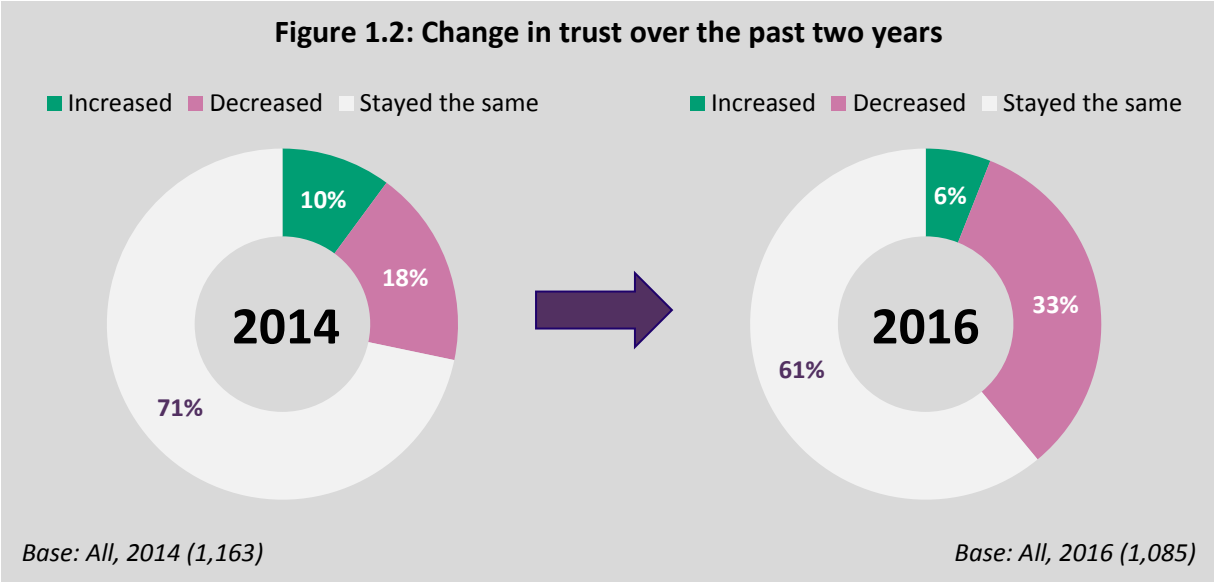


While trust has fallen across all groups, there remains some demographic variation in opinions of charities. Trust is highest among 18-24 year olds (6.0) and lowest among those aged 55-64 (5.2). In addition, women are slightly more trusting than men (5.9 and 5.5 respectively). There are also differences amongst social grades. Those classified as C2 social grade are the least trusting of charities (5.1), compared to those classified as AB social grade (6.1). An explanation of the social grade system is included in the Methodology section at the end of this report.

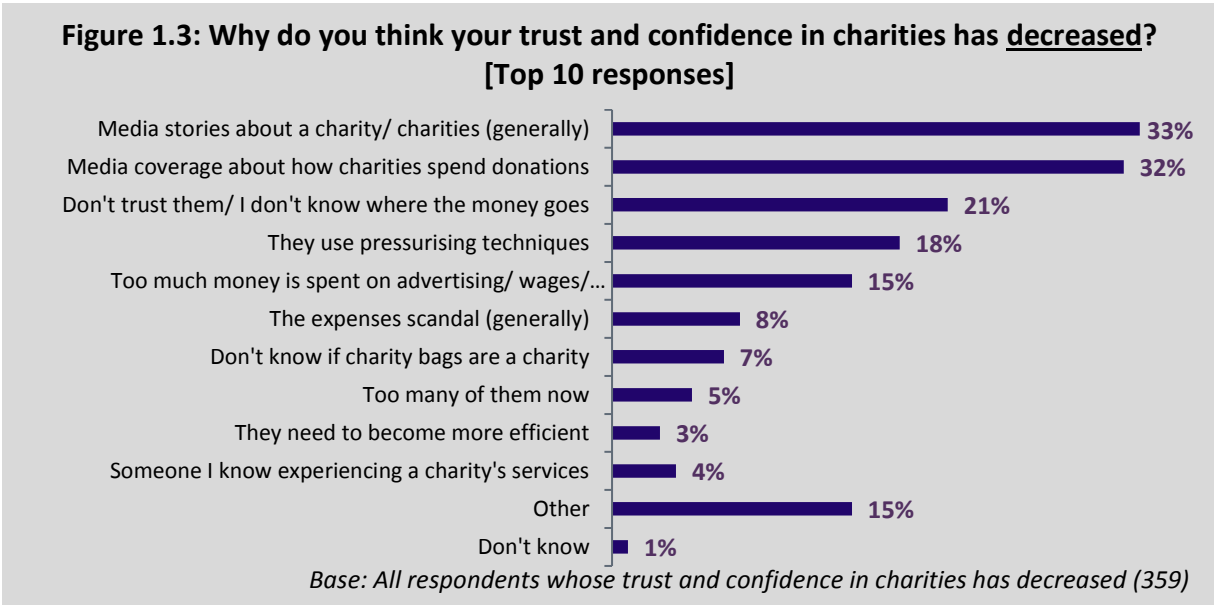
Because the changes in trust were so significant, Populus conducted a follow-up survey to ensure the results were not a 'one-off' or fluke result. The results of the follow-up survey, conducted more than a month later and a time of very little negative media coverage about charities, were consistent. In fact, in the second survey, which did not coincide with any major negative news about charities, the trust and confidence score dropped further – to 5.6.

This decline in trust and confidence, a trend recurring throughout the telephone survey and across the focus groups, is largely attributed by the public to critical media stories about charities, a distrust about how charities spend donations, and a lack of knowledge amongst the public about where their donations go. The use by some charities of tactics that are perceived as high-pressure to secure donations is also an important factor contributing to a decline in trust.

Asked separately whether, over the past two years, their trust and confidence in charities had increased, decreased, or stayed the same, 61% of the public say it has stayed the same, 33% say that their trust and confidence has decreased, while just 6% say it has increased. Compared to 2014, the public are less likely to say their trust and confidence has stayed the same (61% falling from 71% in 2014), or has increased (6% falling from 10% in 2014), but are almost twice as likely to say their trust and confidence has decreased (33% rising from 18% in 2014) (see figure 1.2).

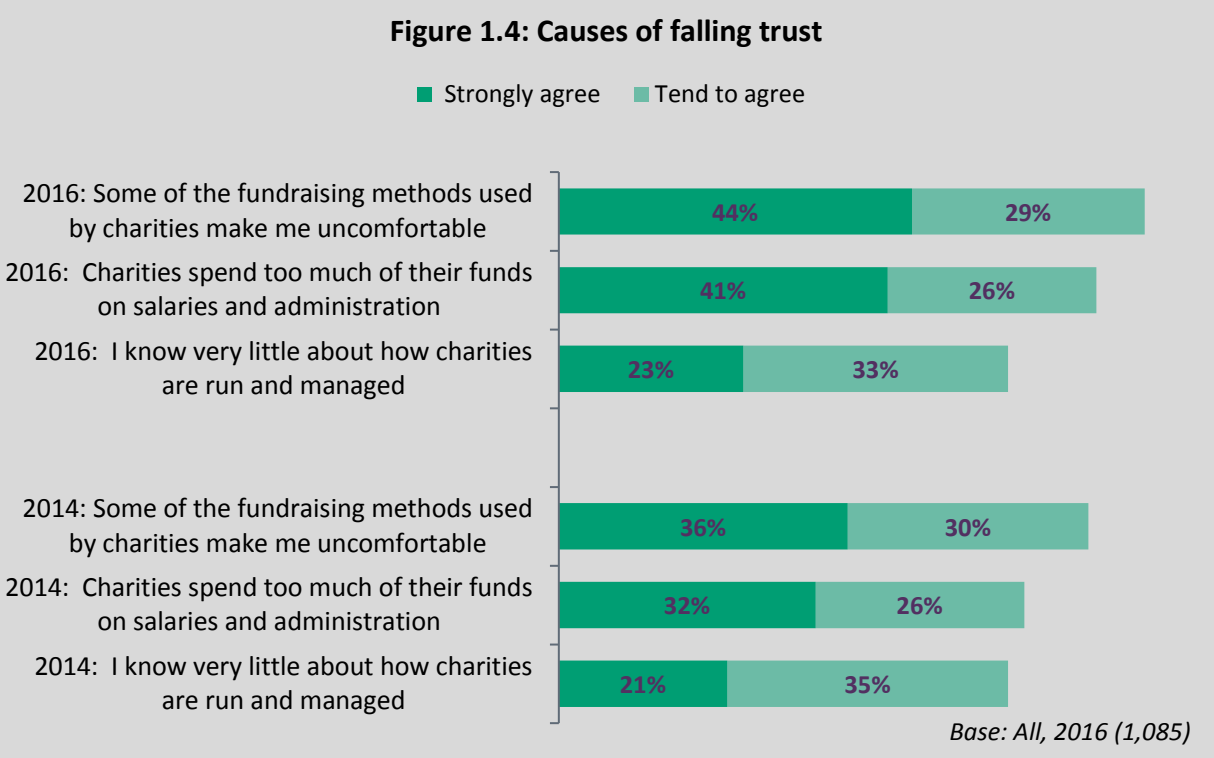


Amongst those who say their trust and confidence has decreased, a third attribute this to general media stories about a charity or charities (33%) and a further third cite media coverage about how charities spend donations, for example, expense claims, bonuses etc (32%). A fifth say their confidence has decreased because they don't trust charities or don't know where the money goes (21%). A similar proportion (18%) say that their trust has declined because of charities using pressurising tactics to elicit donations. These figures have all increased since 2014 (see figure 1.3).



These views are not just held by those whose trust has declined. Across the whole public, 67% agree that charities spend too much of their funds on salaries and administration, compared to 14% who disagree. Over half agree that they know very little about how charities are run and managed, whilst around a third disagree (57% v 31%) (see figure 1.4).

Three-quarters of the public agree that some fundraising methods make them feel uncomfortable (74%), compared to 18% who disagree. These figures are significantly different for 18-24 year olds: less than half of 18-24 year olds (49%) agree that fundraising methods make them feel uncomfortable, compared to 40% who disagree. Conversely, 55-64 year olds are more likely than the average to agree with the statement (85% compared to 10% who disagree).



In the focus groups the public also agreed that what they perceived as ‘high-pressure fundraising techniques’ made them feel uncomfortable which, in turn, made them less inclined to give money. Examples of fundraising techniques that caused frustration include: ‘incessant’ phone calls asking for money, adverts that deliberately manipulate the emotional responses of donors, and street fundraising (‘chugging’). However, around half conceded that adverts that manipulate the emotional responses of donors are also useful in showing the outcome of fundraising.

“ I subscribe to Save the Children. I did used to do one for deaf children, but they just kept phoning and asking for more money all the time. It was £8, and wanted me to go up to £17 a month, and they were just quite irritating.”
 [London, negative]

- “ When they're phoning you up, you're giving a little, which means a lot, but yet, they still want more. To me, that's naughty.” [Cardiff, mixed]
- “ I got a letter from a muscular dystrophy campaign this week, it said; free will writing service. Come to us, and we'll write your will for you. Obviously, you can see exactly what they want.” [London, positive]

Other factors that contribute to a decrease in public trust and confidence in the sector, but are less frequently mentioned, include: too much money spent on advertising, wages and administration (15%) and concerns about expenses (8%).

These findings are supported by the views expressed by many respondents in the focus groups. Negative press coverage about charities, and stories of corruption, were cited as having particularly damaged views of the charity sector in general, and making the public worry about a lack of both transparency and accountability. Participants in the focus groups spontaneously raised the recent controversy surrounding Age UK, as well as Kids Company – though many could not recall specific details.

- “ The amount of money that was being pumped into [Kids Company]. Then they closed down all of a sudden. So, with all your hard work, what have you got to show?” [Cardiff, mixed]
- “ [Kids Company] got lots of money and went bust. They seemed to be spending money very haphazardly.” [London, positive]

In the focus groups participants developed this theme of transparency, talking about a perceived lack of progress on many of the causes charities fight for, and a perception that charitable donations are wasted on inflated salaries and administration.

Many participants in the focus groups were frustrated by what they saw as a lack of feedback from charities, explaining what they have done with donations and how that has furthered their aims. This contributed to respondents' uncertainty about where donated money ended up, which they claimed made them less likely to donate. Respondents also thought that this puts some types of charity at an advantage, especially health charities or those operating in their local area, where donors have a greater chance to see or hear about what their donations had achieved.

- “ I don't know where the money's going. I never know where any of its gone at all. I know there are leaps and bounds in cancer research which I've been a beneficiary of. But the rest of the time I don't know where anything's gone and it gives me no heart to want to give if they're not being transparent enough about it. They do [these appeals] every year and they say they raise all this money and they're still wanting mosquito nets.” [London, negative]
- “ It would be nice to know where the money goes and whether it is helping. They should show them as adults, raising their children with decent land.” [Newcastle, mixed]

- “ It's different with MacMillan or those type of charities because they have testimonials from people.” [Newcastle, mixed]
- “ I'd like to donate to charities where I can see the end product. When you're just putting money in a bucket you don't know if it's actually helping.” [Cardiff, mixed]

There was some scepticism about celebrities being used to front fundraising campaigns to encourage the public to donate. A significant minority of respondents assumed that exorbitant fees were being paid to these celebrities and questioned the extent to which that redirects funding from the end cause. This finding is confirmed by the results of the poll, with only 32% of the public agreeing that they trust charities more if they have well-known people as patrons, compared to the 48% who disagree (see figure 3.2 on page 25).

- “ David Beckham did something for UNICEF where he played football in every country around the world. I think how much did that cost?” [London, negative]
- “ When you've got these celebs constantly pleading with you to give money when they're on absolutely loads. They're all having jollies aren't they. They're all having holidays over there showing you all around. It's like a free trip for them.” [London, negative]

Involvement with a charity is an important factor that affects trust and confidence in charities: those who have been (or are related to) beneficiaries of a charity have the most trust and confidence in the sector, followed by those who work for (or are related to the employees of) charities, while those with no connection give lower scores (see figure 1.5). This finding highlights the importance of telling customers, visitors or beneficiaries that your organisation is a charitable one.



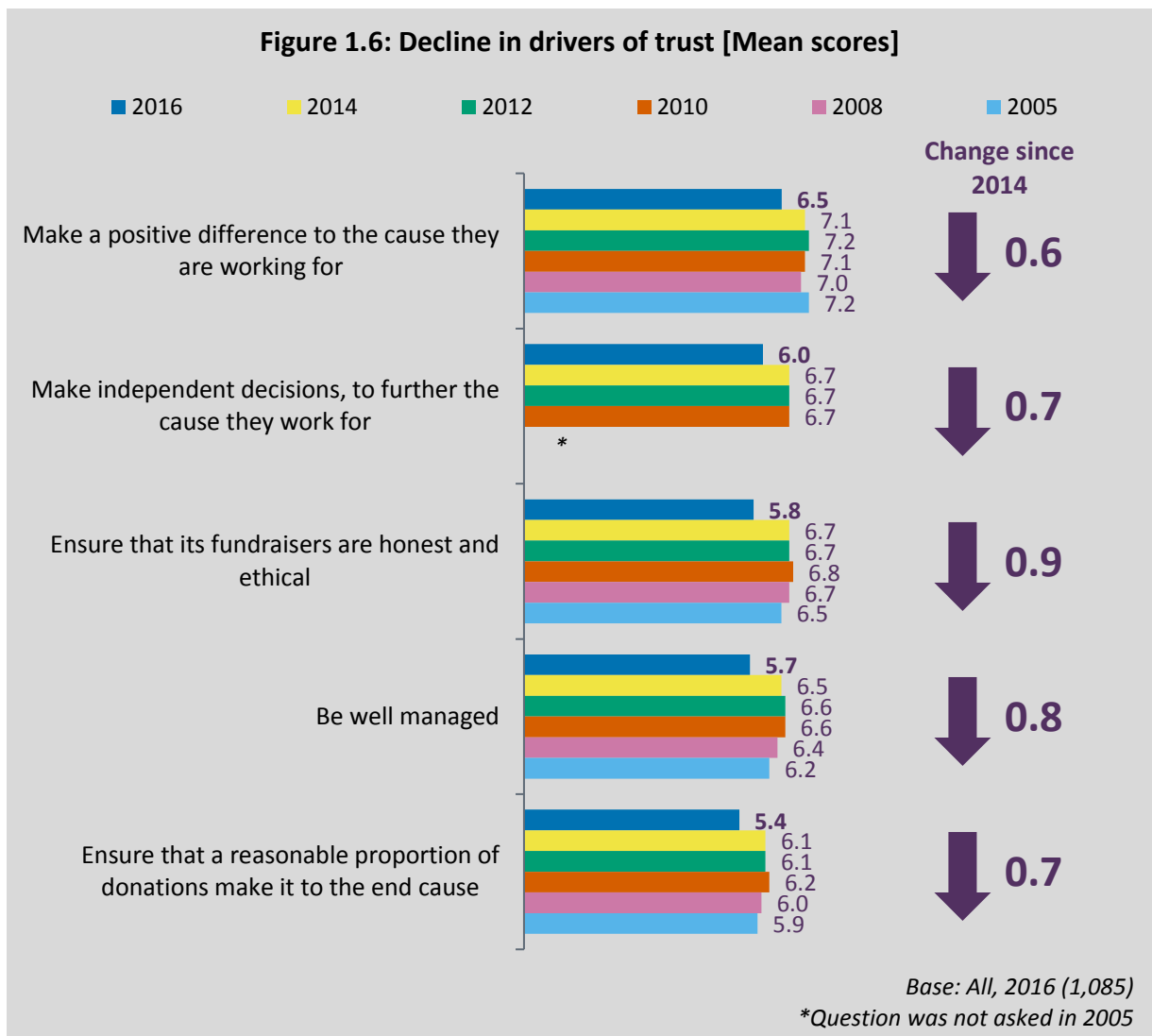
It is not just headline trust and confidence scores that have declined. In comparison with previous years, average scores have also declined across drivers of trust and confidence (see figure 1.6). The belief that charities ensure fundraisers are honest and ethical has fallen from a consistent score of around 6.7 in previous years to 5.8 this year, while the perception that charities are well-managed has fallen from 6.5 to 5.7. 18-24 year olds are the most likely age group to trust that charities ensure that its fundraisers are honest and ethical (6.2), and are well-managed (6.0), compared to those aged 55-64 (5.7 and 5.2 respectively).

As in 2014, the public are least trusting that charities ensure that a reasonable proportion of donations make it to the end cause, and on this too they have become less sure, scoring

charities 5.4, down from 6.1 in 2014. A fifth of the public trust charities to ensure that a reasonable proportion of donations make it to the end cause (22% scoring 8-10), and a similar proportion (21% scoring 8-10) trust charities to be well-managed.

Two-fifths of the public say they trust charities to make a positive difference to the cause they are working for (37% scoring 8-10, falling to 26% for 55-64 year olds) (See figure 1.6). Three-in-ten say they trust charities to make independent decisions to further the cause they work for (30% scoring 8-10, falling to 24% for those aged 65 or older). Around three-in-ten say they trust charities to ensure that fundraisers are honest and ethical (27% scoring 8-10, rising to 30% of females).

Conversely, around one-in-ten say that they do not trust charities (giving a score of 0, 1, or 2) across the same scale of 0-10. This rises to 15% who say that they do not trust charities to ensure that a reasonable proportion of donations make it to the end cause.



Much less frequently than trust decreasing in the past two years, a small number of respondents say their trust and confidence has increased (6%) over the last two years. Of this minority who say their trust has increased, a third say that this is because charities are doing a good job (30%), the same proportion say this is because they began volunteering or

working for a charity (30%), and 20% say it is because they, or someone they know, are using or experiencing a charity's services directly. Half of those whose views of charities have improved, therefore, have had close contact with a charity.

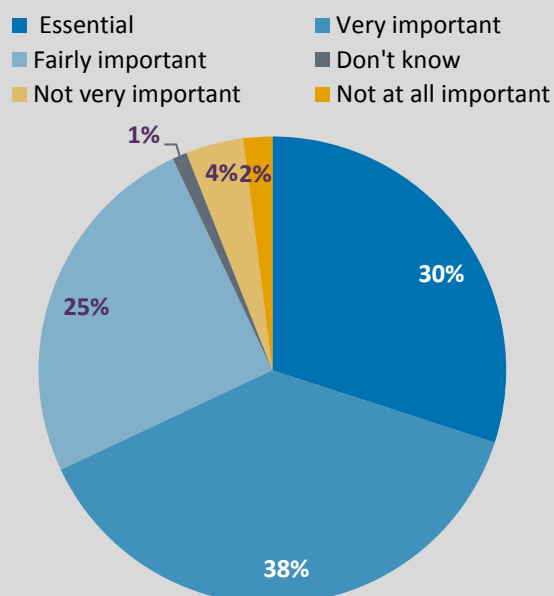
The role of charities in society

Key findings

- 61% of the public think that charities are trustworthy and act in the public interest, down from 71% in 2014
- Charities have dropped from third place in our public trust ranking (behind doctors and the police) to fifth. They are the only entry to change significantly
- Charities are considered more likely than public or private organisations to deliver a caring approach
- Half of the public think there is little difference between types of service provider

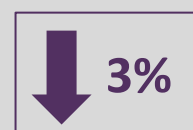
The drop in trust and confidence in charities over the past two years has made a small but noticeable impact on the importance that the public places on the existence of the charitable sector. When asked how important a role they think charities play in society today, 93% of the public think that charities play a role of either fair, very, or essential importance (see figure 2.1). On a scale of 1-5 where 1 means not at all important and 5 means essential, the public give an average score of 3.9 out of 5.

Figure 2.1: Overall, how important a role do you think charities play in society today?



Base: All, 2016 (1,085)

In **2014 96%** of the public said charities played a role of fair, very or essential importance in society versus **93% in 2016**

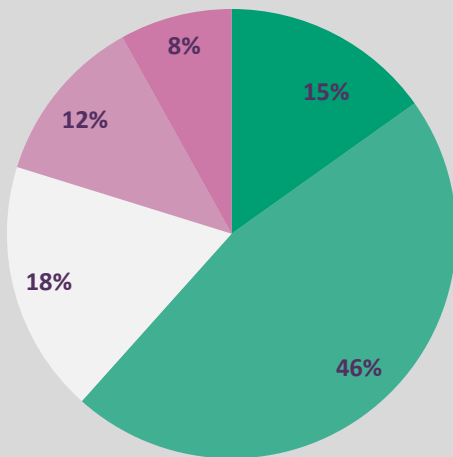


Women are more likely than men to agree that charities play a very or essentially important role in society (72% of women and 66% of men respectively). While respondents from the AB and C1 social grades think charities are more important (71% and 71%) than C2s and DEs (66% and 65%).

The public also tend to agree that charities are trustworthy and act in the public interest, with 61% of the public agreeing with the statement (see figure 2.2). However, this figure has fallen significantly since 2014, when 71% of the public agreed that charities were trustworthy. Younger people are more likely to agree that charities are trustworthy compared to older people: 69% of 18-24 year olds agree with this statement which falls to 56% of 55-64 year olds.

Figure 2.2: How much you agree or disagree that most charities are trustworthy and act in the public interest?

- Strongly agree
- Tend to agree
- Neither agree nor disagree
- Tend to disagree
- Strongly disagree



Base: All, 2016 (1,085)

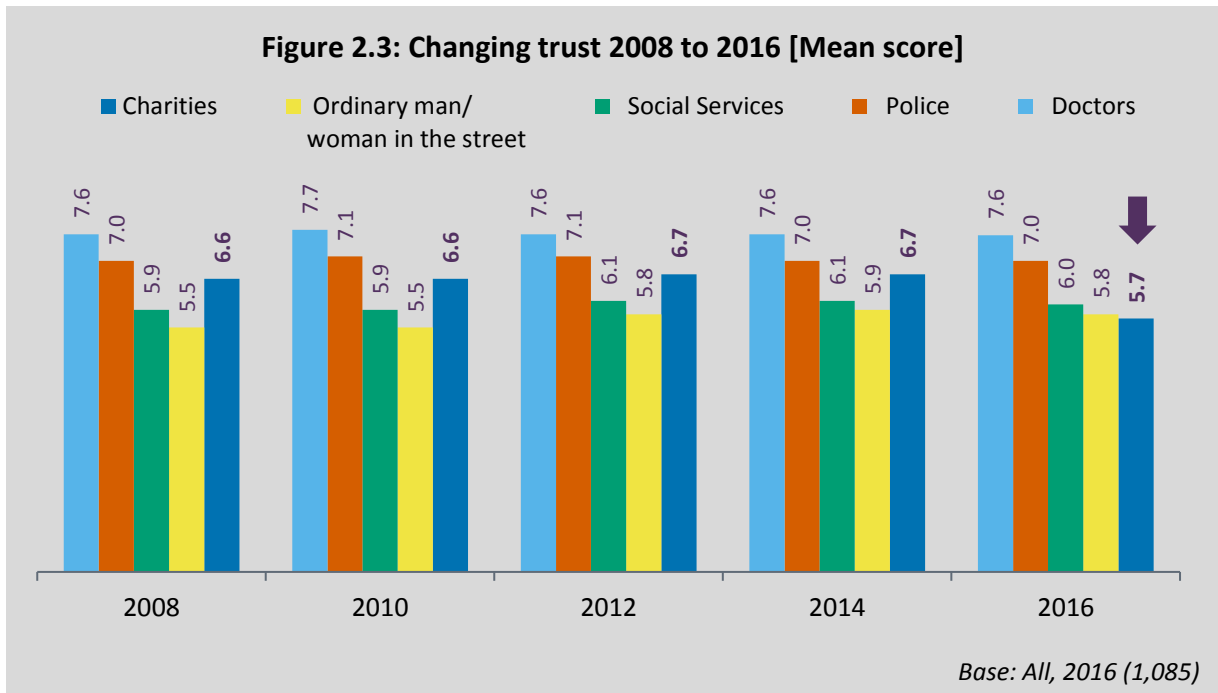
In **2014** 71% of the public agreed that charities were trustworthy and acted in the public interest, in **2016** that number is **61%**



If an individual, or their family, needed support from a public service, a fifth would be more confident if the service was provided by a charity (20%) compared with 7% who would be less confident. However, the majority of the public, around seven-in-ten, say that it would make no difference (71%), echoing the results shown in figure 2.5 (on p. 23), that around half of the public do not expect the type of provider to make a difference to the quality of service that they receive.

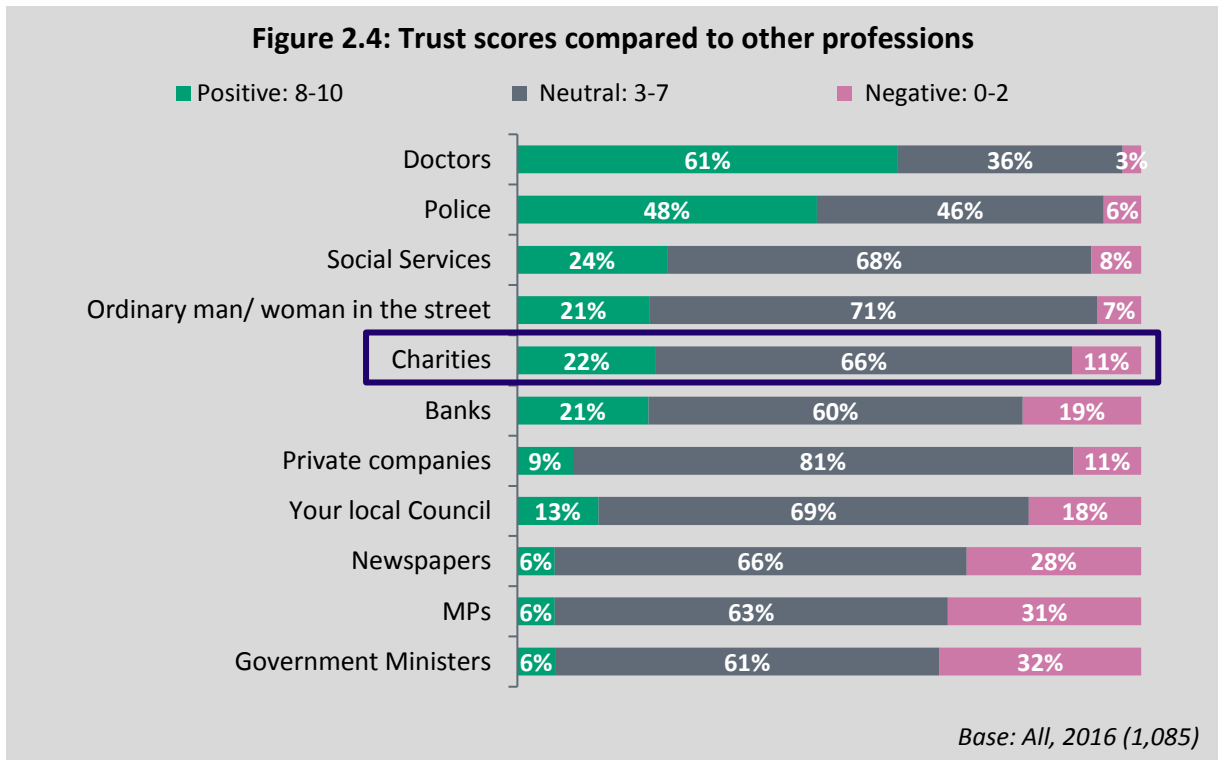
This implies that public trust and confidence are unlikely to be strengthened on the basis of any superior service quality provided by charities.

Comparing charities with other sectors



Falling trust has had some impact on how the public trust charities in comparison to other professions and types of organisation. Since 2014, average public trust and confidence in charities has deteriorated compared to other organisations or public bodies, and charities have fallen from third place (behind doctors and the police) to fifth place (behind doctors, the police, social services and the ordinary man/ women in the street).

To underline the bad year that charities have had, charities are the only group that sees a significant drop in this year's figures (see figure 2.3).



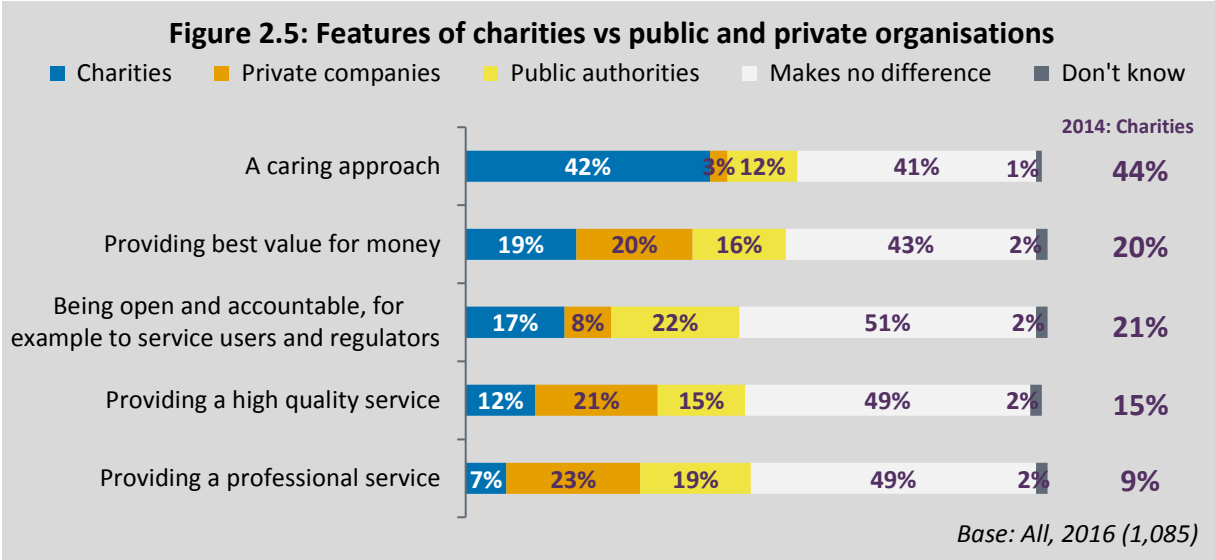
Doctors (61%), the police (48%) and the social services (24%) are the professions the public trust the most, based on the percentage of the public giving these professions a trust score of 8, 9, or 10, (see figures 2.3 and 2.4). Conversely, newspapers (28%), MPs (31%), and Government Ministers (32%) are the least trusted (with these professions seeing the highest proportion of the public giving a critical score of 0, 1, or 2).

Overall, charities are more trusted than banks, local councils, and private companies but less so than doctors, the police, social services, and the ordinary man/woman in the street. On this measure, 22% of the public trust charities highly, 66% are neutral and 11% distrust charities.

A further question compares in greater detail the perceived strengths of charities, private companies and public authorities (see figure 2.5). Charities come out top for a caring approach (42%), and rank second for providing best value for money (19%). These figures fall amongst those aged 65 or older (33% and 16% respectively).

Public authorities are thought most likely to be open and accountable (22%) while the score for charities is 17%, down from 21% in 2014. Charities fare worst for providing a professional service, scoring just 7%. Since 2014, however, these figures remain largely unchanged.

Private companies rank first for providing a professional service (23%), and providing a high quality service (21% versus 12% for charities). Both public authorities and private companies fare less well in terms of providing a caring approach (12% and 3% respectively).



For many respondents the type of service provider is not an important factor in their overall decision about which would be the best. Indeed, around half of the public think that the type of provider makes no difference across a range of indicators: being open and accountable (51%), providing a high quality service (49%), and providing a professional service (49%). However, the type of provider is expected to have a slightly greater impact on whether the service has a caring approach (41% say no difference) and offers best value for money (43%).

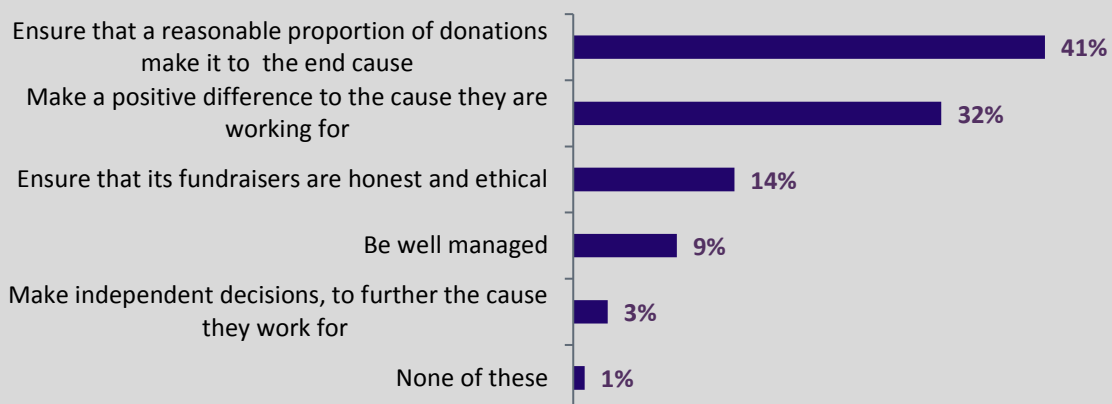
Drivers of public trust and confidence in charities

Key findings

- The importance of familiarity with a specific charity is so strong that three-fifths (61%) would not feel confident donating to a charity that they weren't previously familiar with
- Trust and confidence in charities is driven by the proportion of donations making it to the end cause, the positive impact charities make, but also by the efficient and ethical management of charities
- The sector will need to work harder to convince the public that charities are well-managed and that a reasonable proportion of donations makes it to the end cause

When the public are asked about the qualities that are most important to their trust and confidence in charities they show a clear preference for charities that satisfy their demand for accountability and impact: ensuring that a reasonable proportion of donations make it to the end cause (41%) is the most important quality, followed by making a positive difference to the cause the charity is working for (32%) (see figure 3.1). These significantly outstrip factors such as ensuring fundraisers are honest and ethical (14%), effective management (9%) and making independent decisions to further the cause they work for (3%).

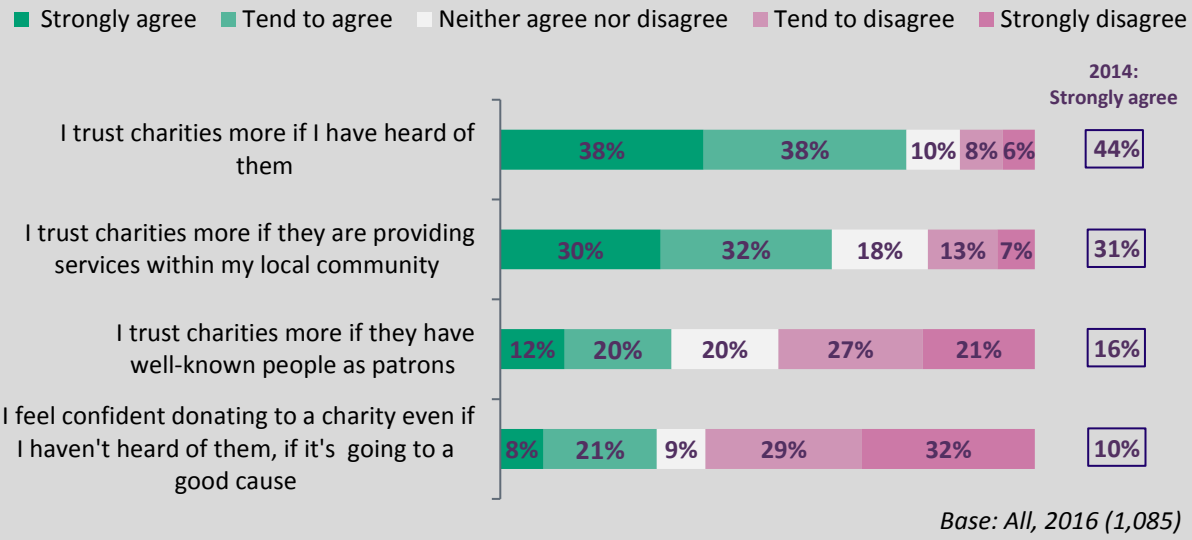
Figure 3.1: Which one, if any, of these qualities is most important to your trust and confidence in charities overall?



Base: All, 2016 (1,085)

Familiarity, and a connection with the local community, are also important when the public choose which charities to trust (see figure 3.2). Three-quarters of the public agree that they trust charities more if they have heard of them (76%), and three-in-five agree that they trust charities more if they are providing services within their local community (62%). The importance of familiarity with a specific charity is so strong that three-fifths (61%) would not feel confident donating to a charity that they haven't heard of previously, compared to a third who would (30%).

Figure 3.2: I'm now going to read you a list of statements and ask you how much you agree or disagree with each of them.



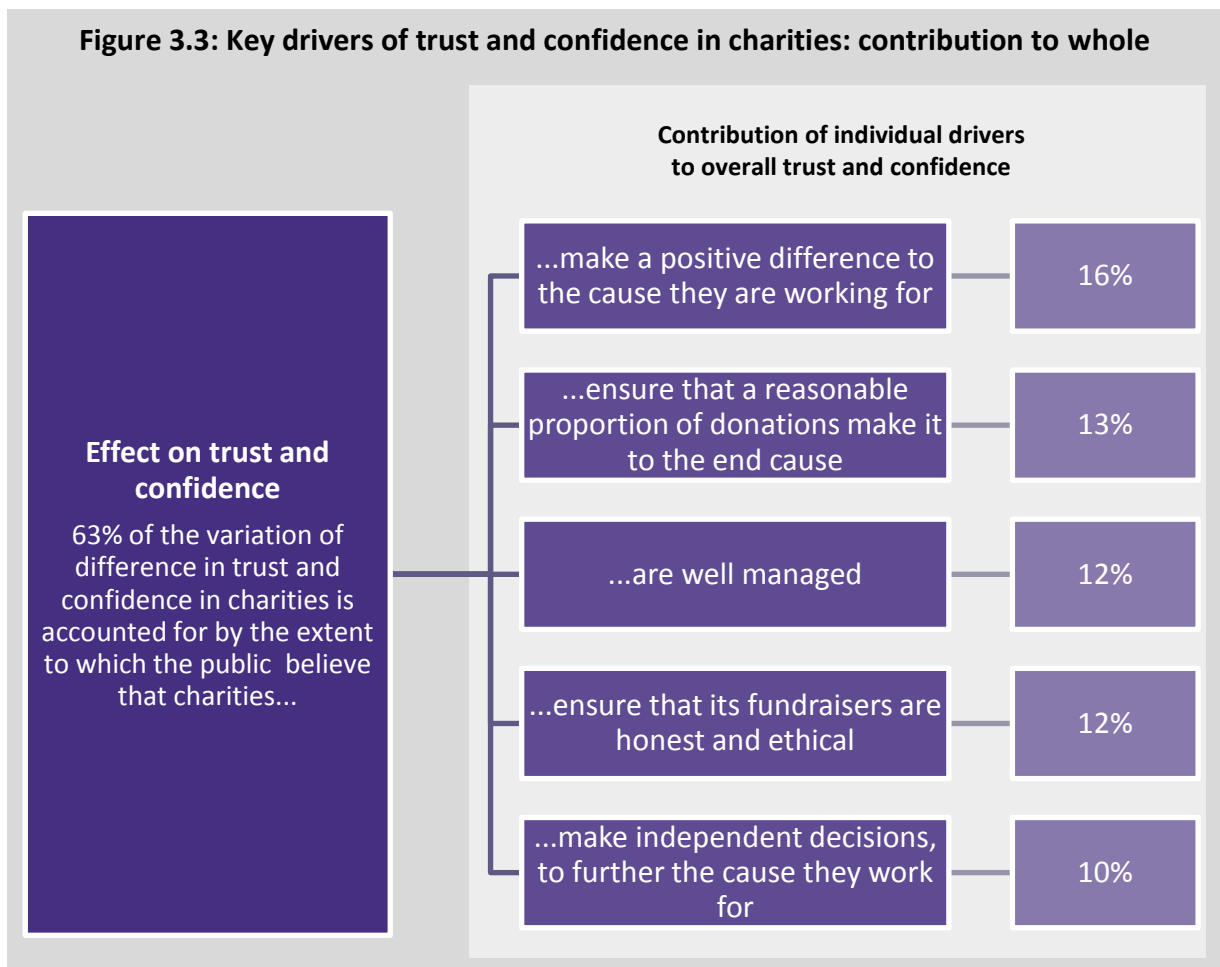
Key Drivers Analysis: overall trust and confidence in charities

Respondents (in any research) often find it hard to quantify the importance of a specific factor to their overall opinion. Therefore, in order to delve behind these stated influences and discover the factors most strongly correlated with public trust and confidence in charities, we used a technique called Correlated Components Regression (CCR) to determine, for a range of possible factors, their individual contribution to a basket of 'drivers' of trust and confidence.

The relative importance of each factor to the model is described in percentages: the higher the percentage, the more important it is in driving trust and confidence towards charities. We can then look at how the sector performs on each of these key individual drivers in order to better understand the primary causes of falling trust and confidence in charities.

Figure 3.3 shows the results of this analysis: 63% of the variation in trust and confidence in charities is caused by the factors in this model. The individual importance of each factor is listed next to each one and over the page figure 3.4 shows the average score that the public give the sector on each of these measures. The other 37% of the variation in trust and confidence is explained by other factors and measurement error.

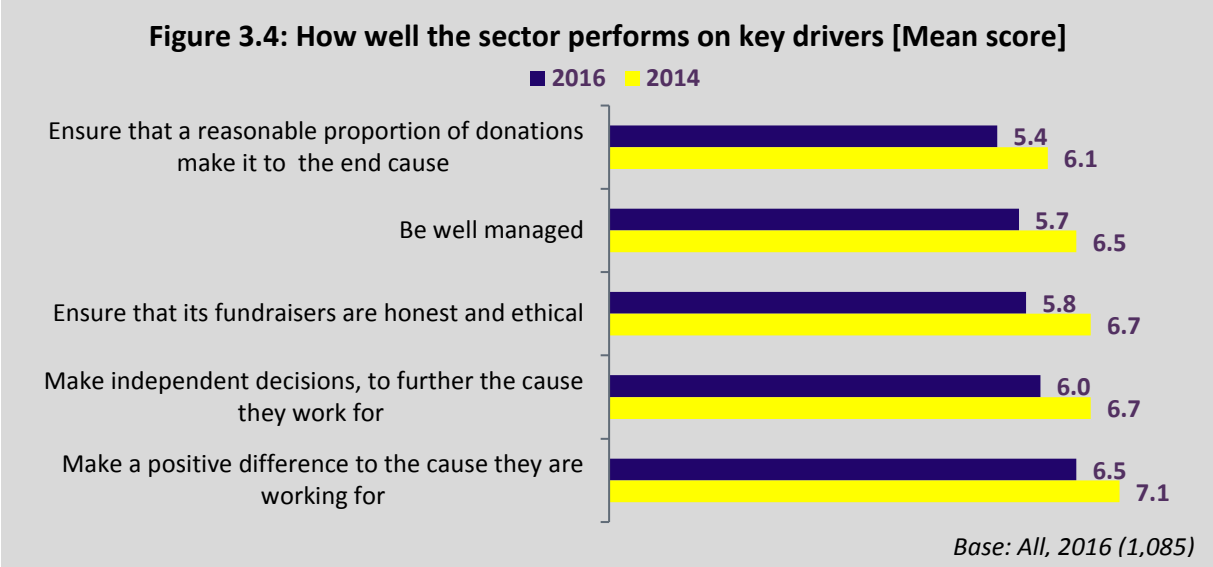
Five factors contribute to the variation in trust and confidence towards charities and these are very similar to the findings in 2014. Of these, the most important driver is the extent to which charities make a positive difference to the cause they are working for.



Comparing survey responses with our key driver analysis (figures 3.1 and 3.3) we see that respondents expect that donations reaching their intended target, and charities making a positive difference, will dominate their views of that charity. The reality is more complex and goes some way to explain the significant drop in the overall confidence and trust figure compared to previous years. The key driver analysis reveals that respondents actually weigh these factors far more evenly in their assessment than they expect to: all contribute between 10% and 16% of the overall score. This means that charities need to show that they perform well on all of these fronts in order to drive trust, because they all matter to the public.

The performance figures shown in figure 3.4 demonstrate that the sector’s performance is currently uneven across these key drivers. If trust and confidence scores are to improve, the sector will need to work hard to improve public belief that charities are well-managed and that a reasonable proportion of donations make it to the end cause.

- “ [One organisation] send me a booklet every month, saying what they were doing, what they'd achieved, what they were planning to do. That really helped me feel connected to them and I would take some pride in what was happening.” [London, positive]
- “ [You want to feel] that most of your donation is going towards doing something, rather than being wasted.” [London, positive]



A comparison between the sector’s performance on these driving measures in 2016 and 2014 helps to explain the overall drop in trust and confidence. Given the significant fall this year, we would expect to see a corresponding decline in the underlying drivers of trust and confidence. This is, indeed, what we see: the sector’s performance across all the key drivers has declined since 2014.

Trust and confidence in individual charities

Key findings

- Overall, the public are more likely to trust small charities (57%) over large ones (34%) and charities that operate in the UK only (61%) over those that operate internationally (31%). Younger age groups are less likely to distrust international charities
- The public favours charities for which they feel more confident in assessing the impact of their donation: local charities, or ones from which they or their families have benefited are therefore at an advantage
- When asked by a personal contact to donate, respondents vary their donation according to their relationship with that person: a closer relationship means a higher donation

Given the importance of familiarity to trust and confidence (discussed in the previous section), it is unsurprising that when asked, unprompted, to name the particular charities or the types of charities they trusted the most, the top three most trusted charities spontaneously named by respondents are some of the biggest in the sector: Cancer Research UK, Macmillan Cancer Support and the British Heart Foundation (see figure 4.1). And when asked why they trust these charities in particular, respondents' answers echo the findings from other sections of the poll and from the focus groups: familiarity and transparency.

Figure 4.1: Most trusted charities and types of charities [unprompted]
(greater size = greater number of mentions)

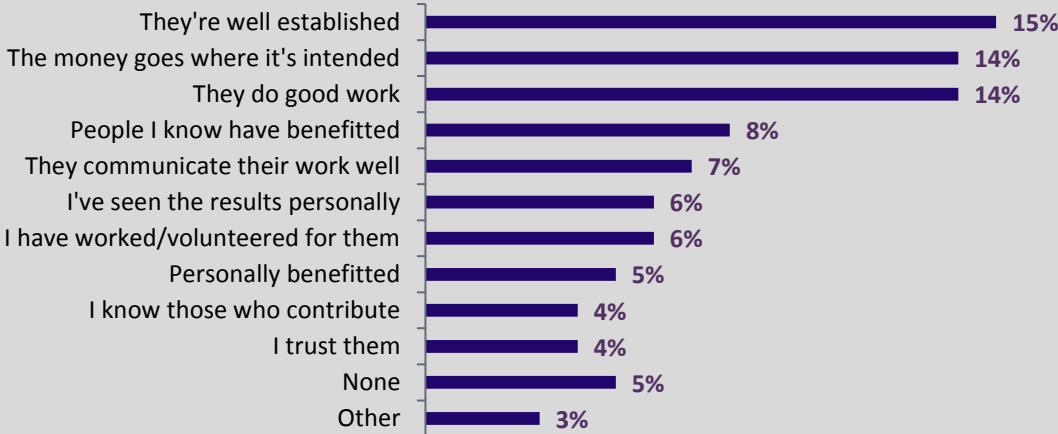


Base: All, 2016 (1,085)

The most popular reason for trusting one charity over another is that it is well-established (15%), and that donations go where they are intended to (14%) (see figure 4.2). Charities must not only do good work (14%) but be *seen* to make a positive contributions – either because respondents (6%), or their friends or family (8%), benefit from the services of the charity, or by effectively communicating their achievements (7%).

- “ If they have got to that level of prestige and recognition, they are obviously doing something right, no one has made a scandal out of them.” [survey response]
- “ [Cancer Research UK] have always been there and do well, they provide the best possible care and the money goes to research.” [survey response]
- “ [The British Heart Foundation] just seems that it’s been there for a very long time and there have been results from research.” [survey response]

Figure 4.2: Reasons to trust some more than others [Top 10]



Base: All trust some charities more than others, 2016 (618)

As for those charities that the public trusts the least: international aid charities in general (12% of responses), followed by Oxfam specifically (11%), animal charities (6%) and less established charities (5%) are those that are named, unprompted.

International aid charities are trusted less than other charities because the public believe that the money doesn't go to where it needs to and they can't see the outcome of donating

Figure 4.3: Least trusted charities and types of charities [unprompted] (greater size = greater number of mentions)



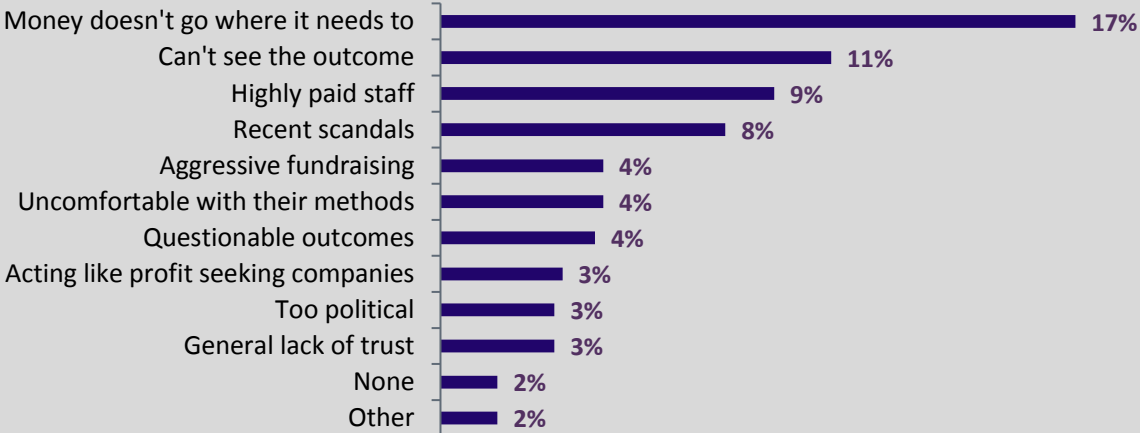
Base: All, 2016 (1,085)

to these charities. Instead they hear about highly paid staff and note that recent scandals and aggressive fundraising tactics are reasons that they trust international charities and, in particular, Oxfam less than other charities. It is worth noting, however, that some did name Oxfam as one of their most trusted charities. These findings make clear the vital importance of documenting impact in a way that is easily accessible to donors.

“ [International aid charities] The money is definitely siphoned off along the process, they keep the orphans in the scruffiest state for the promotion videos.”

“ [International aid charities] The problem still stays there and they are always after more money. They don't actually solve the problem.”

Figure 4.4: Reasons to trust some less than others [Top 10]



Base: All trust some charities less than others, 2016 (378)

In this sequence of questions, participants were able to name both broad types of charities (“children’s charities”, “international aid charities” etc) as well as specific charities.

Figure 4.5, below, summarises those individual charities spontaneously named for being most trusted. These charities work across a range of areas with a diverse set of charitable objects. Three of the top ten, including both the most and second most trusted charities, address cancer support and research.

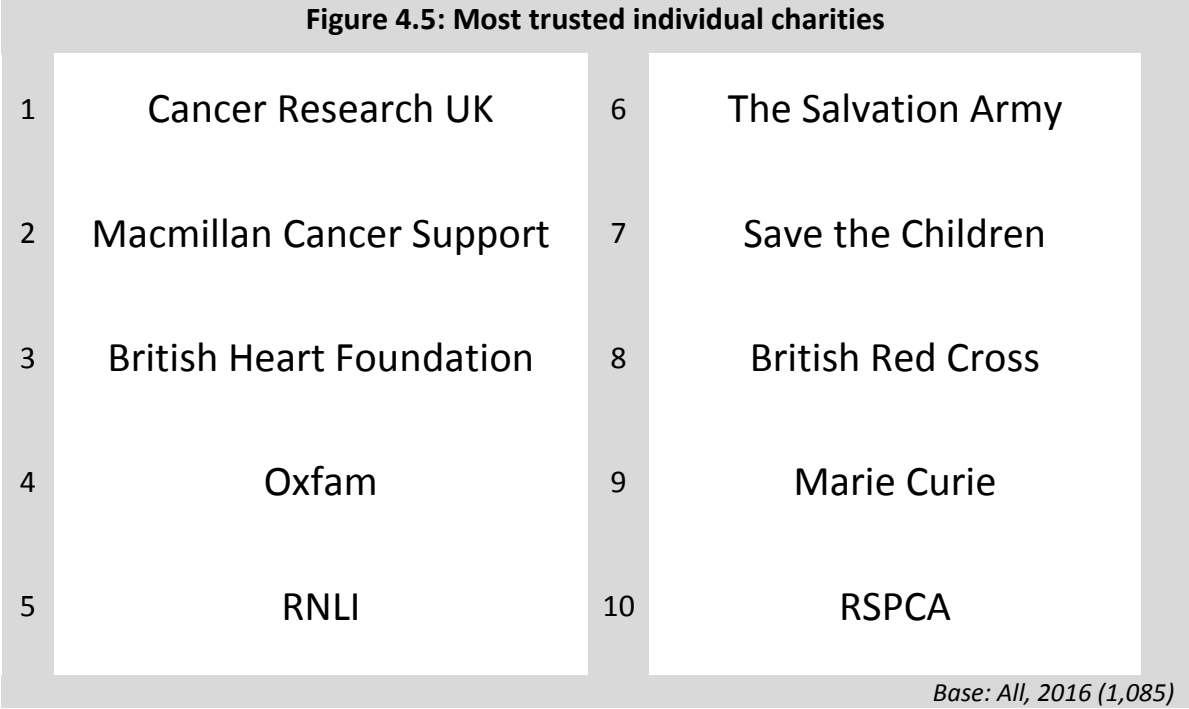
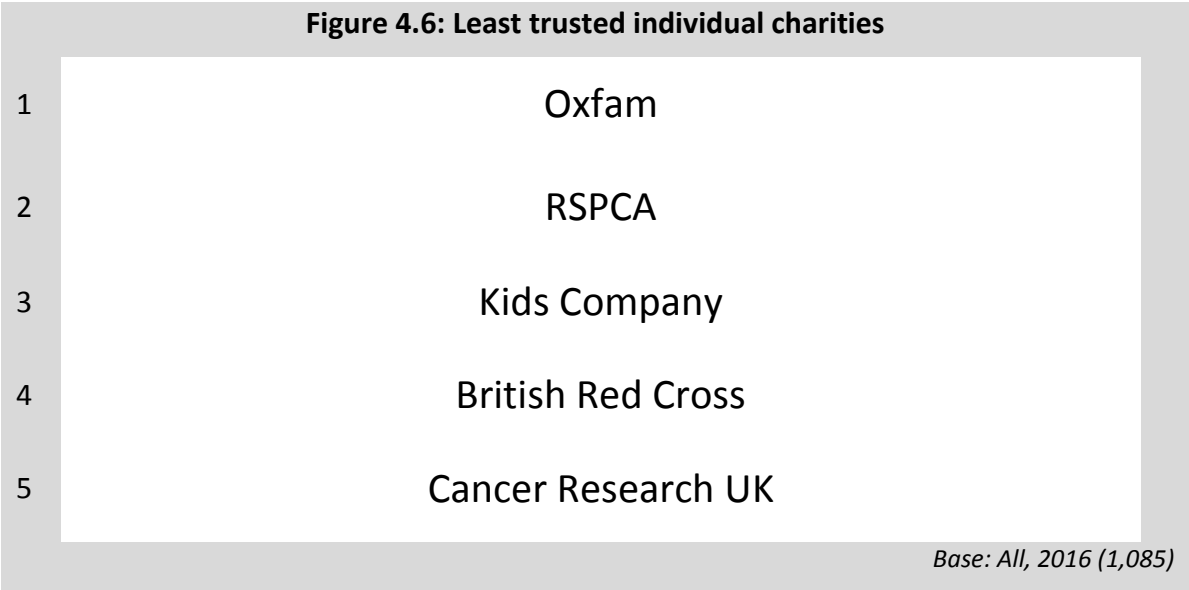
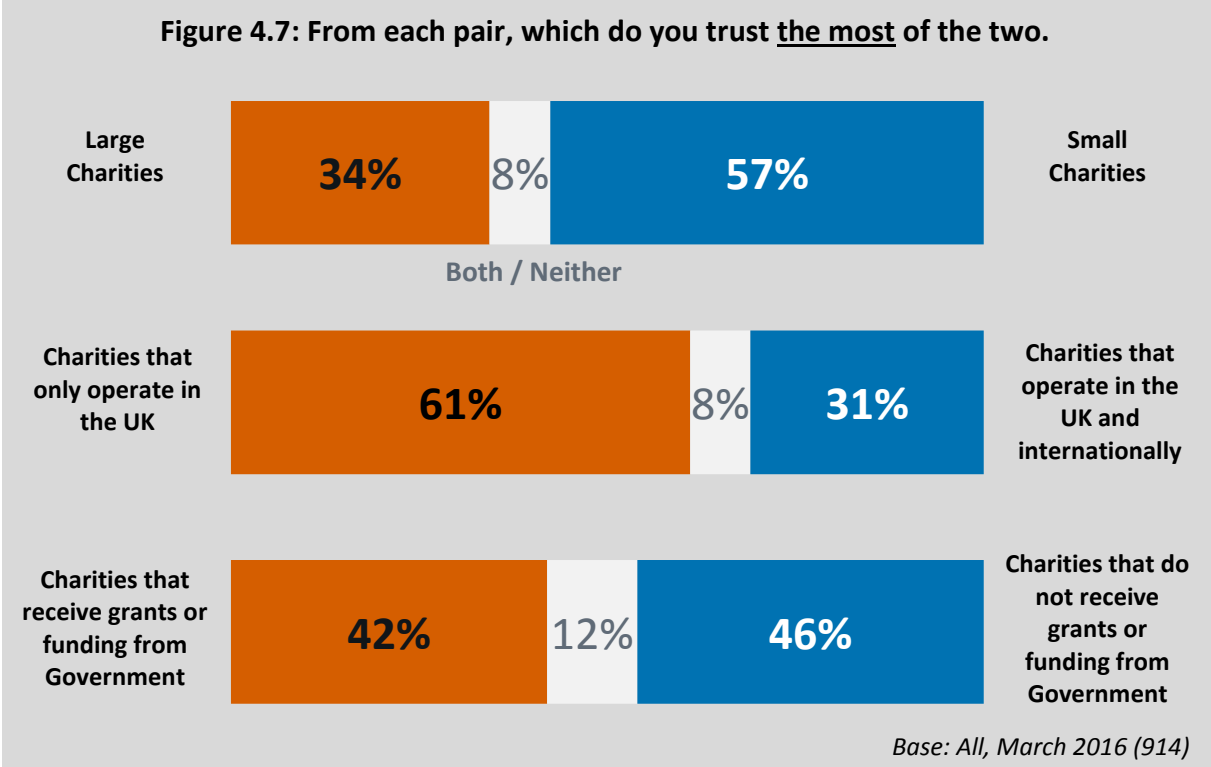


Figure 4.6 shows those individual charities noted by the public for being less trusted. While the public often felt able to name individual charities they trusted, they did not always name less trusted individual charities. For this reason, only the top five are shown below. Four of the five charities, reflecting a lack of consensus in public opinion, appear in both the most and least trusted lists.



In the second national telephone poll, conducted in March, we took the opportunity to investigate further the categories of charity that the public trust the most. For this purpose, we asked respondents to choose between three pairs of characteristics, asking them which they trusted the most of the two (see figure 4.7). Overall, the public are more likely to trust small charities (57%) over large ones (34%) and charities that operate in the UK only (61%) over those that operate internationally (31%). However, they are more closely divided on the impact of government funding on trustworthiness.



The preference shown in the polling for small charities over large was explained in the focus groups by reference back to accountability and transparency:

- “ Transparency is absolutely vital. It's much easier to support smaller, local charities, because you feel they're more transparent.” [London, positive]
- “ Every charity is open to that sort of corruption, the bigger it gets.” [London, positive]
- “ If I've got the opportunity to do so, I'd give a small amount of money to a small charity because it has a bigger impact or it can have a bigger impact on them.” [Newcastle, mixed]

The headline figures for the other two choices we posed disguise some significant disparities across age groups and social grades. 18-24 year olds are much more likely than other age groups to trust charities that operate internationally (51% vs 31% across all ages). Conversely, those aged 65 and over are more likely to trust charities that only operate in the

UK (72%) compared to a fifth (20%) who trust charities that operate in the UK and internationally more.

Those classified as AB social grade are slightly more likely than the average to say they trust charities that operate internationally more than they do those that only operate in the UK (36% of ABs vs 31% amongst the public as a whole). While those in social grades C2 (70%) and DE (69%) are more likely than the average to trust charities that only operate in the UK (UK average: 61%).

18-24 year olds are also more likely than the average to say they trust charities that receive grants or funding from Government (54% v 42% respectively). This contrasts with the over-65s, who are more likely to trust charities that do not receive grants or funding from Government (57% v 46% average).

Our focus group respondents identified a number of additional factors that both increased their trust in particular charities and their likelihood to donate. Many respondents agreed that they were more likely to donate if they had heard of the charity but they also responded to charities with which they had some kind of emotional connection, or donated to support friends or family members:

- “ Cancer charities I'll give to because of personal issues. My father died of prostate cancer, my sister had cancer.” [Cardiff, mixed]
- “ I would probably do it, if it was a friend, to support the friend, but there are other charities I'm more passionate about. You give to the ones you're more passionate about.” [Cardiff, mixed]
- “ If it's something that's closer to home you're more empathetic, and you're more likely to do something, rather than just say that's really sad, and move on. Years ago, a friend's mother died of cancer, and she set up one of those online fundraising drives for Cancer Research, and I gave something like £40.” [London, positive]

In the case of supporting friends and families, familiarity with a charity matters less than the closeness of the personal contact. Indeed, participants say that the amount they donate to charities that friends bring to their attention depends primarily on how well they know the individual.

- “ It depends on the donation, it depends on how close you are. If you're very close to them, you'd give them a good donation. Otherwise, if it's just somebody in the office, you'll probably put in £5 or £10, just to support them.” [London, positive]
- “ If it's your friends or family, you're happy to donate no matter what the cause is. But if it's putting money in a bin or a bucket, then it has to be personal to you. I'll probably donate to any cause, if somebody I know is asking me.” [Cardiff, mixed]

Involvement with charities

Key findings

- The public underestimate their involvement with, and benefit from, charities
- One-in-five say they or their close family or friends have received money, support or help from a charity, and around a third benefited from the services of a charity
- Given a list of charitable activities, from art galleries, to youth clubs, from helplines, to hospices, and the number saying they, or close friends and family, have benefitted increases to 94%
- As closeness to charities increases, through being a beneficiary or a volunteer, trust and confidence in the sector improves

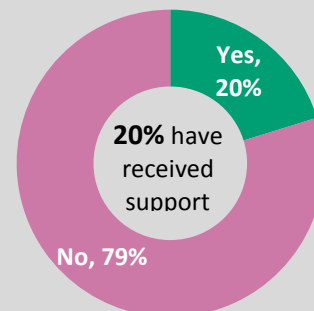
When asked whether they, or any of their close family or friends, have ever received money, support or help from a charity, only a fifth say they have (20%), whereas 79% say they have never received any support. However, when probed, many more of the public can provide examples when they, or their friends and family, have benefited, either directly or indirectly, from a charity.

Unprompted, a third of the public (32%) say they, or their friends or family, have benefited from or used the services of a charity (see figures 5.1 and 5.2). Those that have benefited from charities or received their support (or who know people that have) have higher levels of trust and confidence in the sector, as do staff and volunteers for charities.

Once they were given a list of examples, respondents recall a long list of interactions with charitable organisations. Only 6% say they have never done anything on the list (see figure 5.3). Most commonly, respondents have visited a National Trust property, nearly three-quarters of the public (72%) have done so.

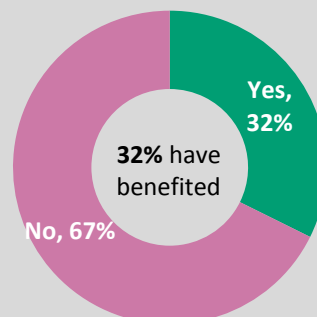
Two-thirds (63%) have visited an art gallery, and 57% say they have attended a youth club provided by a charity – for example Girl Guides, Scouts or Girls or Boys Brigade. In addition,

Figure 5.1: Have you, or any of your close family or friends, ever received money, support or help from a charity?



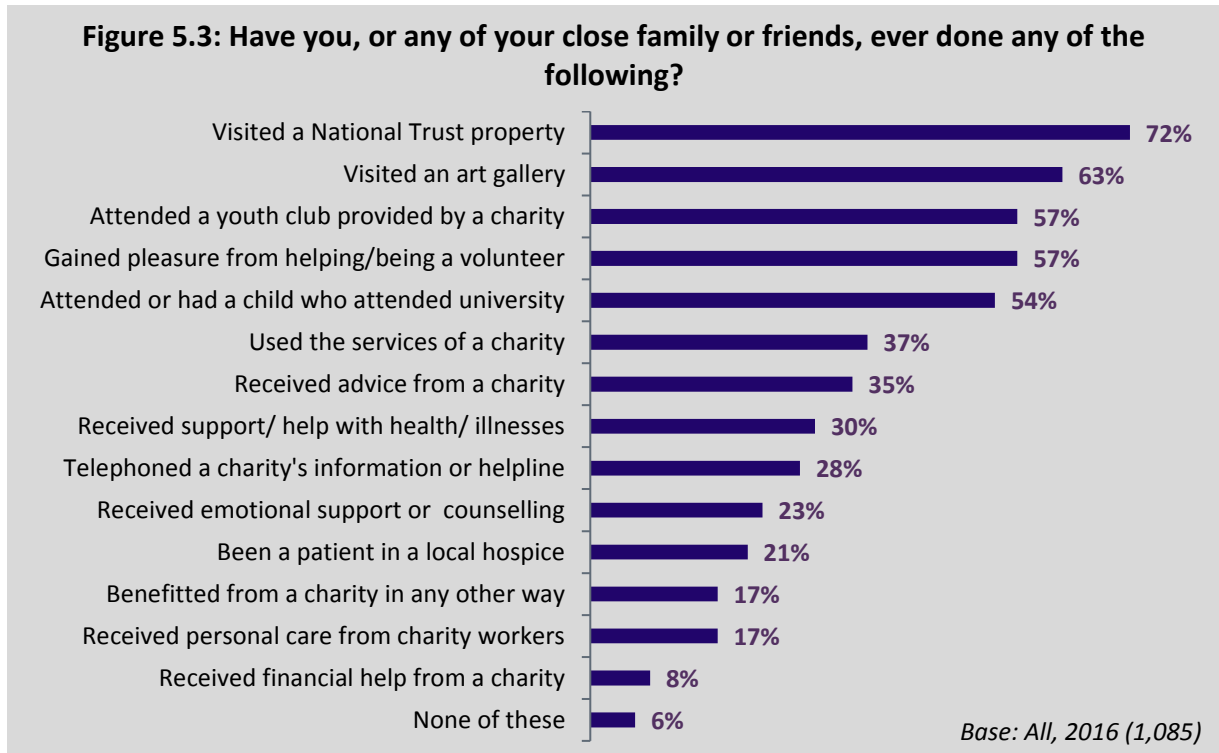
Base: All, 2016 (1,085)

Figure 5.2: Have you, or any of your close family or friends, ever benefited from or used the services of a charity?



Base: All, 2016 (1,085)

over half say they gained pleasure from helping or being a volunteer (57%), and 35% say they have received advice from a charity. A third say they have received support, help with health, illnesses, medical treatment (30%), and a similar proportion say they have telephoned a charity's information or helpline (28%).

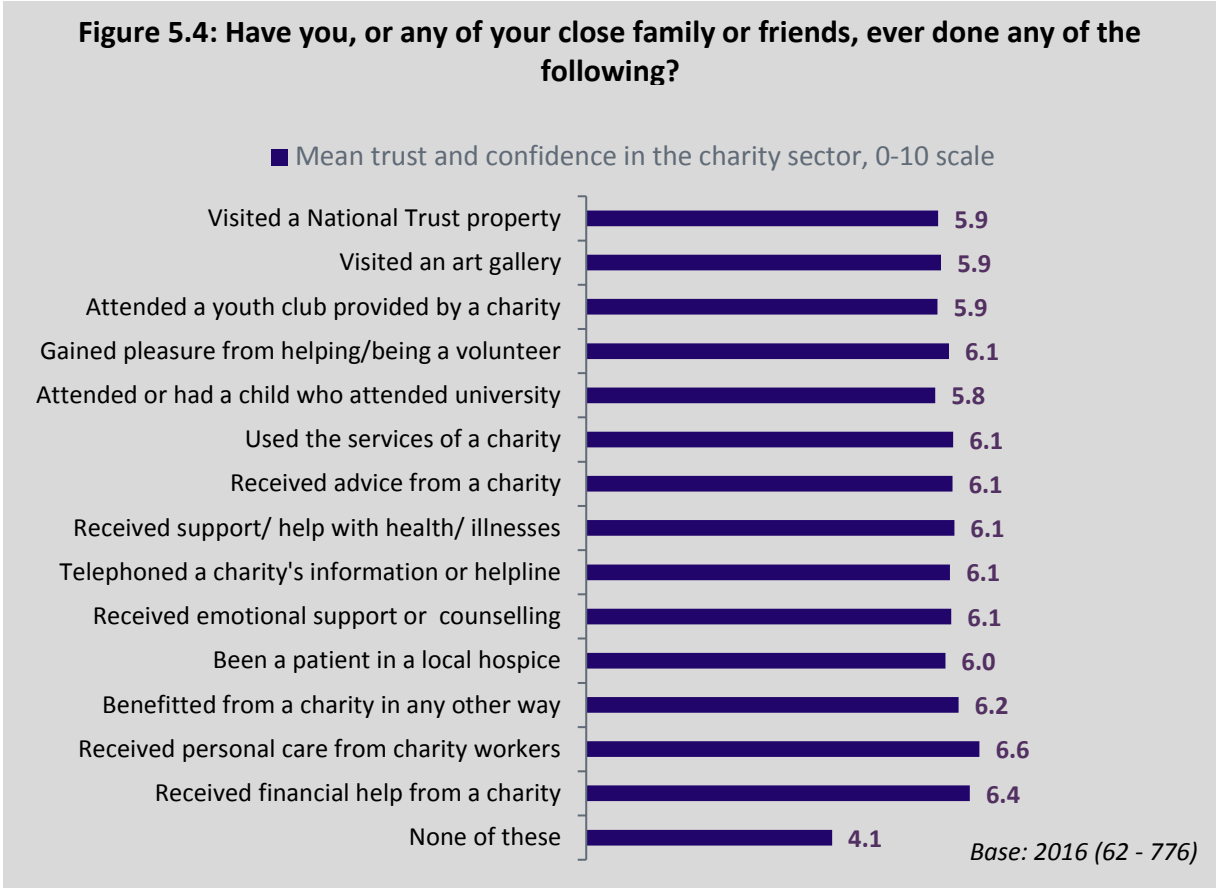


This lack of awareness of the diverse role of charities followed by realisation of their pervasiveness throughout society, was reflected in the focus groups too. Many respondents did not realise that they either attend, or use the services of, a charitable organisation. For example, once prompted participants in the focus groups mentioned charity shops, churches, schools, universities and hospitals as organisations that they use or have used in the past – despite having previously said they had little or no contact with charities.

- “ The Lottery, is that a charity?” [Cardiff, mixed]
- “ I suppose I have been to charity shops, so that’s a charity, isn’t it?” [Newcastle, mixed]
- “ We help with church things. I suppose that's part of the same warp and weft of it.” [London, positive]

The lack of public awareness of the myriad roles that charities play is significant because respondents who know that they have contact with charities, either as a beneficiary or benefactor, have higher levels of trust and confidence in the sector.

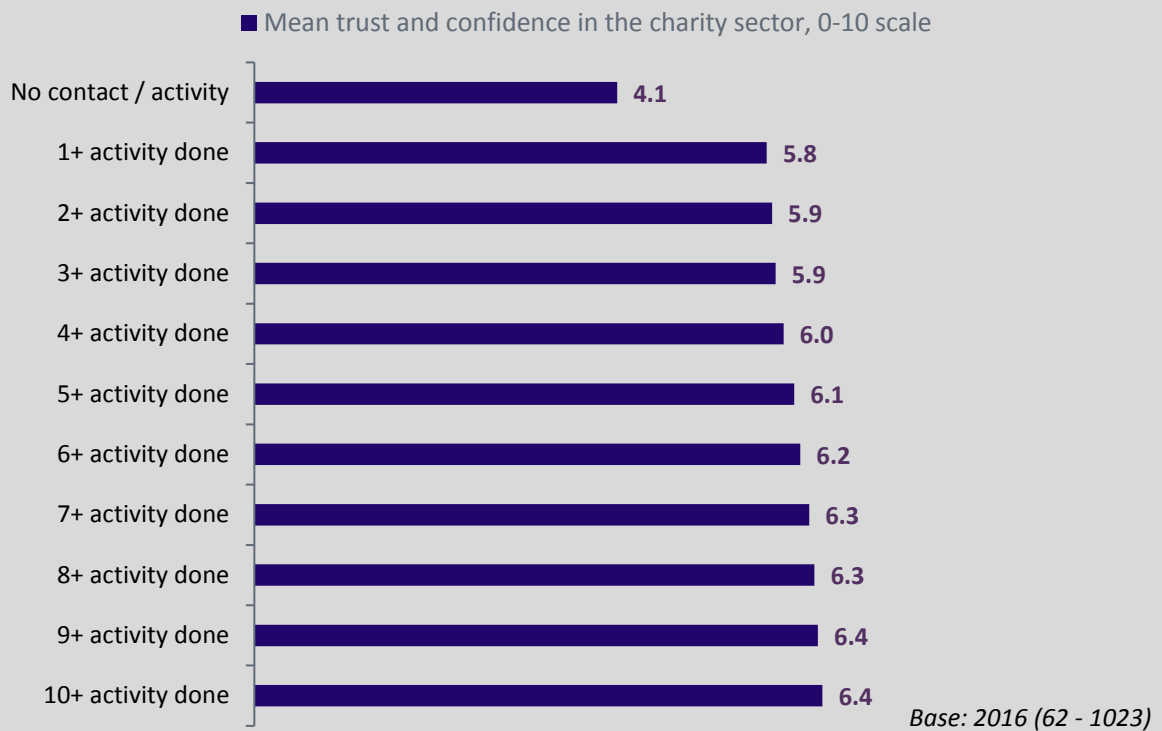
By combining data on the public’s overall trust and confidence in the charity sector with that on their contact with, and use of, charities, we can see the impact closer contact and greater knowledge has. Figure 5.4 shows the trust and confidence in the charity sector amongst those who have personally, or have close friends and family, who have done each of the activities offered.



Against a national average of 5.7, the whole range of forms of contact with, and benefitting from, charities is linked with more positive impressions of the charity sector. Those who have, or known a close contact, who have received personal care give a score of 6.6 on average. For financial help, the figure is 6.4. Trust and confidence in charities is an above average 6.1 among those who have, or know close family or friends who have, benefitted from each of the following; being a volunteer, used the services of charity, received advice from a charity, received support for an illness, telephoned a helpline, and received counselling. Closeness to charities, clearly, has a positive impact on trust and confidence.

Naturally, there is considerable overlap in the figures above, with some of the 72% visiting National Trust properties amongst the 63% visiting art galleries. Figure 5.5 investigates these overlaps, looking at the cumulative impact on trust and confidence as the number of points of use and contact with charities increases, from none, to one or more, two or more and so on.

Figure 5.5: Have you, or any of your close family or friends, ever done any of the following?



Again, there is a clear progression in trust and confidence as engagement with charities grows. The most significant improvement comes from those who say they, their friends, and their family have never had contact (a small minority of just 6% of the public) to those who have had at least one form of contact. Trust and confidence jumps from 4.1 to 5.8. Beyond this, the increases are modest but steady, moving from 5.8 amongst those with one or more forms of contact and engagement, to 6.4 with those with 10+ activities and forms of contact.

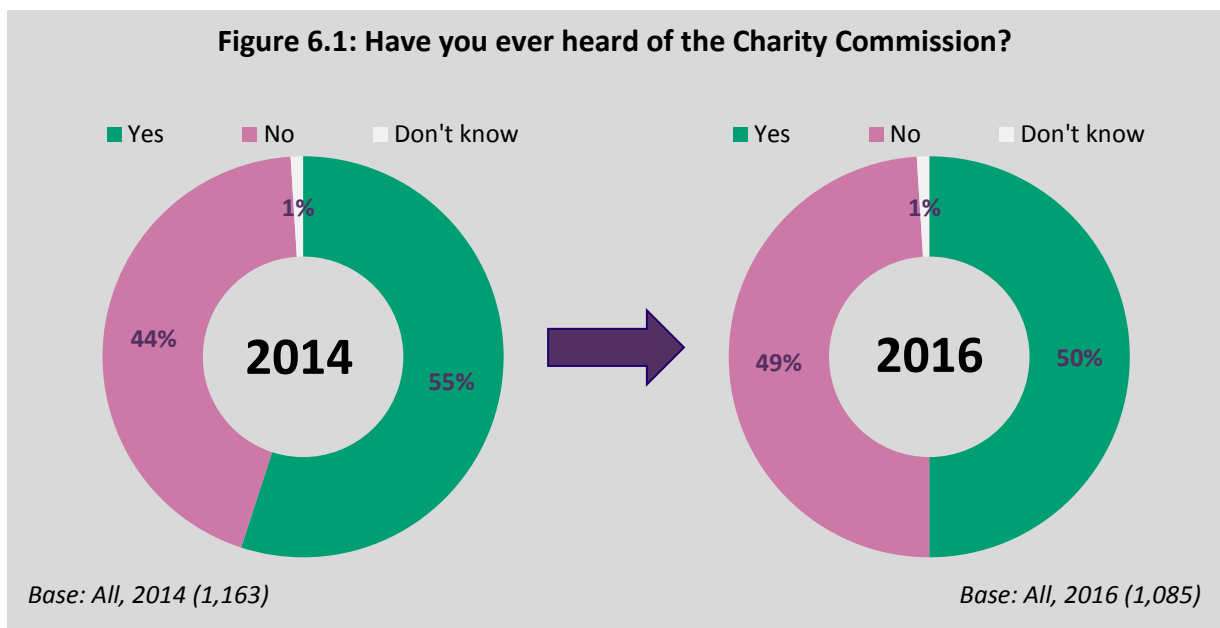
Charity Commission: Public awareness and understanding

Key findings

- 88% regard the Charity Commission's role as important, with 57% describing it as "essential", a proportion that has steadily climbed since 2005
- Three-in-five (60%) regard charities as effectively regulated, compared to a third (36%) who disagree
- 50% are aware of the Charity Commission, a drop from 55% in 2014

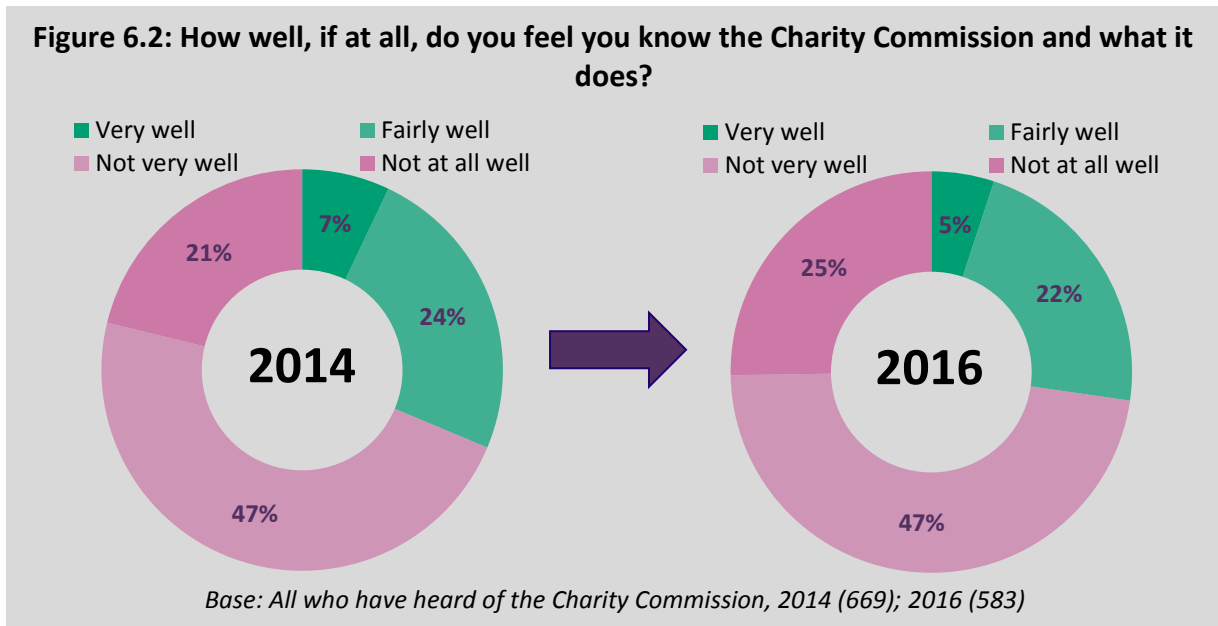
Half of the public have heard of the Charity Commission (50%), down from 55% in 2014 (see figure 6.1, below). 27% of the public say they know the Commission fairly or very well. Men are more likely than women to say that they have heard of the Charity Commission (54% and 46% respectively).

There are very significant differences by age too, 18-24 year olds are the least likely age group to have heard of the Charity Commission (23%), while 55-64 year olds are the most likely age group to have heard of the Charity Commission (65%).

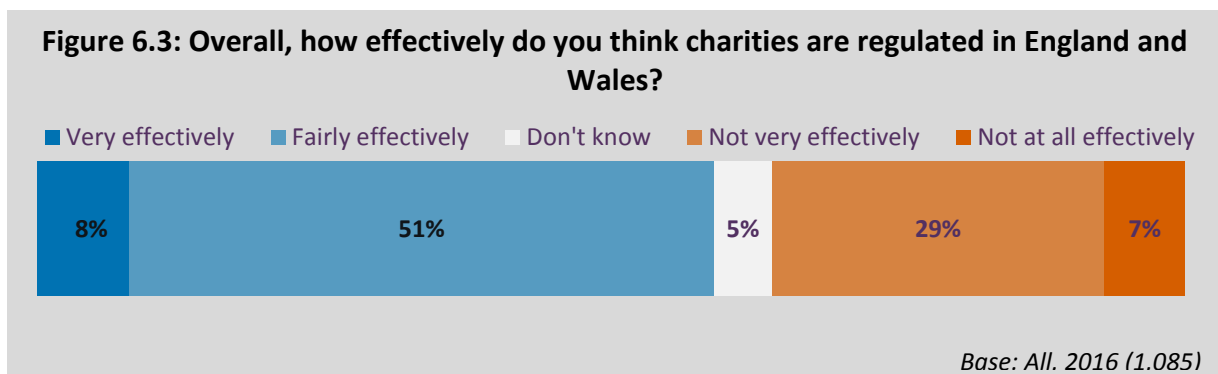


However, even amongst those who have heard of the Charity Commission, there is a lack of understanding of what it does – 73% say they do not feel they know the Charity Commission and what it does (this rises to 81% of 18-24 year olds), compared to a quarter who say they know it very or fairly well (27%) (see figure 6.2).

Amongst those who have heard of the Charity Commission, average trust and confidence in the Charity Commission is 5.5 out of 10 (where 0 means ‘I don’t trust them at all’ and 10 means ‘I trust them completely’), with 17% giving a high score of either 8, 9 or 10. This has declined slightly, from an average score of 6.0 in our detailed report last year on the subject of [Trust and Confidence in the Charity Commission](#).

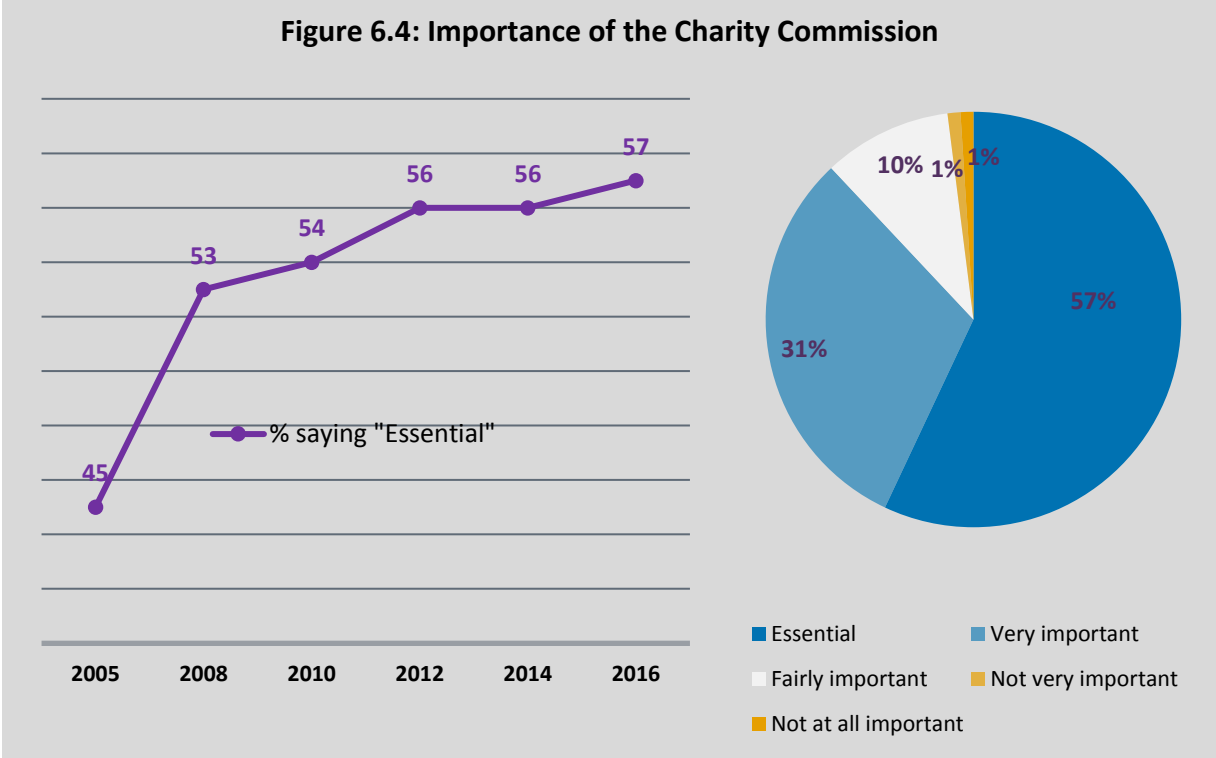


Regulation of charities



Although they are not very aware of how it is achieved, 60% of the public believe that charities are regulated effectively (rising to 78% of 18-24 year olds), compared to 36% who think that charities are not effectively regulated. Furthermore, half agree that charities are regulated to ensure that they are working for the public benefit (51%, see figure 6.5 on page 43). When the role of the Charity Commission is explained, most say that this role is important (88%), and 57% say the role is essential – a metric that has risen consistently from

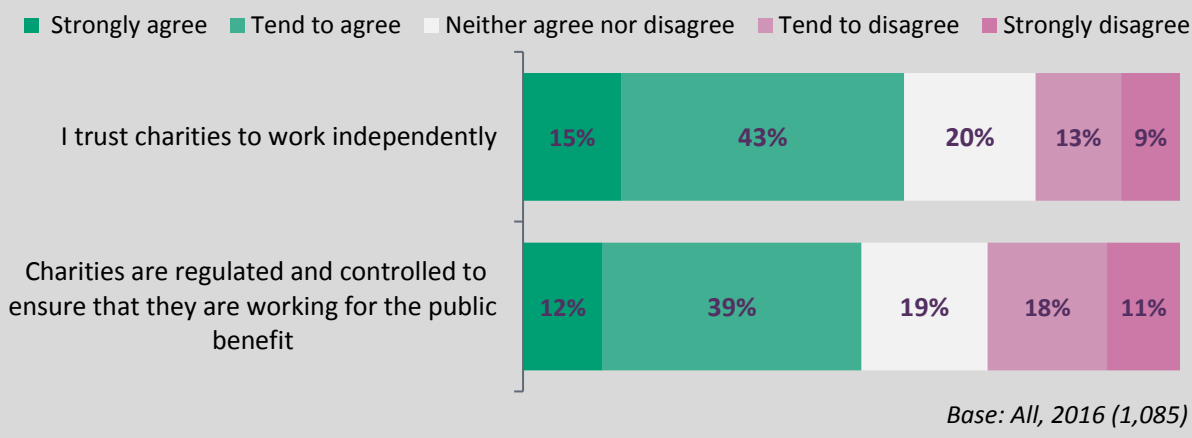
45% in 2005. Only 2% say they regard the role of the Commission as not important. More than half (51%) of the public also agree that charities are regulated and controlled to ensure that they are working for the public benefit, with 58% trusting them to work independently. Whilst few of the public know much about the Charity Commission, focus group participants were unanimous in their belief that a regulator for the sector is vital and welcomed more information about the Charity Commission.



What more would these, more doubtful respondents like to see from the Commission? Despite half of the public (51%) agreeing that charities are regulated and controlled to ensure that they are working for the public benefit, there are still 30% who disagree with this and 22% that don't trust charities to work independently. There was some enthusiasm for the Charity Commission taking a more proactive approach to regulation, with every group of participants suggesting that more should be done to detect problems before they reach critical levels. However, most later agreed that the number of charities made this approach impractical and expensive.

- “ You're only treating the symptoms, if you do that, you're not actually monitoring the problems whilst they're happening. You're only finding out the things that become public, as opposed to the things that may go on.” [Cardiff, mixed]
- “ You don't hear too many stories about the Commission flexing its muscles. You don't hear much about the Charity Commission.” [London, positive]

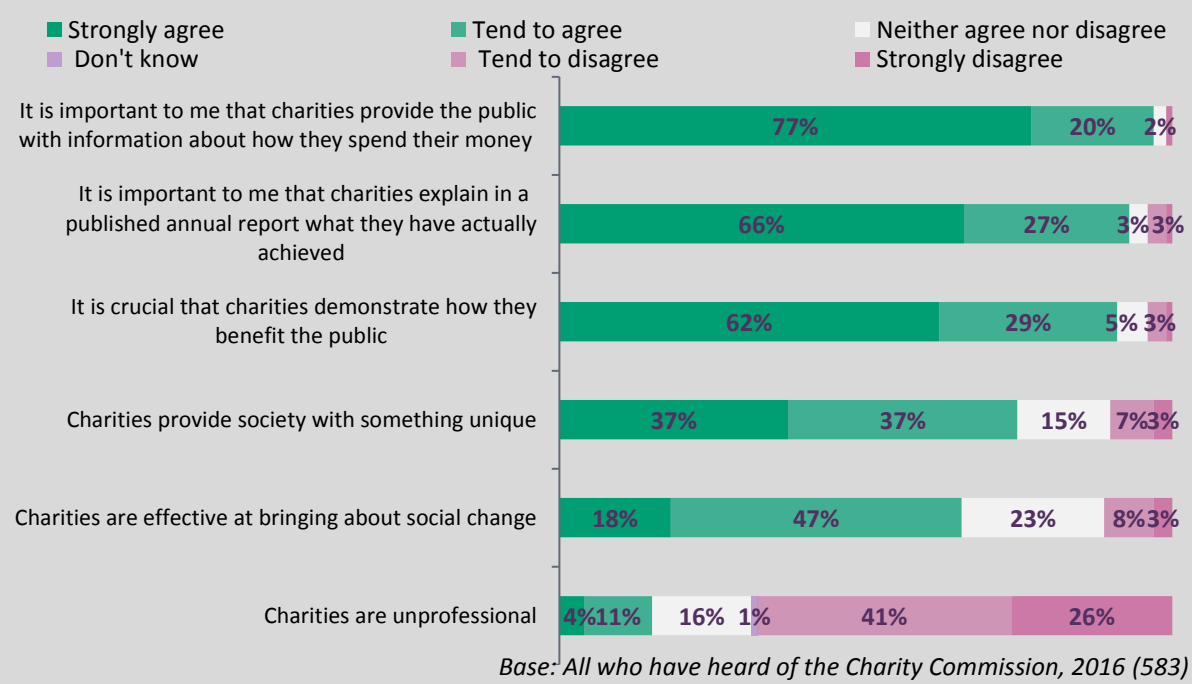
Figure 6.5: Independence and public benefit



Amongst those who are aware of the Charity Commission, charities providing the public with information about how they spend their money is considered the most important form of accountability of a charity (97%). The second most important is for charities to explain in a published report what they have actually achieved (93%). In addition, those who have heard of the Charity Commission, agree that it is crucial that charities demonstrate how they benefit the public (91%).

Three quarters agree that charities provide society with something unique (74%). The respondents who are aware of the Charity Commission are much less likely to agree that charities are unprofessional (15% agree compared to 67% who disagree). This opinion was reflected in the focus groups, where respondents who had heard of the Charity

Figure 6.6: Thinking about charities in general, to what extent do you agree or disagree with each of the following statements?



Commission were often either involved with a charity or more aware of the regulation with which charities must comply.

Charity Commission's website

7% of the public say they have used the Charity Commission website in the past year. In focus groups, those who have browsed the Charity Commission's website found it interesting but thought it only gave basic information.

- “ The Charity Commission website is first port of call, but it doesn't give a huge amount of information.” [London, positive]
- “ You can get the basic accounts, and you can get the basic statement of objectives, or whatever the thing is. There's really not much more. I see it as very much a question of keeping an audit of those charities, rather than, say, are these all well-run? Is their objective good? That's a subjective judgment.” [London, positive]
- “ The Charity Commission website is there for plain, hard facts. From that, you can get the accounts. The Commission is there to confirm that the charity is filling its returns in, and meeting its charitable objectives, that's really as far as it goes.” [London, positive]

Participants suggested it would be helpful for the Charity Commission's website to host a greater depth of information from each charity. For example, some wanted to see charity profiles in order to give some measure of the progress each organisation had made towards its end goals.

- “ If you could even see a timeline, or some of the progress that's been made.” [London, positive]
- “ Maybe if there had ever been some sort of investigation on them, and what the result of that was.” [London, positive]
- “ The Charity Commission's website, it will name every single trustee of every single charity, and what you find out is what other charities they're a trustee of. What you don't find out is what qualifications they have for being a trustee. I do think that's a problem because it doesn't give you a lot of information on the people.” [London, positive]

Appendix 1: Methodology

Quantitative Methodology

Populus conducted a representative survey of 1,085 adults aged 18 and over in England and Wales, by telephone, between 26 January and 8 February 2016.

That fieldwork was conducted during a period of negative press coverage, for example, Age UK's controversial tariff for pensioners, as well as the Kids Company controversy. Therefore, to ensure that the significant drop in the trust and confidence score shown in the first survey was indicative of a longer-term change in public attitudes, rather than a temporary fluctuation, Populus conducted a second, shorter telephone survey among 914 adults aged 18 and over in England and Wales, between 11 and 13 March 2016.

Nationally representative quotas for both surveys were set on gender, age and region and each was then weighted on gender, age, region, social grade, work status, tenure, foreign holidays taken in the past three years & car ownership.

On both surveys, Populus also used a 50:50 mix of mobile and landline respondents in order to ensure the most representative sample of a population where 15% live in a mobile-only household and 93% of adults own or use a mobile phone ([Ofcom figures](#)).

Where quoted percentages do not add to 100% this can be due to a variety of factors; the exclusion of 'Don't know' or 'Other' responses, respondents able to select multiple answers, or rounding of decimal points.

Rounding can also mean differences in total figures (e.g. net 8-10 scores calculated from individuals scoring 8, 9 or 10) between the combined figures and the component scores.

This report refers to social grade, sometimes known as Socio-Economic Grade or SEG. This is a standard method in opinion research to classify demographically the country.

The grading is based on the occupation of the head of household:

A	Higher managerial, administrative or professionals
B	Intermediate managerial, administrative or professional
C1	Supervisory or clerical and junior managerial, administrative or professional
C2	Skilled manual workers
D	Semi-skilled and unskilled manual workers
E	Casual workers, state pensioners, and those reliant on state benefits

Key Drivers Analysis

In this report, Populus uses an analytical method known as Key Drivers Analysis to draw out the reasons behind public views about the charitable sector. Key Drivers Analysis identifies the factors most strongly linked with an overall opinion and shows their individual contribution to a basket of 'drivers' of an attitude or behaviour.

This analysis is achieved using a technique called Correlated Components Regression (CCR). Using CCR we can isolate the individual issues and attitudes that are the most important drivers of trust and confidence towards charities. This helps to identify exactly how much impact a particular factor has on a person's view. By isolating the impact of issues that are often lumped together, this research identifies the true drivers of trust and confidence towards charities.

The relative importance of each factor to the model is described in percentages, the higher the percentage, the more important it is in driving trust and confidence towards charities. We then look at how the sector performs on each of these key individual drivers in order to better understand the primary causes of a drop in trust and confidence charities.

Qualitative Methodology

In addition to the quantitative surveys, Populus also conducted four focus groups to investigate further public trust and confidence in charities in January 2016.

Each group discussion consisted of around ten participants, lasted around 90 minutes, and followed an open-ended discussion guide agreed with the Charity Commission.

Illustrative, verbatim, quotes are included in this report.

Quotas were set for each group based on responses to particular survey questions. The make-up of each of the four focus groups is shown below:

Location	Group Quotas
London	Those who registered more positive scores towards the charity sector (allocating the sector a score of 7-10)
London	Those who registered more negative scores towards the charity sector (allocating the sector a score of 0-6)
Cardiff	General population – mix of sentiments about charities
Newcastle	General population – mix of sentiments about charities

APPENDIX 2: FULL DATA TABLES FOR SURVEY 26 JANUARY – 8 FEBRUARY 2016

APPENDIX 3: FULL DATA TABLES FOR SURVEY 11 – 13 MARCH 2016