

# Segmentation Profiles

## Segmentation methodology

The Commission asked BMG to develop an audience segmentation of charity trustees, to see if this would provide new insights and enable the Commission to communicate with different groups of trustees in a more effective and targeted way.





### What is our segmentation approach?

- The bespoke segmentation was created using data from the 2025 trustee survey.
- We used 25 of the survey questions (including 2 multiple questions) to **input into the segmentation**, covering **confidence** in different aspects of the trustee role; **knowledge** of responsibilities and decision-making; and trustees' length of **experience**.
- After testing both cluster and **latent class** approaches, we decided on the latter – this is a well-established segmentation technique that identifies and groups patterns found naturally in the data.
- This approach identified four segments which are introduced on the next page.

### Reporting our segmentation

- The 'overall knowledge' score uses trustees' responses to 19 questions on understanding of what to do in decision making and around their responsibilities (e.g. if they got all 19 correct their score was 19).
- Other than the overall proportions each segment consists of, and the derived knowledge scores, all data is weighted to be representative of charity size by income.

# Meet the Segments:

		Size in CCEW trustee survey
	Segment 1: Skilled and sure	43%
	Segment 2: On the right track	29%
	Segment 3: Experienced and overconfident	9%
	Segment 4: Low confidence but learning	20%

## Segment 1: Skilled and Sure 43%

This group make up the largest proportion of trustees (43%). Nearly all have served for over five years (97%) with the most common level of experience being over 10 years (46%), compared to a survey average of 38%. Just under two thirds of them (64%) are aged 50-75.

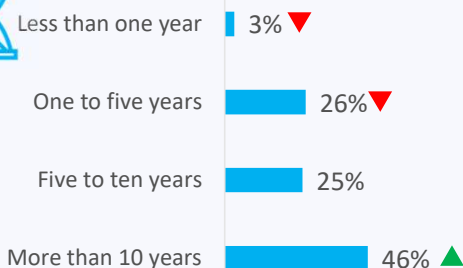
Their overall confidence is the highest among all segments with 99% saying they are very confident. This group are very confident in making decisions (99%) and delivering their charity's purpose (98%), and confidence across all other areas of the role are significantly higher than the average. This group are very good at knowing what they should always do during decision making such as asking questions even if they are challenging or awkward (97%) and speaking up if they disagree with the majority (94%).

However, there is still room for improvement. This group are more likely to incorrectly think trustees should always make decisions based on their personal views (14%). There are also some areas of trustee responsibility that not all get correct –particularly keeping up to date with the Commission's guidance; and making sure the Commission gets the right information on time – so there is still room to grow and challenge incorrect assumptions through revisiting guidance.

## Segment 1: Skilled and sure – 43%

This segment shows higher levels of confidence than average and are more experienced in their role as a trustee.

### Experience as a trustee

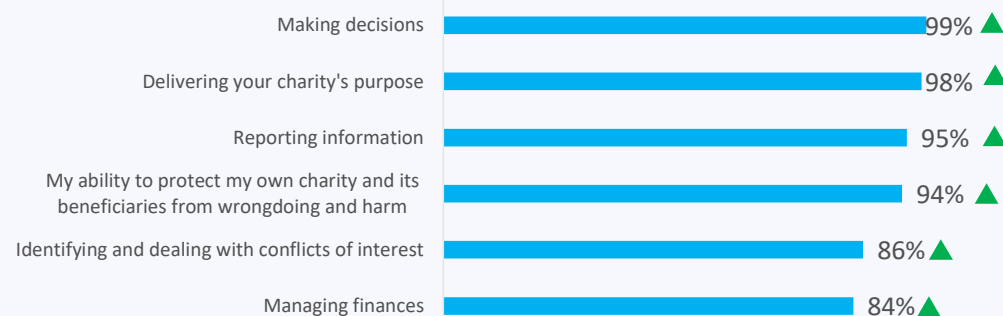


### Confidence



Overall confidence  
in role: **99%** ▲  
very confident

### Say they are **very confident** in...



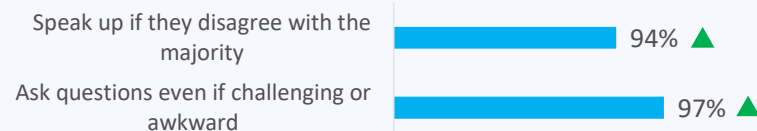
### Knowledge



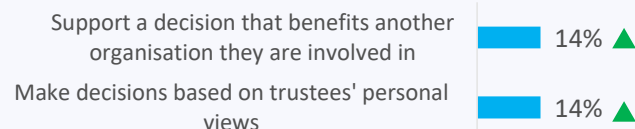
Average  
knowledge score\*  
is **16.2** ▲

\*Out of a total of 19 possible points. Total trustee average is 15.6

### More likely to know that in decision making, they **should always...**



### But are more likely to **incorrectly think** they should always...



**95%** ▲ know they are responsible for making the important decisions.

**65%** ▲ know they are responsible for making sure the charity sends the right information to the Commission at the right time.

## Segment 1: Skilled and sure – 43%

This segment shows higher levels of confidence than average and are more experienced in their role as a trustee.

### Trustee characteristics:



**64%**▲ are **50-75** years old



**24%**▲ have the role of **chair** within their charity



**48%**

Use **any** Charity Commission guidance at **least once a year**



**43%**▲

Use guidance **direct from its website** at **least once a year**

### Reasons for **not** using Charity Commission guidance more often:

I don't think I need guidance that regularly **74%**▲

I didn't know that the Charity Commission provided guidance **6%**▼

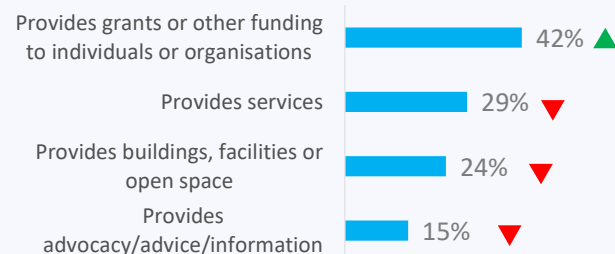
I don't know how to find what I need **5%**▼

I don't use the internet very much **4%**▼

### Main charity activity



**45%**▲ have a charity income of **£0-£10K**



### Perception of fairness:



**52%**▲

Say the **Charity Commission acts fairly** when supporting charities or dealing with wrongdoing. (Only **3%** say unfairly)

### Use of codes, standards and governance tools:



**44%**▲

say their charity applies **any** code, standard and governance tool. **26%**▼ say they don't know about their usage.

## Segment 2: On the right track 29%

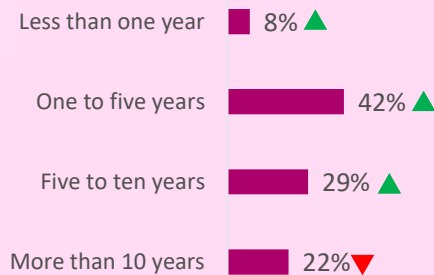
This group consists of around a third (29%) of trustees. They most commonly have one to five years' experience (42%) and this group has the smallest proportion of trustees with more than 10 years' experience. They show fairly high levels of confidence in their role, but the proportion who are very confident is below the average at 43%. Specifically, they are more confident than average in making decisions (88%) and delivering their charity's purpose (85%). Despite being less experienced, this group's knowledge is strong when looking at decision making and role responsibilities, falling in line with the overall average. For example, 92% know they are responsible for ensuring that all the charity's activities help to achieve the purposes for which it was set up.

There are some areas which this group can improve on. Only 65% are very confident in reporting information, which is below average. They mostly know what they are doing, but do not always get it right. When given an overall 'knowledge score' (out of 19 based on their responses to 19 knowledge related questions), theirs is the second highest at 15.8 – in line with the trustee average – but they are less likely than average to know that the Charity Commission provides guidance (16%).

## Segment 2: On the right track – 29%

This segment shows fairly high confidence and mostly know what they're doing, but don't always get it right.

### Experience as a trustee

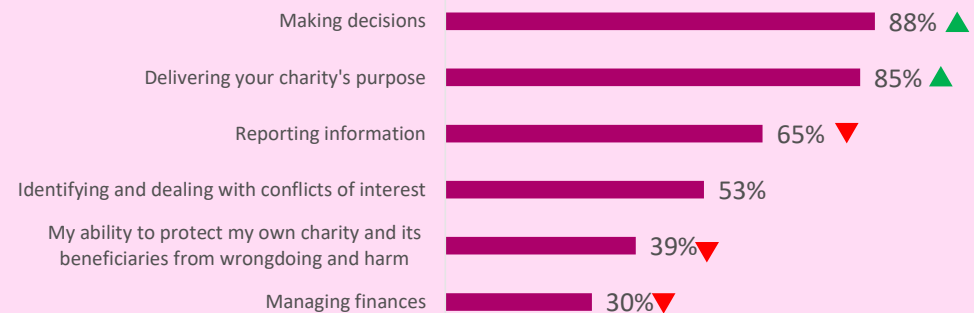


### Confidence



Overall confidence  
in role: **43%** ▼ very  
confident

### Say they are **very confident** in...



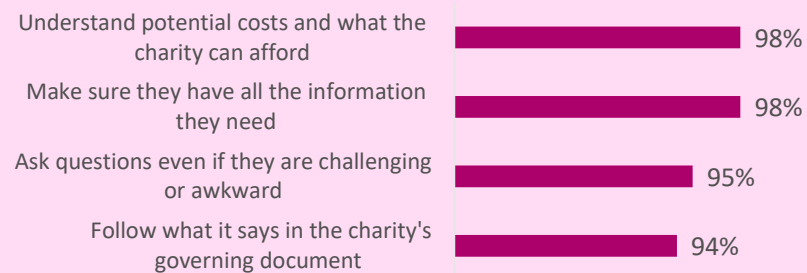
### Knowledge



Average  
knowledge score\*  
is **15.8**

\*Out of a total of 19 possible points. Total trustee average is 15.6

### Know that in decision making, they **should always..**



**92%** know they are responsible for ensuring that all the charity's activities help to achieve the purposes for which it was set up

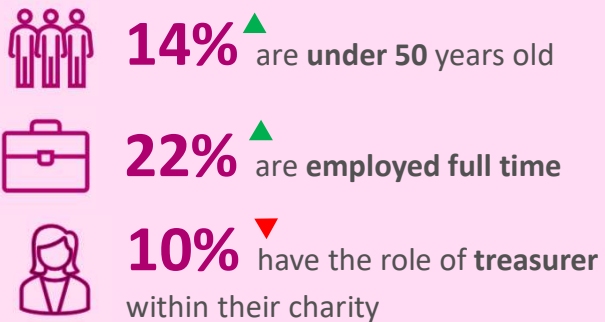
**73%** ▲ know they are responsible for keeping up to date with relevant Charity Commission guidance



## Segment 2: On the right track – 29%

This segment shows fairly high confidence and mostly know what they're doing, but don't always get it right.

### Trustee characteristics:



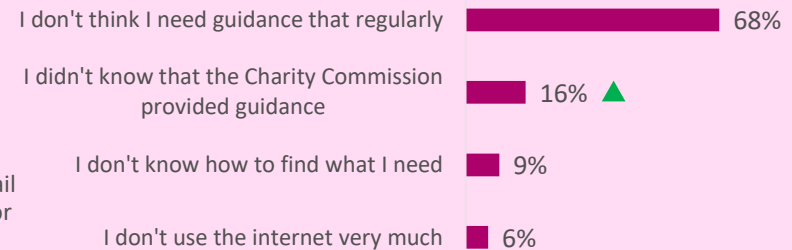
**46%**


Use **any Charity Commission** guidance at **least once a year**

**23%** 

Ever phone or email the Commission for guidance

Reasons for **not** using Charity Commission guidance more often:



**7%**  don't know the income of their charity

### Main charity activity



### Perception of fairness:




**43%**

Say **the Charity Commission acts fairly** when supporting charities or dealing with wrongdoing. (Another **43%** say they don't know)

### Use of codes, standards and governance tools:



**32%** 

say their charity applies **any** code, standard and governance tool. **42%**  say they don't know about their usage.

## Segment 3: Experienced and overconfident

### 9%

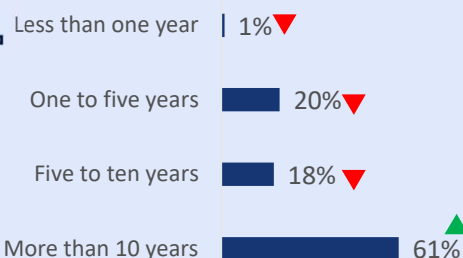
This group makes up the smallest proportion of trustees (9%). They are an experienced group; nearly two thirds have more than ten years' experience as a trustee. Their overall confidence in their role is above average with 88% saying they are very confident. More specifically they are more confident than average in managing finances (80% very confident) and in their ability to protect their charity and beneficiaries from wrongdoing and harm (72% very confident). Their confidence in delivering their charity's purpose and reporting information sits in line with the trustee average. This group are good at knowing what they should do when decision making, including knowing they should always make sure they have all the information they need (98%) and that they should understand potential costs (96%) – both figures in line with the trustee average.

However, there are some areas where this group could improve. One of these areas is in conflicts of interest, with the group being less likely to say they are very confident in dealing with conflicts of interest (11%). This is demonstrated in their knowledge with just 61% knowing that all trustees are responsible for managing conflicts of interest, and in the fact that over half (56%) said that 'it depends' when asked about whether trustees should support a decision that benefits another organisation they are involved in.

## Segment 3: Experienced and overconfident – 9%

This segment is experienced and shows confidence, but they don't know how to correctly do certain things, and where their responsibilities lie.

### Experience as a trustee

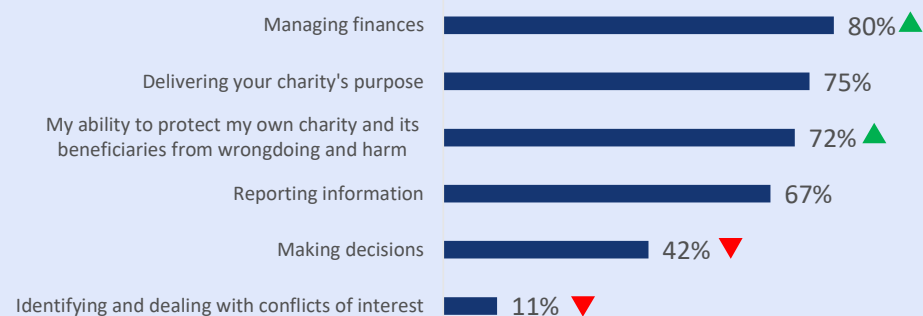


### Confidence



Overall confidence  
in role: **88%** ▲ very  
confident

### Say they are **very confident** in...



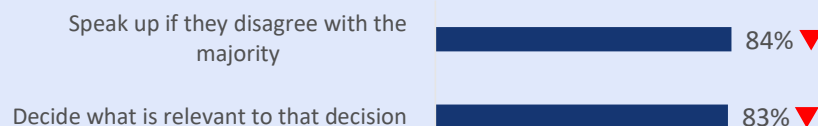
### Knowledge



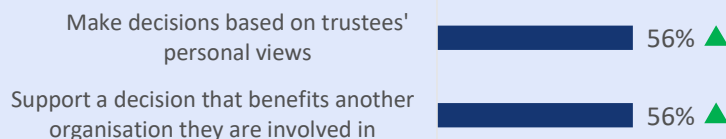
Average  
knowledge score\*  
is **14.5** ▼

\*Out of a total of 19 possible points. Total trustee average is 15.6

### Know that in decision making, they **should always..**



### But are more likely to incorrectly say **it depends** for the following...



**85%** ▼ know they are responsible for  
ensuring that all the charity's activities help to  
achieve the purposes for which it was set up

**57%** ▼ know they are responsible for  
keeping up to date with the Commission's  
guidance

## Segment 3: Experienced and overconfident

This segment is experienced and shows confidence, but they don't know how to correctly do certain things, and where their responsibilities lie.

### Trustee characteristics:



**42%** ▲ are over 75



**70%** ▲ are retired



**33%** ▲ have the role of **treasurer** within their charity



**43%**

Use **any** Charity Commission guidance at **least once a year**



**12%** ▼

Less likely to read their own charities guidance several times a year

Reasons for **not** using Charity Commission guidance more often:

I don't think I need guidance that regularly

**84%** ▲

I didn't know that the Charity Commission provided guidance

**9%**

I don't know how to find what I need

**6%**

I don't use the internet very much

**4%**

### Main charity activity



### Perceptions of fairness



**44%**

Say **the Charity Commission acts fairly** when supporting charities or dealing with wrongdoing. (Another 44% say they don't know)

### Use of codes, standards and governance tools:



**37%**

say their charity applies **any** code, standard and governance tool.

## Segment 4: Low confidence but learning 20%

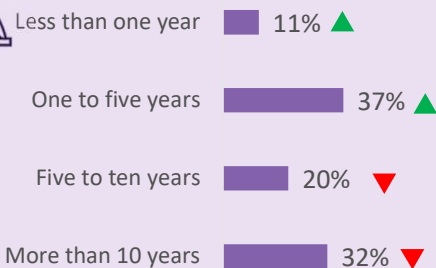
This segment has low confidence and less experience. This group has the largest proportion of trustees with less than one year's experience (11%), with most (37%) trustees typically having one to five years' experience. Their overall confidence is the lowest among all segments with only one in twenty (5%) reporting that they are very confident in the role. They consistently display low levels of confidence throughout every area of their role; less than one third (32%) is very confident in delivering their charity's purpose and only 3% are very confident in identifying and dealing with conflicts of interest.

This group aren't always sure of what they should always do when making a decision. Lower than the average, 89% know to always ask questions even if they are challenging or awkward. This group are more likely than average to incorrectly say it depends on the situation whether they should support a decision that benefits another organisation that they are involved in (51%). This group's overall knowledge score is 14.7/19 – below the average. They are more likely to not use Charity Commission guidance as they don't know how to find what they need (14%) and because they didn't know that the Charity Commission provided guidance (16%).

## Segment 4: Low confidence but learning

This segment represents low confidence and lower experience.

### Experience as a trustee



### Confidence



Overall confidence  
in role: **5%** ▼ very  
confident

### Say they are **very confident** in...



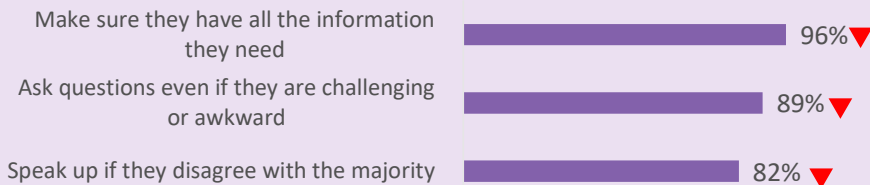
### Knowledge



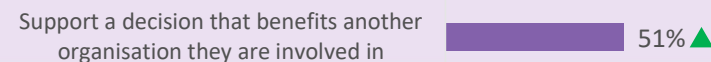
Average  
knowledge score\*  
is **14.7** ▼

\*Out of a total of 19 possible points. Total trustee average is 15.6

### Know that in decision making, they **should always..**



### Incorrectly say **it depends** for...



**86%** ▼ know they are responsible for ensuring that all the charity's activities help to achieve the purposes for which it was set up

**47%** ▼ know they are responsible for making sure the charity sends the right information to the Commission at the right time

## Segment 4: Low confidence but learning

This segment represents low confidence and lower experience.

### Trustee characteristics:



**14%** ▲ are **under 50** years old



**10%** ▼ have the role of the **Chair** within their charity



**41%** ▼ Use **any Charity Commission** guidance at **least once a year**



**53%** ▲ Have **never** used their own charity's guidance

### Reasons for **not** using Charity Commission guidance more often:

I don't think I need guidance that regularly **62%** ▼

I didn't know that the Charity Commission provided guidance **16%** ▲

I don't know how to find what I need **14%** ▲

I don't use the internet very much **11%** ▲



**9%** ▲ don't know the income of their charity

### Main charity activity

Provides services **36%** ▲

Provides buildings, facilities or open space **32%** ▲

Provides grants or other funding to individuals or organisations **28%** ▼

Provides advocacy/advice/information **19%**

### Perceptions of fairness:



**38%** ▼ Say **the Charity Commission acts fairly** when supporting charities or dealing with wrongdoing. (**49%** ▲ say they don't know)

### Use of codes, standards and governance tools:



**25%** ▼ say their charity uses any of the codes and standards, with **54%** ▲ saying they don't know whether they are applied.