Charities Surveys 2014 – General Public

Research Findings
31st March 2014

Background

- OSCR provides regulatory, administrative and advisory services to Scotland's 23,500 registered charities. OSCR states its vision for the Scottish charity sector as being "*for charities you can trust and that provide public benefit, underpinned by the effective delivery of our regulatory role*".

- Between 2007 and 2011, OSCR commissioned annual external stakeholder surveys to collect the attitudes of certain target audiences, the results of which were used to draw attention to attitudinal changes and to flag to OSCR existing and developing issues and concerns.

- *Scottish Charities Surveys 2014* constitutes the first formal external stakeholder research since 2011 and, as such, looks to track changes in stakeholder attitudes during this intervening time, provide feedback on emerging themes and establish a future baseline in new areas of interest. Ultimately, the findings from this research will allow OSCR to more effectively deliver its regulatory functions and engagement priorities.

Objectives

- The objectives of the research were to:

    - measure awareness of, and attitudes towards the work of charities

    - identify any issues about charities' activities that are of concern

    - measure awareness of the regulation of Scottish charities and the main sources of information on regulation (specifically looking at awareness of OSCR)

    - explore the impact of charity regulation on attitudes towards Scottish charities and attitudes towards the regulation of charities

    - Track and analyse any changes that have occurred in people's opinions

Method

- Combination of Qualitative and Quantitative methods

Qualitative

- 6 focus groups discussions
- 3 with high level donors, 3 with lower level donors
- Held in:
  - Edinburgh
  - Glasgow
  - Dingwall
- Fieldwork dates – February 12th to February 27th
- Groups in Edinburgh, Glasgow and Dingwall were viewed by members of OSCR
- Each lasted 90 minutes

Quantitative

- Online self-complete questionnaire
- Sample size – 1,001 Adults across Scotland
- Representative Sample of the Scottish population - Weighted to Census data for:
  - Age
  - Gender
  - SEG
- Final weighted sample size – 1,000
- Conducted in partnership with Research Now via an online panel
- Fieldwork dates – 17th February - 9th March
- Margins of error for the results shown are +/- 0.87% and +/- 3.1%

All work has been carried out in accordance with ISO 20252 guidelines and the MRS Code of Conduct

Sample profile Qualitative

Location	Level of donating	Number of respondents	Charities supported
Glasgow	High	8	Macmillan, Cancer research , NSPCC, St Vincent's Hospice, Accord hospice, Salvation Army, Oxfam, Marie Curie, Heart Foundation, Red Cross, York Hill sick kids.
Glasgow	Low	7	Dogs Trust, class Malawi, diabetes, cancer research British Heart Foundation, Jeans for Genes, Macmillan, CRIY, Breast cancer, SCIAF, children in need, Santa Sport Relief
Edinburgh	High	8	Huntington's, Auto Neurone, Autistic, Cancer research, Breast Cancer research, EDCH, big appeals, SSPCA, Guide dogs for the blind, Edin sick kids, Sports relief, CLASP, Alzheimer's Scotland, Maggie's centre, hearing dogs, dogs trust.
Edinburgh	low	8	SSPCA, sick kids, Heart Foundation, Fire fighters, cancer research, Marie Curie, CLASP, SAMH, SOBS, Orchid appeal, St Columba's hospice, RNLI, Oxfam, Greenpeace, EU Alumni, children's cancer, CLIC Sargent.
Dingwall	High	8	Puffin Pool, Highland Hospice, Red Cross, Cancer Research, Oxfam, British Heart Foundation, Chest heart and Stroke, Marie Curie Cancer, Christian Aid, RNLI, UNICEF, The Dog Trust, Maggie's Centre, Smile Train, Blythswood, Friends Of the Earth, NCL
Dingwall	Low	8	Red Cross, Macmillan Cancer, Poppy Appeal, Help the Heroes, Highland Hospice, RSPB, RNLI, Dogs Trust, Shelter, Donation box in local Tescos

A good mix of gender and age across all groups.

Sample Profile Quantitative

	Unweighted	Weighted		Unweighted	Weighted
Gender			**Age**		
Male	48%	48%	16-24	13%	15%
Female	52%	52%	25-34	16%	15%
Location			35-44	19%	17%
North East Scotland	-	17%	45-54	18%	18%
Highlands & Islands	-	6%	55-64	15%	15%
South Scotland	-	5%	65+	18%	20%
West Scotland	-	14%	**SEG**		
Central	-	18%	AB	20%	19%
Mid-Scotland & Fife	-	8%	C1	32%	32%
Lothians	-	18%	C2	19%	22%
Glasgow	-	15%	DE	28%	28%
BASE:	**1,001**	**1,000**	**BASE:**	**1,001**	**1,000**

Executive summary

Summary

Engagement with charities

- Overall interest in charities has remained stable but there has been a decline in numbers of those giving top box score of 8 to 10 who are extremely interested.

- A significantly higher number of respondents this year (22%) compared to 2011 (9%) claimed to have used a service provided by a charity. Interestingly younger age groups (56%) are more likely than other age groups to have had any contact with a charity. Qualitative work suggests that this is because of charitable work encouraged at school and university.

- There is a significant increase of those donating goods and a decrease in those giving donations of more than £200. There is also a significant increase in the proportion of people buying goods from charities.

- There is a significant increase in the proportion of people who view themselves as donating more money. It could be that the pattern of donation is changing and that more frequent but smaller donations in cash are being made. This is more pronounced in the numbers of those donating more goods which is consistent with other findings

- Text, TV and Appeal websites are now commonly used as vehicles for giving, whereas there was a significant decrease in the number of those donating by credit and debit card.

Summary

Motivation and Trust

- Both qualitative and quantitative research confirmed that personal connection and interest are the most driving reasons for being involved with a charity.

- Qualitative research indicated that people are suffering from donor fatigue and that techniques of *"hard sell"* are no longer working.

- While fewer people give a top box score (10) there is an overall significant increase in trust and confidence with 68% rating 6 or more in 2014 compared to 60% in 2011.

- Local charities enjoy a greater level of trust from the public than their national and international counterparts Scottish charities come a close second to local charities in ratings of trust.

- The top three elements that drive trust are:

  - *Knowing how much of my donations goes to the cause*

  - *Seeing evidence of what is achieved*

  - *Knowing that the charity is fully regulated*

- Having trust is essential, the vast majority (83%) say trust is important when it comes to determining how much to donate.

- If charities can demonstrate the three elements above they are highly likely to increase the levels of donation.

Summary

Concerns

- The top two spontaneously mentioned concerns about how charities are run are the amount spent on running costs and money reaching the actual cause. This is highly consistent with findings relating to building trust.

- Over half the sample (52%) said they were very concerned over Chief Executives' salaries and 44% were very concerned over the amount of donations spent on running costs.

- Few knew where to go if they had a concern relating to a charity when unprompted but when prompted with OSCR's full title it was the most likely place chosen to express a concern.

Awareness of OSCR

- While no respondents in the qualitative research had really experienced any problems with charities the majority were vociferously in favour with regulation of charities. This was true of low and high level donors.

- Qualitative research gave clear indications that if respondents knew charities were registered with OSCR they would trust them more and be more inclined to make donations. Respondents were vocal about the need for charities to promote the fact that they are registered with OSCR.

- This research indicates a need for OSCR to increase its awareness with only 21% being aware.

- The overwhelming majority (85%) consider OSCR's role to be very or fairly important.

Conclusions

- There are some very positive findings in this wave of research and some very interesting messages that can be delivered as a result of it.

- Charities are having to work harder to get cash donations and they must have the trust of the public to get those donations.

- Knowing that charities are registered with OSCR really builds trust and the public would like to see OSCR's logo as well as the charity number on their chosen charities.

- OSCR already does a lot of the things the public would like it to do but they are unaware of this. If the public knew there was a central place where they could get details of charities they would be more likely to check out the charity's credentials and make a donation on the basis that is it well governed.

- Building awareness of OSCR and its work will undoubtedly benefit charities and the general public.

Main Findings

- Engagement
- Motivations and Trust
- Concerns
- Awareness of OSCR

Engagement with Charities

Interest in charities and their work

Legend: 2011 (B:1,018) · 2014 (B:1,000)

Category	2011	2014
0-2 Not at all interested	14%	12%
3-4	8%	12%
5	21%	22%
6-7	22%	29%
8-10 Extremely Interested	33%	25%
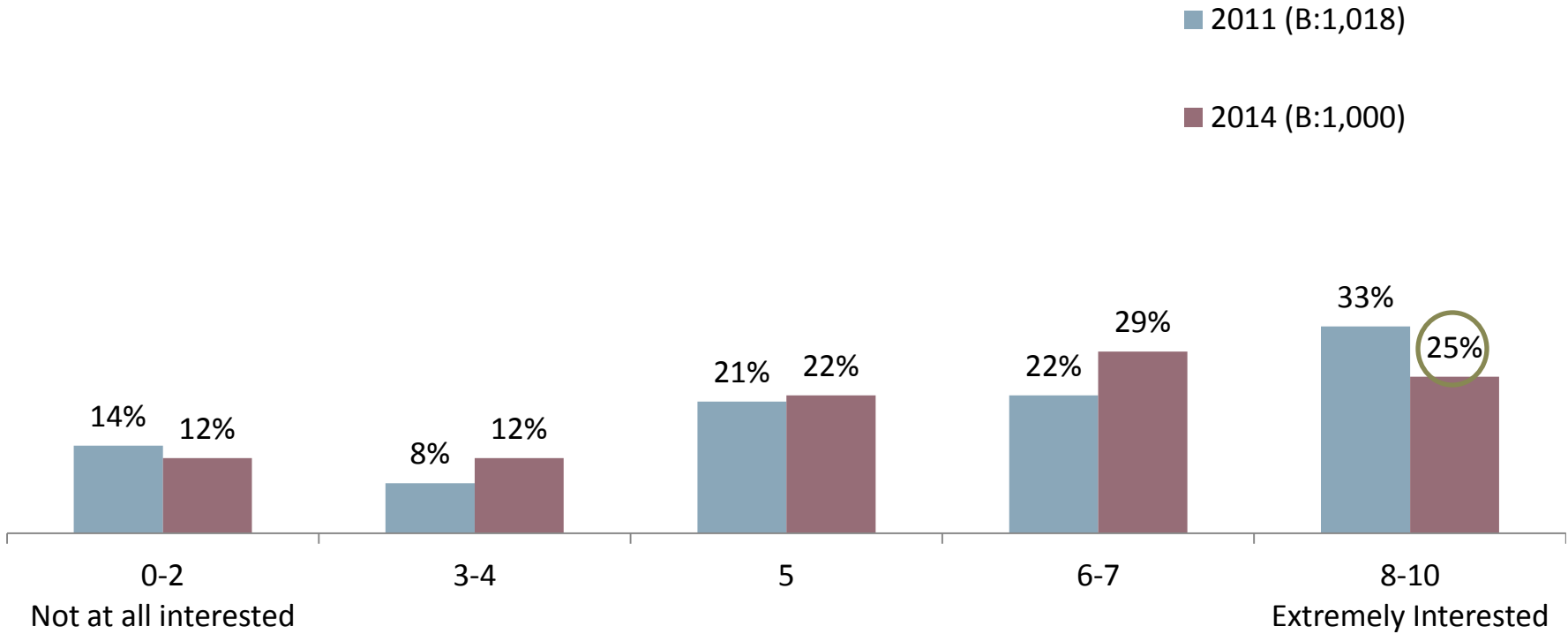
While there is little change in overall interest we can see a significant decrease in the number of respondents who are extremely interested in charities and their work.

Q1. How interested are you in charities or their work?

Base (all respondents)

Interest in Charities

- **High level** donors tended to have a broader and very specific repertoire of charities they donated to. They were often physically involved with them and they gave freely of their time. They tended to give to more than three charities. They were more likely to donate money by standing order (SO) and direct debit (DD). Most of them benefacted local charities as well as national and international charities.

- **Lower level** donors tended more often to cite generic charities such as children's cancer. They tended not to give of their time and were less likely to donate money by SO or DD. They tended to give to fewer charities. They tended to donate to national and international charities over local ones.

Profile of those most interested in charities

2011	% scoring 8-10 2011	Mean Score 2011	2014	% scoring 8-10 2014	Mean Score 2014
Total (1,018)	**33%**	**5.98**	**Total (1,000)**	**25%**	**5.75**
Male (561)	27%	5.60	Male (480)	24%	5.54
Female (557)	38%	6.33	Female (520)	26%	5.95
16-24 (108)	30%	5.94	16-24 (150)	37%	6.63
25-34 (147)	23%	5.40	25-34 (150)	34%	6.25
35-44 (174)	33%	5.99	35-44 (170)	21%	5.50
45-54 (200)	38%	6.43	45-54 (180)	22%	5.64
55-64 (154)	46%	6.71	55-64 (150)	19%	5.10
65+ (235)	29%	5.48	65+ (200)	22%	5.52
AB (206)	41%	6.71	AB (185)	33%	6.21
C1 (272)	29%	5.87	C1 (315)	27%	5.95
C2 (205)	30%	5.61	C2 (220)	16%	5.33
DE (335)	34%	5.89	DE (280)	26%	5.55

There appears to be a significant drop in high level interest from Females and those aged 55 to 64.

Q1. How interested are you in charities or their work?

Base (all respondents)

Contact with charity

A slightly higher percentage of females (45%) than males(40%) have had any contact with charities

A higher percentage of 16-24 year olds (56%) have had any contact with charities compared to an average of 43%. We strongly suspect that this is because of charitable work encouraged at school and university.

■ 2009 (1,009)
■ 2010 (1,039)
■ 2011 (1,018)
■ 2014 (1,000)

Chart categories: Used a service provided by a charity (9%, 22%), Received money/help from a charity (2%, 4%), Charity advisor (1%), Member of a charity's executive or management committee (3%, 2%, 3%), Volunteer (18%, 16%, 20%, 23%), Trustee (1%, 2%), Paid Employee (6%, 5%, 4%)
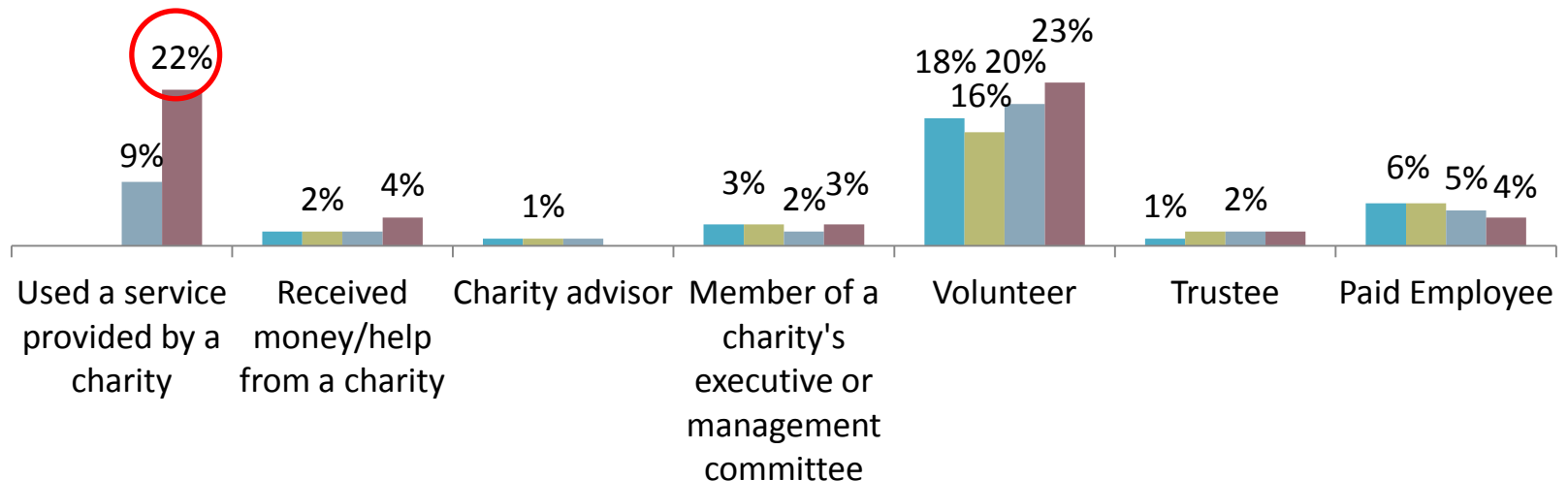
There is a significant increase the numbers using services provided by charities, including charity shops.

Q2. Do you or any of your close friends and family have any of the following contact with a charity?

Base (all respondents)

Donation of time, goods and/or money in the last year

AB SEGs (81%) were the most likely to have donated money

The 65+ age group (77%) were more likely than other age groups to have given goods

Younger people 36% (16-24 year olds) were the most likely to donate their time

2009 (B:1,009)
2010 (B:1,039)
2011 (B:1,018)
2014 (B:1,000)

Yes (Any): 89%, 86%, 89%, 92%

Yes (Money): 77%, 74%, 73%, 72%

Yes (Goods): 39%, 42%, 44%, 62%

Yes (Time): 17%, 17%, 21%, 23%

No/decline to say: 11%, 13%, 11%, 8%
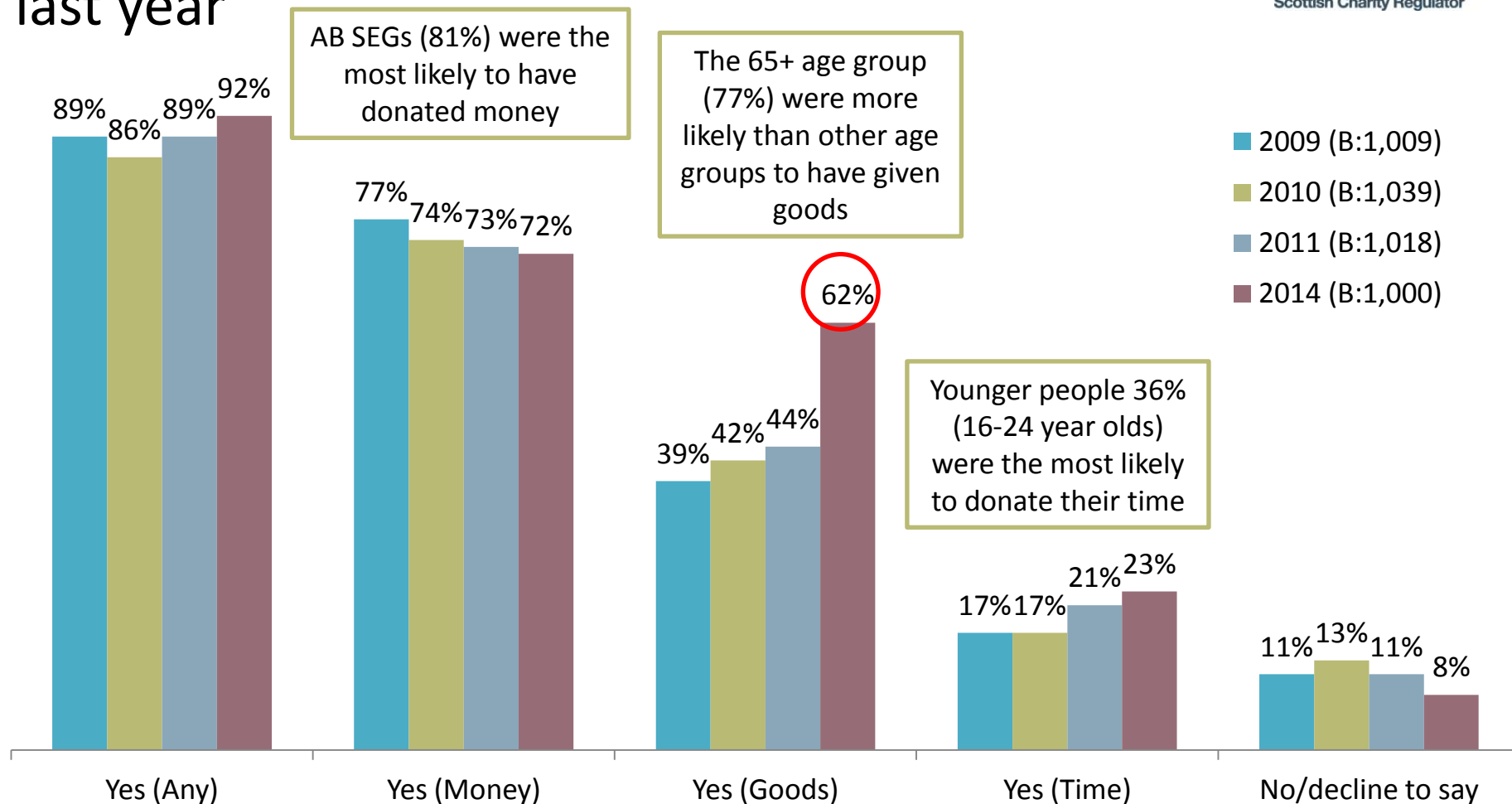
There is a significant increase in the percentage of those giving goods to charity . Other means of donating to charity remain consistent with previous waves, with overall donation stable at 9 out of every 10 respondents.

Q3. Have you given any time, goods or money to a charity within the last year? If so, which?

Base (all respondents)

Amount of money donated to charity

54% of younger people (16-34) donated between £5 and £50 a year.

- 2009 (B:775)
- 2010 (B:769)
- 2011 (B:740)
- 2014 (B:715)
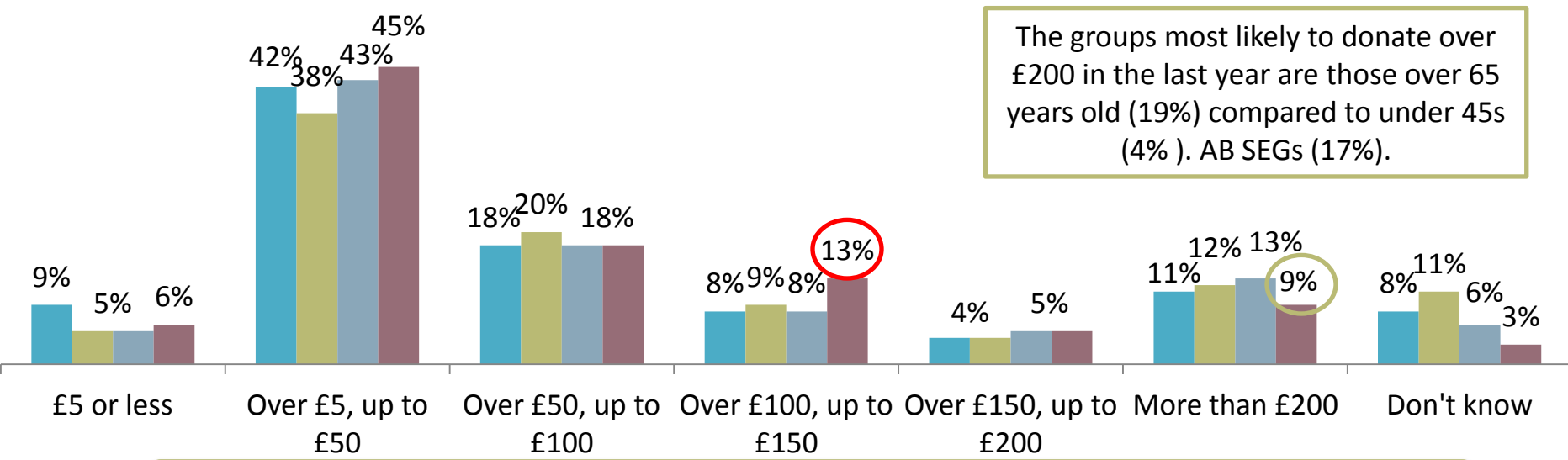
The groups most likely to donate over £200 in the last year are those over 65 years old (19%) compared to under 45s (4%). AB SEGs (17%).

Chart data:

£5 or less: 9%, 5%, 6%

Over £5, up to £50: 42%, 38%, 43%, 45%

Over £50, up to £100: 18%, 20%, 18%

Over £100, up to £150: 8%, 9%, 8%, 13%

Over £150, up to £200: 4%, 5%

More than £200: 11%, 12%, 13%, 9%

Don't know: 8%, 11%, 6%, 3%

The amount of money donated has remained fairly stable across the four waves with a significant reduction in donations of over £200 and a significant increase in donations of over £10 up to £150.

Q4a. Approximately how much money do you give to charity per year (including coins into cans)?

Base (all who donated money)

How money was donated to charity

Donated cash
- 59% (2014)
- 64% (2011)

Bought goods
- 55% (2014)
- 29% (2011)

Again, we see the increase in the proportion of people buying goods from charities

Attended an event/bought a raffle ticket (net)
- 54% (2014)
- 35% (2011)

Bought a raffle or lottery ticket
- 42% (2014)
- 27% (2011)

■ 2014 (B:715)

■ 2011 (B:740)

Attended a fundraising event
- 28% (2014)
- 22% (2011)

*New to 2014

Street Fundraising*
- 29% (2014)

Consistent with a decrease in levels of cash given, we see a decrease in the numbers of those who have donated cash.

Q4b. How have you donated money to charity the past 12 months?

Base (all who donated money)

How money was donated to charity (cont)

Chart: How money was donated to charity

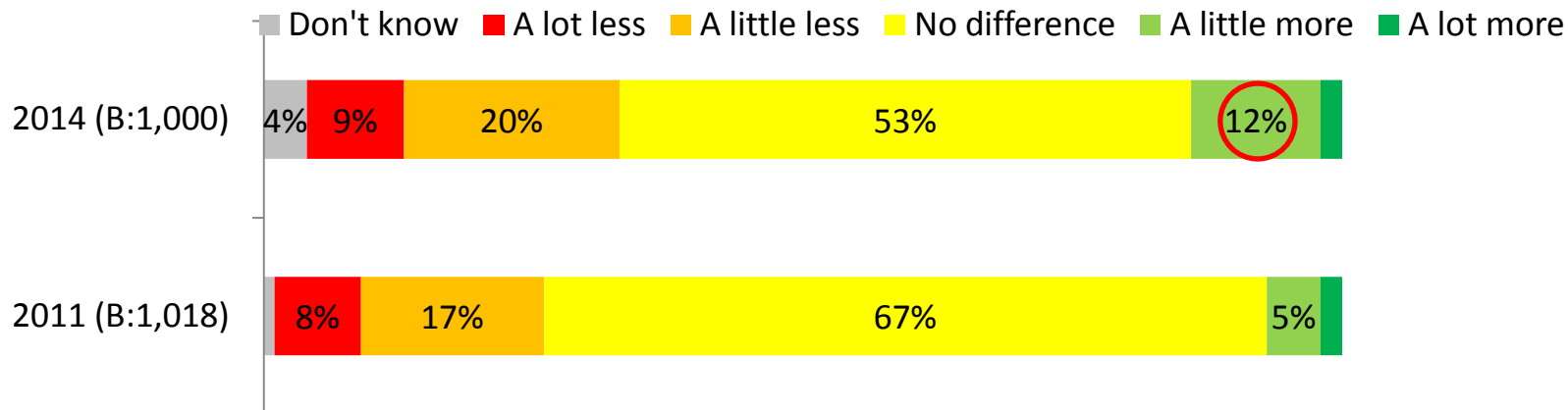| Category	2014 (B:715)	2011 (B:740)
Any regular donation	33%	29%
Direct Debit, standing order or covenant	28%	25%
Regular donation by payroll/salary	8%	6%
Prompted ad hoc donations (net)	45%	28%
Donated by social media / Just Giving*	20%	
Text donation	14%	3%
TV appeal	15%	9%
Credit / debit card or cheque	15%	21%
Appeal website*	12%	
Membership fees and subscriptions	10%	7%

*New to 2014

While regular donations remained fairly constant there was a significant increase in ad hoc donations. Donations such as text and online giving polled strongly while donations by credit and debit cards decreased significantly.

Q4b. How have you donated money to charity the past 12 months?

Base (all who donated money)

How money was donated to charity (significant differences)

- Women (62%) were more likely than men (48%) to have donated to charity through buying goods.

- Those aged 45 and over (35%) were more likely than under 45 year olds (19%) to donate regularly via direct debit, standing order or covenant.

- 53% of over 65 yr olds had bought a raffle or lottery ticket (excluding the national lottery). This was true for only 30% of those under 35.

- 25 to 34 year olds (17%) were significantly more likely than the average (8%) to donate through payroll or from salary.

- 17% of AB SEGs said that they donated through membership fees and subscriptions, compared to 8% across C_1, C_2 and DEs.

Q4b. How have you donated money to charity the past 12 months?

22

Change in the amount of donated…

Money:

Legend: Don't know · A lot less · A little less · No difference · A little more · A lot more

2014 (B:1,000): 4% | 9% | 20% | 53% | (12%)
2011 (B:1,018): 8% | 17% | 67% | 5%

Goods:

Legend: Don't know · A lot less · A little less · No difference · A little more · A lot more

2014 (B:1,000): 4% | 10% | 63% | (16%) | 5%
2011 (B:1,018): 3% | 7% | 81% | 5%
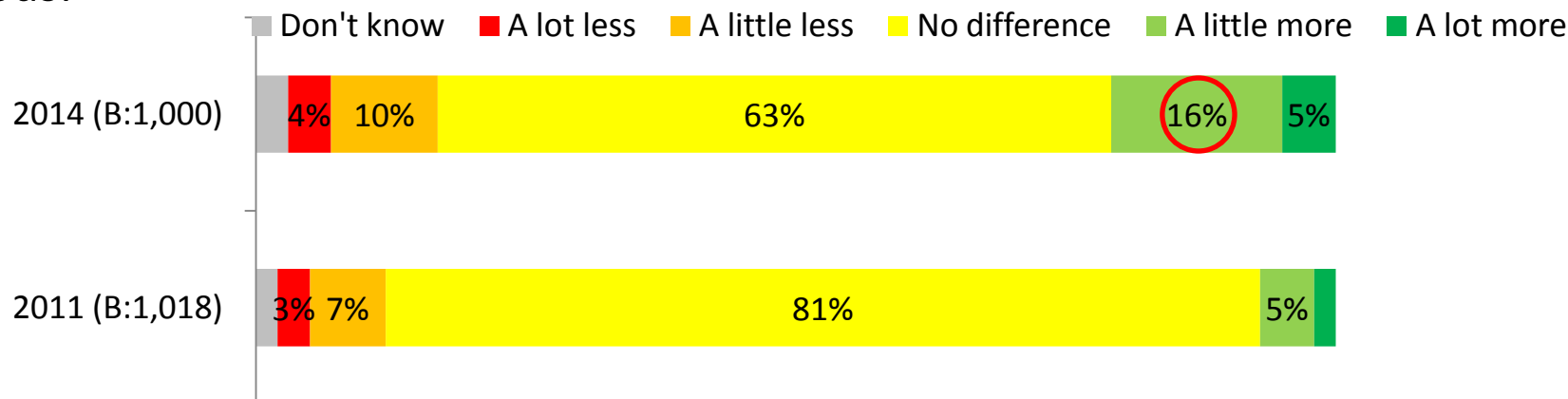
> While the actual numbers are small we can see a significant increase in the proportion of people who view themselves as donating more money. This is more pronounced in the numbers of those donating more goods.

Q5a/b. How much difference, if any, would you say that the current economic climate has made to the amount of money/goods you donate to charities nowadays compared to 2 years ago?

Base (all respondents)

23

Types of charity supported

	2011 (B:902)	2014 (B:921)		2011 (B:902)	2014 (B:921)
Medical or health related charities	44%	**51%**	Big charities	9%	**17%**
Children's charities	40%	**40%**	Small charities	8%	**17%**
Local charities	25%	**36%**	'Mainstream' charities	9%	**16%**
Animal charities	20%	**33%**	Charities supporting ongoing needs	7%	**13%**
Charities supporting urgent needs / emergency appeals	10%	**22%**	Domestic charities	4%	**11%**
National charities	15%	**21%**	Environmental charities	5%	**8%**
People charities	12%	**20%**	'Neglected' charities	2%	**5%**
Military or ex-service charities	12%	**19%**	Art / cultural charities	3%	**5%**
International charities	14%	**17%**	Don't know	4%	**3%**

We suspect the consistent increases across all types of charities are an artefact of the method of survey and that online gives respondents more options to tick all boxes.
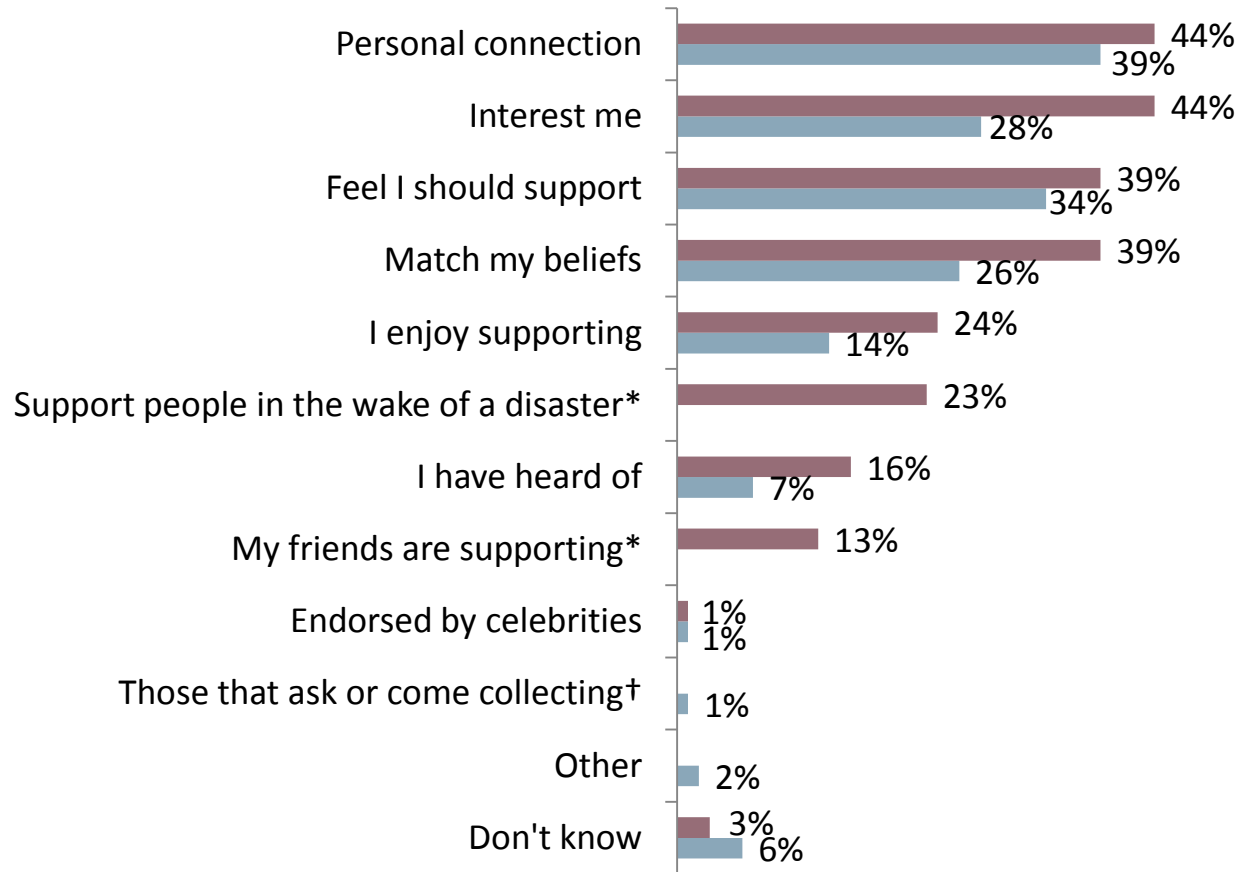
Motivations and Trust Towards Charities

Motivations to be involved

- Having personal experience of a charity is by far the strongest motivator to support and be involved with it.

- Many of our respondents in the high donor category were personally affected by the charities of their choice because the charity had helped them through bereavement & illness or had supported family or close friends in the same ways.

- They were highly driven by the need to *"give a little back"* and many who had the time volunteered for, and had personal relationships with members of, their chosen charity.

- Many claimed to benefit from volunteering:
  - *It gets me out of the house*
  - *Makes me feel really good about what I've done*
  - *I love that the kids like me and want me to go every week*

- Many were supportive of local charities and said they were motivated to continue supporting them because they could *"see the differences being made"*.

- Often times the relationships with charities were maintained through newsletters from the charity with photographic evidence of achievements. Facebook was reported to be more and more important to people as a way of following the charity of their choice.

Reasons for supporting charities and causes

Personal connection 44% / 39%
Interest me 44% / 28%
Feel I should support 39% / 34%
Match my beliefs 39% / 26%
I enjoy supporting 24% / 14%
Support people in the wake of a disaster* 23%
I have heard of 16% / 7%
My friends are supporting* 13%
Endorsed by celebrities 1% / 1%
Those that ask or come collecting† 1%
Other 2%
Don't know 3% / 6%

2014 (B:921)
2011 (B:901)

That a charity 'interests me' is of more importance to ABC1 respondents (50%), than to C2DE (38%)

* New to 2014
† Not included in 2014

The reasons for supporting charities remain in a very similar order of importance across both waves. This order of importance is highly consistent with findings from the qualitative stage of research. We suspect the significant increases across all parameters are an artefact of the method of survey and that online gives respondents more options to tick all boxes.

Q4d. Thinking of the charities and causes that you support, can you please tell me the reasons why you choose to support them?
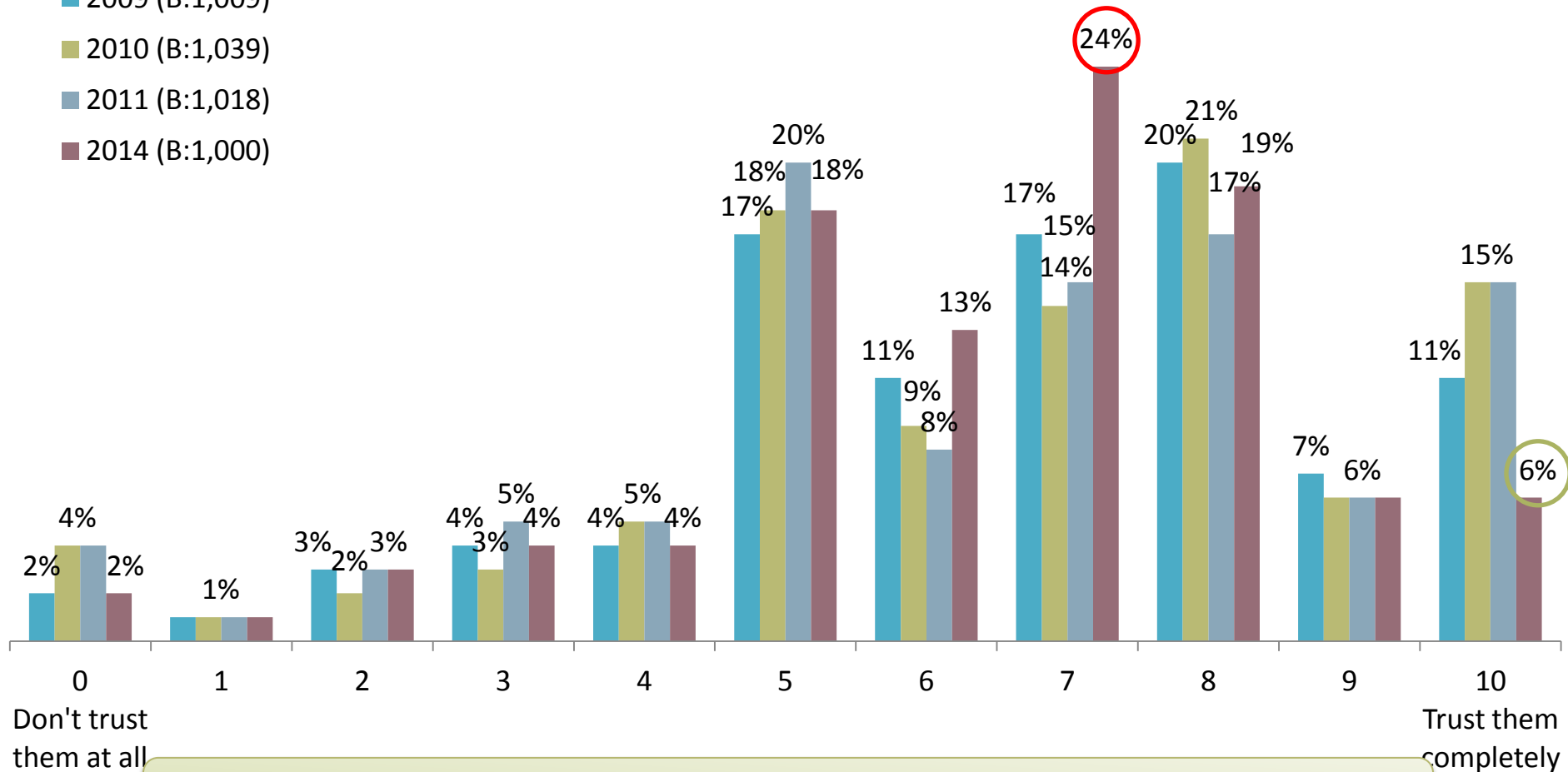
Base (Those who have donated)

What de-motivates people

- Many claimed to be overwhelmed by television adverts for charities, especially at Christmas time. There were clear signs of donor fatigue in our qualitative sample with respondents saying they felt more pressured by advertising , telephone requests and street collectors.

- There were also reports of charities behaving aggressively when it comes to soliciting donation. With forceful people at the door and street collectors who wouldn't take no for an answer.

- Hard sell techniques are highly de-motivating.

- People claimed to be tired of being made to feel guilty and being subjected to emotional blackmail. This was especially true in the context of children's charities and endangered animals.

- Some claimed to have been in a situation where they had cancelled DD donations on account of being telephoned and asked to give more.

- Respondents also commented on how negatively they felt toward the barrage of collectors in their local shopping centre and collectors knocking at the door.

- Respondents were very sensitive to the issue of ratio of donation that actually goes to help which made them more inclined to give to charities where they know those running it are volunteers.

- Knowing that charity workers are salaried de-motivates some.

Overall trust and confidence in charities

Legend:
- 2009 (B:1,009)
- 2010 (B:1,039)
- 2011 (B:1,018)
- 2014 (B:1,000)

Chart: "Overall trust and confidence in charities"

Rating	2009	2010	2011	2014
0 – Don't trust them at all	2%	4%	4%	2%
1	—	1%	1%	1%
2	3%	2%	3%	3%
3	4%	3%	5%	4%
4	4%	5%	5%	4%
5	17%	18%	20%	18%
6	11%	9%	8%	13%
7	17%	14%	15%	24%
8	20%	21%	17%	19%
9	7%	6%	6%	6%
10 – Trust them completely	11%	15%	15%	6%

> While there may be a decrease in the number of those giving the highest rating, overall we can see a significant increase in trust and confidence levels with 68% rating 6 or more in 2014 compared to 60% in 2011.

Q6a. Thinking about how much trust and confidence you have in charities overall, on a scale of 0 to 10 where 10 means you trust them completely and 0 means you don't trust them at all, how much trust and confidence do you have in charities?

Base (all respondents)

Overall trust in charities – sub-groups

	% scoring 6-10 2011		% scoring 6-10 2014	
	Base	%	Base	%
Total	**1,018**	**61%**	**1,000**	**68%**
Aware of OSCR	184	70%	209	81%
Not aware of OSCR	831	59%	791	64%
Any contact with charity	331	69%	431	77%
No contact with charity	687	57%	569	61%
Given to charity in the last year	902	65%	921	71%
Not given to charity in the last year	113	28%	79	28%
Interest in charities 0-2	149	30%	117	33%
Interest in charities 3-4	82	48%	118	49%
Interest in charities 5	214	50%	221	55%
Interest in charities 6-7	222	79%	290	81%
Interest in charities 8-10	338	74%	253	90%

The most significant increases can be seen amongst those who are aware of OSCR, have given to charity in the last year and/or consider themselves most interested in charities and their work (i.e. are most engaged).

Q6a. Thinking about how much trust and confidence you have in charities overall, on a scale of 0 to 10 where 10 means you trust them completely and 0 means you don't trust them at all, how much trust and confidence do you have in charities?

Definition of a charity

- The most mentioned spontaneous qualifications for a charity were:
    - *It has to do good*
    - *Benefit the community*
    - *Help people*
    - *Do what it says it will*
    - *Improve life*

- There was a general acceptance that organisations such as Schools, Churches and Sports for Kids fall into the category of charity. However, some voiced scepticism that independent schools should have charitable status as there is some doubt in their minds that they really benefit the community.

- There appears to be a need for some charities to publish their credentials and demonstrate that they are doing good or at least that their charitable status is bona fide.

- The issue of knowing that a charity is registered came up spontaneously with respondents who referred to the charity number as proof that they are "*real*".
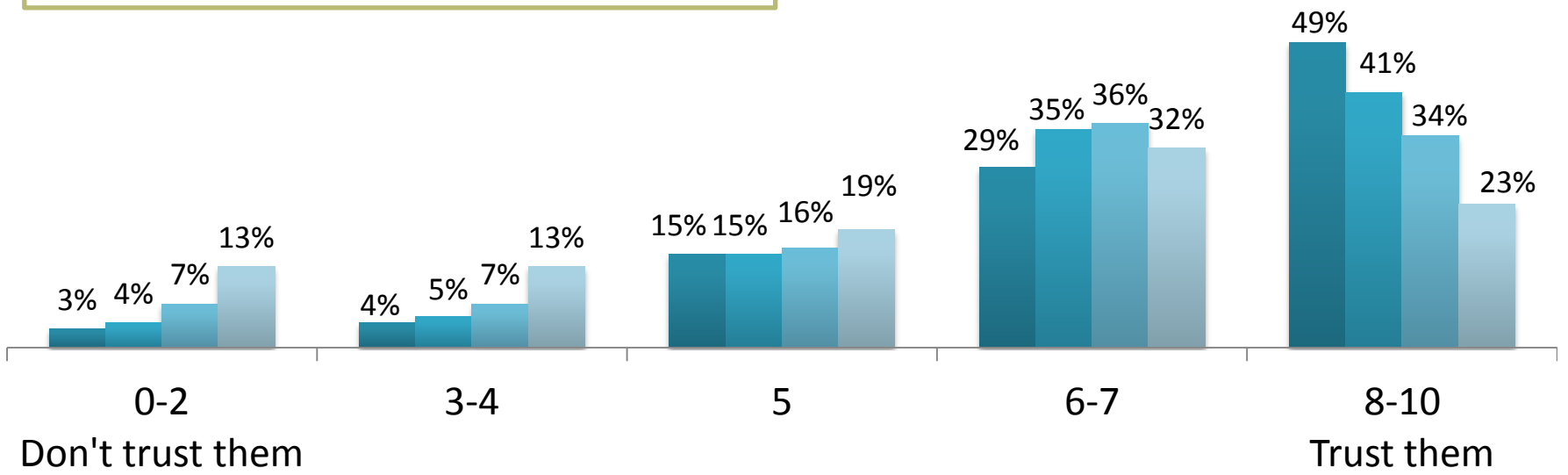
Trust according to size of charity

Over 65yr olds is the group most trusting of local charities, with 57% rated 8-10. 43% of 16-24s rated them this highly. The average was 49%,

Conversely, a younger group (31%), 25-34s, rated the highest trust in international charities. With over 65s (14%) the least inclined to score them this highly.

Legend:
- Local Charities
- Scottish National Charities
- UK National Charities
- International Charities

	0-2	3-4	5	6-7	8-10
Local Charities	3%	4%	15%	29%	49%
Scottish National Charities	4%	5%	15%	35%	41%
UK National Charities	7%	7%	16%	36%	34%
International Charities	13%	13%	19%	32%	23%

Don't trust them — Trust them

Local charities enjoy a greater level of trust from the public than their national and international counterparts.

Trust in Charities

Builds trust

- *Knowing where the money goes*
- *Seeing evidence of where money goes (this is true of local charities)*
- *Having contact*
- *Long term experience of the charity*
- *Seeing evidence of what is achieved*
- *Volunteers running it*
- *Donating locally*
- *Personal involvement*
- *National campaigns bringing Britain together (e.g.comic relief)*
- *Familiarity*
- *Being registered*

Breaks trust

- *Chief execs high salary*
- *Reporting of pay rises for leaders of charities*
- *Most of the money going on running organisation*
- *International aid charities that don't demonstrate improvement*
- *Reports of dishonesty*
- *Bombarded by collectors (Silverburn & Cameron Toll)*
- *Cold callers asking for DD on the door*
- *Phone calls asking for donations*
- *Being asked to increase my donation*
- *Non-specific collections*
- *No badge of identity*
- *No visible charity number*
- *Gimmicky gifts*

Ways of increasing levels of trust

Legend: Don't know | 1 – not at all | 2 | 3 – Somewhat | 4 | 5 – Greatly

Category	Don't know	1	2	3 – Somewhat	4	5 – Greatly
Knowing how much of my donation goes to the cause	3%	2%		17%	18%	57%
Seeing evidence of what it has achieved				19%	22%	49%
Knowing that it was fully regulated by an independent body	4%	3%		24%	24%	39%
Having open access to its accounts				26%	21%	34%
Having a website where I could check that the charity is ethical and honest	6%	6%		27%	25%	32%
A badge on all of its advertising that verifies that it is regulated		7%		30%	22%	30%

Knowing how much money goes to good causes is the most important way of building trust. This is followed by having evidence of what is achieved. Knowing the organisation is fully regulated is very important as a trust builder.

Base (all respondents): 1,000

Q7a. To what degree would the following increase your level of trust in a Scottish charity?

Ways of increasing levels of trust (significant differences)

- Older age groups were, in general, slightly less positive than younger age groups regarding the potential for increasing trust in charities

  – 37% of under 34s viewed a badge that verifies a charity is regulated as something that would 'greatly' increase their trust in Scottish charities, this compares to only 25% of those over 55 years old

- This is highly likely to be connected to the idea that trust is built through experience and long term experience.

Q7a. To what degree would the following increase your level of trust in a Scottish charity?

35

Importance of trust when donating to charity

83% of respondents said trust was important when it comes to determining how much to donate.

Slightly more women (86%) than men (81%) said that trust was important in determining how much they donated to charity

44% — Very important
39% — Fairly important
12% — Neither/nor
1% — Fairly unimportant
2% — Very unimportant
2% — Don't know
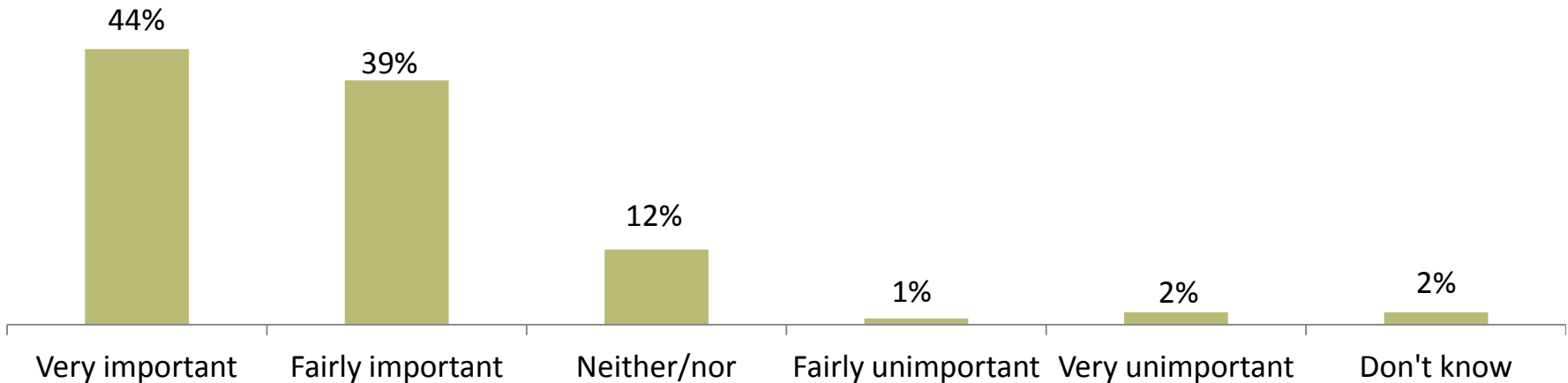
Trust in a charities is a very strong factor in determining the amount people donate. Findings from this research demonstrate that the more trust a person has in the charity the more likely they would be to donate to it.

Q7b. How important is your trust when it comes to determining how much money, goods or time you choose to donate to a charity?

Base (all Respondents): 1,000

Concerns about Charities

Concerns regarding how charities are run

This table ranks the order of mentions that respondents gave to an open ended question.

	(B:1,001)	
	Tot.	%
Running costs	308	31%
Not enough money reaches the actual cause	223	22%
I don't know how they spend their money	90	9%
Money is lost through corruption	43	4%
They use fundraising techniques I don't like	27	3%
They waste the money	17	2%
No issues or concerns	394	39%

8a What issues or concerns, if any, do you have relating to how charities are run?

Base (all respondents; unweighted)

Concerns regarding how charities are run

I feel that the "big" international charities are paying people at the top far too much money which could be used for relief work

Donations to overseas aid falling into the wrong hands

Some charities want to "make" you donate: charity members come home asking to give them your bank details or stop you in the street asking to donate, this is a bit annoying

That money is lining the pockets of people rather than benefiting those that need the money.

That my whole donation is being used to help the people within the charity and a percentage is not being held back for other things. i.e. running costs of the charity

Where the money actually goes and peoples salaries

Must be ethical & accountable for where money goes & what it is used for

I knew a friend who collected for charity and when I found out how little went to the charity and the greater amount he and the directors received I was appalled.

Levels of concern relating to charities

Charity chief executives' salaries

Legend: ■ Don't know ■ 5 – Very concerned ■ 4 ■ 3 ■ 2 ■ 1 – Not at all concerned

2014 (B:1,000)	52%	21%	17%	4%	3%
Not run in 2011		
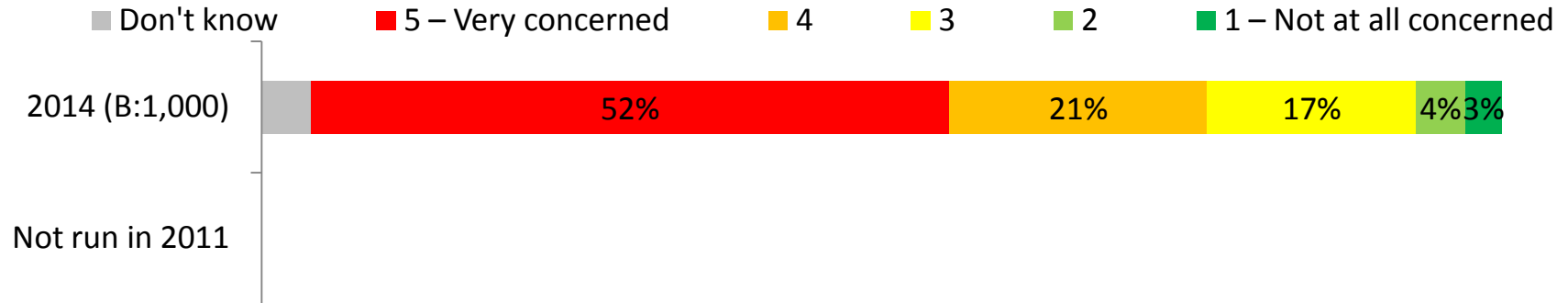
Amount of donations spent on administration/running costs of charities

Legend: ■ Don't know ■ 5 – Very concerned ■ 4 ■ 3 ■ 2 ■ 1 – Not at all concerned

2014 (B:1,000)	44%	25%	21%	4%	3%
2011 (B:1,018)	35%	20%	19%	7%	16%

Base (all respondents)

Q8b. Please state how concerned you are about each of the following issues.
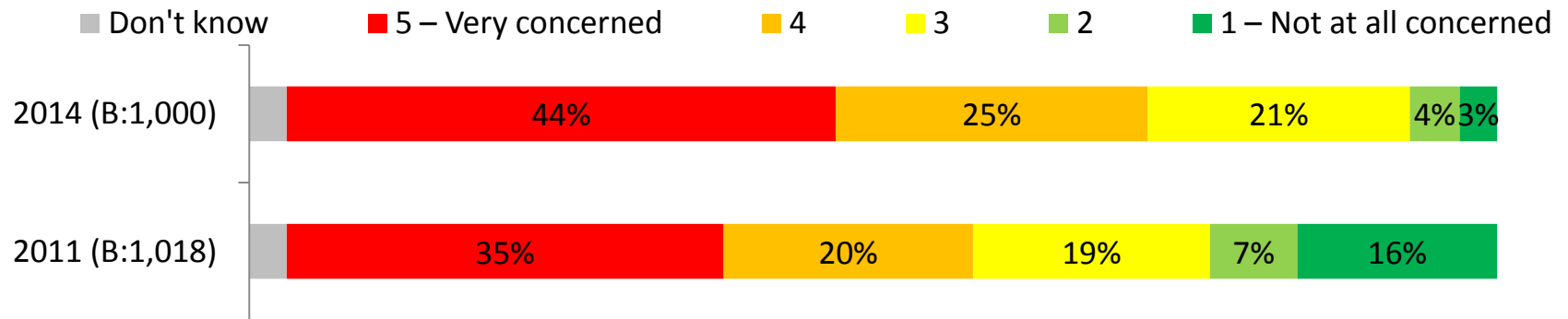
Levels of concern relating to charities

Accuracy of charities' accounts
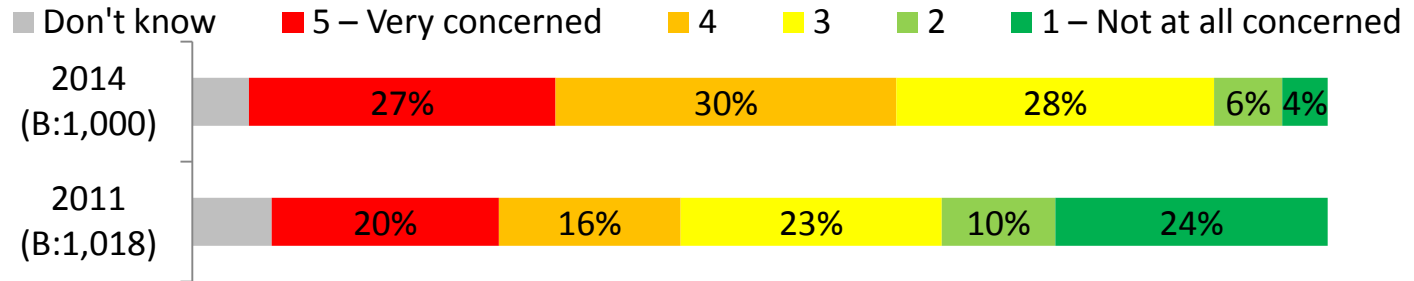
Legend: ■ Don't know　■ 5 – Very concerned　■ 4　■ 3　■ 2　■ 1 – Not at all concerned

Year	5 – Very concerned	4	3	2	1 – Not at all concerned
2014 (B:1,000)	27%	30%	28%	6%	4%
2011 (B:1,018)	20%	16%	23%	10%	24%

Existence of charity regulation to ensure they are working for public benefit

Legend: ■ Don't know　■ 5 – Very concerned　■ 4　■ 3　■ 2　■ 1 – Not at all concerned

Year	5 – Very concerned	4	3	2	1 – Not at all concerned
2014 (B:1,000)	26%	32%	27%	5%	4%
2011 (B:1,018)	24%	16%	27%	10%	19%

Base (all respondents)

Q8b. Please state how concerned you are about each of the following issues.
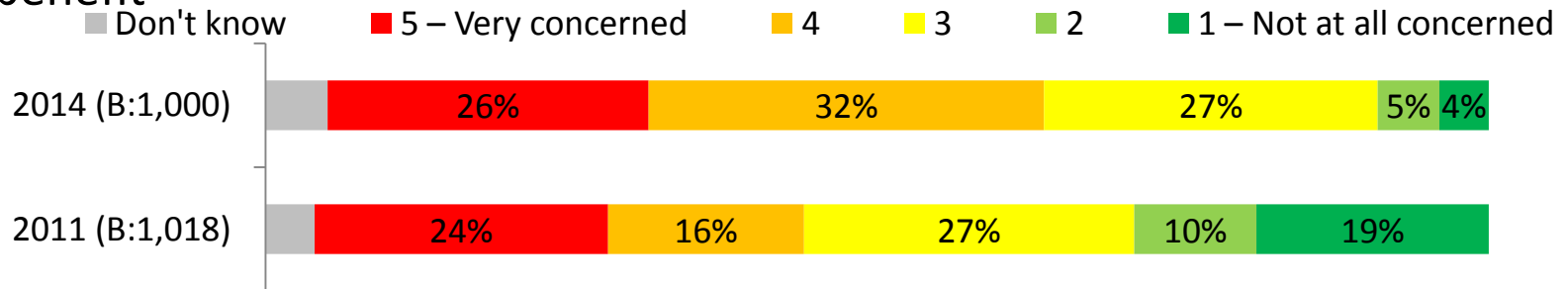
Levels of concern relating to charities

Methods of fundraising used by charities

Legend: ■ Don't know ■ 5 – Very concerned ■ 4 ■ 3 ■ 2 ■ 1 – Not at all concerned

2014 (B:1,000)	21%	27%	32%	10%	6%
2011 (B:1,018)	15%	14%	27%	11%	30%
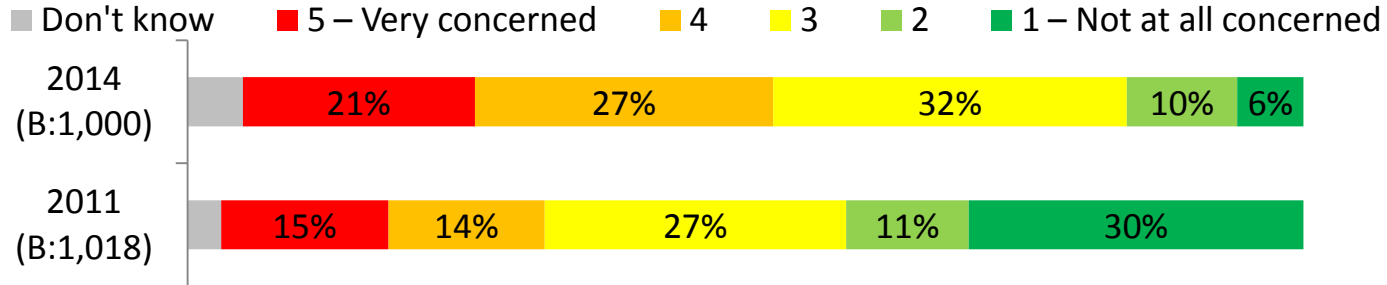
2014 showed consistently higher levels of concern across all five issues compared to 2011. The number of respondents who gave a rating of
(4-5) increased from an average of 40% in 2011 to 58% in 2014.

Whilst the number of respondents who claimed to be not too concerned (scores 2-3) for each issue has remained fairly stable, there has been a dramatic drop in those who claimed to be 'not concerned at all' (an average of 22% in 2011 down to 4% in 2014).

Base (all respondents)

Q8b. Please state how concerned you are about each of the following issues.

Higher levels of concern consistently displayed by older age groups

Those who rated their concern for each item as either 4 or 5 (Very concerned)

	Average Total sample 1000	16 to 44 years old B:470	45+ years old B:530
Methods of fundraising used by charities	48%	43%	52%
Accuracy of charities' accounts	57%	49%	62%
Amount of donations spent on administration/running costs	69%	58%	79%
Existence of charity regulation to ensure they are working for public benefit	58%	53%	63%
Charity chief executive's salaries	73%	63%	82%

Q8b. Please state how concerned you are about each of the following issues.

Reporting Problems

- Very few had experienced problems with a charity. Even so respondents displayed levels of scepticism that all charities are operating in a proper way.

- Some reported that a local Charity shop is known for its volunteers filtering out good quality donations and keeping them for personal use. One reported that a charity she had sold sweets for had been found to be dishonest.

- Reporting malpractice is not an issue that is top of mind largely because people were very unsure of where they would go.

- Some said they would phone the charity direct others mentioned the Police or Citizens Advice. A few mentioned the power of the internet at "outing" bad practice on Facebook or through other social media. A minority mentioned charity ombudsmen/commission.

Where to express concerns about Scottish charities (spontaneous)

	(B:538)	
	Tot.	%
MSP/Government/Council (net)	**96**	**18%**
MSP/MP	59	11%
Government/Council/Local authority	37	7%
OSCR/Unspecified charity regulator (net)	**79**	**15%**
Charity regulator/commission (not specified)	52	10%
OSCR	27	5%
Charity itself	51	9%
Media	32	6%
Police	20	4%
Don't know	224	42%

Q9a. If you had a concern about a Scottish charity, where might you turn to express your concerns?

Base (excluding 'I have no concerns'; unweighted):

45

Concerns regarding how charities are run

I assume there is some kind of charities ombudsman to whom complaints can be addressed.

I don't really know but the charity registration board would be where I would try

Probably start of with the OSCR, and do various other researches & online researches.

Would consider speaking to a local MP for advise on the matter

To express my concerns about anything it is usually done through social networking e.g. Facebook, twitter... you can get in touch with the charity directly and voice your concerns.
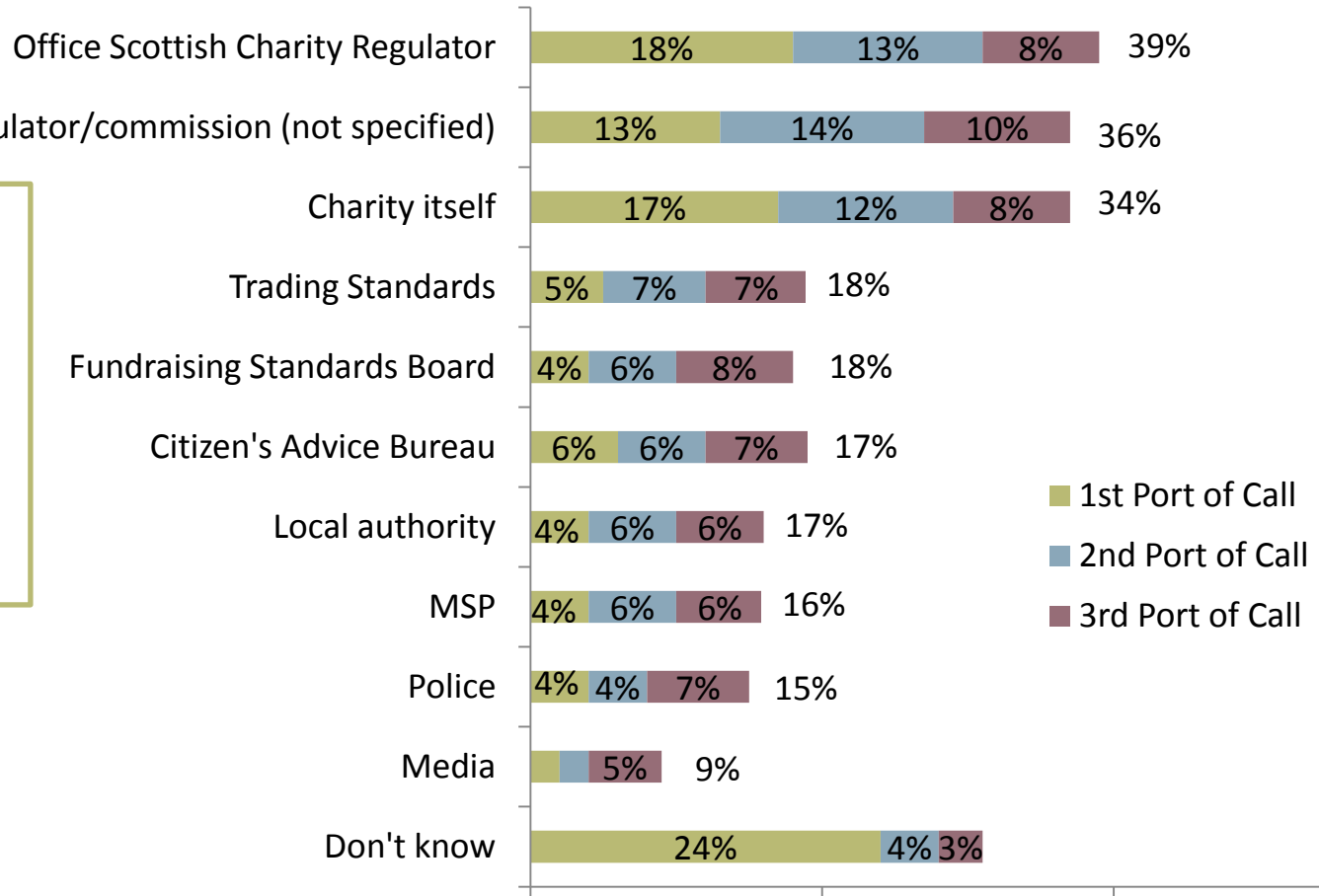
I have no idea, regrettably

I would check if they were 'registered' and find out who is in charge of the register

It is difficult to know where to go and receive any useful assistance

Where to express concerns about Scottish charities (prompted)

progressive
OSCr
Office of the
Scottish Charity Regulator

25-34 year olds (19%) were the age group least likely to seek OSCR/the regulator in the first instance. Over 65s (38%) were the most likely to approach OSCR/ the regulator first.

	1st Port of Call	2nd Port of Call	3rd Port of Call	Total
Office Scottish Charity Regulator	18%	13%	8%	39%
Charity regulator/commission (not specified)	13%	14%	10%	36%
Charity itself	17%	12%	8%	34%
Trading Standards	5%	7%	7%	18%
Fundraising Standards Board	4%	6%	8%	18%
Citizen's Advice Bureau	6%	6%	7%	17%
Local authority	4%	6%	6%	17%
MSP	4%	6%	6%	16%
Police	4%	4%	7%	15%
Media		5%		9%
Don't know	24%	4%	3%	

When prompted, there is a much stronger showing for OSCR and/or an unspecified regulator as a body to which concerns would be expressed.

Q9b. Now looking at the following list, if you had a concern about a Scottish charity, where might you turn to express your concerns? Please select which three would be your first, second and third port of call

Base (all Respondents): 1,000

Awareness and knowledge of OSCR

Regulation of Charities

- While none had really experienced any problems with charities the majority were vociferously in favour with regulation of charities. This was true of low and high level donors.

- The majority of respondents were slightly bemused at the thought that there wouldn't be a body to control and monitor charities. At the same time they didn't know who the organisation could possibly be.

- The main reasons for wanting a regulatory body were stated as:
    - *Making sure the money goes to where it is supposed to*
    - *Ensuring they are doing what they say they are*
    - *Running spot checks on shops*
    - *Making sure they are legal and above board*
    - *Making sure it isn't dodgy in any way*
    - *Suspend the ones that are wrong*

Regulation of Charities

- Respondents were asked to state in an ideal world what would a regulatory body do and the main thrust of comments were tied into the issues of governance and accounting previously mentioned.
  - *You have to make sure it is legal and above board*

- Higher level donors also mentioned the ways in which charities could benefit:
  - *Help them know how to set up*
  - *Give advice on how to run the charity*
  - *How to set up fund raisers*
  - *How to get the best interest rates on money invested*
  - *Make sure volunteers and staff are safe (checked for their integrity)*
  - *Audit books*
  - *Create portal like Virgin for people to donate*

- When respondents were asked what effect it would have knowing a regulatory body was there all spontaneously and enthusiastically talked about increased levels of confidence they would have.

How would you feel knowing a body was in place

It just makes it so much safer all ways round. Charities will have more confidence and people who want to donate would feel better about it knowing its totally above board.

It would make me so much more confident that I knew where my money was going.

It would make sure that CEOs are not filling their pockets.

Its a necessity to have one for any organisation dealing with money. It should be government funded and every charity should be registered. It shouldn't cost the charity to be registered.

I'd be much happier to donate that's for sure.

Would it cost some of the smaller ones? It wouldn't be good if it did.

I would feel really reassured.

It would give you somewhere to complain if you thought things were not as they should be.

I would trust them more because they would be so much more open and transparent.

Awareness of OSCR

- Very few (5) of the sample had ever heard of OSCR.

- When respondents were given a description of OSCR, it roles and responsibilities they were universally in favour and many expressed high levels of enthusiasm.

- Many wanted to know more about OSCR and asked questions such as:
    - *Where is it based*
    - *How long has it been around*
    - *How big is it*
    - *Who funds it*
    - *How come I've never heard of it before*

- At the end of the groups discussion many people claimed they would go home and check out the OSCR website.

How could OSCR Build Trust in Charities

- A lot of the suggestions made by respondents focused on the content of OSCR's website and included:

  - *Provide a ranking of the best performing charities (in terms of ratio of donations to doing good)*
  - *List all local charities in your area*
  - *Give financial information about the charity*
  - *Point to subject specific charities*
  - *List all Scottish and Scotland based charities on the website*
  - *Tell us how much money the charity spends on staff*
  - *Check all of the credentials of the charity*
  - *Make sure charities publish their financial records*
  - *Link to the charity's own website*
  - *Create a directory of charities that way everyone would know where to go*

How could OSCR Build Trust in Charities

- Respondents were vocal about the need for charities to promote the fact that they are registered with OSCR.

- They commented that seeing the OSCR logo on collections buckets and other publicity material would give them a much heightened sense of assurance that the charity is completely trustworthy.

  - *It would really enhance the profile of any charity that was registered*
  - *You would trust them so much more if you knew they were registered with OSCR*
  - *It would really make me think differently about the charity*
  - *It would really help the people who are collecting or soliciting for donations*
  - *Every charity should send out all of its information with the OSCR logo on it*

Awareness and knowledge of OSCR

■ 2011 (B:1,018)

■ 2014 (B:1,000)

The most knowledgeable group regarding OSCR were those who have donated their time to a charity on the last year, with 39% having heard of OSCR, 9% claiming to know 'a lot'

	Aware (Total)	Aware and knew a lot	Aware and knew a little	Aware of the name only	Not aware	Don't know
2011	18%	3%	9%	6%	77%	5%
2014	21%	3%	10%	8%	74%	5%
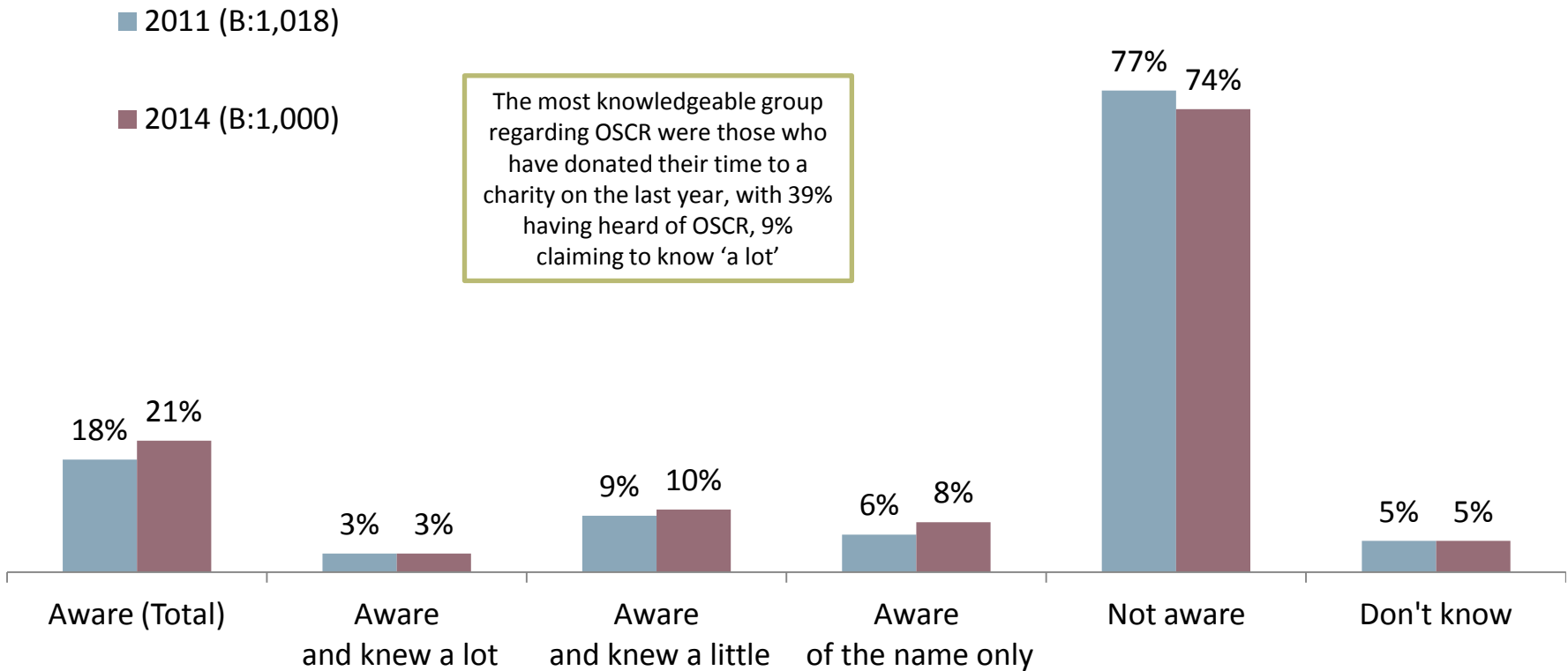
Awareness of OSCR remains fairly low Just over one fifth of respondents (21%) aware. This jumped to over one third (34%) of respondents who have worked, volunteered or advised for a charity or have family or friends that do.

Q10a. Have you heard of the Scottish Charity Regulator?

Q10b. How much do you know about the Office of the Scottish Charity Regulator or OSCR? Do you know a lot or a little about the Office of the Scottish Charity Regulator or do you only know the name?

Base (all respondents)

Level of knowledge of those aware of OSCR

Legend:
- 2011 (B:187)
- 2014 (B:209)

	Aware and knew a lot	Aware and knew a little	Aware of the name only
2011	16%	51%	32%
2014	13%	47%	40%
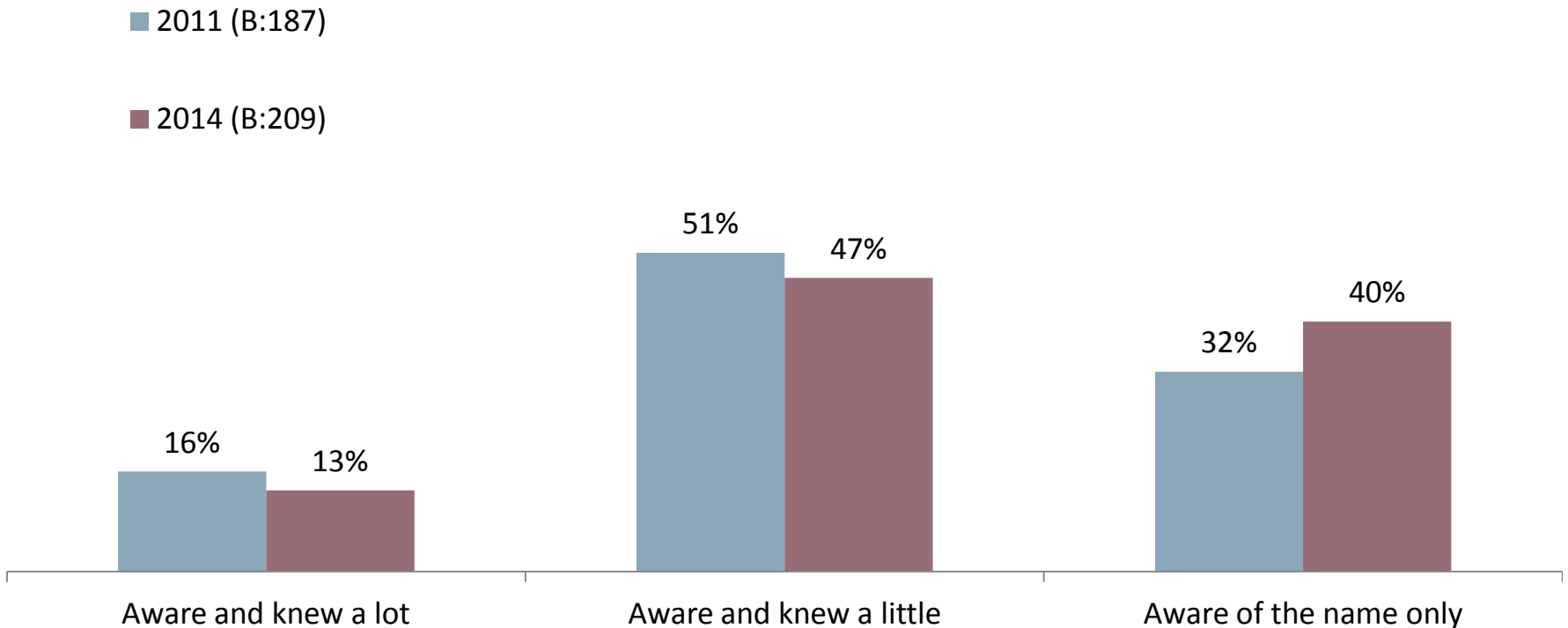
Respondents who had donated their time to charity and were aware of OSCR in the past 12 months were more likely to claim that they knew 'a lot' about the organisation (23%) than those who had donated money (11%) or goods (9%).

Q10b. How much do you know about the Office of the Scottish Charity Regulator or OSCR? Do you know a lot or a little about the Office of the Scottish Charity Regulator or do you only know the name?

Base (all who are aware of OSCR 210)

56

Where heard about OSCR

	(B:120) Tot.	%
Through contact/involvement/fundraising with charities/church	30	25%
Press/TV/Radio	28	23%
At work	26	22%
Internet	11	9%
Leaflet	2	2%
Friends/family	6	5%
Word of mouth	5	4%

Q11. Where did you hear about OSCR?

Base (all who are aware of OSCR; excluding 'don't know'; unweighted)

Awareness of OSCR's functions (overall)

Horizontal bar chart comparing 2014 (B:1,000) and 2011 (B:1,018):

Function	2014	2011
Any (total)	77%	50%
Any core OSCR function (net)	71%	42%
keeping a register of charities	61%	32%
Handling complaints about charities	58%	29%
Granting charity status	44%	17%
Advising government on charity matters	24%	15%
Checking/monitoring charities' accounts*	59%	
Policing fundraising	36%	20%
Promoting the work of charities	10%	9%
Training Charities		9%
Don't know	23%	50%

* Not present in 2011

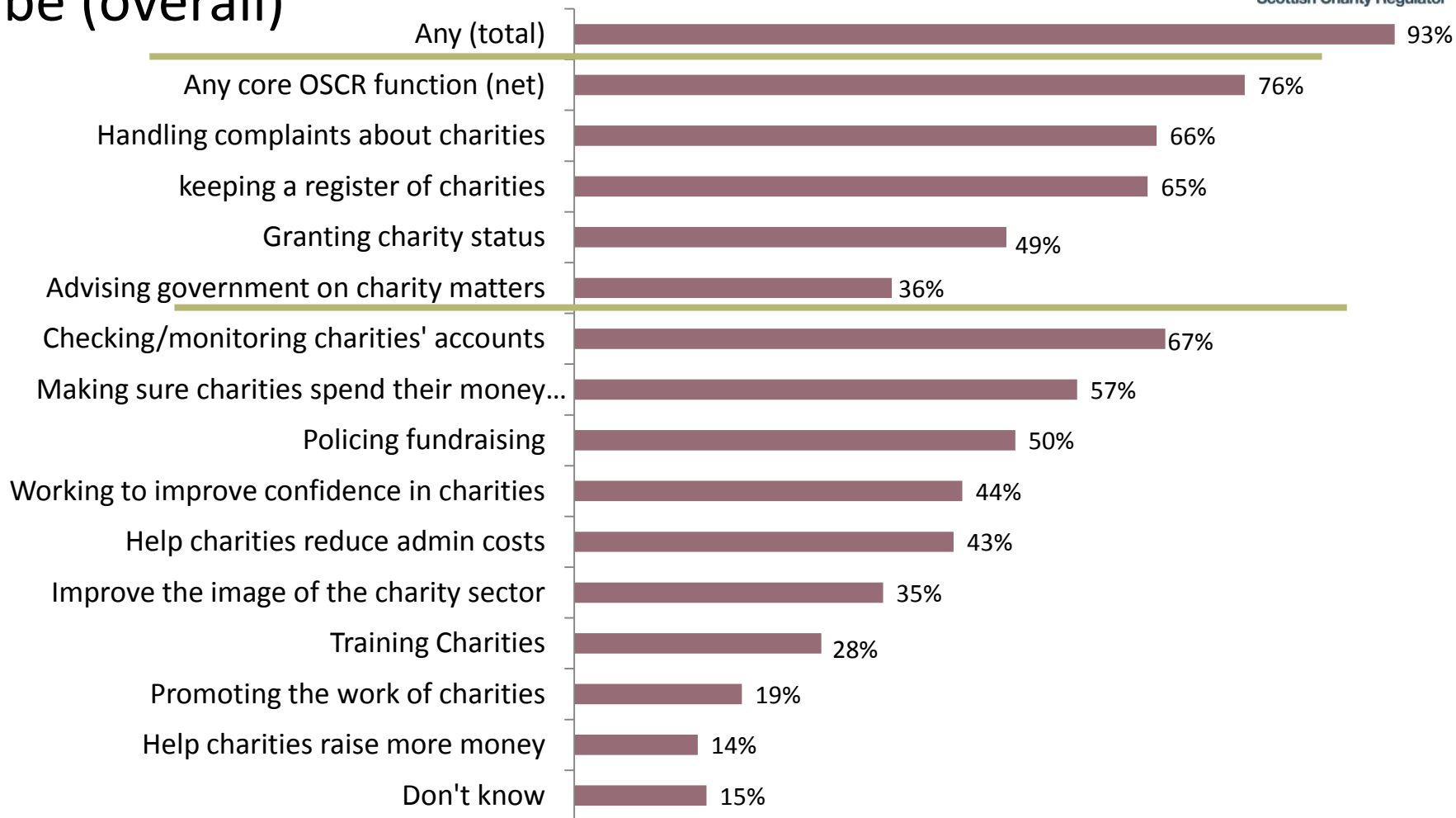While 2014 issues fall in the same rank order as the previous wave, we suspect the significant increases across all parameters are an artefact of the method of survey and that online gives respondents more options to tick all boxes. Older respondents were more aware of OSCR's core responsibilities when prompted. 81% of those 45 and over selected at least one of OSCR's core functions with 70% of those under 45 doing the same.

Awareness of OSCR's functions (those aware of OSCR)

Function	2014 (B:209)	2011 (B:187)
Any (total)	93%	84%
Any core OSCR function (net)	86%	74%
keeping a register of charities	78%	61%
Handling complaints about charities	69%	50%
Granting charity status	60%	40%
Advising government on charity matters	36%	27%
Checking/monitoring charities' accounts*	72%	
Policing fundraising	36%	35%
Promoting the work of charities	13%	17%
Training Charities		15%
Don't know	7%	16%

■ 2014 (B:209)
■ 2011 (B:187)
* Not present in 2011

Amongst those who have heard of OSCR, there is a higher level of awareness of the organisation's core functions in the 2014 sample compared to 2011. Of non-core activities; monitoring charities accounts and policing fundraising poll the highest.
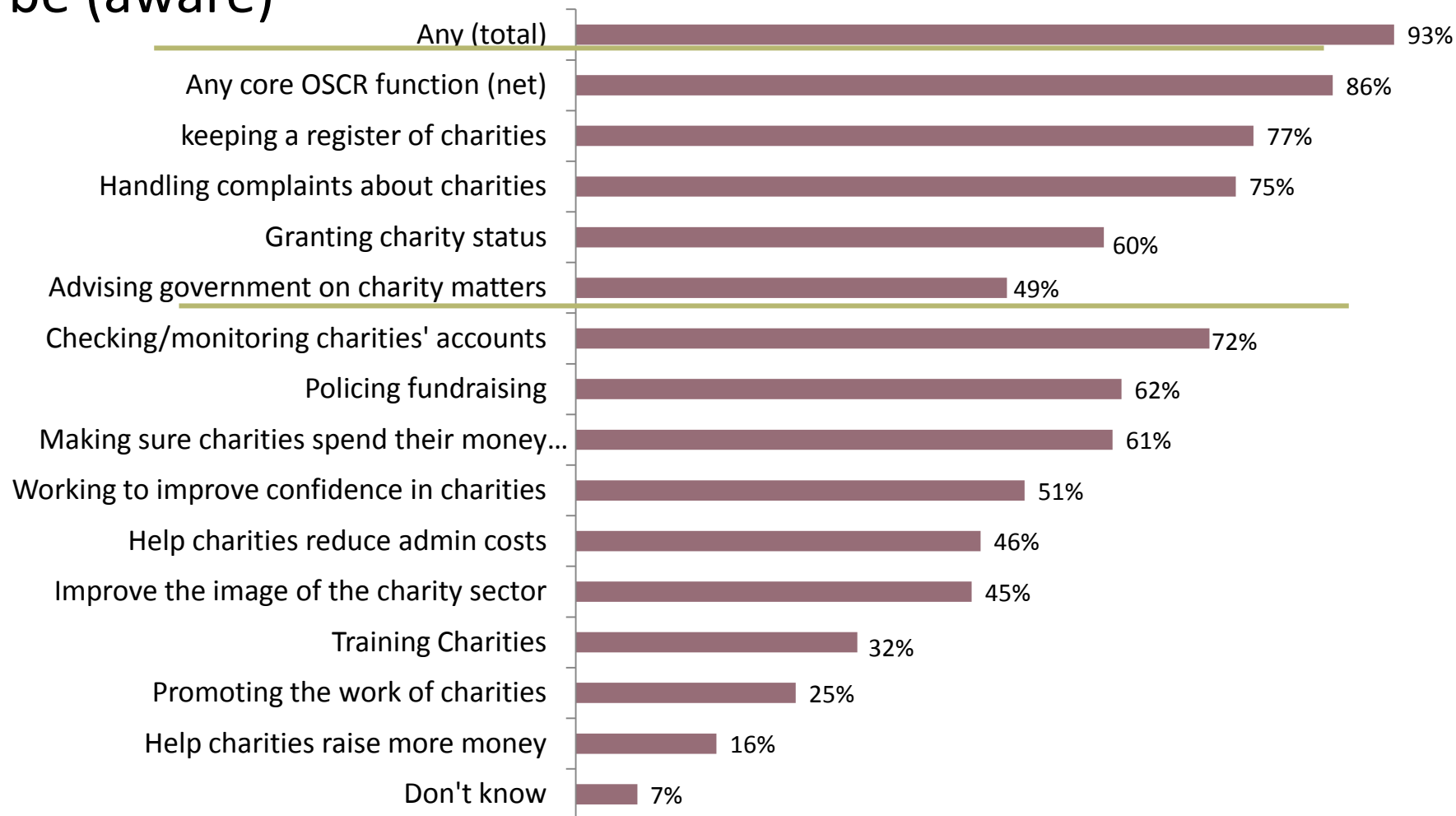
Q13a. Which of the following functions do you believe OSCR is responsible for?

Base (all aware of OSCR)

Beliefs regarding what OSCR's functions should be (overall)

Function	Percentage
Any (total)	93%
Any core OSCR function (net)	76%
Handling complaints about charities	66%
keeping a register of charities	65%
Granting charity status	49%
Advising government on charity matters	36%
Checking/monitoring charities' accounts	67%
Making sure charities spend their money…	57%
Policing fundraising	50%
Working to improve confidence in charities	44%
Help charities reduce admin costs	43%
Improve the image of the charity sector	35%
Training Charities	28%
Promoting the work of charities	19%
Help charities raise more money	14%
Don't know	15%

The core OSCR activities of advising government and granting charity status both poll lower than checking accounts, ensuring money is well spent and policing charity fundraising.
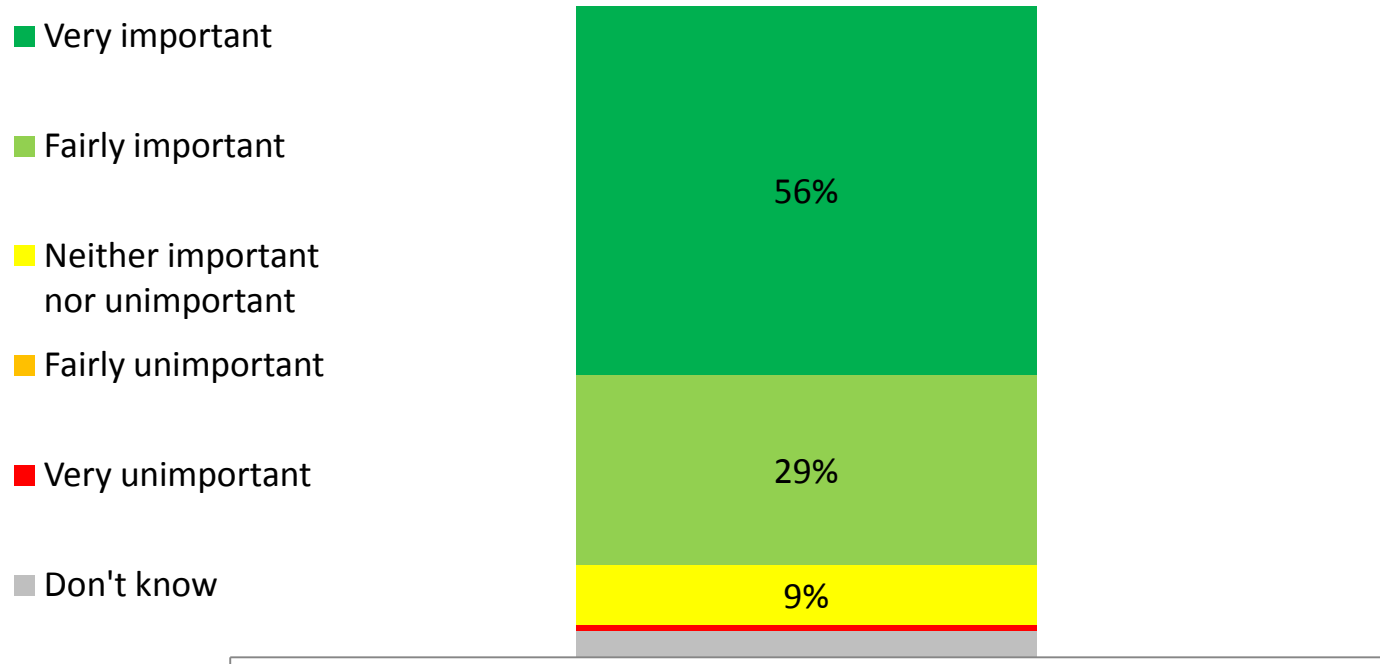
Base (all respondents): 1,000

Q13b . Which of the following functions do you believe OSCR SHOULD BE responsible for?

60

Beliefs regarding what OSCR's functions should be (aware)

Function	%
Any (total)	93%
Any core OSCR function (net)	86%
keeping a register of charities	77%
Handling complaints about charities	75%
Granting charity status	60%
Advising government on charity matters	49%
Checking/monitoring charities' accounts	72%
Policing fundraising	62%
Making sure charities spend their money…	61%
Working to improve confidence in charities	51%
Help charities reduce admin costs	46%
Improve the image of the charity sector	45%
Training Charities	32%
Promoting the work of charities	25%
Help charities raise more money	16%
Don't know	7%

Those who are aware of OSCR very much share the priorities of the wider sample.

Base (all aware of OSCR): 209

Q13b . Which of the following functions do you believe OSCR SHOULD BE responsible for?

Importance of OSCR's role

Legend:
- Very important
- Fairly important
- Neither important nor unimportant
- Fairly unimportant
- Very unimportant
- Don't know

Chart values:
- 56%
- 29%
- 9%

The vast majority of people continue to view the role of OSCR as very important.

Q12. The Office of the Scottish Charity Regulator is an independent body responsible for registering and regulating charities in Scotland. How important do you personally regard this role?

Base (all respondents): 1,000

Importance of OSCR's role – sub-groups

	% scoring Very Important
Total (1,000)	**56%**
Aware of OSCR (209)	67%
Not aware of OSCR (791)	53%
Any contact with charity (431)	58%
No contact with charity (569)	54%
Given to charity in the last year (921)	57%
Not given to charity in the last year (11)	38%
Least interest in charities 0-2 (117)	42%
Most interest in charities 8-10 (253)	67%

Q12. The Office of the Scottish Charity Regulator is an independent body responsible for registering
and regulating charities in Scotland. How important do you personally regard this role?

Sources of information about charity regulation (spontaneous)

This table ranks the order of mentions that respondents gave to an open ended question.

	2014 (B:1,001) Tot.	%
Internet (not specified)	470	47%
OSCR (total)	**117**	**12%**
OSCR (website specifically)	44	4%
Citizen's Advice Bureau	52	5%
Council/MP/Government	42	4%
Don't know	292	29%

Q14. Where would you go to find out more about charity regulation?

Base (all respondents, unweighted)

17 Corstorphine Road

Edinburgh, EH12 6DD

Tel: 0131 316 1900

69 St Vincent Street

Glasgow, G2 5TF

Tel. 0141 226 8895

sarah.ainsworth@progressivepartnership.co.uk

alex.belcher@progressivepartnership.co.uk

Technical Appendix
Quantitative

Method:
- The data was collected online
- The target group for this research study was members of the Scottish public
- The target sample size was 1,000, with 1,001 interviews completed
- The sample was weighted to reflect Scottish Census 2011 statistics in regard to age, gender and SEG
- Fieldwork was undertaken between 17th February and 9th March 2014
- The sample frame included all individuals in Scotland who are enrolled on Research Now's online panel. Research Now, also complies with the rules of the MRS and ESOMAR. All research projects undertaken by Progressive comply fully with the requirements of ISO 20252.
- Quota controls were used to guide sample selection for this study. This means that we cannot provide statistically precise margins of error or significance testing as the sampling type is non-probability. The margins of error outlined below should therefore be treated as indicative, based on an equivalent probability sample.

Data Processing and Analysis:
- Margins of error (all calculated at the 95% confidence level (market research industry standard)):
  - sample of 1,001 provides a dataset with a margin of error of between +/- 0.87% and +/- 3.1%
- Our data processing department undertakes a number of quality checks on the data to ensure its validity and integrity. These checks include:
  - All responses are checked manually for completeness and sense. Any errors or omissions detected at this stage are referred back to the field department, who are required to re-contact respondents to check and, if necessary, correct the data.
  - A computer edit of the data is carried out prior to analysis, involving both range and inter-field checks. Any further inconsistencies identified at this stage are investigated by reference back to the raw data on the questionnaire.
  - Our analysis package is used and a programme set up with the aim of providing the client with useable and comprehensive data. Cross breaks to be imposed on the data are discussed with the client in order to ensure that all informational needs are being met.
  - Where "other" type questions are used, the responses to these are checked against the parent question for possible up-coding.
- All data is stored directly on Progressive's secure server

Technical Appendix
Qualitative

- **Method:**
- The data was collected by focus groups
- The target group for this research study was charity donors amongst the general population in Scotland
- In total, six group discussions were undertaken. Each group contained 8 respondents.
- Fieldwork was undertaken between 12th and 27th February.
- Respondents were recruited face to face by Progressive's team of skilled qualitative recruiters. These recruiters worked to predetermined quota controls to ensure that the final sample reflected the requirements of the project. All respondents were screened to ensure that they had not participated in a group discussion or depth interview relating to a similar subject in the last 6 months prior to recruitment.
- An incentive of £30 was used to compensate respondents for their time and to encourage a positive response.
- In total, two moderators were involved in the fieldwork for this project.
- Each recruiter's work is validated as per the requirements of the international standard ISO 20252. Therefore, all respondents were subject to validation, either between recruitment and the date of the group discussion, or on the day of the group discussion. Validation involved respondents completing a short questionnaire asking pertinent profiling questions, and checking that they have not participated in similar research in the past 6 months.
- It should be noted that, due to the small sample sizes involved and the methods of respondent selection, qualitative research findings do not provide statistically robust data. This type of research does, however, facilitate valid and extremely valuable consumer insight and understanding.
- All research projects undertaken by Progressive comply fully with the requirements of ISO 20252.