

# Trust in charities post-Covid

And inspiring trust in the years ahead

MARCH 2021

**.YONDER**



**CHARITY COMMISSION**  
FOR ENGLAND AND WALES

## Summary

No one can say quite what the longer term impact of the coronavirus pandemic will be, but we do know that the past 18 months have concentrated public attention on the ways in which national institutions and prominent organisations have responded in a time of crisis.

Where the national spotlight has fallen on charity, it has been on the positive difference it can make, for example on charities' role supporting those living in food poverty, on the importance of medical research, or on the public generosity inspired by the late Captain Tom Moore.

Given this context, it is perhaps not surprising that we have seen modest but significant improvements in public attitudes towards charities over the past twelve months. As high profile scandals involving charities recede in public memory, trust and confidence in charities continues gradually to improve. After almost a decade of decline there has also been a slight increase in the proportion of people who consider charities as important to society. These are steps in the right direction.

But there is no room for complacency. While the context in which charities have operated since March 2020 has changed, people's fundamental attitudes towards charity have not. There remains significant consensus within society that a high proportion of funds raised by charities should be spent on beneficiaries, that the impact promised should be delivered, that being a charity means acting charitably too, and that all charities have a collective responsibility to uphold the good name of charity by doing all these things. People disagree on much when it comes to charities, but these basic expectations are shared now, as they were before Covid-19.

That is why those running charities must continue to ensure they can show they are making a difference while demonstrating high standards of probity. And it is why the Charity Commission's role remains vital in helping charities to get it right, and holding those that fall short to account.

# Introduction: who are ‘the public’ and what does ‘charity’ mean to them?

## A recap

In last year’s report we introduced a more sophisticated way of understanding public opinion.

Public opinion isn’t monolithic.

We are all products of our backgrounds and circumstances. These go a long way in explaining differences of opinion and behaviour. They also help to explain why these differences can be difficult to handle.

If you associate only with people from your own social and educational background, you risk two things: overestimating the extent to which people outside your direct experience agree with you; and demonising those who don’t.

We can avoid this by acknowledging our differences and carefully analysing them. As last year, we use a map of the country where people are defined not by latitude or longitude but by how high or low they score relative to the rest of the country on two independent measures derived from census data.



These two measures are **security**, combining measures of health, wealth and wellbeing such as income, occupation and education; and **diversity**, a combination of factors including ethnicity, culture and population density which determine how close you are to your neighbour in distance or background.

Using these measures, the country can be broken down into four 'quadrants'.

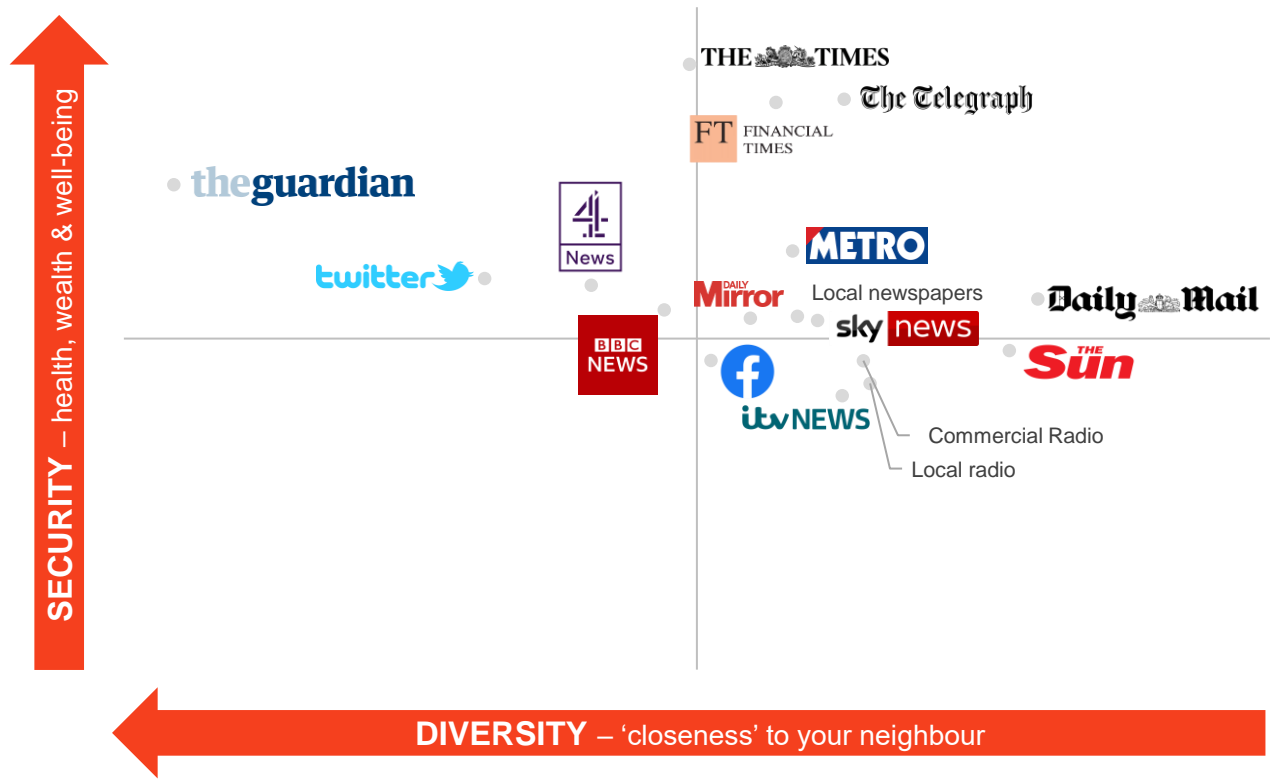
Other data – like polling data – can then be plotted onto the quadrant map we've created.

Take something like media consumption.

Here is the average position on the diversity/security map of a representative sample of England and Wales of those who say they get their news at least once a week across all platforms from the sources shown.

You can of course find readers or viewers of any particular source anywhere on the map, but these points show where you are more likely to encounter them.

*A way of looking at the population that recognises the effects our backgrounds have on our views of the world and explains much of the polarisation we see today*



## The public & charity

The same is true when it comes to points of view about charities.

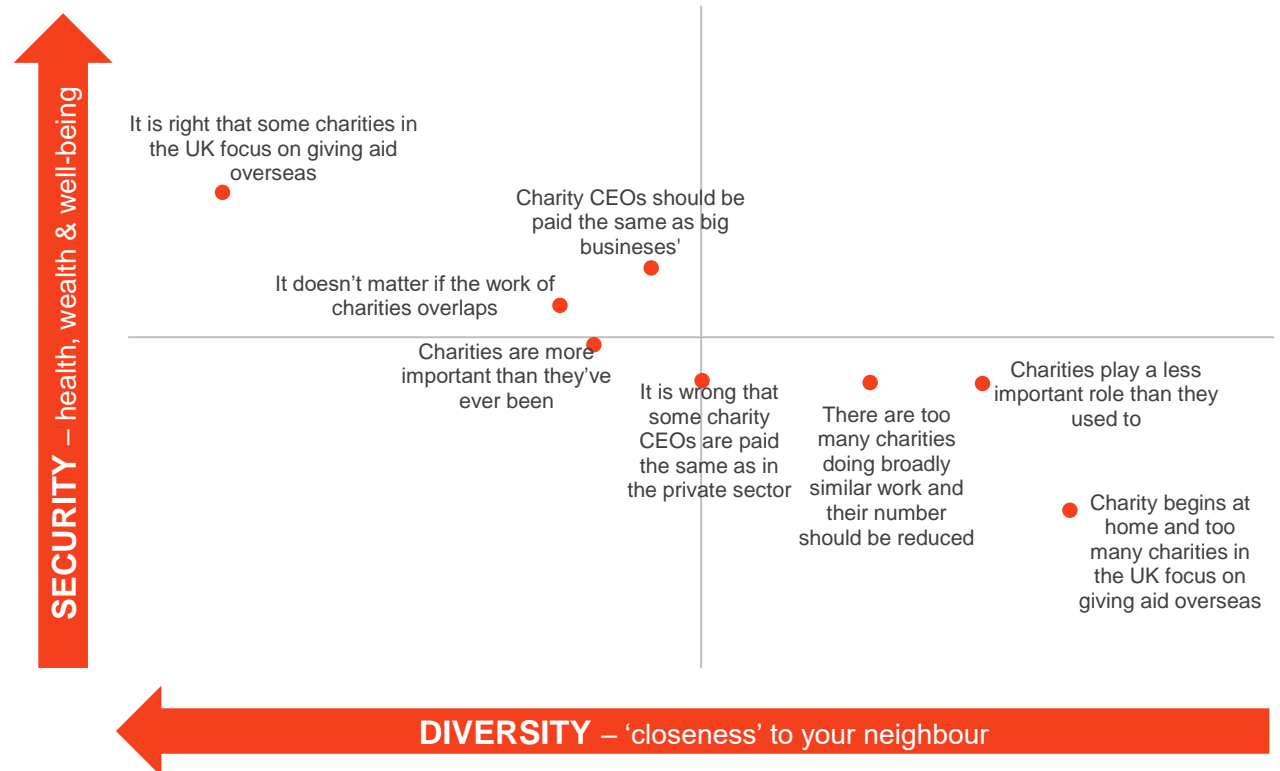
Whether people prefer charities with a local or international focus, whether it is acceptable for their work to overlap, whether they should be run by professionals or volunteers – you can encounter different points of view on issues like these anywhere in the population, but certain perspectives are more prevalent among some parts of the public than others.

Those prevalences reflect the different experiences and circumstances that shape people's thinking and behaviour.

The differences are real and worthy of our respect but it is important to keep them in proportion and to understand that some issues involving charities transcend them.

Because on some of the most significant matters involving charities, there is broad agreement across different parts of the population – a set of shared expectations about how charities should behave.

These expectations underpin our analysis of trust in charities in the following pages.



SECTION 1

# What is the public opinion landscape for charities post-pandemic?



## A further rise in public trust over time

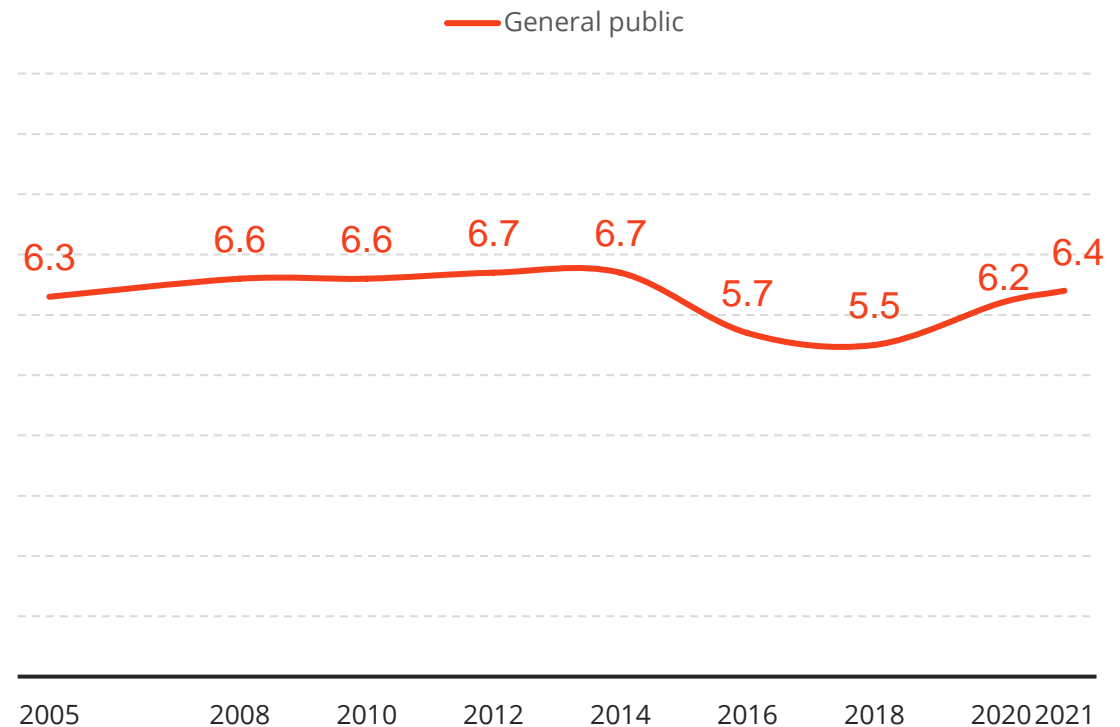
### Continuing in the right direction

For the second year running, public trust in charities in England and Wales is on the rise, approaching its 2014 peak.

However, the journey to restoring public trust following scandals involving household name charities between 2014-2018 remains a gradual one. The difference in trust this year compared to last is small, and comparable uplifts occurred for nearly all other sectors tested.

The public continues to hold high expectations of charities. Meeting those public expectations will be crucial in advancing the ongoing recovery of trust and ensuring that the collective reputation of charity can thrive.

Mean trust and confidence in charities (/10)

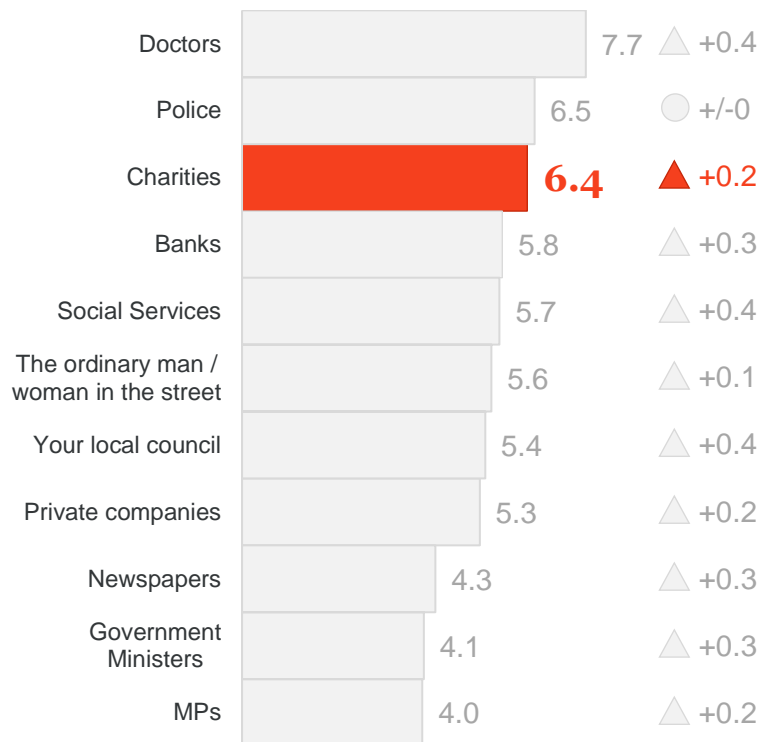


\*From 2018 onwards, the survey was conducted online rather than via telephone. This question, however, was also asked on a concurrent telephone survey as a comparison in 2018, giving a mean score of 5.7/10 (a difference of +0.2)

# Charities retain their trusted status above most other parts of society

## But others also experience a small uplift

Mean trust and confidence by sector/group  
(/10), with change vs 2020



“ ”

“In general I do trust charities. There's not been any crazy scandal that I'm aware of, or that's come across my screen. We're living in such a climate where everything is so heavily regulated and monitored that I don't see how there's a big gap in the market for fraudulent behaviour or people taking a bit too much money out of the jar.”

“I've always had trust in charities. I am trying to think if there has ever been a scandal. But nothing really springs to mind.”



# The high profile scandals of 2014-2018 are receding

## Allowing the trust recovery to continue

This research programme has consistently demonstrated that high profile governance scandals can have a dramatic effect on public trust. Between 2014-2018, the mean overall trust score fell from 6.7 to 5.5. We know that when the public think of 'charity', they often think of individual household name charities or local charities that they know well.

In previous qualitative conversations, high profile scandals involving individual charities were front of mind for the public and directly influenced many people's propensity to support not just the charities in question but the charity sector as a whole.

Now, with three years passing since the 2018 Oxfam Haiti scandal, and longer still since the Kids Company and Age UK revelations were first publicised, our conversations with the public demonstrate those memories are beginning to recede, allowing public trust to slowly re-grow.

But the lasting impact is still detectable. The trust of those who do easily recall those incidents is still dented, while others sometimes refer to governance issues in generalised terms.

Expectations of charities are great, and therefore so too is the effect on trust when those expectations are not met.

“ ”

“Any news stories about charities? Nothing comes to mind.”

“Charity has to conduct itself impeccably. We all know the massive damage caused by certain actions with Oxfam in Haiti. It almost effectively wiped Oxfam off the charity map.”

“Some of the larger charities that have had negative publicity have affected the choices I make when I donate my time or money.”

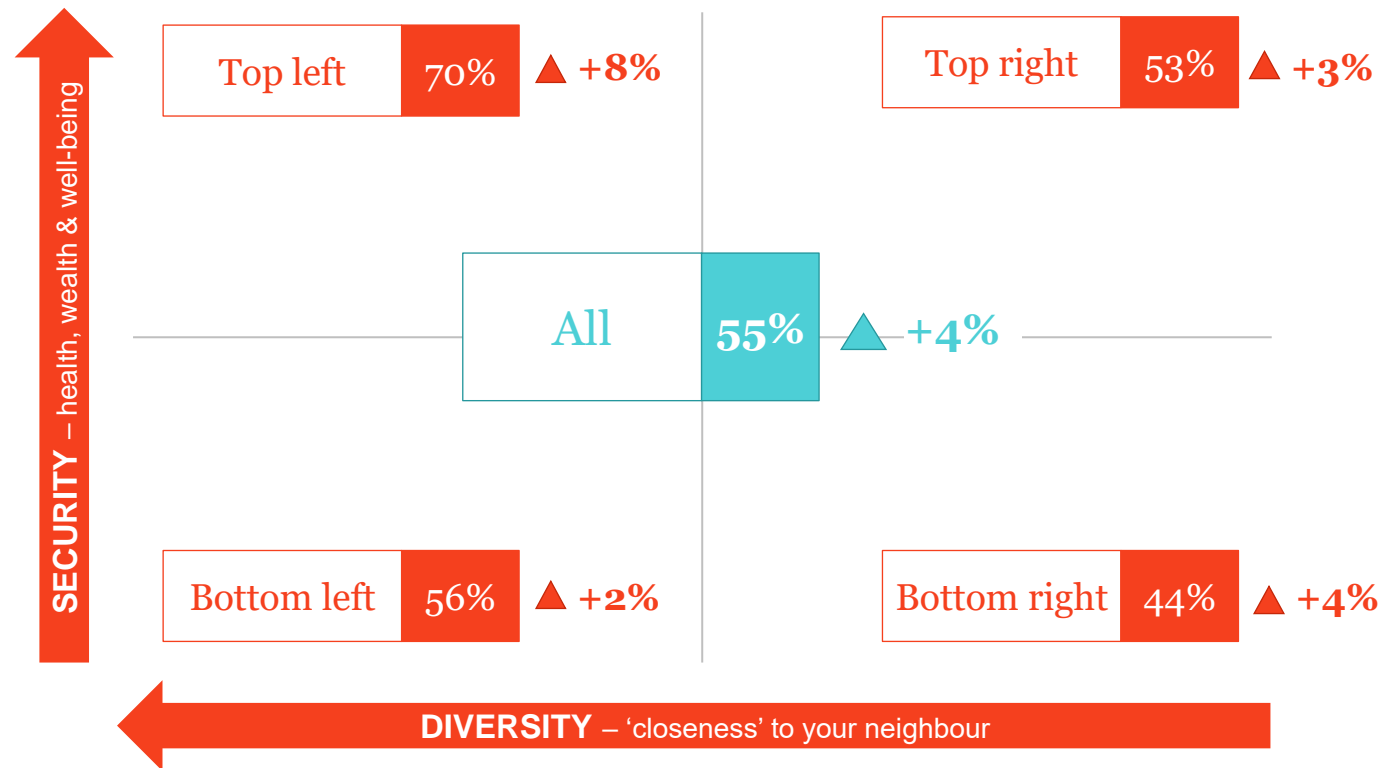
# Trust in charities has increased across the public

*Trust in charities remains unevenly distributed.*

*The high security, high diversity quadrant of the public (top left) trusts charities much more than other quadrants.*

*Meanwhile, less than half of the bottom right quadrant trusts charities.*

% who trust charities (with a score of 7-10 on a 0-10 scale)



# The perceived importance of charities has also risen

## Up for the first time since 2012

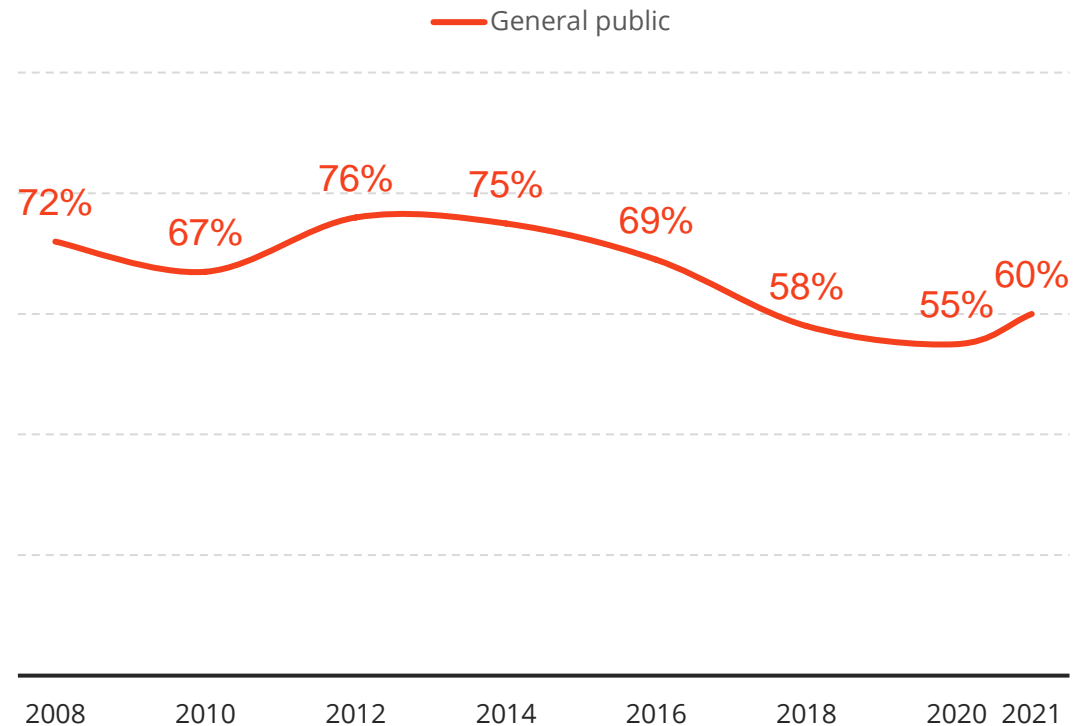
For several years, the proportion of the public who thought that the role charities play in society was 'essential' or 'very important' was trending downwards, from a high of 76% to a low of 55%. For any research into social attitudes, this is a large shift in a short period of time.

But for the first time since 2012, we have seen that percentage move back in favour of the importance of charities.

That shift is also apparent among both the top left quadrant and the bottom right quadrant of the population.

It still remains the case that the bottom right is much less likely to view charities as a fundamentally important part of society, but things are moving in the right direction for all parts of the public.

% who describe charities as 'essential' or 'very important'



\*From 2018 onwards, the survey was conducted online rather than via telephone. This question, however, was also asked on a concurrent telephone survey as a comparison in 2018, giving a percentage of 62% (a difference of 4%, and confirming the significant decrease)

SECTION 2

**Covid has changed our  
lives, but it hasn't  
fundamentally changed  
how we see charity**



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## For some, the pandemic has highlighted the importance of charity

Our quantitative data shows that there has been a small rise in the perceived importance of charities post-pandemic.

Our qualitative data supports this and helps to explain the reasons. Covid has not produced wholesale changes in the way people view or talk about the charity sector, but it has brought home, for some, the harsh realities that many charities seek to address.

Food poverty has been highlighted for some members of the public in the past 12 months, along with the impact of medical vulnerabilities. Many mention the role played by food banks for those who have faced economic hardship during the pandemic.

Though they rarely bring this up in qualitative conversations until asked specifically about how Covid may have changed their view of charities, the pandemic has for some underscored problems in society that can't always be solved by government or the private sector.

“ ”

“Certainly the last year has brought them far more into focus. During the first lockdown there were a number of stories about food banks being set up because people have lost their jobs and couldn't afford to buy food.”

“During Covid we've seen even more stuff on TV about food banks. All the media channels are doing stories about it. It opens your eyes a bit more to some charities.”

“Research is ever-expanding and getting more complex and they're making breakthroughs. Monetary support is more vital than ever to carry it on.”

## But it is important to keep this in perspective

While Covid has increased the perceived importance of charities to some degree, it would be easy to overestimate the impact that the pandemic has had on views of charities.

A minority – often located in the high security, high diversity ‘top left’ quadrant of the public – are acutely aware of the role charities play and are primed to notice the essential contributions they make.

But it is clear from our qualitative conversations that the sector is not front of mind for most when they think about the pandemic.

They want charities to succeed and lives to be enriched by charities’ work, but they don’t see things so readily through the filter of what charities are doing. The proportion of those who agree ‘charities are more important in today’s society than they’ve ever been’ has increased, but only by 3% (from 67% last year to 70% this year) .

For the most part, members of the public only notice the work of charities they support, and they notice when things go wrong in any high profile charity – in the small number of cases when charities don’t uphold the standards they expect. That’s why good governance and transparency continue to be fundamental to public trust overall – with or without a crisis.



“To be honest, since the pandemic started, there’s been nothing on charity. Nothing’s really been widely spoken about charity. All you see is about Covid. I’ve been focused on that more than anything.”

“I haven’t really seen anything of late [involving charities], but it’s just that the Oxfam one was [in the news] for quite a while. I wouldn’t say I paid a lot of attention to it, but when you see the negative stuff, it pulls you away from it.”

“No, I haven’t [noticed any news relating to charities], because I really have just had my head down because of Covid. There isn’t always time to absorb all the media because there’s so much of it. [...] You hear publicity somewhere along the line, and you realise that not everything that you’re donating is going to where it needs to go. I think that some charities have muddied the waters for others.”

# The public continues to hold charities in high regard. With this comes high expectations

The public values the role charities play in society, and continues to hold charities in high regard. The perceived importance of charities has slightly risen.

More people view charities as the best way of channelling support to good causes (56%) than those who think there are better ways of doing so (20%). Moreover, more people think that it has never been easier to get involved or support a local community by contributing to charity (51%) than those who think it seems harder than it used to be to do so (19%).

The special and distinct nature of charity leaves the public with high expectations of both charities they know and the wider sector. The public wants charities to succeed, and to know that charities it supports are channelling donors' funds in the most effective way. The conduct of the highest profile charities in particular is often used by members of the public as a heuristic to assess the standards of conduct and behaviour in the sector more generally.

Last year, we introduced four key public expectations of charities. These expectations transcend areas where the public might disagree about the role of charities, and set out clear standards of conduct and behaviour that are expected of them.

These expectations are clear when analysing both quantitative and qualitative data from across our research programme. It is because of how important the public think charities are to society that they have such high and consistent expectations.

Despite the impact of Covid, these expectations have remained the same. How charities are seen to perform against these is far more important in determining public trust than the immediate effects Covid has had on the sector.

Meeting these four key expectations is therefore crucial in inspiring trust in the sector.

## Public expectations of charities include four key factors

### Where the money goes

That a high proportion of charities' money is used for charitable activity

### Impact

That charities are making the impact they promise to make

### The 'how'

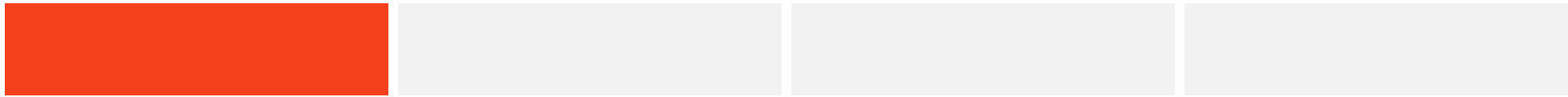
That the way they go about making that impact is consistent with the spirit of 'charity'

### Collective responsibility

That all charities uphold the reputation of charity in adhering to these

*These expectations are drawn from quantitative and qualitative data from across the research programme. How charities are seen to perform against these is far more important in determining public trust than the immediate effects Covid has had on the sector.*





## Where the money goes

*That a high proportion of charities' money is used for charitable activity*

### The most firmly-held expectation

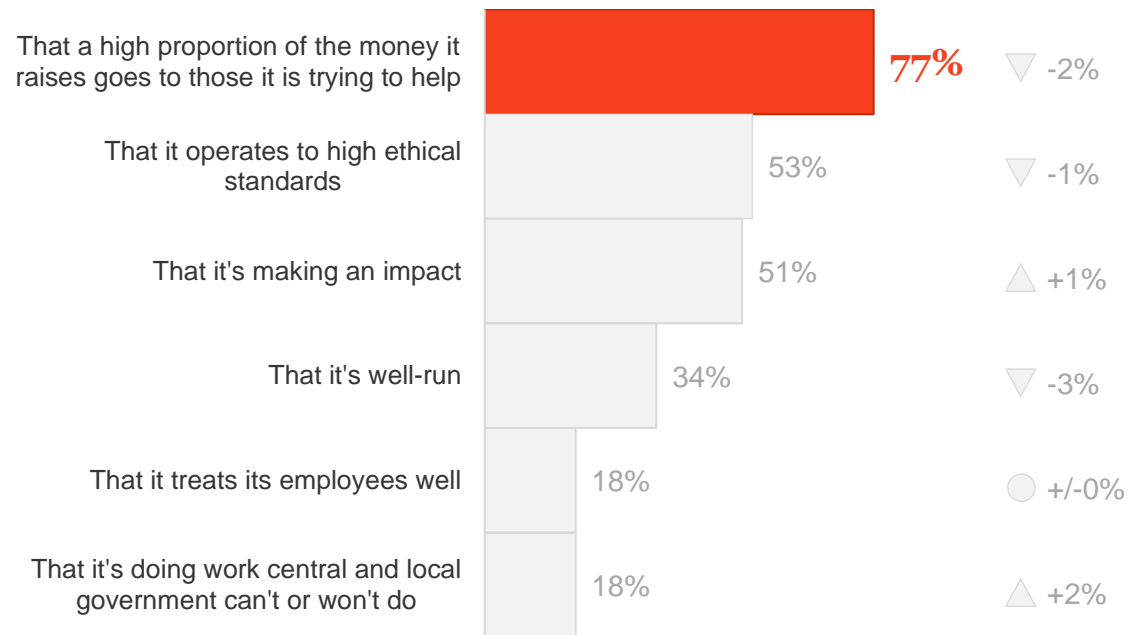
Ensuring that a 'high proportion of the money a charity raises goes to those it is trying to help' remains by far the most important and firmly-held expectation for how a charity should operate. It influences much of the public's broader perceptions about charity.

For some, this means maximising how much of donors' money directly reaches those it is trying to help, while keeping operational, staffing, and fundraising costs to a minimum.

There has been little change in opinion since last year's research – this remains the expectation the public feels most strongly about.

In qualitative conversations, participants understand that running a successful charity requires operational investment of various forms. In their mind, it is acceptable for a sizeable minority of a charity's income to be used for running costs and other expenditures, provided that a clear majority of its income goes straight to those it is trying to help.

*% who select each as one of their top three most important factors when it comes to how a charity operates, with change vs 2020*





## Impact

*That charities are making the impact they promise to make*

### Important for all quadrants

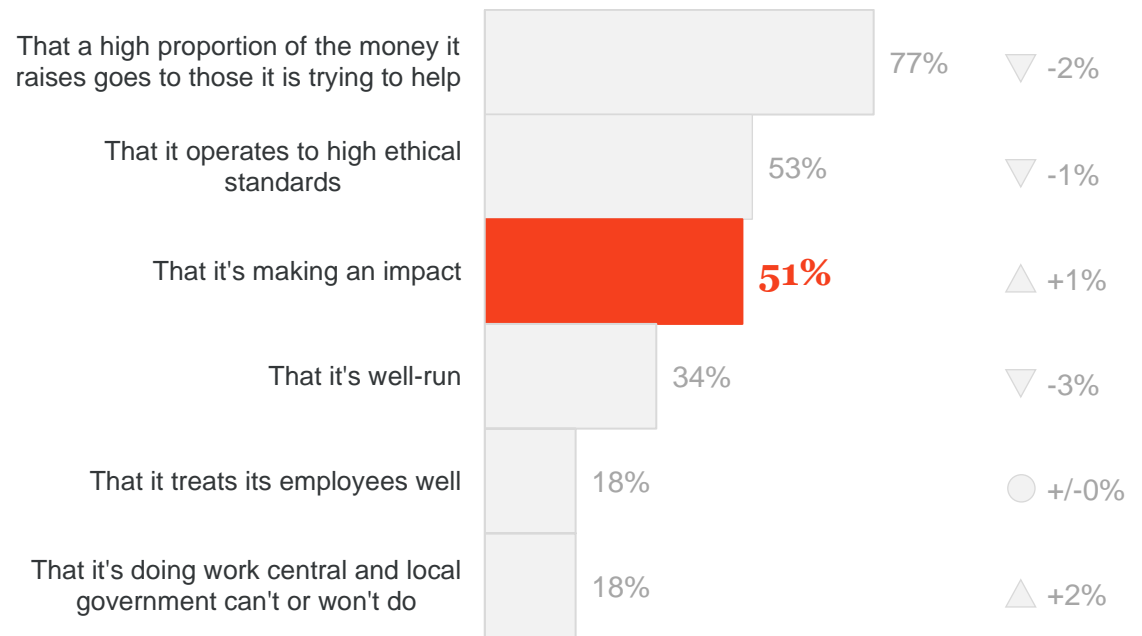
Once again, that charities are making an impact is important across the four quadrants of the public.

In the public's mind, 'impact' is closely tied to the expectation that a high proportion of a charity's funds should reach its beneficiaries.

Impact is not simply taken for granted. The responsibility is placed with charities to demonstrate the impact they have with regards to the cause they serve.

Reassurances include statistics demonstrating how much of the money donated is reaching beneficiaries, and real-life stories or case-studies.

*% who select each as one of their top three most important factors when it comes to how a charity operates, with change vs 2020*





## The 'how'

That the way they go about making that impact is consistent with the spirit of 'charity'

### High standards

However, we know that impact alone is not sufficient.

The way charities go about meeting their purpose is also viewed as very important, with members of the public tending to think that this is as important as whether they fulfil their purpose or not. A majority prioritise high ethical standards in charities.

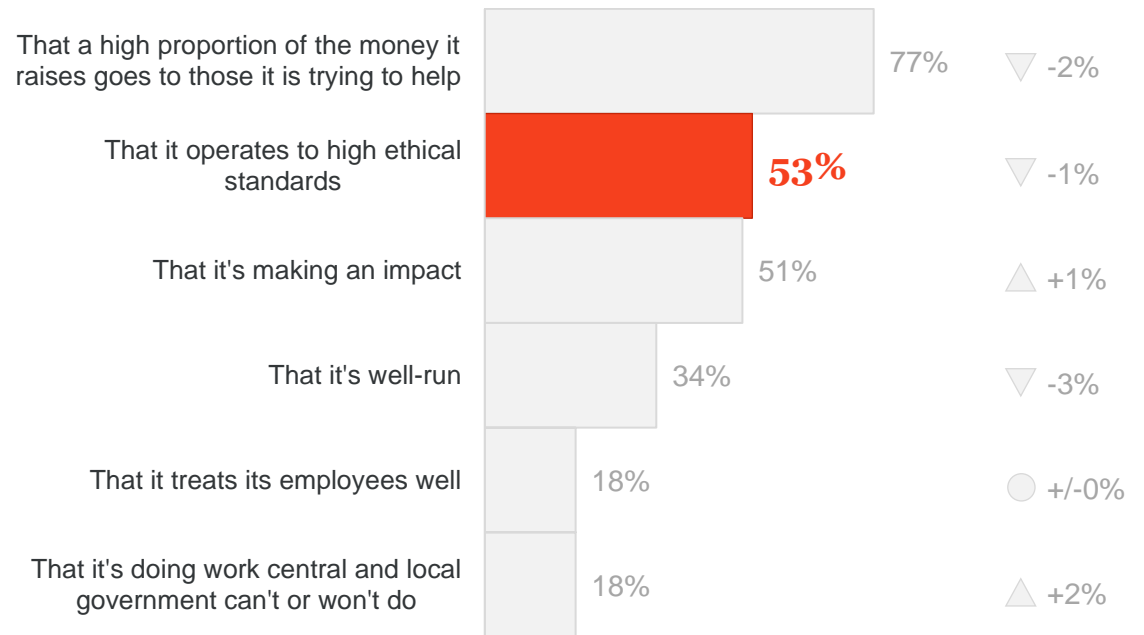
There has been no significant year-on-year change.

*The way charities go about meeting their charitable purpose is as important as whether they fulfil it or not* **50%**

vs

*It is more important that charities fulfil their charitable purpose than how they go about doing so* **29%**

% who select each as one of their top three most important factors when it comes to how a charity operates, with change vs 2020



## The 'how'

*That the way they go about making that impact is consistent with the spirit of 'charity'*

### Charities are distinct

The public believes that charities are special and distinct from other businesses or organisations because of their purpose. Therefore, they believe they should be held to high ethical standards.

Once again, this expectation is tied to the belief that charities must ensure a high proportion of the money they receive goes to the beneficiaries, alongside treating staff fairly and being transparent with the public.

Encouragingly, most feel the majority of charities do this already, though lingering concerns often remain.

“ ”

“If you're going to donate money, you want to make sure that the charity is being managed properly and things are being done right, rather than putting all your trust in them [regardless].”

“Trust to me is how much you can believe in what they say and what they're doing. That's it in a nutshell for me.”

“They have to act legally, but they have ethical and moral obligations as well, for example treating volunteers fairly. Because they are a charity, you expect them to do the right thing.”

## Collective responsibility

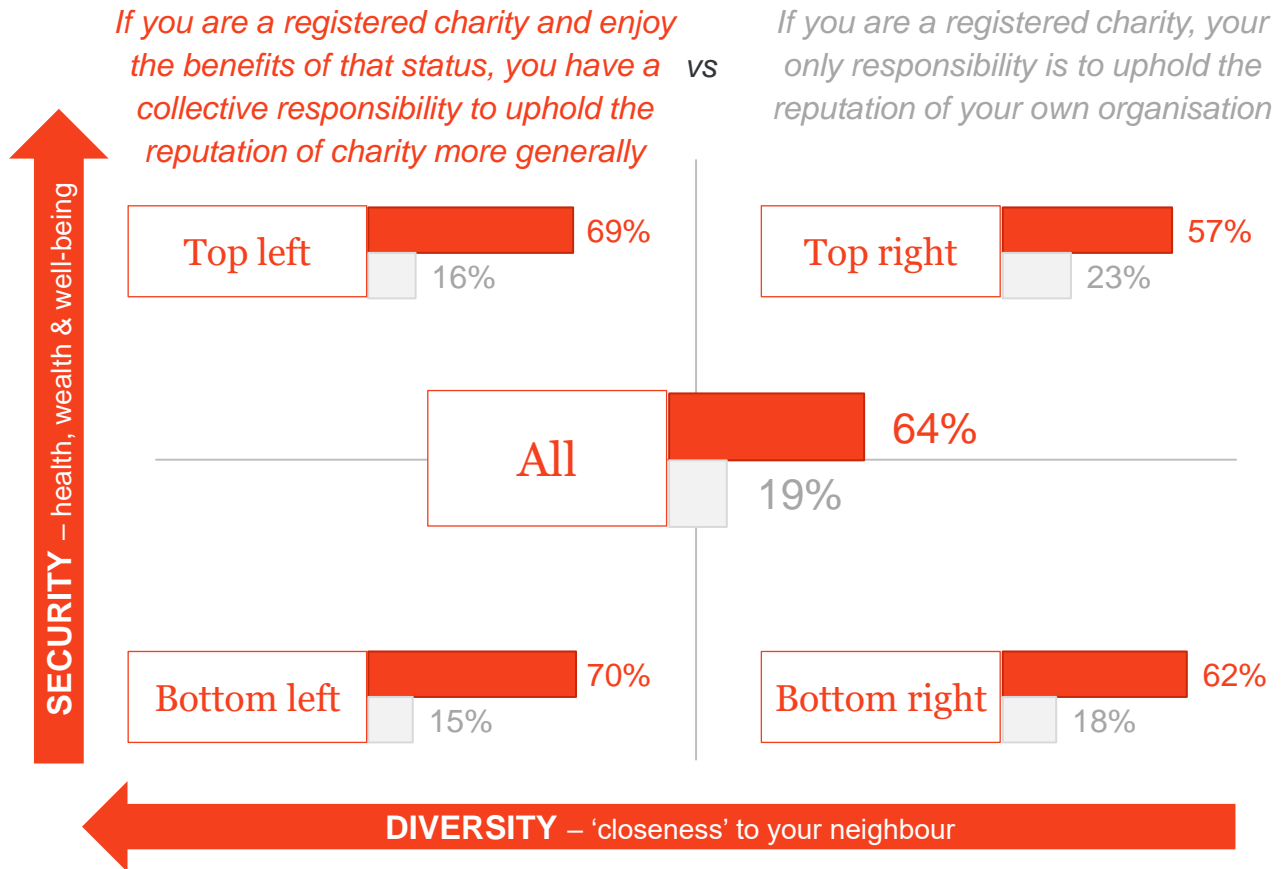
That all charities show a collective responsibility to each other in adhering to these

### Important for all quadrants

The public hold the belief that registered charities have a collective responsibility to uphold the reputation of charity. This expectation has remained consistent year-on-year.

This means demonstrating that charities are adhering to both public expectations and what the law and the Charity Commission require. In reality, well-known charities bear more of the burden in demonstrating good conduct because they are more visible to the public and are more often taken to represent the whole.

Qualitative conversations suggest previous scandals are receding in the public's mind, helping the trust recovery to continue. Our tracking of trust in charities over time demonstrates the impact that governance issues within one charity can have on the reputation of the majority.



SECTION 3

# Looking ahead & inspiring trust further



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# The opportunity to inspire trust further

## Looking ahead

Overall, the public feel the sector has risen to the exceptional circumstances brought about by Covid. Combined with slow increases in trust and confidence, this is a welcome indication of progress. Most agree that charities are meeting their key expectations.

However, there is still room for charities to better demonstrate their performance against the public's key expectations.

Currently, only 17% are completely convinced that a high proportion of charity funds raised goes to the end cause. The public would like to see a more proactive approach to elucidating how and how much of their money reaches beneficiaries, for instance by publishing regular statistics or case studies. In order to convince those outside of the most secure, diverse quadrant that charities deserve public trust, evidence is crucial.

There have been no significant changes in the proportion who think that charities are delivering against key expectations like making an impact and ensuring a high proportion of the money they raise reaches the end cause.

In qualitative conversations, all agree that charities must show they are listening to the public.

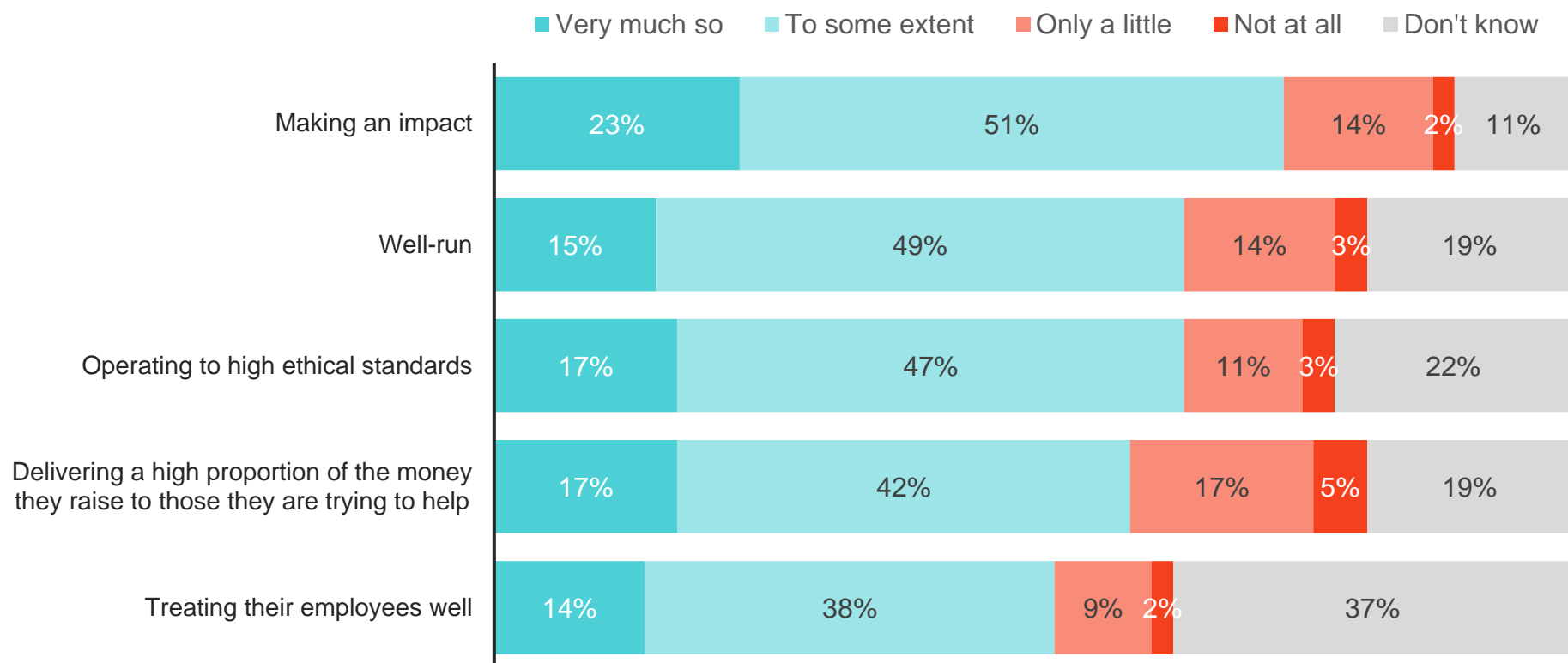
There is further room to reassure that charities both prioritise the 'how' as much as delivering the promised impact.

Registered status plays an important role in upholding public trust, offering further reassurance that a charity will adhere to the public's key expectations.

While taking comfort that charities in England and Wales are registered at an overall level, most of the public do not proactively check registration status when deciding whether to give support to an individual charity, relying instead on the opinion of friends or family, or the impression they take from a charity's website.

## Most think that charities are meeting key expectations, but there is room for improvement

To what extent do you think that charities you know about are...

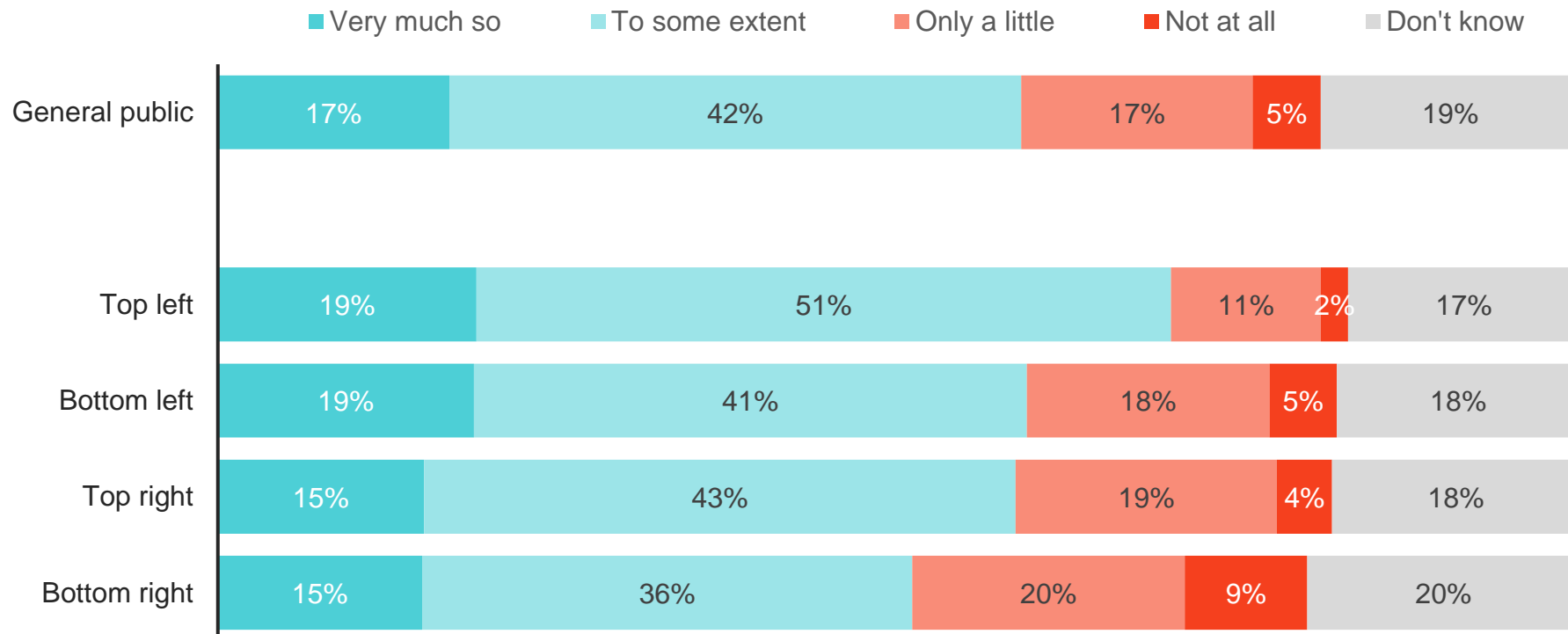


*There have been no major changes since last year*



# The public is yet to be fully convinced that a high proportion of the money charities raise delivers their end cause

To what extent do you think that charities you know about are delivering a high proportion of the money they raise to those they are trying to help?



*There have been no major changes since last year*

# Registration plays a role in upholding trust & confidence

## A badge of extra confidence

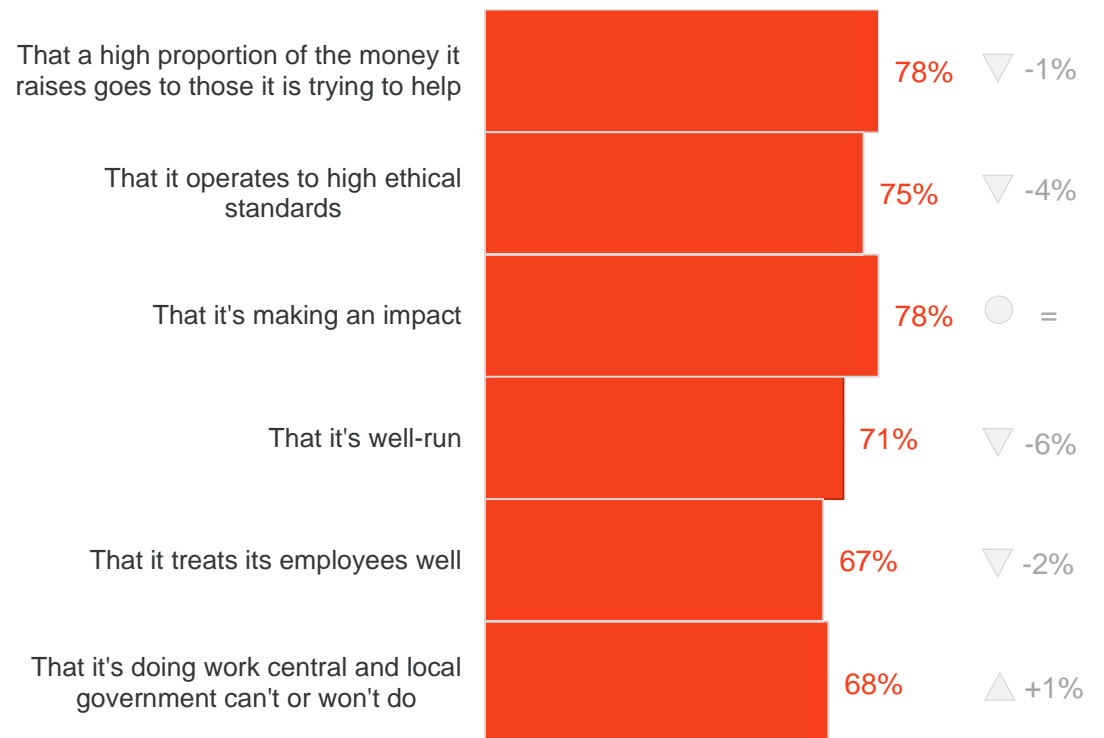
Registered status remains a powerful marker of charities doing the right thing in the public mind.

A majority believe a charity is more likely to be making an impact, maximising its donations and operating ethically if it is registered and regulated by the Charity Commission.

“ ”

“I trust them now more than ever because of my understanding of what the Charity Commission does, that they have to report to them every year. They have to have accounts. They have to be transparent in their practices and they have to show how they're using funds.”

% who have more confidence about each of the following if they know a charity is registered



## While drawing confidence from the badge of registration, most are unlikely to seek out this information proactively

In reality, the public often assume charities are registered, and do not go out of their way to check. In qualitative conversations, few say they have used the charity register or the Commission's website.

Their decision as to whether or not to support a charity is currently influenced more by the impression taken from the charity's website (used by 63%), recommendations from friends and family (69%) or media stories (60%).

Given the influence of word of mouth and news stories in determining attitudes towards charities, there is an opportunity to make greater use of registered status in order to reassure the public.

“ ”

“I know they each have a number. I've never actually gone anywhere or know where to go to look for that number, to check if it's genuine or not.”

“I tend to go off hearsay and if I recall any past discrepancies or news articles regarding those charities.”

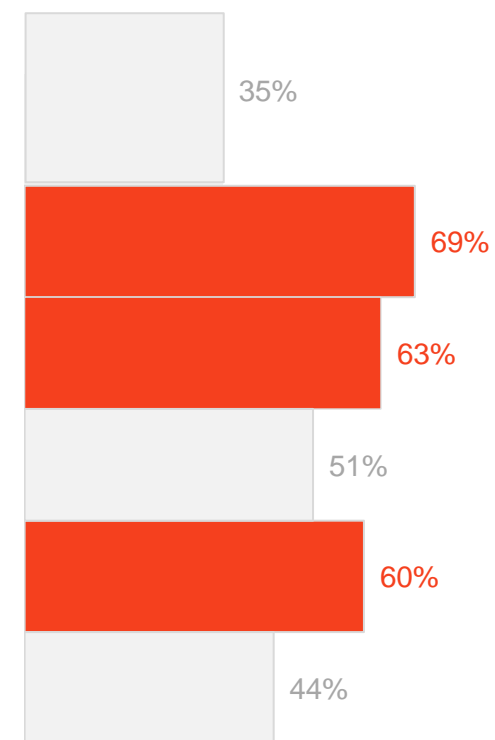
“I think there is something where the charities should be registered because you normally see registered numbers and registered charities, but I don't know very much about it.”

## In reality, the public relies more on the opinion of friends or family, the charities' own website, and the media when deciding whether to donate to an individual charity

*% who would be confident in each as a source of information*



*% who actually use them to decide whether to donate ('always' or 'sometimes')*



SECTION 4

# How the regulator can help uphold public trust and help the sector thrive



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# The public still wants the regulator to ensure charities fulfil their wider responsibilities

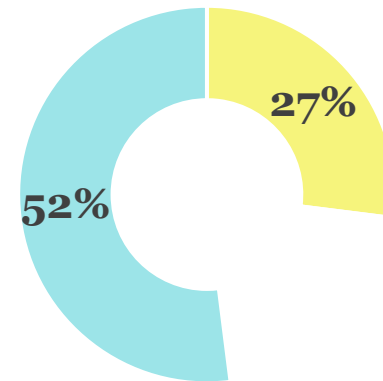
## Wider responsibilities

The public also expects the regulator to do more than just manage the register.

In last year's research and again in 2021, we asked the public whether they think the regulator should make sure charities fulfil their wider responsibilities, or just make sure they stick to the letter of the law. This year, as last, the public favours by a 2:1 margin the regulator trying to make sure charities fulfil their wider responsibilities.

In qualitative conversations with the public, it is clear that nothing in the past year has changed their view in this regard. Many would like the Commission to make sure that charities live up to public expectations – for example, by making sure charities are evidencing the impact they have and the use they make of donations.

*The charity regulator should try to make sure charities fulfil their wider responsibilities to society as well as sticking to the letter of the laws governing charitable activity*



*The charity regulator should confine its role to making sure charities stick to the letter of the laws that govern charitable activity*



“We need to monitor what’s going on. Just because one person is doing something brilliant doesn’t mean that somebody else in the background isn’t trying to take a little bit off the top.”

“They are the policeman, making sure that charities satisfy all those [factors of trust] before they could declare themselves charities.”

“Charities can be dealing with large sums of money and I think someone independent has got to have an eye on that.”

## Awareness of the Charity Commission instils confidence

The regulator's visible presence within the media has the potential to have an effect in upholding public trust.

Those who trust charities are more likely to have heard of the Commission, and a majority (62%) of those aware of the Commission are aware because of its presence in the media.

At an overall level, awareness of the Charity Commission remains in line with last year: 54% have heard of it (vs 53% last year) and 35% of those people say they know very well or fairly well what it does (vs 36% last year).

Qualitatively, as last year, there is limited recall of the Charity Commission by name and awareness of what it does also remains limited (especially among younger people).

# 54%

have heard of the  
Charity Commission

## 6.5/10

Mean trust in charities is slightly higher among those who have heard of the Commission...

## 6.2/10

...than among those who have not

“ ”

“I feel more confident. I'm glad that there is an institution... a Commission that is overseeing charities.”

“It's important you hear from the Charity Commission every so often, just as reassurance that they are taking things seriously when necessary.”

# Methodology note

## Quantitative data and analytics

Yonder surveyed a demographically representative sample of 4,037 members of the English and Welsh public between 18 and 21 January 2021. The survey was conducted online.

Answer options were randomised and scales rotated. All questions using opposing statements were asked using a sliding scale.

The data was analysed using Yonder's ['Clockface' model](#) to help understand the various elements of public opinion and ensure the Charity Commission's work is rooted in an understanding of the social and economic dynamics at play across the English and Welsh public.

## Qualitative data

Yonder conducted 20 in-depth interviews with members of the public from across the Clockface model's two-dimensional map of 'security' and 'diversity' and with a geographical spread across England and Wales. Interviews were conducted between 10 and 18 February 2021.

Each interview lasted around 30 minutes.



## About Yonder

Yonder (formerly Populus) is an award-winning consultancy and a trusted adviser to some of the UK's best-known companies, public bodies and brands. It uses research, evidence and expertise to help clients unlock opportunity and deliver impact.

## About the Charity Commission

The Charity Commission for England and Wales registers and regulates charities to ensure that the public can support charities with confidence. It is an independent, non-ministerial government department accountable to Parliament.

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