Ipsos MORI
Social Research Institute

Public trust and confidence in charities

Research study conducted by Ipsos MORI on behalf of the Charity Commission

29 June 2012

Legal notice

Contents

Introduction

This report presents the findings of the 2012 Charity Commission study into public trust and confidence in charities, conducted by Ipsos MORI on behalf of the Commission.

The study was first conducted by the Charity Commission in 2005, in response to the Draft Charities Bill (now the Charities Act 2006), which proposed a new statutory objective for the Charity Commission to increase public trust and confidence in charities. The study was repeated in 2008 and 2010 to track progress towards this aim. This wave of research again monitors progress on this measure as well as other key questions.

The main **objectives** of the 2012 research are to:

- Investigate public trust, confidence and general attitudes towards charities in 2012 (and change since 2005, 2008 and 2010 where applicable), including:
    - overall trust and confidence in charities;
    - trust in specific aspects of charities' performance;
    - factors affecting trust in charities;
    - general perceptions of charities;
    - trust in charities to provide public services;
    - awareness and understanding of the Charity Commission's role; and
    - level of involvement with, and benefit from, charities.
- Explore the key drivers for overall trust, updating the key driver findings from the 2010 research.
- Explore variations in results by age, gender, region, socio-economic group and other key demographic characteristics.
- Compare the results for trust in charities against other areas of society e.g. doctors, police, key public institutions, and politicians.

Methodology

Quantitative Methodology

A representative **survey of 1,142 adults aged 18+ in England and Wales was conducted by telephone**. Interviewing was conducted between 4 and 21 May 2012.

Telephone leads were generated at random, using Random Digit Dialling (RDD).

Quotas were set on the following demographic variables to ensure the final sample was representative of the adult population of England and Wales:

1. gender;
2. age;
3. socio-economic group;
4. working status;
5. region; and
6. ethnicity.

The sample size was 'boosted' to at least 100 respondents in regions which otherwise would have contained fewer than 100 respondents (in a representative sample), to allow reliable analysis by region. Down-weighting was then used to ensure that the final sample remained representative of the overall population. **Weighting** was also used to correct for minor differences between the final sample profile and the population profile.

Qualitative Methodology

In addition to the quantitative survey, ten in-depth interviews were conducted over the telephone from 28 May to 1 June 2012. This was to allow us to explore some of the issues in greater depth and to add context and understanding to the quantitative data.

As part of the survey, participants were asked whether they would mind being re-contacted to take part in further research on this project. Those who were happy to be re-contacted formed the sample for the recruitment for the qualitative depth interviews.

Loose quotas were set, based on responses to particular survey questions, including:

- **trust in charities:** five with higher trust (6-10); five with lower trust (0-5) (Q1);
- **level of familiarity with the Charity Commission:** at least two who know the Charity Commission fairly/very well; at least two who know the Charity Commission not very/not at all well (Q13B).

Participants were recruited using Ipsos MORI's in-house qualitative recruitment specialists.

Reporting

The results reported and presented graphically in this report are based on the 1,142 representative interviews with adults 18+ across England and Wales, unless otherwise stated.

Figures quoted in graphs and tables are percentages. The size of the sample base from which the percentage is derived is indicated. Note that the base may vary – the percentage is not always based on the total sample. Caution is advised when comparing responses between small sample sizes.

As a rough guide, please note that the percentage figures for the various sub-samples or groups generally need to differ by a certain number of percentage points for the difference to be statistically significant. This number will depend on the size of the sub-group sample and the percentage finding itself, as noted in the appendices.

Where an asterisk (*) appears it indicates a percentage of less than one, but greater than zero. Where percentages do not add up to 100% this can be due to a variety of factors – such as the exclusion of 'Don't know' or 'Other' responses, multiple responses or computer rounding the decimal points up or down. Computer rounding may also lead to a one percentage point difference in combination figures (such as total agree or disagree) between those in the text and in the charts.

Interpretation of the qualitative data

While qualitative research was an integral part of this study, it is important to bear in mind that qualitative research is based on very small samples, and is designed to be illustrative rather than to produce statistics. This should be taken into account when interpreting the research findings. It is also important to bear in mind that the research deals with perceptions rather than facts (though perceptions *are* facts to those that hold them).

Throughout this report, the qualitative findings are clearly differentiated from the quantitative findings using coloured boxes. We have made use of verbatim comments to expand upon and provide further insight into the quantitative findings. However, it is important to be aware that these views do not necessarily represent the views of all participants.

Executive Summary

Executive Summary

Ipsos MORI has been tracking public trust and confidence in charities on behalf of the Charity Commission since 2005. The specific focus of this trend research is the Commission's statutory objective to increase public trust and confidence in charities, and the survey also collects valuable data on wider public perceptions of charities amongst adults living in England and Wales.

In May 2012 a representative survey of 1,142 adults aged 18+ in England and Wales was conducted by telephone. Additionally, 10 follow-up qualitative interviews were conducted in May and June 2012.

Introduction

This research is conducted at an interesting time for the charitable sector, with austerity measures arguably placing greater pressure on charities to fill the gaps left in public service provision accompanied by increasing challenges to the funding environment.

The NCVO UK 2012 Civil Society Almanac[1] estimates that by 2015/16 the voluntary sector is likely to lose £1.2bn in government income each year. The Almanac identifies that: the sector receives £13.9bn from government, 79% of which is contracts for services; charity spending increased in real terms by £1.1bn in 2008-10 as charities expanded their services in order to meet increased demand; and public sector grants fell by almost £500m during the initial recession dip. Free reserves were £42.2bn in 2009/10 which is £4.1bn lower than at the beginning of the decade in real terms.

The government's Giving White Paper 2011 recognises the valuable role that charities play in society today and sets out the government's agenda for, "*Making it easier and more compelling for people to give time and money and so make the change they want to see.*"[2] In addition to introducing new incentives and a range of motivational measures aimed at encouraging social norms around giving, the government looks at ways in which easier modes of giving might be facilitated, such as giving by Automatic Teller Machine (ATM) or Round Pound schemes to give small amounts when paying by card. However, the latest Citizenship data (2009-10)[3] indicates a slight downward trend in charitable giving, placing greater pressure on fundraisers at this time of government spending cuts.

[1] http://data.ncvo-vol.org.uk/
[2] http://www.official-documents.gov.uk/document/cm80/8084/8084.pdf
[3] http://www.communities.gov.uk/documents/statistics/pdf/2056233.pdf Methods of giving: Door-to-door collection street collection; sponsorship; collection at church, mosque or other place of worship; shop counter collection; pub collection; collection at work; buying raffle tickets (not national lottery); buying goods from a charity shop or catalogue; direct debit, standing order, covenant or debit from salary; giving to people begging on the street; other method of giving.

Indeed, these are two key patterns seen in the 2012 Public Trust and Confidence data:

- There has been an increase in the proportion of adults who agree that some fundraising methods used by charities make them uncomfortable. This is accompanied by evident concerns amongst the public that charities spend too much on salaries and administration, which is held up as a key barrier towards greater charitable giving. This points to clear challenges for fundraisers and for charities to overcome the public's (arguably often unrealistic) expectations of the proportion of their donations that reach the end cause.

- The survey also supports the view that charity spending is increasing to meet demand, with a rising perception that charities play an essential role in society (those saying charities play an essential role has risen from 30% in 2010 to 37% in 2012). There has also been an increase in the proportion of the public who use a range of different charities' services.

The Key Drivers Analysis offers an interesting context for these findings. When asked to directly select which one quality is most important to their trust and confidence in charities overall, the greatest proportion of the public (43%) prioritise *ensure a reasonable proportion of donations make it to the end cause*. However, in the Key Drivers Analysis, ensuring charities *make a positive difference to the cause they are working for* comes through as the strongest driver of overall trust in charities, while *ensuring a reasonable proportion of donations make it to the end cause* ranks lower down. This indicates that while respondents may *state* the importance of donations reaching the end cause, it is actually the impact that charities have that is the strongest driver of their overall trust levels (which is supported by the sub-group analysis of the survey data).

This shows an interesting contrast in perceptions of the sector – negative media stories about wastage have a hugely negative impact on the sector as a whole, which is possibly leading to people citing donations reaching the end cause as a more top of mind issue that drives trust in charities. However, positive levels of trust are actually more likely to be driven by user experience and the good work that charities do.

The Charity Commission has a clear role to play in offering the public reassurance that negative stories about charities are the exception rather the norm, wider publicising of their regulatory role, and supporting the sector in the celebration of positive user experiences. The research also indicates the need for a review of fundraising methods, which is part of a current review of the Charities Act 2006 by Lord Hodgson.

Overall trust and confidence in charities

Public trust and confidence in charities remains high, with the mean score for trust being in line with previous years at 6.7. Charities are still one of the most trusted groups, with only the police and doctors being more highly trusted[4].

Three quarters of the public (73%) give a rating of six out of ten or higher for trust and confidence, which shows a significant increase in those using the upper end of the scale over the last four years, rising from 68% of people in 2008. Between 2005 and 2012 there has also been a decrease in people stating trust levels towards the bottom of the scale (10% give a rating of 0-4 compared to 14% in 2005).

However, when prompted with a direct question on how trust and confidence has changed in the past two years, while three quarters of the public say it has stayed the same, the proportion saying it has *decreased in the last two years* has risen from 11% in 2010 to 16% in 2012. Conversely, the proportion saying it has increased remains consistent with 2010. Media coverage and negative stories about how donations are wasted are the most frequently given reasons provided for a decrease in trust over the past two years. The volume of charities and direct material received from charities is also cited.

Looking at trust and confidence overall, the message remains a positive one and charities are highly trusted. However, negative media coverage of the way that charities spend money is clearly having a negative impact on trust for some people.

Factors relating to trust

The most important factor relating to trust remains *ensuring a reasonable proportion of donations make it to the end cause,* with more than four in ten choosing this option (43%). This is followed by *making a positive difference to the cause they work for*, with three in ten seeing this as most important (31%). The public do generally trust charities to ensure money reaches the end. However, as previously mentioned, negative media stories have negatively impacted on this perception amongst some.

Qualitative research was undertaken with ten survey respondents to look at their views on trust and confidence in more detail. How money is spent was a key issue for these individuals, with concerns raised about salaries for charity staff, spending on fundraising, and charity reserves. There was also some concern over being able to see where money had gone when charities are sending funds overseas.

Transparency and reporting is important in overcoming some of the concerns about how money is spent and the impact charities have. The overwhelming majority of people believe charities should provide the public with information on *how they spend their money* (96%) and on *how they benefit the public* (94%). This was a very important theme in the qualitative research, where participants strongly felt that charities had to show how they spent money and what impact it had to encourage more people to support them.

[4] This reflects the findings of Ipsos MORI's veracity index, which we have been tracking since 1983: http://www.ipsos-mori.com/researchpublications/researcharchive/2818/Doctors-are-most-trusted-profession-politicians-least-trusted.aspx

The public tend to agree that they *trust charities more if they have heard of them* (82%), highlighting the importance of familiarity. In the qualitative research this issue was seen by some as a barrier for smaller charities who may not have the high profile or ability to publicise themselves as some of the bigger ones. However, there was also some scepticism amongst these participants about larger charities and whether they spend their funds appropriately.

As well as familiarity, a local presence is also important, with three in five people agreeing they *trust charities more if they are providing services within their local community* (59%).

Public perceptions of charities' conduct are strong, with three quarters agreeing *charities are trustworthy and act in the public interest* (74%). The qualitative research reveals that the public have positive views about the motivations of charities, seeing them as trying to benefit society and support people.

Where the public have concerns these are around fundraising techniques and the use of funds. Fundraising methods are of increasing concern among the public, two thirds (67%) of the public agree that *some fundraising methods used by charities make them uncomfortable*, which is a significant increase from the proportion who said this in 2010 (60%). Almost three in five (59%) believe *charities spend too much on salaries and administration*.

The societal role of charities, charity beneficiaries and involvement

The public continue to place high importance on the role that charities play in society (96% say charities play an essential, very important or fairly important role, which is consistent with 2010). However, given the current economic climate it is particularly interesting that the proportion saying charities play an *essential* role has significantly increased from 30% in 2010 to 37% in 2012.

This is accompanied by an increase in the proportion of people who have used a charity's services – a third of people (34%) now say they have benefited from or used the services of a charity, or had close friends or family do so, compared to 30% in 2010. Compared to 2010 there has also been an increase in the proportion of respondents (by at least three percentage points or more) saying they, or any of their close friends or family, have done each of the following: used the services of a charity; received advice from a charity; telephoned a charity's information or helpline; received emotional support or counselling from a charity; been a patient in a local hospice; received personal care from charity workers; and received financial help from a charity.

That this increased use of charitable services is accompanied by an increase in the proportion of the public who feel charities play an essential role in society today indicates a growing reliance on the charitable sector. It is worrying that the data also point to increasing frustration and even rejection of fundraising methods in the sector, which in the context of decreasing government spending creates clear challenges for the sector.

Over a third of people (37%) say they, or a close friend or family member, are actively involved in a charity as an employee, volunteer or trustee. Those who are actively involved in a charity have higher levels of overall trust in charities then those who do not, which is consistent with those who have greater familiarity with a particular charity having higher level of trust. This highlights the positive impact of direct experience.

Charities and public service provision

Public authorities are still thought to be best at *providing services including care homes, social housing, leisure or sports centres, hospitals, schools and information/advice services.*

However, an increasing proportion feel that charities would be best at *providing information and advice*, 20% compared to 16% in 2010. Compared to 2010 the proportion of people who have personally or whose close friends or family has *received advice from a charity* has increased by six percentage points to 37% in 2012. In the qualitative research service provision was not something that had been considered strongly, but there was a sense amongst participants that charities could provide a more personal, caring service. This is also seen in the quantitative findings, where most think charities are best at *providing a caring approach* (47%).

Awareness and perceived importance of the Charity Commission

Awareness of the Charity Commission has not changed significantly since 2010, with just over half of the public being aware of it (55%, compared to 53% in 2010). Once explained, people's appreciation of the Commission's role is very high, with 98% believing its role is essential, very or fairly important – 91% say they personally think it is essential or very important compared to 87% in 2010).

Regulation was seen as being important by those taking part in the qualitative research. They felt it was important for charities to be held to account on how their funds were spent.

Since this tracking survey began in 2005 we have seen an increasing use of charitable services and the rising perception that charities play an essential role in society today. The public perceives that charities operate to ethical aims and operate for the public good, but at the same time demand accountability and that a large proportion of donations reach the end cause. While members of the public are unlikely to check a charity's accounts themselves, or necessarily seek to reassure themselves that their money is being spent wisely, exposure to negative media stories creates doubt that this may not be the case and can have a damaging effect on the sector as a whole.

Given the increasingly important role that charities play in society, the Charity Commission's role is becoming ever more important.

Detailed Findings

Trust and confidence in charities and other organisations

Key Findings

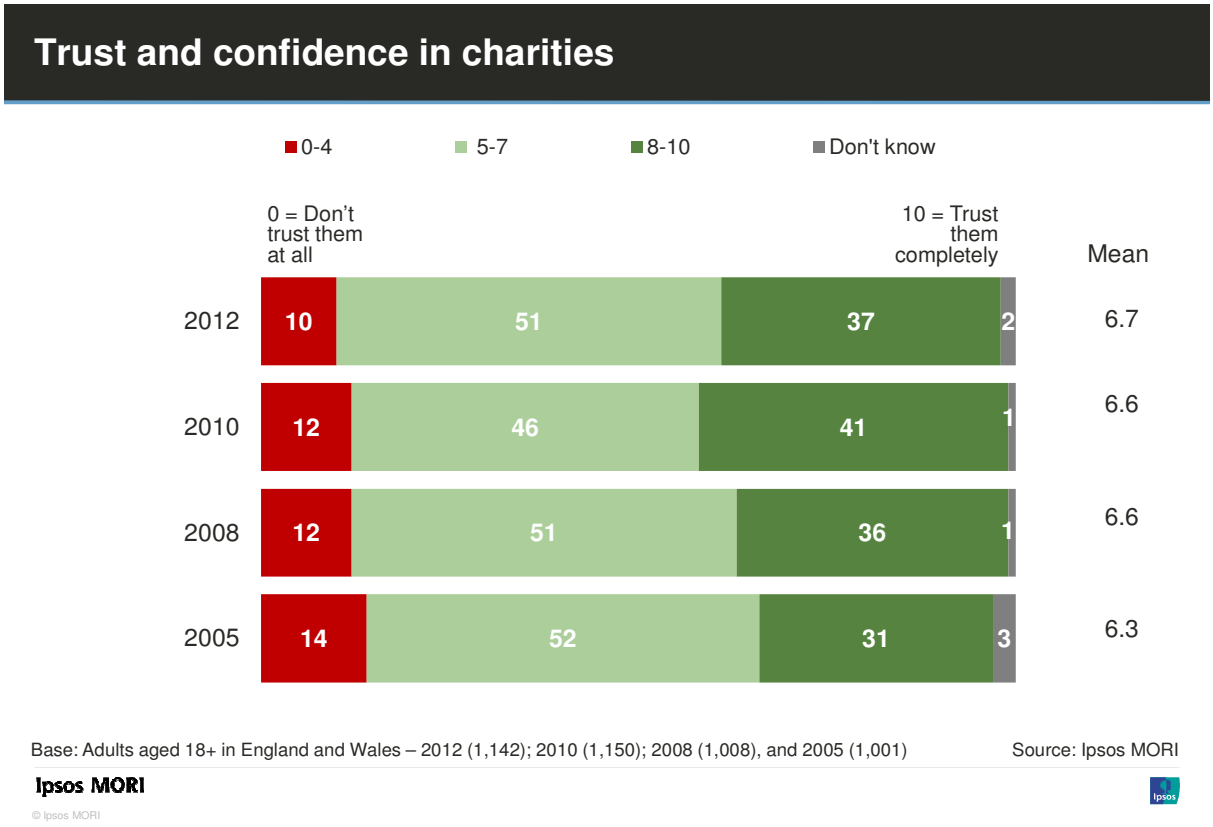
- Overall trust and confidence in charities in 2012 remains consistent with 2010, with a mean score of 6.7 compared to 6.6 in 2010.
- Charities remain one of the most highly trusted organisations included in the questionnaire, third only after doctors and the police.
- Adults in England and Wales are still confident in general that charities *make a positive difference to the cause they work for*, with a mean score of 7.2. However, the public is less confident about charities' ability to *ensure a reasonable proportion of donations make it to the end cause* (mean 6.1), with just 28% stating high trust (8-10) despite more than four in ten (43%) saying this is the most important quality for trust in charities. This is also a quality which is frequently mentioned by respondents in the qualitative interviews.
- The most common reason why some charities are trusted less is not knowing how their money is spent (36% who trust certain charities less than others mention this). People interviewed qualitatively felt they wanted to know where money went and were concerned that staff and administration costs were too high.
- Having seen/experienced what they do was the main reason given by people who mentioned trusting some charities more than others (38%).
- An overwhelming majority of people (96%) agree that charities *should provide the public with information on how they spend their money,* with a similarly high proportion agreeing that charities *should demonstrate how they benefit the public* (94%). This is a strong theme in the qualitative interviews, with many saying they would like charities to do more to publicise the breakdown of where fundraising revenues are allocated.
- Familiarity with charities has a strong bearing on trust, with more than eight in ten (82%) trusting charities more if they have heard of them. Size is less important, with the public split on whether they trust big charities more than small ones.

Overall trust and confidence in charities

The public were asked to give an overall trust and confidence rating in charities using a scale of 0 to 10, where 0 means they do not trust charities at all, and 10 means they trust charities completely.

Almost three quarters of respondents (73%) now give an overall rating of six out of ten or above, up on both 2010 and 2008 (70% and 68% respectively). This is a significant increase in trust from 2008 levels. As a result the mean score increases very slightly to 6.7 (as shown in the following chart, although note that this is not a statistically significant increase), however the general distribution of trust and confidence across the scale has remained similar.

Q – Firstly, thinking about how much trust and confidence you have in charities overall, on a scale of 0-10 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?



Direct experience of a charity has a positive influence on levels of trust and confidence – people who have benefited from a charity give a mean score of 7.0 compared to a score of 6.5 from those who have not. The same is true for those who work for a charity, who also give a mean score of 7.0, compared to 6.5 for those who do not work for a charity.

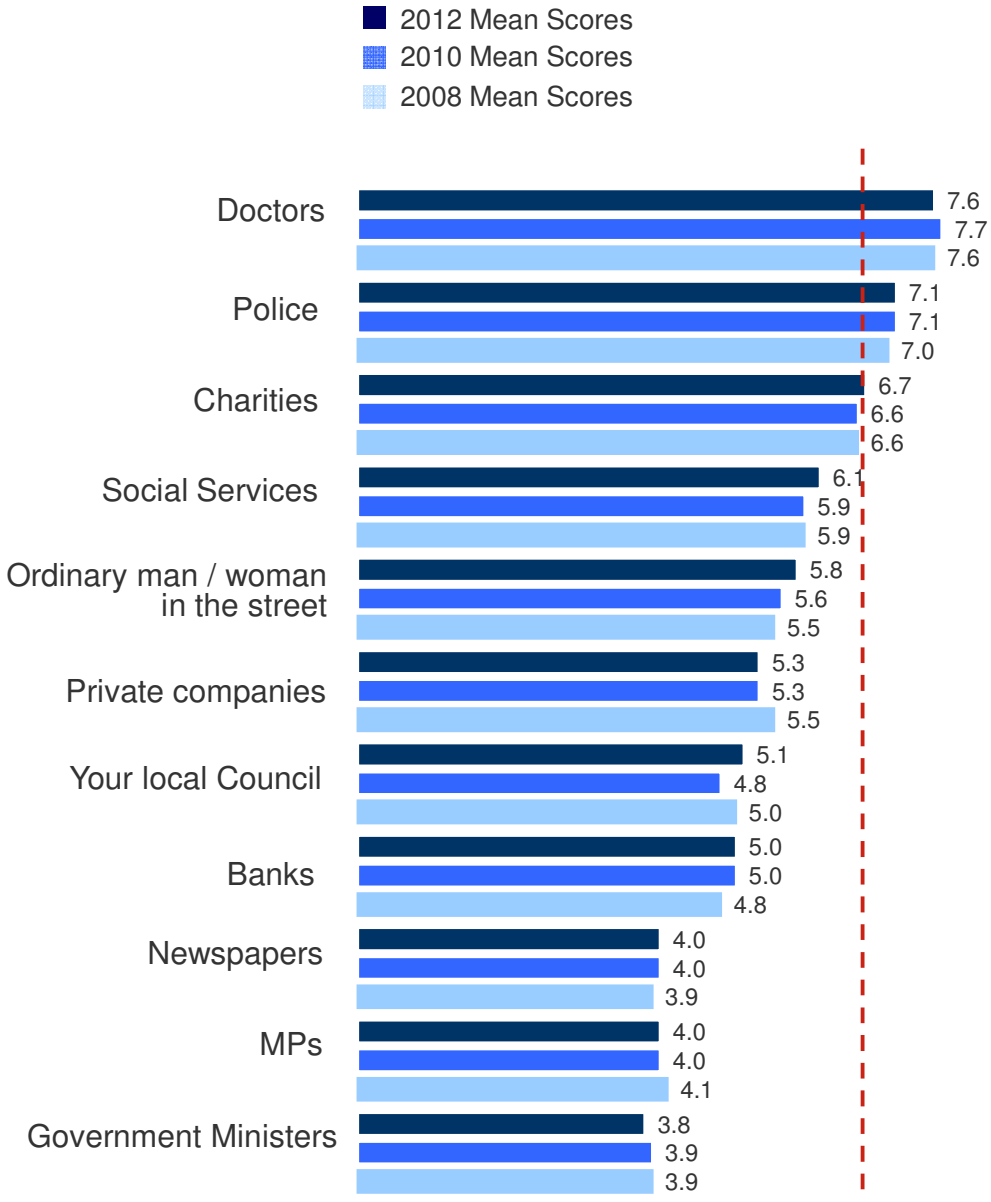
People living in the South East are significantly less likely to give a high rating of 9 or 10 than people in most of the other regions, although the South East mean of 6.5 is not significantly lower than the average of 6.7. In fact, it is people living in London who offer a significantly lower mean score than average of 6.4, which is also significantly lower than the two highest scoring regions – the North East (7.1) and the South West (7.0) (although these scores are not significantly different to any of the other regions).

Comparison with other organisations

As seen in previous waves of this survey, the public have a higher level of trust and confidence in charities than most other organisations included in the questionnaire. Again, doctors and the police are the two exceptions. Mean scores have moved very little over the past two waves of research as shown in the chart below:

Q – Now for some other types of organisations and professions. On a scale of 1-10 where 10 means you trust them completely and 0 means you don't trust them at all, please tell me how much trust and confidence you have in…

Public trust and confidence in charities vs. other organisations



Base: Adults aged 18+ in England and Wales – 2012 (1,142); 2010 (1,150); 2008 (1,008)

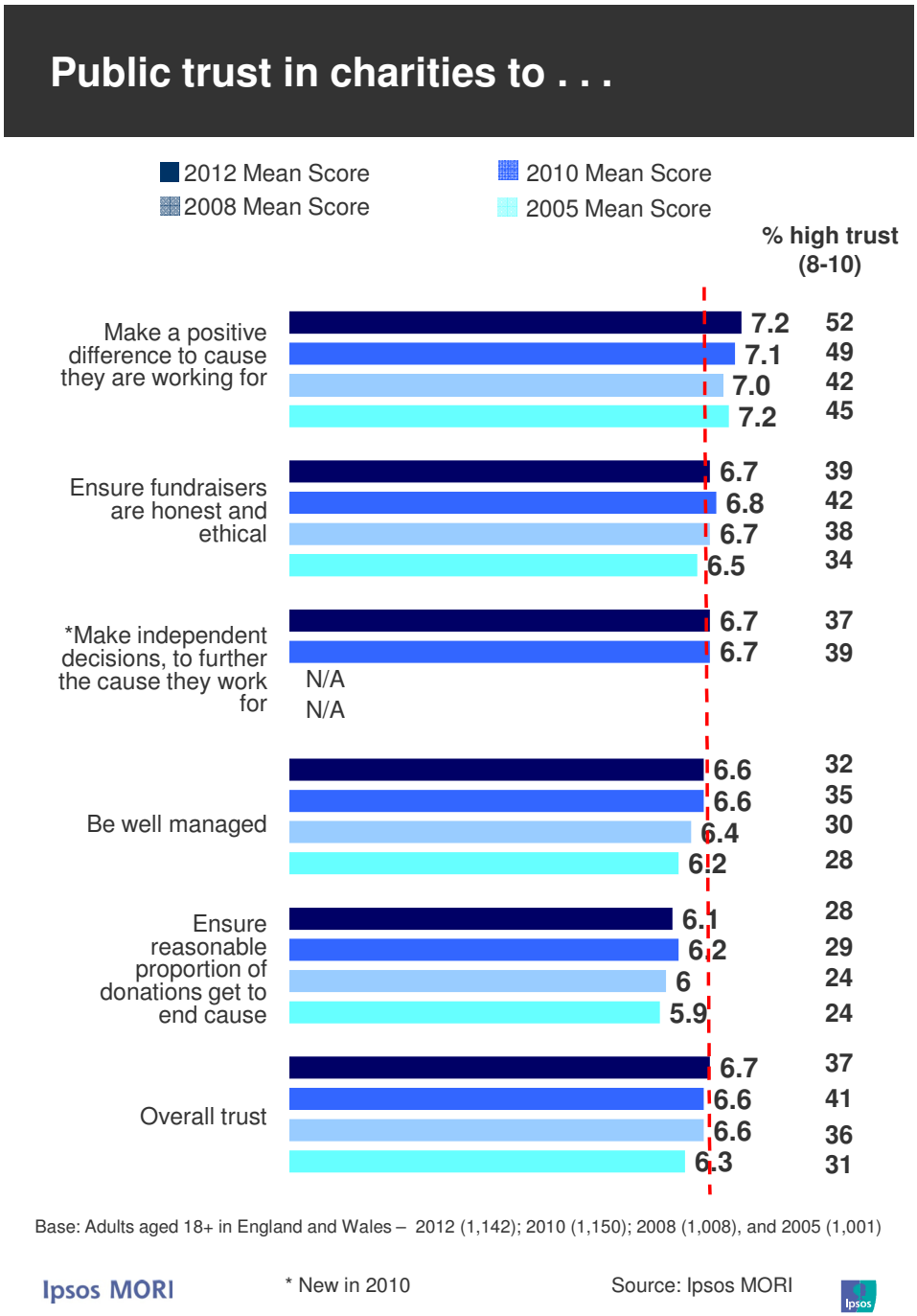
Ipsos MORI

Source: Ipsos MORI

Trust in specific aspects of charities' performance

When asked about some more specific aspects of trust in charities, again there are mixed results with regard to how charities are perceived in certain areas. The following chart illustrates this point.

Q – And on the same 0-10 scale, how much would you trust charities to…



Base: Adults aged 18+ in England and Wales – 2012 (1,142); 2010 (1,150); 2008 (1,008), and 2005 (1,001)

Ipsos MORI * New in 2010 Source: Ipsos MORI

With a mean score of 7.2, there are high levels of trust in charities to *make a positive difference to the cause they are working fo*r, which is in line with the 7.1 mean score in 2010. Many also feel that they trust charities to *ensure that its fundraisers are ethical and honest* with a mean score of 6.7. While people do feel charities will ensure that its fundraisers are ethical, two thirds feel *uncomfortable about some of the fundraising methods used* (67%). Perceptions around fundraising are explored in more detail later in this report. *Ensuring that a reasonable proportion of donations make it to the end cause* is an area the public perhaps feel less confident about, with a mean score of 6.1.

Women's trust in charities is significantly higher than men's, both at an overall level and for specific aspects of charities' work, reflecting a similar pattern to 2010, with women giving a mean score of 6.9 compared to 6.5 for men. As seen in previous years, younger people tend to have a greater level of trust and confidence in charities, with a mean score among 18-34 year olds of 7.0, higher than any other age group. Around four in ten (39%) 18-34 year olds rate their overall trust and confidence in charities at 8-10 which is less than 35-44 year olds (43%) despite their significantly lower mean score of 6.6. This is due to 18-34 year olds being more clustered around the middle scores, while a greater proportion of people in the 35-44 (and 45-54) age group are more likely to give a score of four or less.

In line with their greater mean score for overall trust, people living in the North East had the highest mean score on the majority of these measures.

Interestingly, those who believe that it is most important for charities to *ensure that a reasonable proportion of donations make it to the end cause* are significantly less positive about their trust and confidence in charities than those who believe it is most important for charities to *make a positive difference to the cause they work for*, with a mean score of 6.6 compared to 7.1.

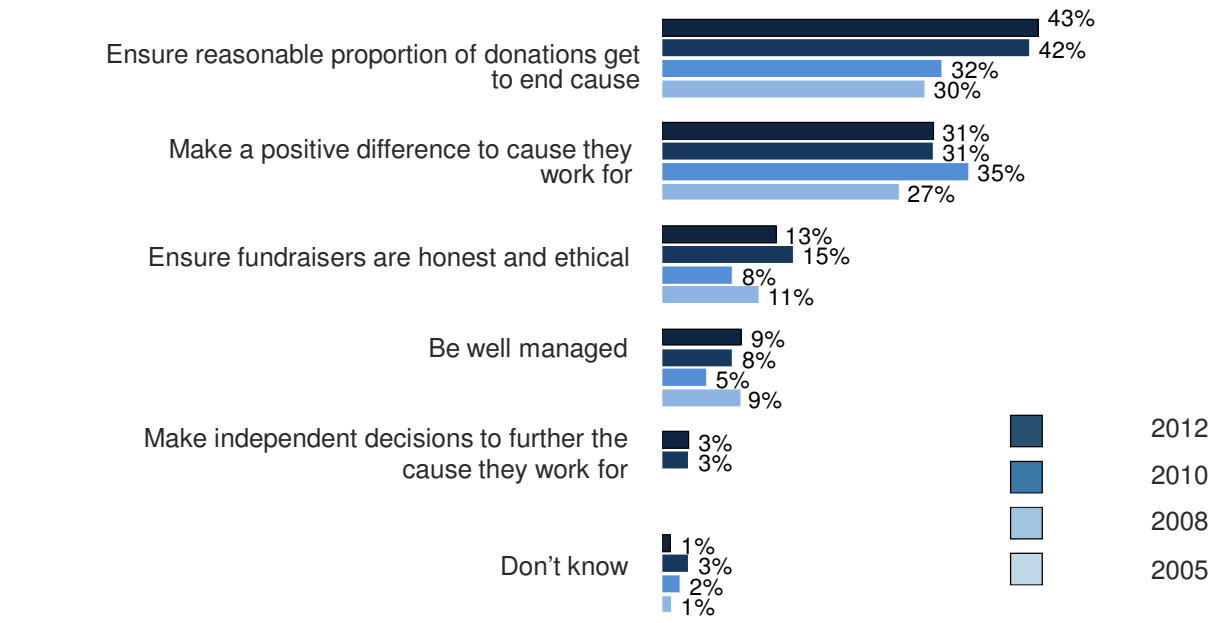
Most important quality for trust in charities

As in 2010, the public still believe that *ensuring that a reasonable proportion of donations make it to the end cause* is the quality they think is most important to their trust and confidence in charities overall (43%).

Making a positive difference to the cause they work for (31%) is the next most frequently mentioned quality. In 2010, we saw a shift from the public seeing this issue as most important to *ensuring a good proportion of donations reach the end cause* and this has remained consistent in 2012. As suggested last year, this could well be a symptom of the economic climate and a desire to see charities follow suit in this respect. It is also apparent that negative media stories can challenge the public's assumption that charities are spending money responsibly.

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

Most important qualities for trust and confidence



Base: All respondents – 2012 (1,142), 2010 (1,150), 2008 (1,008), 2005 (1,001)

Source: Ipsos MORI

Ipsos MORI

It is interesting to note that overall trust and confidence in charities appears to be related to views on which of these qualities is most important. As the table below shows, the less trust people have in charities, the more likely they are to feel that ensuring donations get to the end cause is most important, and the less likely they feel that making a positive difference is most important. This underpins the view that how charities spend their funds is of key importance to levels of trust and confidence.

Overall trust and confidence in charities (Q1)			
	0-4 (n=109)	5-7 (n=581)	8-10 (n=433)
Ensure that a reasonable proportion of donations make it to the end cause	48%	45%	40%
Make a positive difference to the cause they are working for	18%	28%	38%

Looking at regional differences, people living in the South East (52%) are significantly more likely than average (43%) to select *ensure reasonable proportion of donations make it to end cause.* People living in the East Midlands (39%) are significantly more likely than average (31%) to select *make a positive difference for cause they're working for (*the same proportion as those who select *ensure reasonable proportion of donations make it to end cause* in the East Midlands*).*

Understanding the feelings behind trust in charities

As in 2010, ten qualitative depth interviews were conducted to dig a little deeper into feelings behind trust and confidence in charities and explore particular issues in more detail. When asked about initial impressions of charities and what they do, there are many consistent themes which arise regardless of trust in charities: charities are expected to raise money for a specific cause; to work to help both those in need and to benefit wider society in general; and to act independently and efficiently. There is a sense that in current economic circumstances charities are often doing the work that public bodies cannot or will not do.

"I think [charities] provide an absolutely vital role, almost to the point of some of the things that the government can't do because of finances, charities step in and do."

Male, high trust in charities, familiar with the Charity Commission (Int 10)

Trust in charities was not something many participants had thought about in any real depth prior to the research. However, when prompted, some of those who gave a low trust score at the quantitative phase were able to cite particular examples where they felt charities hadn't operated as effectively or honestly as they should have done, which may go some way to explaining their low trust score. In some cases this was due to discovering how money was being spent. It should be noted that the quantitative findings show that 56% of people agree they know very little about how charities are run, and it is often the case that people have unrealistic expectations about how much of their donation should reach the end cause.

"I used to think [charity] was amazing… but when it came to light that actually, most of the money that you would give them would go on administration fees and salaries for the people working for the charity… I stopped giving."

Male, low trust in charities, not familiar with the Charity Commission (Int 3)

There was some concern amongst participants about how international charities used their money. One participant in the qualitative interviews explained that she actually had quite high trust for charities operating in the UK, but had given a low score because she had low confidence in charities operating abroad due to not being convinced money reached the intended recipients. This was not because she believed there was any wrongdoing on the part of the charity, but because she thought that the potential for the money to end up with the 'wrong' people was higher overseas.

There is an overwhelming sense that supporting charity is a question of personal preference, and that people will give to and trust charities based largely on their personal experiences and feelings. As the next section discusses, this is very much something which comes through in the quantitative phase, with a wide variety of charities selected by respondents when asked if there are certain charities/charity types they trust more or less.

"I don't think anybody appreciates it until you're personally involved with it… It's opened our eyes. It's raised a lot of awareness with us and it does make you realise how much they need help and funding."

Female, low trust in charities, not familiar with the Charity Commission (Int 5)

There was a general feeling amongst some participants that the motivations of charities were good, and this fostered trust. Charities and their employees were felt to be acting for the general good, rather than personal gain.

"Charities are doing some good. They may not be doing the sort of good I'd want them to do but I think there's a sort of mission statement within all charities that I find attractive."

Male, high trust in charities, familiar with the Charity Commission (Int 8)

The importance of ensuring that a reasonable proportion of donations reach the end cause came through very strongly in the quantitative phase, so it is no surprise that this was also frequently mentioned by respondents in the depth interviews. There is a perception, particularly among those with lower trust in charities, that too much money may be spent on administration or salaries of charity employees, and so it is important to be selective with regard to which charities people support and to be able to see donations producing something tangible.

"I personally do subscribe to a charity but it's a charity which is close to home. I can see what they spend their money on – it's equipment, very expensive equipment. It's in the UK [too], so I can see how it's being spent and I can see the result of that money."

Male, low trust in charities, not familiar with the Charity Commission (Int 7)

"The money goes to the [individual] and you can see this person is receiving this amount of money; it's helping them in whatever way. You can see the outcome."

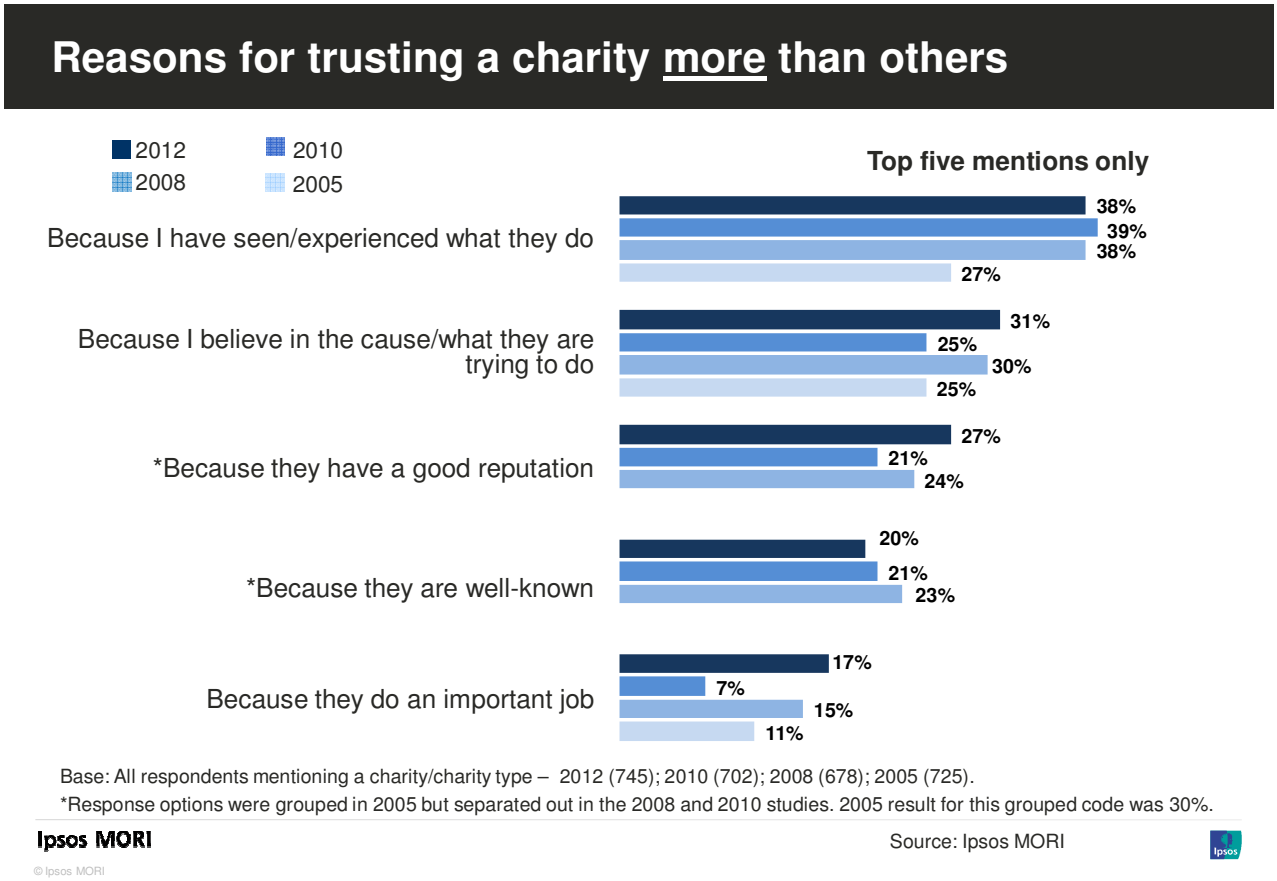
Male, low trust in charities, not familiar with the Charity Commission (Int 3)

Reasons for trusting specific charities more or less

Two thirds of the public (64%) can name a specific charity or type of charity that they trust **more** than others. As seen in previous waves of this survey the specific charities or charity types which are mentioned vary widely, suggesting that this is very much a personal consideration. As in 2010, charities which are mentioned most frequently tend to be larger charities with a national presence in the United Kingdom, namely Cancer Research UK (12%), Oxfam (6%), the British Heart Foundation (5%) and British Red Cross (5%).[5]

Reflecting this, the most common reasons given for higher trust include contact or familiarity with a charity, such as having seen or experienced what they do (38%); because they believe in the cause/what they're trying to do (31%); because they have a good reputation (27%); and because they are well known (20%), as shown in the chart below:

Q – Why do you say that? Why do you trust xxx more than others?



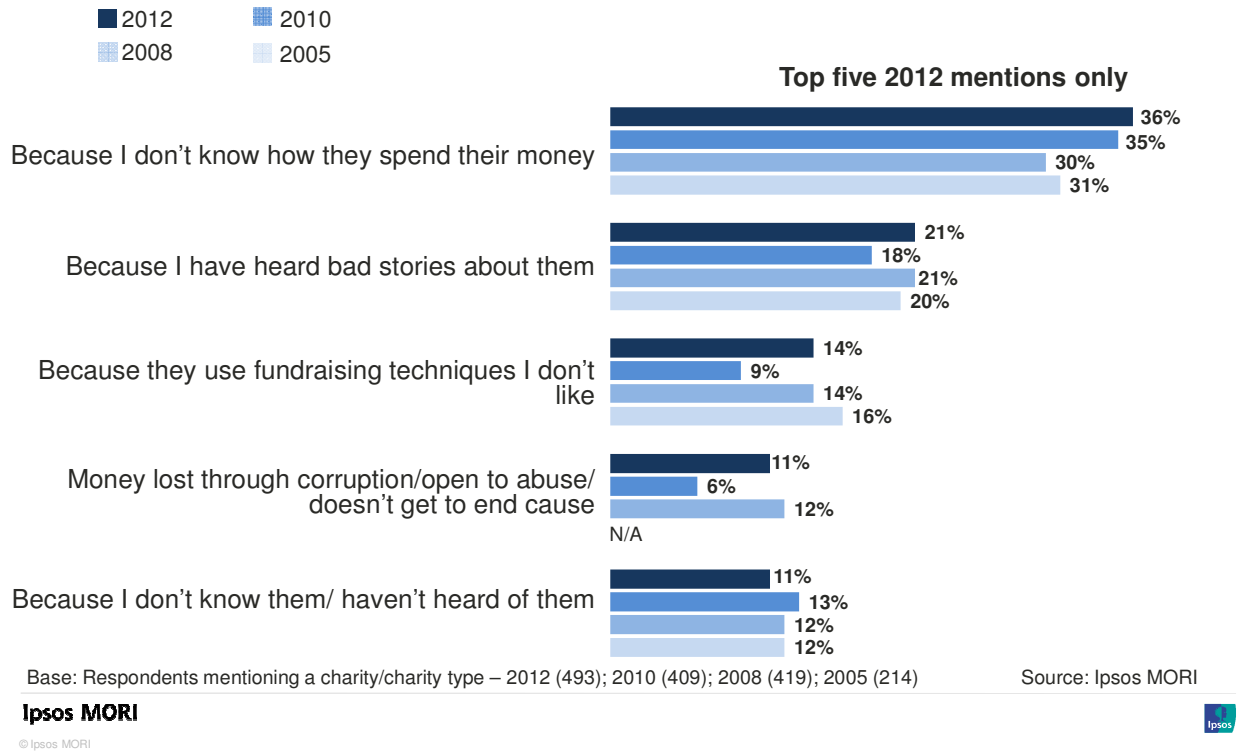
Conversely, 43% of the public name a charity or type of charity which they **trust less** than others. Oxfam (3%) is the most mentioned specific charity type and the only one mentioned by more than 1%, perhaps reflecting their status as a well-known charity. Again, 5% of respondents feel that they trust international charities less than others. Recent research conducted by Ipsos MORI with people giving donations to international charities revealed that understanding where the money goes is of crucial importance to them in deciding to give.

As in 2008, the most frequently cited reasons for not trusting particular charities or types of charities include: not knowing how they spend their money (36%); hearing 'bad stories' about them (21%); dislike of fundraising techniques used (14%); a perception of money being lost through corruption or not getting to the end cause (11%); and not knowing them (11%), as the chart below shows:

[5] Please refer to the topline in the appendices for full table of figures relating to this question.

Q – Why do you say that? Why do you trust xxx less than others?

Reasons for trusting a charity less than others



Base: Respondents mentioning a charity/charity type – 2012 (493); 2010 (409); 2008 (419); 2005 (214) Source: Ipsos MORI

Ipsos MORI

Those in social class DE are significantly more likely to say that personal experience is a particularly important reason why they trust some charities more than others: 45% of those who trust a charity or charity type more than others say this compared with 38% overall.

Those interviewed qualitatively gave a variety of reasons why they trust a charity or type of charity more or less than others, but there are some consistent themes coming through their responses.

Familiarity and size are two crucial aspects with regard to trust in charities, and these are covered in detail in a separate section later in this report. However, another theme which consistently comes up among respondents is charities using what many regard as undesirable fundraising methods.

Volume is one aspect of this: people complain of being 'bombarded' with leaflets and other material which encourages them to donate to a specific cause. In one instance, a charity given a one-off donation continued to ask for money on numerous occasions over many years following the donation.

However, another aspect of fundraising methods perceived negatively is the way in which certain techniques have been adopted by charities to encourage donations. Charities that go door-to-door asking for donations are perceived in a negative light because people are felt put upon to donate on the spot, and there is a sense in which many want to be left alone to make their own choice about which charity to donate to. Also, use of emotive imagery showing people in distress is seen by some as a very cynical way of encouraging people to donate. Previous research on charity messages conducted by Ipsos MORI revealed that negative messages and images were less favoured by potential donors. They preferred to see a positive image that demonstrated the good their donation could do.

"They put these poor children [on charity advertising]. No doubt children do have to suffer bad things like that, but it makes me feel guilty... but how many can you afford to send to?"

Female, low trust in charities, not familiar with the Charity Commission (Int 1)

Telephone fundraising, 'chuggers' and those who carry collection tins are also a source of frustration. Research conducted on ways of giving in April 2012 found that putting money into a collection tin was the preferred way of giving, so the issue may be more about the way people are approached rather than the method itself, as those in the qualitative research were discussing people being 'pushy'.

There is particular concern about how much revenue is spent by charities on administration and salaries, and on publicity and marketing for the charity. This is heavily tied to the earlier point about ensuring that money reaches the end cause, but for many, the fear that their donations might be spent on advertising or on salaries discourages them from donating. The size of reserves charities hold was a real concern for one participant. As mentioned earlier, it should be considered whether the public have unrealistic expectations of how much it costs to run a charity and if isolated negative media stories are having a disproportionate impact on views.

"When you don't know a great deal [about charities] and you hear what's on the news… paying their boards high salaries and this sort of thing, your trust in these charities becomes less and less."

Male, low trust in charities, not familiar with the Charity Commission (Int 7)

"When there is a rotten egg, it gets splashed all over the press… blackening the whole sector from something that's been given a lot of prominence [in the media]."

Female, high trust in charities, familiar with the Charity Commission (Int 2)

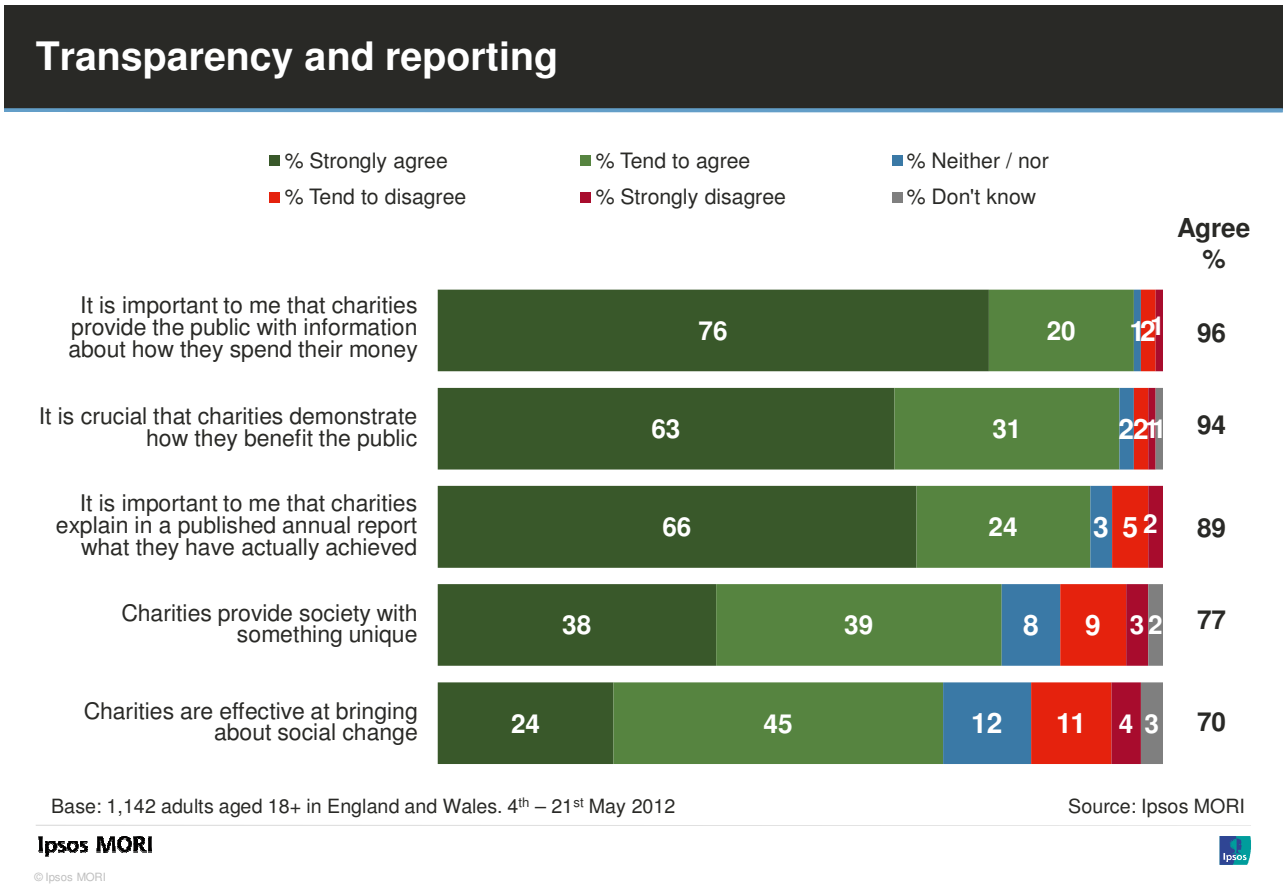
Importance of transparency and reporting

There is little doubt that once more the overwhelming majority of the public feel charities *should provide the public with information on how they spend their money* – 96% agree in 2012, the same proportion in 2010 and 2008. Three quarters (76%) agree strongly, in line with figures from 2010 (73%). Nine in ten (89%) people whose confidence in charities has decreased over the past two years agree strongly that charities should provide the public with more information on how money is spent, significantly more than average. This raises the question of whether more information would improve trust, as well as how this information should be provided.

There is also widespread agreement that *charities should demonstrate how they benefit the public* (94%), but as last year a smaller proportion *strongly* agrees (63%) compared to those who *strongly* agree that charities should *provide information to the public on how money is spent* (76%).

While the public do want information on how money is spent, the form in which they want this information in is less clear. Publishing an annual report explaining what they have achieved is considered to be slightly less important than actually *demonstrating their benefit* – 89% agree (as did 90% in 2008) and 66% agree strongly. This highlights one of the big challenges in meeting the public's needs – the qualitative research highlights that people are unlikely to actively seek this information and there is a sense of being bombarded by too much information from charities, which makes it difficult to achieve cut-through of key messages.

Q – Thinking about charities in general, to what extent do you agree or disagree with each of the following statements. Is that strongly or tend to agree/disagree?



It was noted in 2010 that transparency and reporting were not top-of-mind during the qualitative interviews, with a greater focus on the good work charities do. While the good work charities do was prominent amongst those qualitatively interviewed, there was also a strong focus on the need for transparency and knowing how charities make a difference and spend their money.

Many state explicitly that they would like to see charities do more to publicise their fundraising activities and to give a more detailed breakdown of where their money goes. It seems that many are unaware of how they can find out this information should they want to, and there is a sense that charities are scrutinised much less than other bodies because of their status as charities.

"Where can I go where I can actually see how the money that is given to the particular charity is spent? Every so often you may get a publicity stunt where they show you a few photographs on a billboard or something like that. That isn't good enough these days."

Male, low trust in charities, not familiar with the Charity Commission (Int 7)

"They are generating money every year as charitable income. We just assume because it's a charity that they are spending it efficiently."

Male, high trust in charities, familiar with the Charity Commission (Int 4)

On the other hand, charities have to be careful with their money because of the risk that if they are seen to be profligate with donations, people will be discouraged from giving to them and they will suffer as a result.

"They're aware that actually, if we do waste money it will come out and people won't give us any more money."

Male, low trust in charities, not familiar with the Charity Commission (Int 3)

While those who are less trusting of charities tend to be more sceptical about them and the degree to which they are transparent about their funding and administration, those who are more trusting of charities and who have more experience or knowledge of how they work do know about the work charities have to do to publish information.

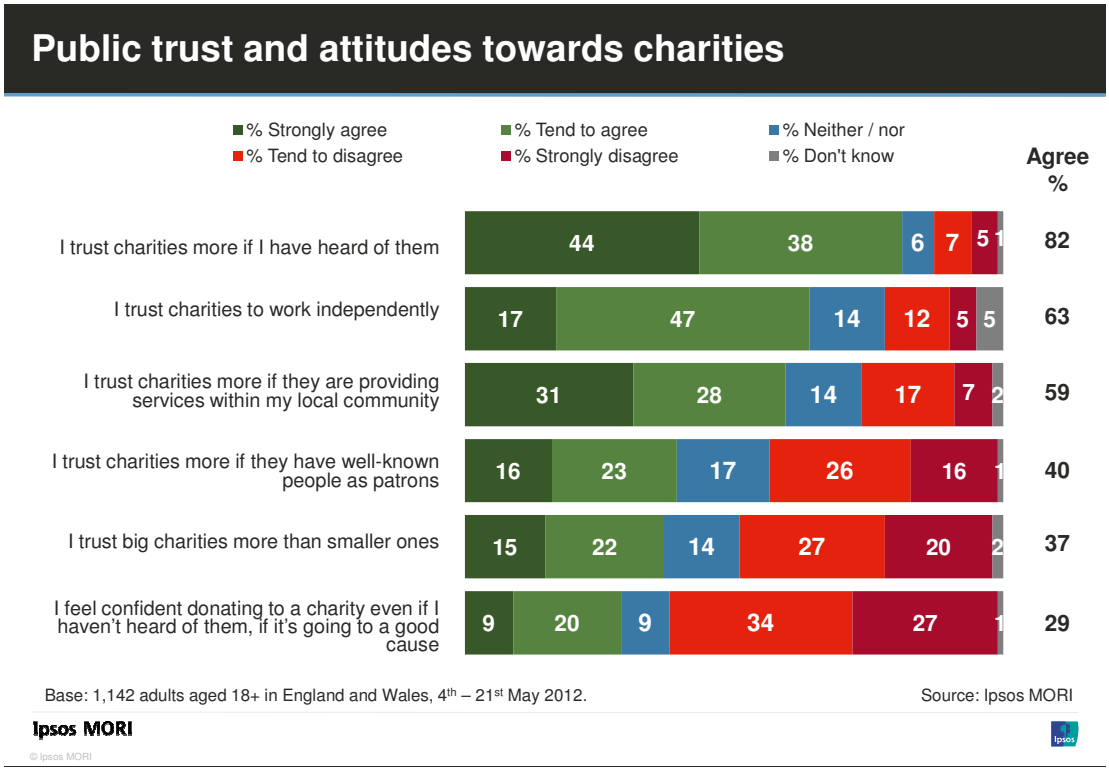
"I was aware that there was a process, and that each year things had to be submitted and our reports had to be put out."

Female, high trust in charities, familiar with the Charity Commission (Int 6)

Impact of size and familiarity on trust in charities

As one might expect, more than eight in ten (82%) agree that they place greater *trust in charities that they have heard of,* similar to the 83% who said this in 2010. As in 2010, two in five (40%) trust charities more if they *have a well-known patron*, though it is interesting to note that around the same proportion (43%) do not agree that having a well-known patron has any bearing on their trust in a charity. The data are shown in the chart below:

Q – I'm now going to read out a list of statements and ask you how much you agree or disagree with each of them…



The majority of the public are inclined to trust local charities, with three in five (59%) agreeing that they *trust charities more if they are providing services within their local community*. Interestingly, those in lower social classes are significantly more inclined to agree here than others – 67% and 65% of those in social classes C2 and DE, respectively, agree compared with 54% of those in AB or C1.

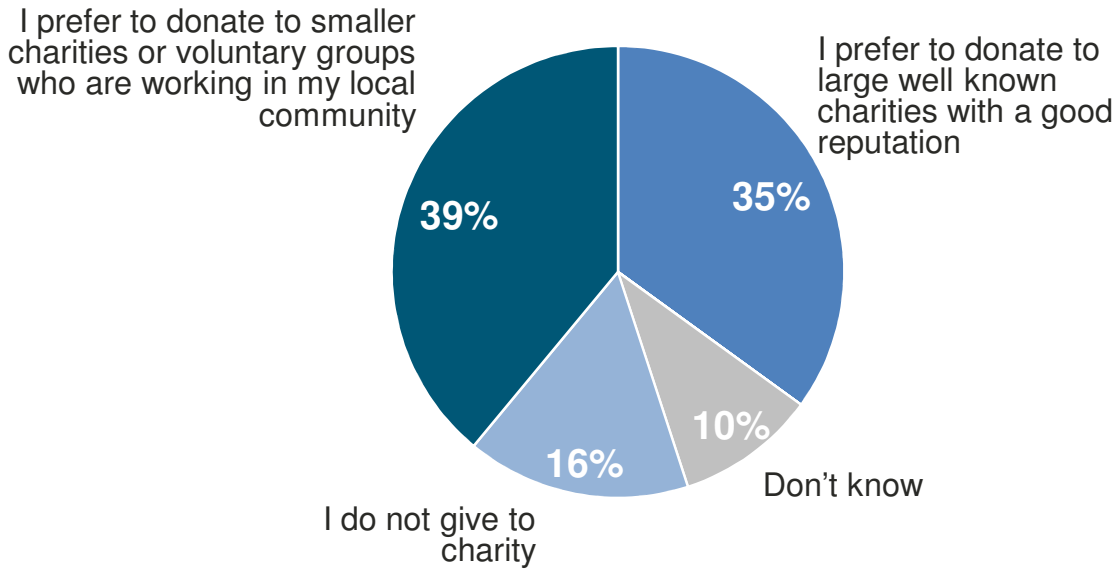
Almost half of the public (47%) disagree that they *trust big charities more than smaller ones,* continuing the trend seen in previous waves that appears to suggest that size is much less important to the public than familiarity. It was observed in 2010 that younger people (18-34) are more inclined than the public in general to trust *big charities more than smaller ones*. This relationship remains in 2012 with almost half (47%), of young people agreeing compared to 37% overall.

While three quarters (74%) of people living in London still tend to agree that *I trust charities more if I have heard of them,* this is significantly lower than the average of 82%. Similarly, providing services in a local community is a little less important with half (49%) of people in London agreeing that *I trust charities more if they provide services in my local community* compared to the overall average of 59%. Whilst not significantly different to the overall mean, it might be noted that people living in London give the lowest mean rating for overall trust in charities (6.4, which is significantly lower than the region with the highest mean - the North East with 7.1). People in London are also less likely than average to say they, their friends or close family have benefited from or used the services of a charity.

These results broadly correspond to findings in a survey we conducted on behalf of Zurich Insurance in 2011 which suggested that the British public are just as likely to support smaller local charities as they are large, well-known charities, as demonstrated in the chart below.

Q – Which of these statements comes closest to your views on donating to charity?

Views on donating to charity



Base: 1,003 British adults aged 15+, 25 Feb – 3 Mar 2011

Source: Ipsos MORI

The quantitative results suggest that there is no clear consensus regarding trust in bigger or smaller charities, and this rings true in the qualitative interviews too, as it did in 2010. Some identify benefits of larger charities as being able to fulfil roles which governments leave empty in a way that smaller charities cannot.

"[Small charities] provide a useful forum, but because they have not got the skills that perhaps can be obtained in the larger charities, and by that I mean training and listening skills like that, sometimes they can do a bit of harm… I think there's far too many small charities."

Male, high trust in charities, familiar with the Charity Commission (Int 10)

The perception that larger charities are not spending funds appropriately is apparent amongst some participants. Concern over the salaries of staff, money spent on administration, size of reserves and money spent on fundraising are all mentioned.

"I think what I would call the more generic charities, people are less comfortable with. I think it tends to be the big national generics that have the chuggers. They seem to be now in business to raise funds to be spent as executive fees. It's inappropriate… If you have a big national charity, there's no reason why you can't organise that on a local basis, so perhaps a dozen local organisations who are more accountable then to local people."

Female, high trust in charities, familiar with the Charity Commission (Int 2)

I do wonder about the big charities. Does all that money go [to the end cause], or is a lot of that eaten up in administration?

Female, low trust in charities, not familiar with the Charity Commission (Int 1)

There is a national/international dimension here too, particularly with regards to being able to observe money going to an end cause. While acknowledging that international charities do an important job and do benefit society, there is a sense in which it is difficult to see where the money goes when donating to large international charities.

"I'm more for [giving to charities in] this country than abroad because I don't feel that I know where that money's going. I know where they say it's going, but you don't know that it gets there."

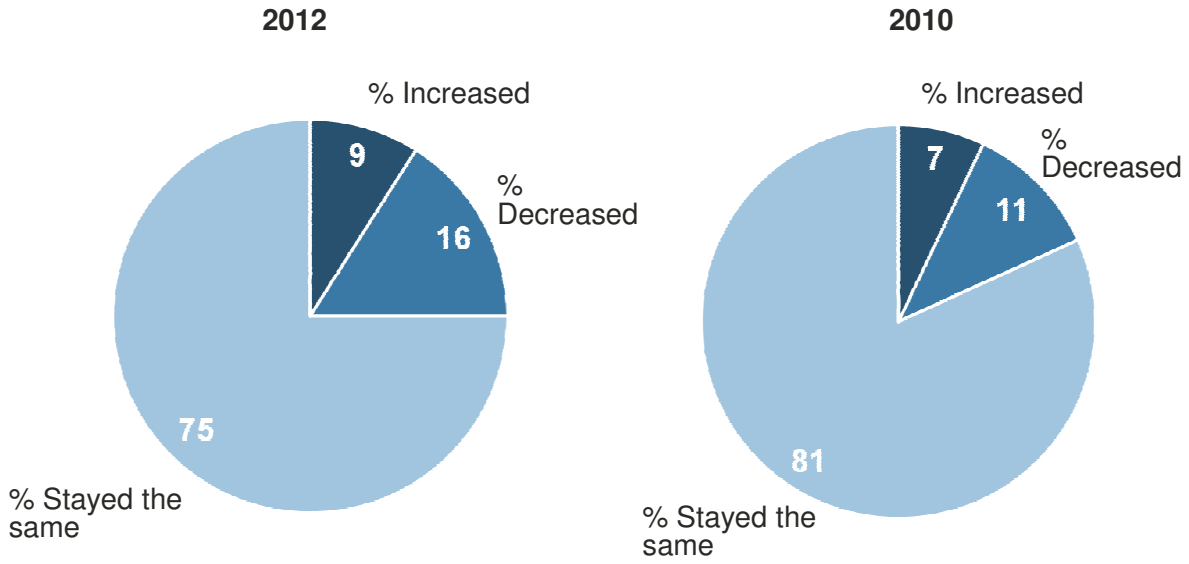
Female, low trust in charities, not familiar with the Charity Commission (Int 5)

Reported change in trust and confidence in charities

The public's views on trust and confidence in charities have changed over the last two years. While 81% stated that their trust in charities had stayed the same over the past two years prior to 2010, this has dropped to three quarters in 2012 (75%). Consequently, a greater proportion of the public are inclined to say their confidence has either increased (9%, up from 7% in 2010, although this is not statistically significant) or decreased (16%, up from 11% in 2010). The reasons behind this are explored in the following section.

Q – Over the past two years, has your trust and confidence in charities increased, decreased or stayed the same?

Change in trust and confidence in charities



Base: Adults aged 18+ in England and Wales – 2012 (1,142); 2010 (1,150)

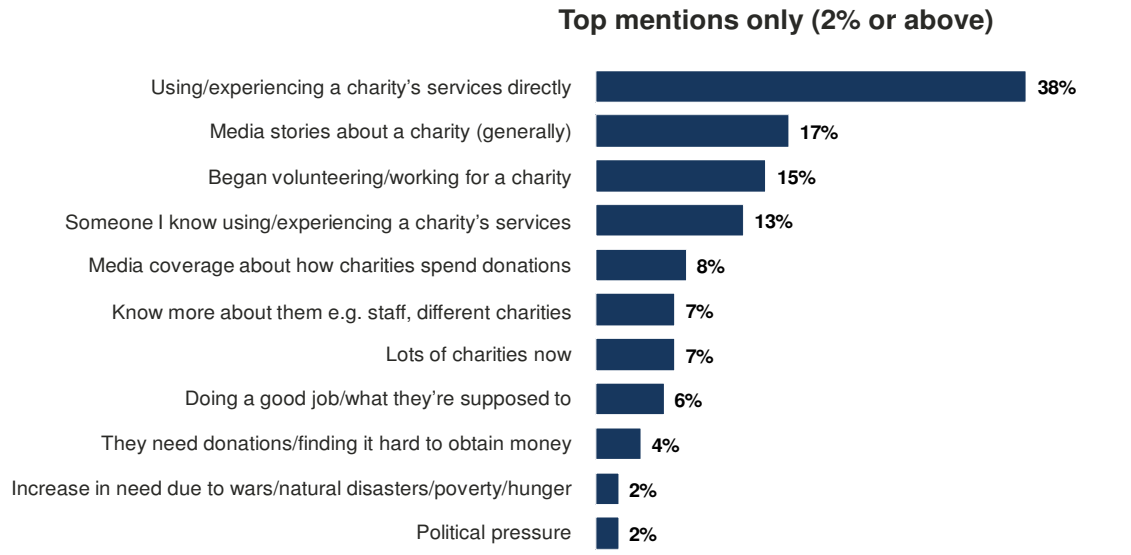
Ipsos MORI

A greater proportion of younger people (18-34) say their trust in charities has increased over the past two years: 16% say this in 2012 (significantly more than the 9% overall). Conversely, over a quarter (26%) of 55-64 year olds say their trust in charities has decreased, which is also significantly more than average.

The majority of the small group of the public who say their trust has increased in the past two years cite direct experience of the charity's services themselves (38%) or through someone they know (13%) as the reason why, media stories about charities in general (17%) and volunteering for a charity (15%) are also mentioned.

Q – Why do you think your trust and confidence in charities has increased? And has anything else influenced this change?

Reasons for increase in trust and confidence



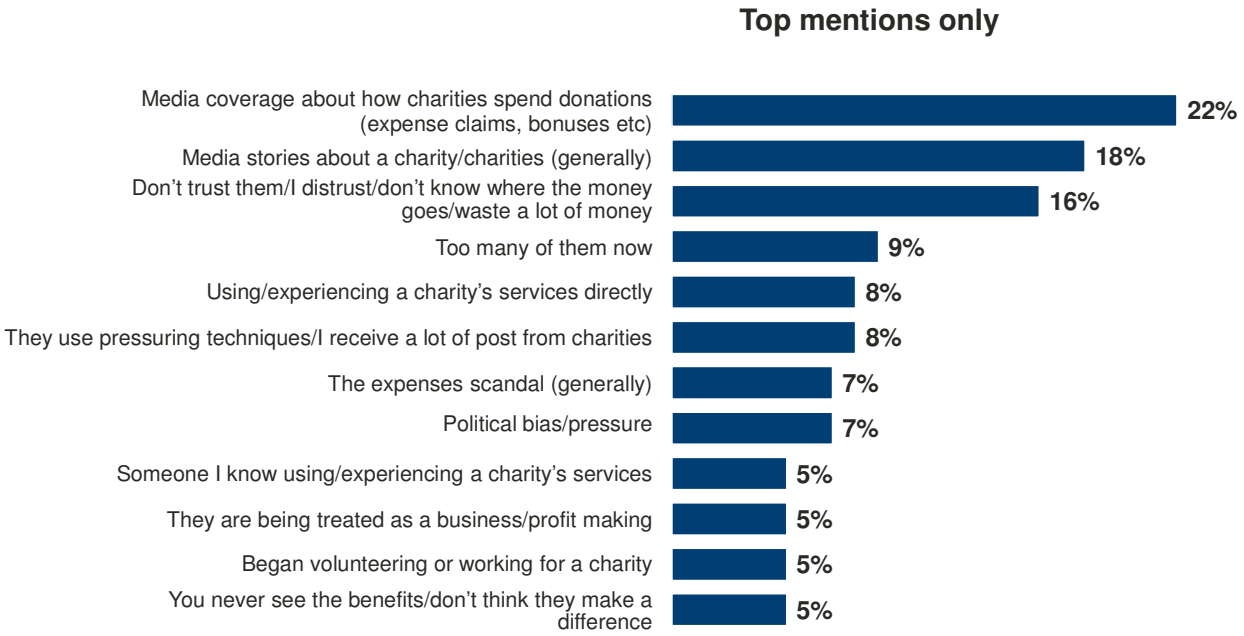
Base: All respondents who said their trust in charities has decreased in the past two years (96 – caution, small base) Source: Ipsos MORI

Ipsos MORI

Conversely, negative media coverage about charity spending (22%) and charities in general (18%) are the main reasons cited by those who say their trust in charities has fallen.

Q – Why do you think your trust and confidence in charities has decreased? And has anything else influenced this change?

Reasons for decrease in trust and confidence



Base: All respondents who said their trust in charities has decreased in the past two years (179)

Source: Ipsos MORI

Ipsos MORI

Overall perception of charities

Key Findings

- In general, the public remain largely positive about the conduct of charities. Three quarters (74%) believe most are *trustworthy and act in the public interest*, which is in line with 2010.
- The qualitative research reveals that the public have very high expectations for the conduct of charities, due to perceptions of what a charity is or should be (ethical, not for profit etc). Therefore, proper conduct is especially important within the charity sector to maintain faith in charities.
- How charities both raise and spend donations is of importance to the public. The qualitative research once again highlighted that people do not like more 'aggressive' forms of fundraising such as being stopped in the street; some participants said this has adversely affected their propensity to donate. There is evidence that fundraising methods are of increasing concern among the public – two thirds (67%) of the public agree that *some fundraising methods used by charities make them uncomfortable*, which is a significant increase from the proportion who said this in 2010 (60%).
- The proportion of people who *trust charities to work independently* has decreased to 63% from 68% in 2010.
- Almost three in five (59%) believe charities *spend too much on salaries and administration*. This was mentioned in the qualitative interviews – most participants felt that charities spend too much money on salaries and administration and said this should be curtailed.
- The vast majority of the public believe charities *play an important role in society* (96%), the same figure as 2010. However, the proportion who believe that *charities provide society with something unique* has fallen by five percentage points since 2010 to 77%.

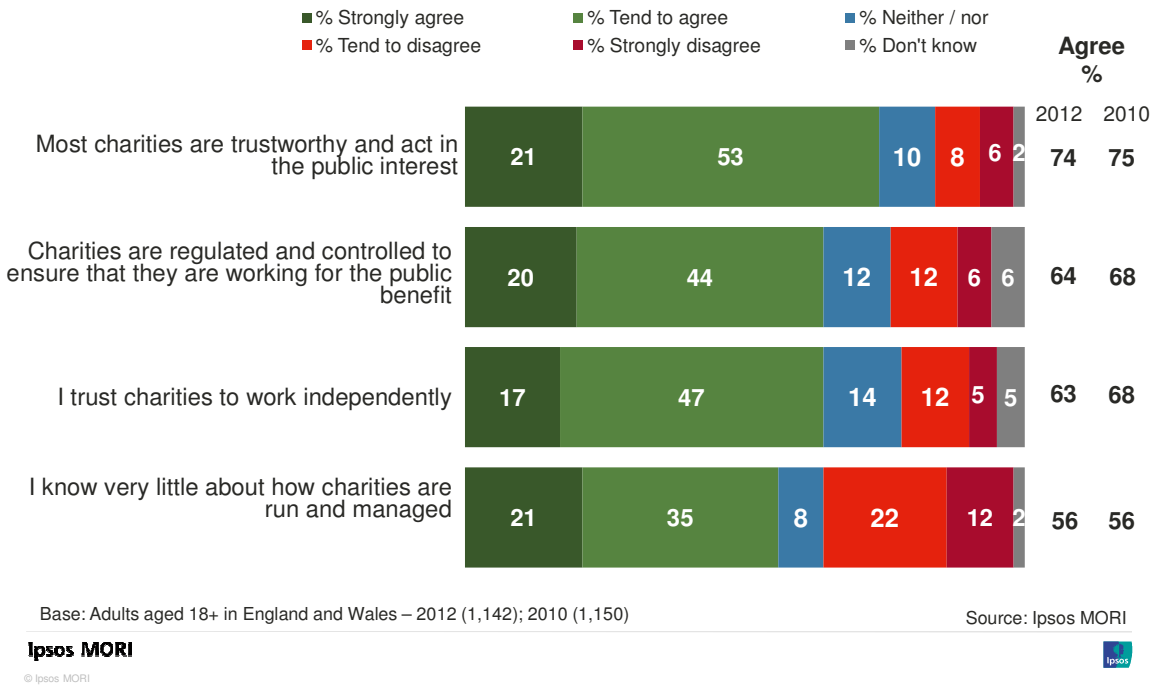
Perceptions of charities' conduct

The vast majority of the public have positive perceptions of charities' conduct and intentions. Three quarters (74%) believe that most are *trustworthy and act in the public interest*, which is in line with 2010 (75%). A high proportion trust *charities to work independently* (63%), although this is significantly lower than in 2010 (68%). However, over half (56%) admit that they *know very little about how charities are run and managed*.

At a prompted level most people are aware that charities are regulated; two thirds (64%) agree that they are *controlled and regulated to ensure that they are working for the public benefit*.

Q – I'm now going to read out a list of statements and ask you how much you agree or disagree with each of them…

Perceptions of charities' conduct



Base: Adults aged 18+ in England and Wales – 2012 (1,142); 2010 (1,150)

Source: Ipsos MORI

Ipsos MORI

Young people and older people are more likely to say that charities are *regulated to ensure they work for the public benefit,* with seven in ten of those aged 18 to 34 (71%) and aged 65 or over (70%) agreeing that charities are regulated compared with under six in ten of those aged between 35 and 64 (57%).

As was the case in 2010, those with a greater level of trust and confidence in charities are more likely to believe that charities are regulated. Three quarters (77%) of those who have a high level of overall trust and confidence in charities (a score of 8-10) agree that charities are regulated for the public benefit while less than half (44%) of those who have lower trust and confidence in charities (a score of 0-5) agree that charities are regulated.

This indicates once again that knowledge about charities and the charity sector appears to be connected to overall trust and confidence. Additionally, those who say their confidence in charities has increased over the past year are significantly more likely to think that charities are regulated than those whose who say their trust in charities has decreased over the past year (77% vs. 40%). This highlights the important role that the Charity Commission plays as the sector regulator and how the wider promotion of its work has the potential to increase public trust and confidence in charities.

As was the case in 2010, participants in the qualitative interviews who are involved with charities, for example through volunteering, tend to exhibit higher opinions of charity conduct. This emphasises the impact of direct experience in shaping positive perceptions.

Participants tended to have trust in charities they were exposed to, either through involvement or donating to them. There tends to be more trust in well-known charities; however, there is some scepticism of the fundraising techniques deployed by larger charities.

"If you have a charity that's fairly tightly focused, I think be it a local charity or a national charity, I think people generally will be more amenable to it and to its aims and its objectives in raising funds. I think what I would call the more generic charities, people are less comfortable with."

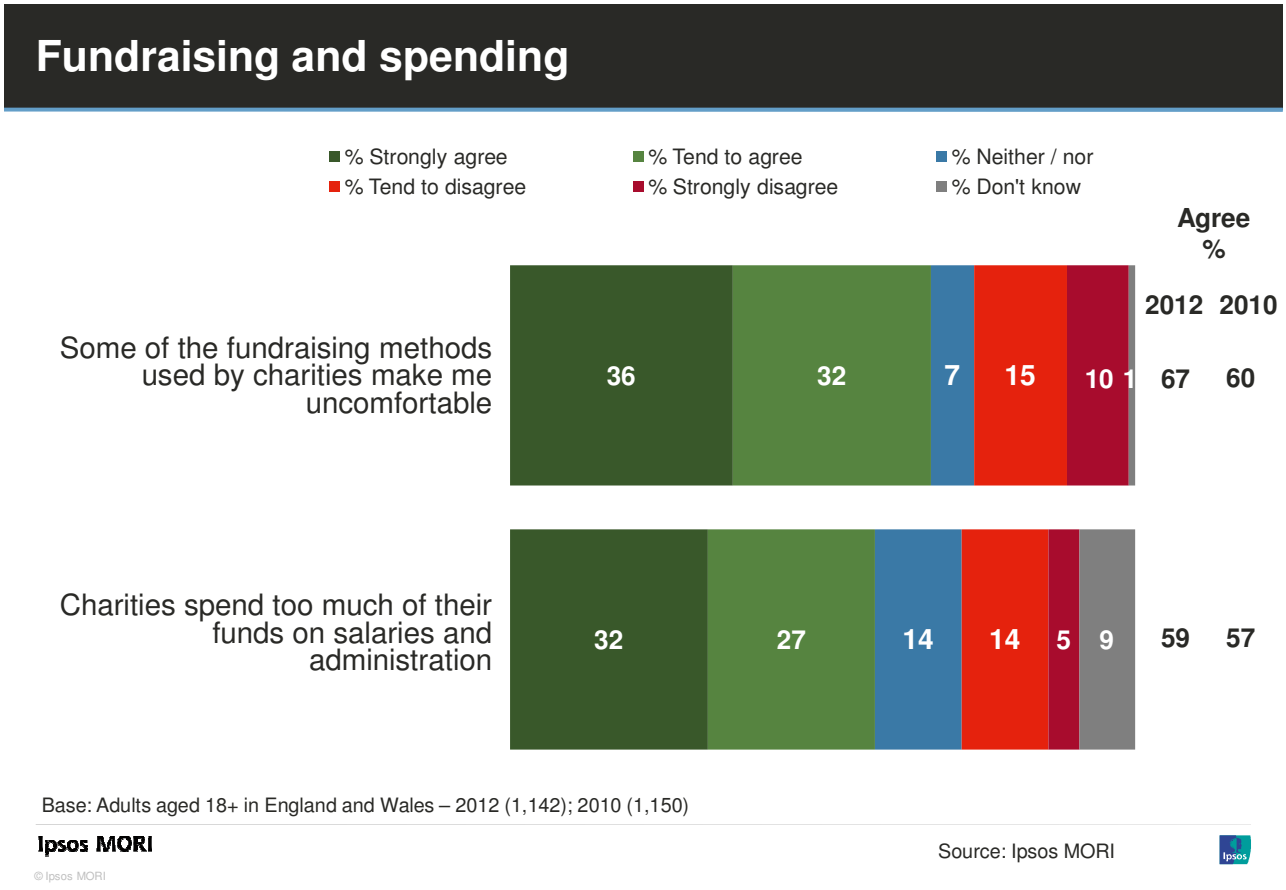
Male, high trust in charities, familiar with the Charity Commission (Int 4)

Fundraising and spending

Although approaching three in five (56%) people admit to knowing very little about how charities are run and managed, there is a *perception* amongst a large proportion of the public that charities *spend too much of their funds on salaries and administration* – three in five (59%) feel this to be true; this finding matches that found in the 2010 survey. This is of particular importance given that the most important issue affecting trust and confidence overall is *ensuring a reasonable proportion of donations get to the end cause* (43%).

Two thirds of people (67%) agree that *some of the fundraising methods used by charities make them feel uncomfortable*, the proportion concerned with fundraising methods has increased significantly since the 2010 survey when six in ten (60%) said some methods made them uncomfortable. In addition, the proportion who *strongly* agree with this statement has increased significantly since 2010, with over a third (36%) saying they strongly agree compared with a quarter (27%) in 2010.

Q – I'm now going to read out a list of statements and ask you how much you agree or disagree with each of them…



Consistent with the 2010 findings, older people remain more likely to agree that *some of the fundraising methods used by charities make them uncomfortable* (77% of those aged 55-64 and 74% aged 65+ vs. 67% overall) and that charities *spend too much on salaries and administration* (71% vs. 59% overall). People in higher social classes (AB) are also likely to agree that *some fundraising methods make them uncomfortable* (72% vs. 67% overall), whereas those in social classes DE are more likely to agree that *charities spend too much on salaries and administration* (70% vs. 59% overall).

People who regard *ensuring fundraisers are honest and ethical* and *ensuring a reasonable proportion of donations make it to the end cause* as the most important qualities in determining their trust and confidence in charities are more likely to agree that charities currently *spend too much of their funds on salaries and administration*. Around two thirds (68% and 65%, respectively)

agree compared with 59% overall. This again demonstrates the relationship between perceptions of outcomes and attitudes.

When exploring the issue of fundraising qualitatively most participants made a distinction between voluntary donations and being asked to donate by paid street fundraisers or by telephone, which they describe as "pushy" forms of fundraising that can put people under pressure. They disliked these forms of fundraising as they felt uncomfortable at being put on the spot.

"I had a chap ring me four or five different times and in the end I gave in, but that was my fault really. It comes back to this trying to get money out of you by telephone and I find it very difficult because… I can choose when it comes through the door I just bin it but I can't choose so easily if somebody is at the other end, you sound so callous and so on."

Male, high trust in charities, familiar with the Charity Commission (Int 9)

"I don't believe in door-to-door and all this sort of thing because then that's putting on people. If people want to do it, they will do it."

Female, low trust in charities, not familiar with the Charity Commission (Int 5)

It is important to point out that a dislike of these fundraising methods does not appear to affect trust of a particular charity, indeed some participants cited occasions when they have donated when asked to via methods they do not particularly like as they like the cause of the charity. A distinction is made between the fundraiser and the charity itself. A negative experience can make someone less willing to donate to that charity though. Giving on a person's own terms is preferred, but recognised as being less effective as participants understood that charities are under pressure to raise funds.

There was a feeling amongst some participants that smaller charities were at a disadvantage when it comes to fundraising because they have less ability to publicise themselves to encourage donations.

"The smaller charities, they can't afford to do the big advertising and everything else, so, you know, we mustn't forget them."

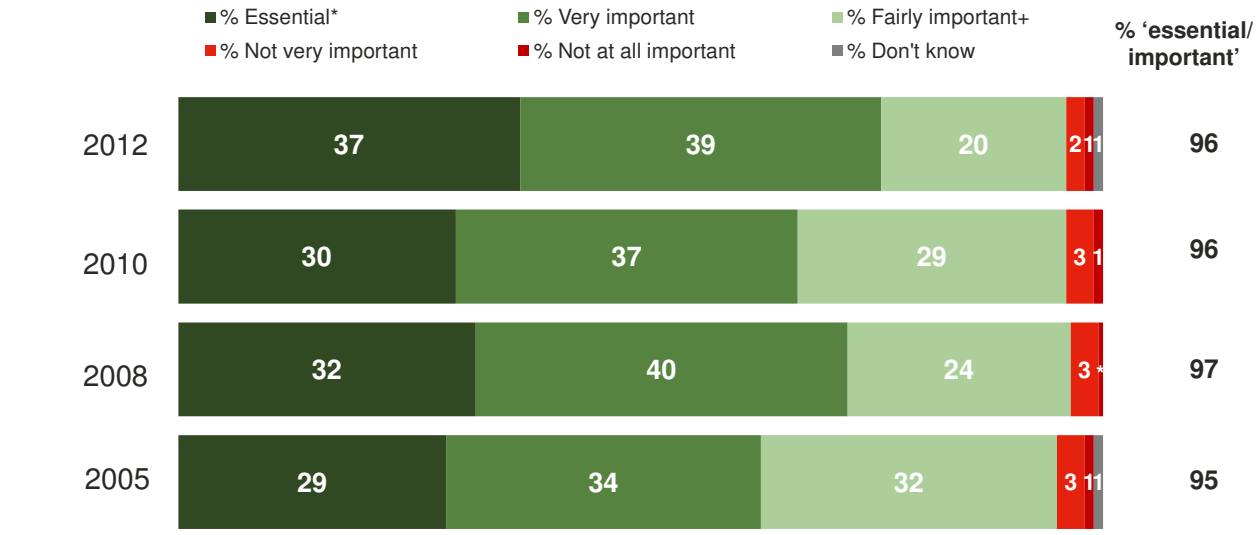
Female, low trust in charities, not familiar with the Charity Commission (Int 5)

Charities' importance in society

As in previous waves, the vast majority of the public feel that charities *play an important role in society;* however, compared with 2010, the public are now more likely to regard the role of charities in society as *essential* (37% vs. 30%) and the combined proportion saying charities roles in society is essential/very important is at a record high of 77%, significantly higher than in 2010 when it stood at 67%. This firming up of perceptions of the importance of the role that charities play in society may be borne from the challenging economic circumstances and government austerity measures since the 2010 wave. Only three percent of the population feel that charities are not very/at all important in society.

Q – Overall, how important a role do you think charities play in society today?

Importance of charities in society



* Option changed to 'essential' from the 2008 wave from 'extremely important' in 2005
\+ Option changed to 'fairly important' for 2008 and 2010 from 'quite important' in 2005
Base: Adults aged 18+ in England and Wales – 2012 (1,142); 2010 (1,150); 2008 (1,008) and 2003 (1,001)

Source: Ipsos MORI

Ipsos MORI

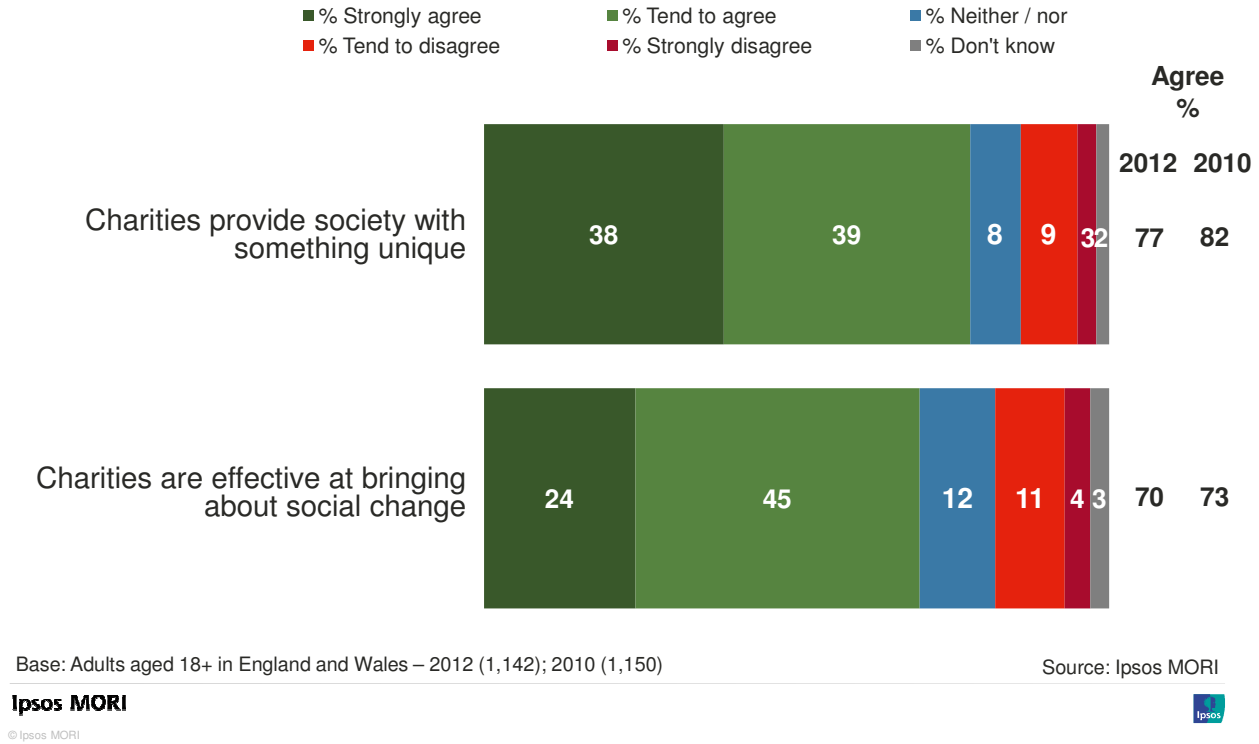
Women are more likely than men to regard the role of charities in society as essential/very important (83% vs. 71%).

People living in Yorkshire and the Humber are significantly more likely than average to think charities play an essential role (49% vs. 37%). It is interesting to note that four in ten (42%) people living in Yorkshire and the Humber have themselves/friends/family benefited from or used charity services compared to the average of 34% (although this difference is not statistically significant) and a greater proportion have also used many of the prompted charitable services.

The majority agree that charities have a positive impact on wider society. Seven in ten (70%) feel they are *effective at bringing about social change* (24% agree strongly) and three in four (77%) agree that they *provide society with something unique* – two in five (38%) agree strongly with this. However, the overall proportion who agree is lower than it was in 2010 when four in five (82%) agreed.

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

Impact on wider society



Base: Adults aged 18+ in England and Wales – 2012 (1,142); 2010 (1,150)

Source: Ipsos MORI

Ipsos MORI

As previously mentioned, trust in charities tends to be higher amongst those who believe charities play an important role and who think charities have a positive impact on society. Those who have a high level of trust in confidence in charities (a score of 8-10) are:

- More likely (47% vs. 28%) to regard the role of charities as essential compared with those who have lower trust (a score of 0-5).
- More likely to agree that charities are *effective at bringing about social change* than those with lower trust and confidence (79% vs. 54%).

During the qualitative interviews respondents elaborated on the vital role that charities play in society and their ability to 'fill in the gaps' and provide services that aren't being met by public sector agencies. However, some maintain that charities would not be needed if "the government was doing its job properly" and that people in England and Wales shouldn't have to rely on charities. Some said charities have taken on greater significance in the current economic climate and, whilst not necessarily agreeing that charities should have to fill in gaps, feel that people are increasingly relying on them.

"With the way the economics of the country are, there are a lot of people out of work, a lot of people are less well off than they were before when times were good and a lot more people are going to be reliant on charities to try and help them and their families out."

Male, high trust in charities, familiar with the Charity Commission (Int 9)

Some felt that charities were able to provide a more personal service than public bodies and could help those who were not eligible for any other help. Their work could be targeted at specific groups of the population, rather than trying to reach everyone.

"They're more of a personal service, so therefore their work is aimed at who it's meant for, rather than overall."

Female, low trust in charities, not familiar with the Charity Commission (Int 5)

Trust in charities to provide public services

Key Findings

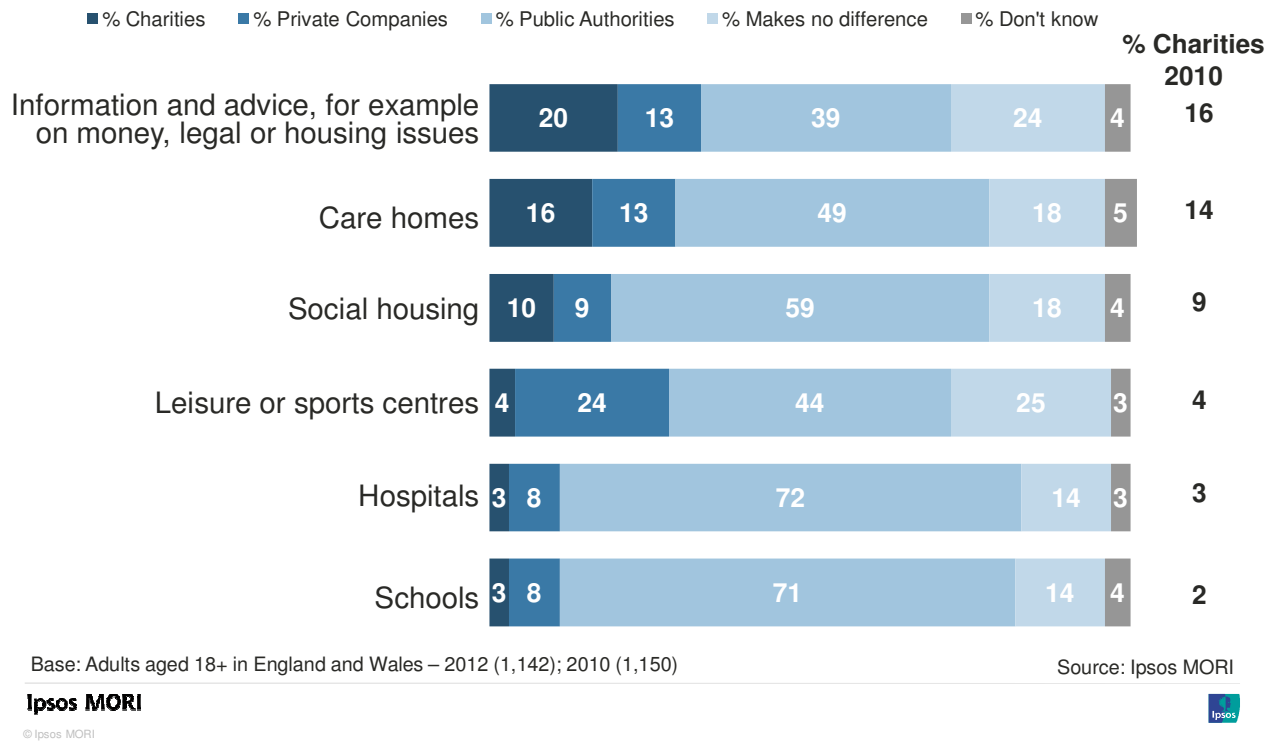
- When asked generally, a quarter (25%) of the public say they would feel more confident if a charity was *providing a public service to them or their family* rather than another type of service provider – this is a significant increase from 2010 when 19% of the public said they would feel more confident. Two thirds (65%) say it would make no difference to their confidence.
- When asked about some specific types of service, the largest proportion of people in each case said that public authorities are best at providing these services, which is in line with 2010.
- Given the choice between charities, private companies or public authorities, the public think that charities would be best at *providing a caring approach* (47%).
- Of the different *types* of services provided, one in five (20%) believes charities are best at *providing information and advice*; this is higher than in 2010 when one in six (16%) said this.

Types of service

The public were asked which out of charities, private companies or public authorities would be best at providing a number of public services including care homes, social housing, leisure or sports centres, hospitals, schools and information/advice services. For each type of service, the largest proportion of people said that public authorities would be best at providing these services, as shown in the following chart. The findings are in line with the 2010 wave of this research.

Q – Which of these – charities, private companies or public authorities – do you think would be best at providing each of the following types of services or does it make no difference?

Trust and service provision – type of service



Base: Adults aged 18+ in England and Wales – 2012 (1,142); 2010 (1,150)

Source: Ipsos MORI

As the above chart shows, the proportion of the public who think charities are best at providing various services is in line with 2010, though a significantly larger proportion now think charities would be best at *providing information and advice* (20% vs. 16%).

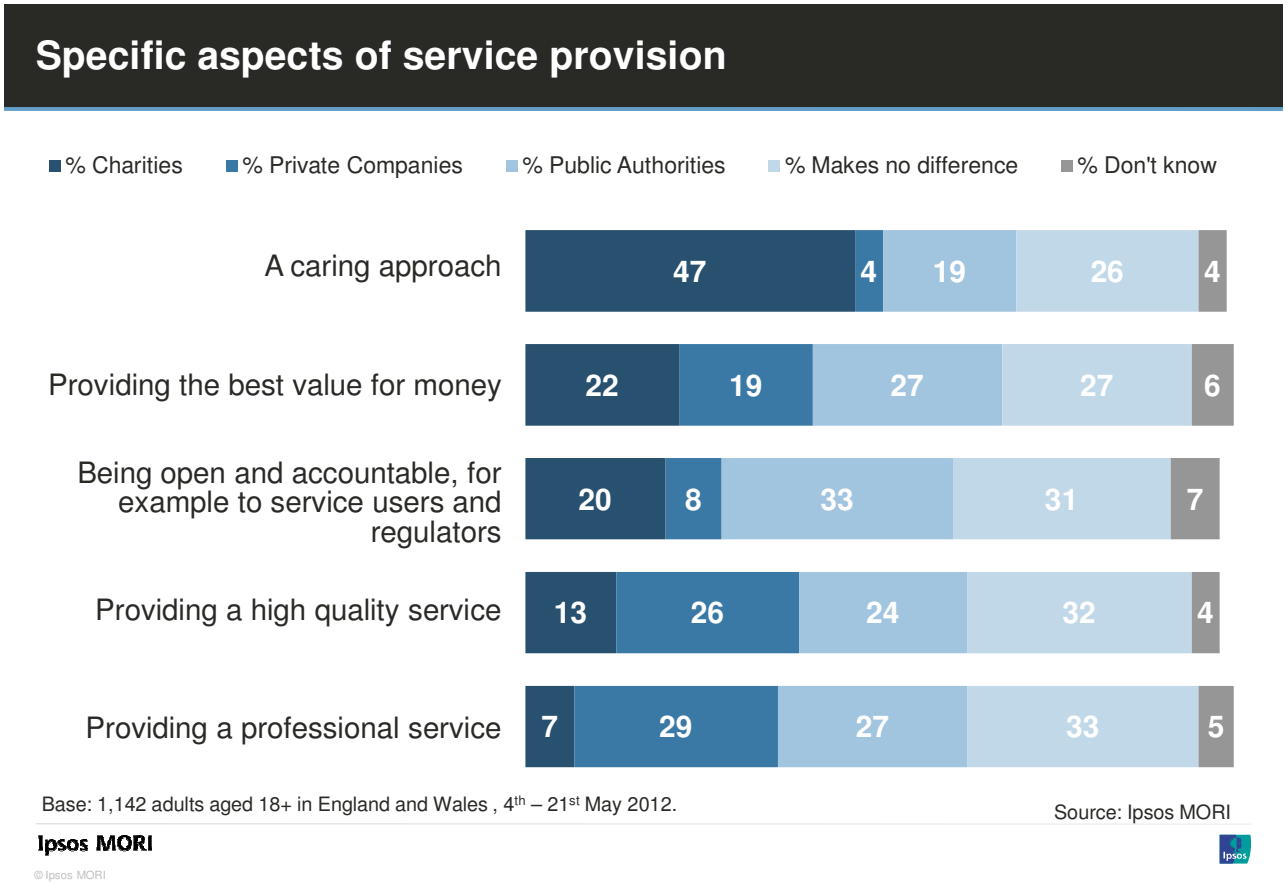
Middle aged respondents (aged 45-54) are more likely to think charities are the best at *providing social housing* (16% vs. 10% overall). Older people (aged 65 or over) are less likely to think charities are best placed to *provide information and advice* (14% vs. 20% overall). Those in social classes ABC1 are more likely than people in social classes DE to believe charities are best placed to *provide information and advice* (23% vs. 15%); this perhaps reflects their higher trust and confidence in charities.

Specific aspects of service provision

When asked which of these three would be best in terms of certain attributes or aspects of service provision, charities are seen as best placed for providing *a caring approach* – around half (47%) of the public say this, which is significantly higher than in 2010 (40%). Similar proportions of the public believe that charities and private companies are best placed to providing the *best value for money* (22% and 19% respectively). This contrasts with 2010 when private companies were viewed by more people than charities as being best placed to *provide value for money* (24% vs. 18%). However, public authorities continue to be seen as providing the *best value for money*, with nearly three in ten saying this (27%).

As in 2010, very few people regard charities as best at *providing a professional service*, this was reflected in the qualitative research as many participants stated that they thought of charities in terms of 'not-for-profit' and 'voluntary'.

Q – Which of these do you think would be best at providing each of the following, or does it make no difference?



There are some differences in views among certain demographics. Women are more likely than men to agree that charities are best placed to *provide a high quality service* (16% vs. 11%). Those aged 45-54 are more likely than average to believe that charities are best at *providing best value for money* (30% vs. 22%) and *providing a professional service* (11% vs. 7%).

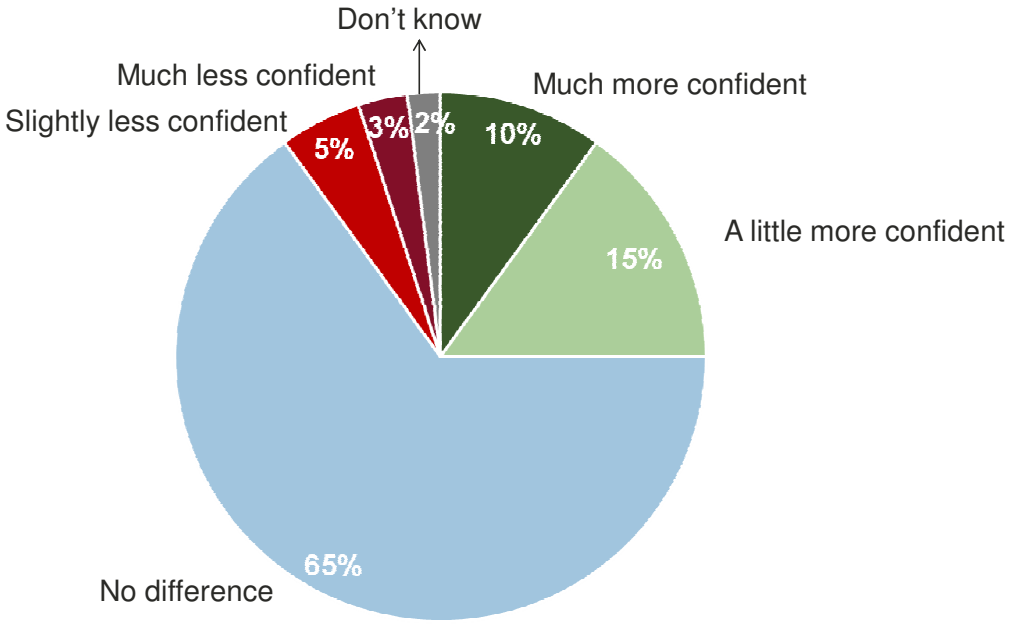
Just as they have higher than average trust and confidence in charities overall, younger people (aged 18-34) are also much more likely than older people (aged 65+) to think charities are the best at *providing a caring approach* (55% vs.35%). Those aged 18-34 are more likely to say they, or close family or friends, have ever benefited from or used the services of a charity than those aged 65+ (37% compared to 22%). They are also more likely to say they or a close family member or friend have *received emotional support or counselling* (27% versus 15% of 65+). This personal experience may explain why they are more likely to agree that charities are best at providing a caring approach.

Those in social classes AB are more likely to agree that charities are best placed to be *open and accountable* (27% vs. 20% overall), which may help explain why they have higher overall levels of trust and confidence in charities. Furthermore, those who work for a charity are also particularly likely to think charities are the best at *being open and accountable* (27%).

For most (65%), if they needed support from a public service it would, hypothetically, make no difference to them whether it was provided by a charity or another type of service provider. However, one in four (25%) would feel more confident (compared with 19% in 2010), while eight percent would be less confident.

Q – Thinking generally, if you or your family needed support from a public service, would you be more or less confident if the service was provided by a charity than another type of service provider, or would it make no difference?

Confidence in services provided by charities



Base: 1,142 adults aged 18+ in England and Wales, 4th – 21st May 2012.

Source: Ipsos MORI

Ipsos MORI

Exploring this issue in a qualitative manner, when asked directly about the ability of charities to provide certain public services, opinion is not clear cut. On the one hand, there is the belief that the charities are more naturally suited to helping people and providing a more personal service than private companies that are motivated by profit. Generally, this was not an issue that had been widely considered amongst participants and they were unsure of their views.

"At the end of the day they (private companies) are businesses to make money, whereas charities…are more humane in their dealings with people."

Male, low trust in charities, not familiar with the Charity Commission (Int 3)

Some concerns were raised, however, over the appropriateness of charities providing services that have been traditionally provided by the public sector. There was a sense that some services should be provided by the state and charities should not be required to fulfil them. Concerns were also raised that the government providing funding to charities just adds another layer of bureaucracy to service provision.

Public awareness and understanding of the Charity Commission

Key Findings

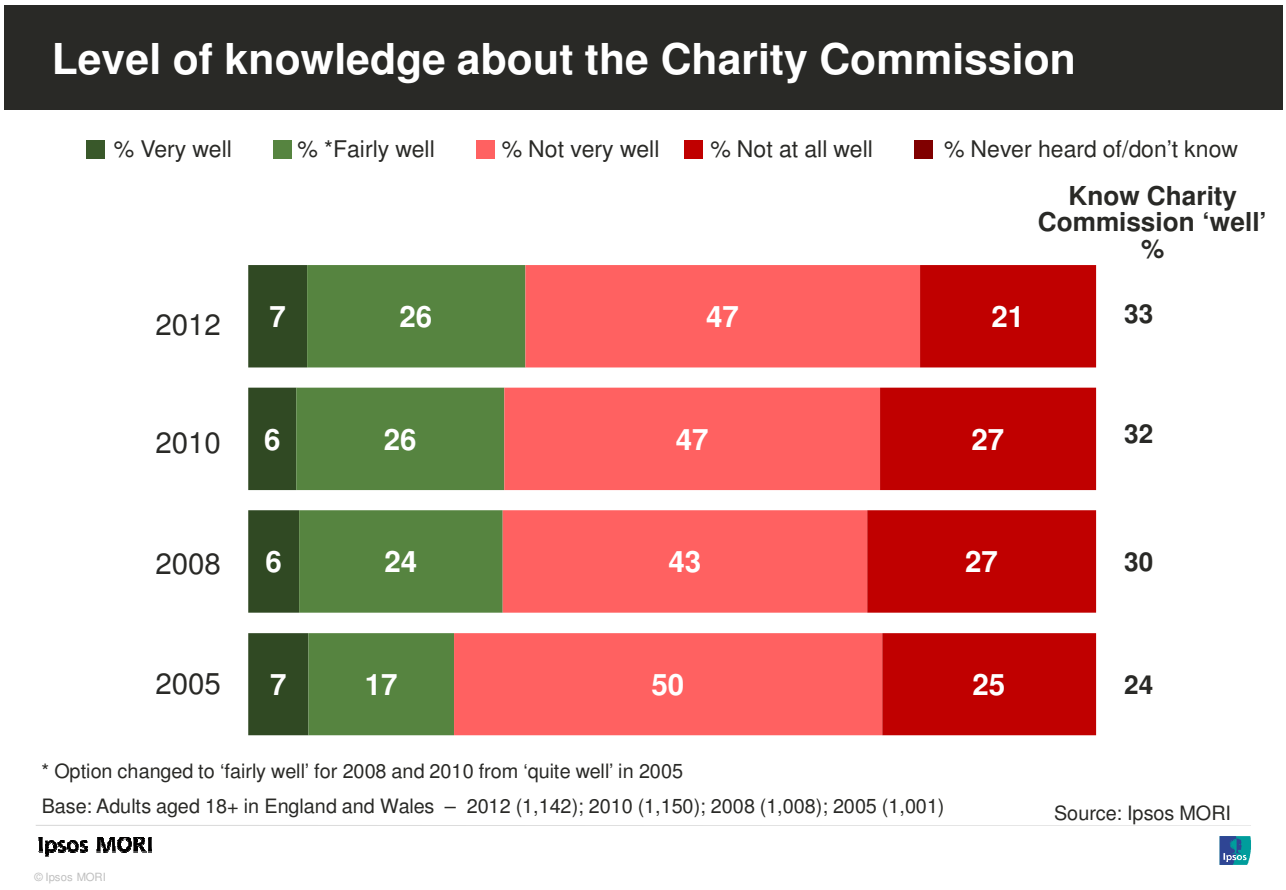
- Awareness among the general public of the Charity Commission has remained in line with 2010 (55% in 2012 and 53% in 2010).
- Once explained, nearly all (98%) believe that the role of the Charity Commission is essential, very or fairly important. This reflects the strong feelings the public have around ensuring charities' funds are used appropriately.
- The qualitative research reveals that people do tend to think about regulation of charities but only in broad terms, and tend to make assumptions about what is monitored. There was some feeling that charities are not effectively monitored or regulated at present, especially with respect to fundraising.

Awareness and familiarity

Just over half of respondents (55%) have heard of the Charity Commission. Public awareness of the Charity Commission remains consistent with 2010 and 2008 (when 53% and 54% respectively had heard of it). Interestingly, awareness is lowest in London (47%), where we also see the lowest levels of overall trust in charities.

Of those aware of the Charity Commission, a third (33%) feel that they know the Commission either very or fairly well, which is in line with 2010 (32%). This equates to around 18% of the adult population of England and Wales as a whole.

Q – How well, if at all, do you feel you know the Charity Commission and what it does?



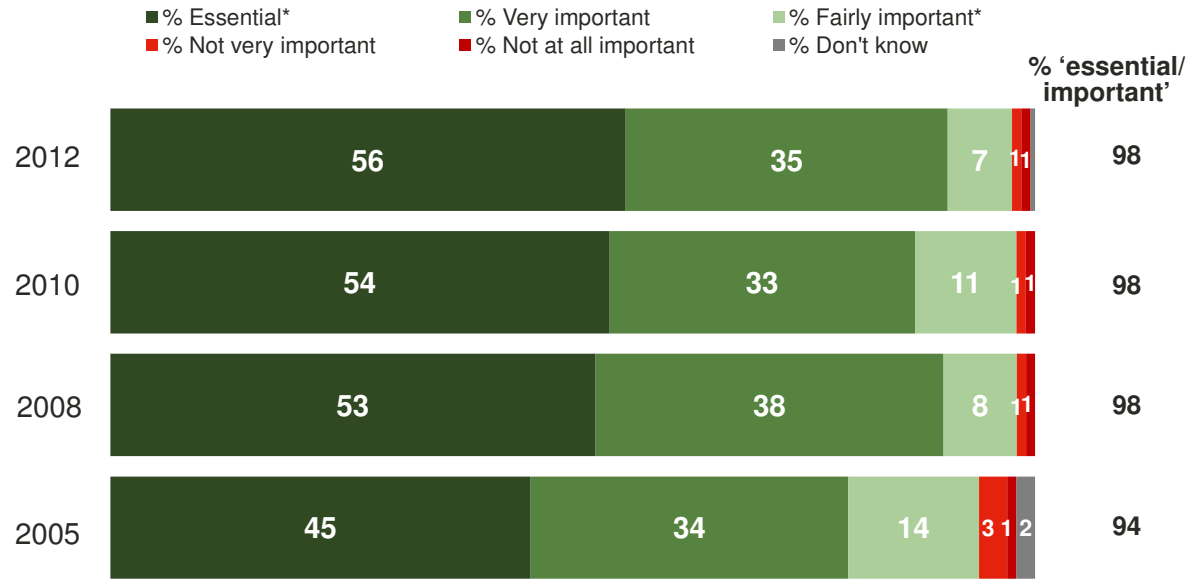
Men are more likely than women to say they have heard of the Commission (63% vs. 48%). As was true in 2010, older people (aged 45+) remain more likely than younger generations (aged 18-34) to have heard of the Charity Commission (66% vs. 34%). Those in social classes ABC1 are also significantly more likely than those in classes C2DE to have heard of the Charity Commission (65% vs. 43% overall) and those who personally, or have close friends or family that work for or are a beneficiary of a charity (66% and 61% respectively vs. 55% overall). Importantly, when thinking about the role that the Charity Commission plays in society, most of these groups also have higher overall trust in charities (the exception is older people – younger people are in fact more likely to have higher trust).

Although only around half (55%) have heard of the Charity Commission, there is much wider consensus on the importance of the Charity Commission's role once this is explained[6]. Just over half (56%) feel its role to be essential, a further third (35%) feel it to be very important, and seven percent say it is fairly important. In total, 98% feel the Charity Commission's role is important.

[6] Explanation given: The Charity Commission is an independent body responsible for registering and regulating charities in England and Wales. They register applicants for registration as a charity after examining their purposes, accounts and structure. They regulate charities by ensuring they stay within the law and are run for the public benefit, and by investigating any allegations of wrong-doing by charities.

Q – How important do you personally regard this role?

Importance of Charity Commission's role



Base: Adults aged 18+ in England and Wales – 2012 (1,142); 2010 (1,150), 2008 (1,008), 2005 (1,001).
*Question options 'Extremely important' and 'Quite important' in 2005 instead of 'Essential' and 'Fairly important'.

Source: Ipsos MORI

Ipsos MORI

Understanding the issue of regulation

Qualitatively, the regulation of charities is something those interviewed are vaguely aware of, but generally have not necessarily considered much prior to this research.

"If they're regulated, they probably have to provide information to people to show where the money's been spent, but it's not something I would actually look into."

Male, low trust in charities, not familiar with the Charity Commission (Int 3)

Those who are not familiar with the Charity Commission suggest various ways in which they would try to determine the legitimacy of a charity such as looking for a registered charity number and using the internet to search for a website or any discussion of the charity.

There is some awareness amongst those who are aware of the Charity Commission, about how it regulates charities. Awareness is higher among those who are currently personally involved with charities and or worked or volunteered for charities in the past.

"Charities have to be registered with the Charity Commission. They have to submit their accounts and suchlike. They have to do annual returns, more people should be aware of that."

Male, high trust in charities, familiar with the Charity Commission (Int 4)

A few of those interviewed question the Charity Commission's ability to regulate in an effective manner and feel that the body may lack the appropriate sanctions to effectively address and deal with transgressions. Participants were generally ambivalent when informed about the Charity Commission and what it does. While some said it is comforting to know that there is a regulator out there, there was some cynicism concerning how effective it can be.

"I think the general public need that security to know that somebody's watching where their money goes to and that it does what it says it's going to do."

Male, low trust in charities, not familiar with the Charity Commission (Int 5)

The idea of a more *proactive* investigation into whether a charity is meeting its objectives and how it is spending money is suggested by some. There is, however, agreement that they want to know that *someone* is ensuring that charities are legitimate, well-run and spending donations effectively.

Charity beneficiaries and active involvement

Key Findings

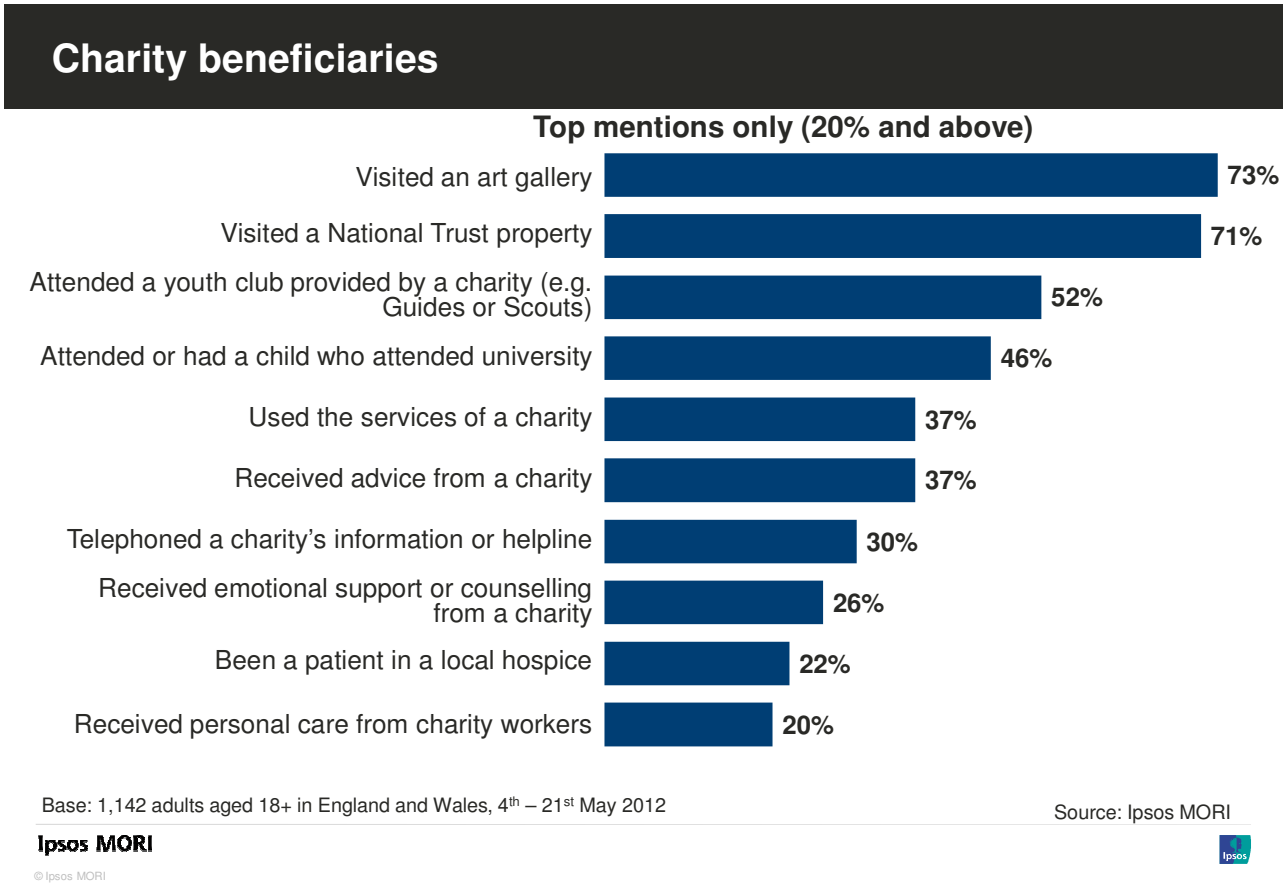
- A third of respondents (34%) say they have benefited personally, or had close friends or family benefit from a charity. However, when prompted with specific examples, a much greater proportion say they or close friends/family have, for example, *visited an art gallery (73%) or a National Trust property* (71%). In addition, half (52%) say they have *attended a youth group*, and over a third have *used the services of a charity* (37%).
- In total, over a third (37%) of the public are personally involved with charities, or have close friends or family members who are in involved with charities. This is higher than in 2010 when the figure was 32%.
- Being a beneficiary or actively involved with a charity (or having close friends/family that are) is linked to higher overall trust and confidence in charities. For example, those with high trust and confidence in charities (a score of 8-10) are more likely than those with no to medium trust and confidence (a score of 0-5) to be personally involved, or have close friends of family involved, with a charity (42% vs. 28%).

Charity beneficiaries

A third of respondents (34%) say they have benefited from, or used the services of a charity when asked directly, this is a small but significant increase since 2010 when three in ten (30%) said they had.

When prompted with a wider range of activities and services that charities might provide, which may not all be as readily associated with a charity, the vast majority (94%) report having benefited personally, or having close family or friends who have benefited, in some way from organisations likely to be classed as charities. This is detailed in the following chart.

Q – Have you, or any of your close family or friends, ever done any of the following?

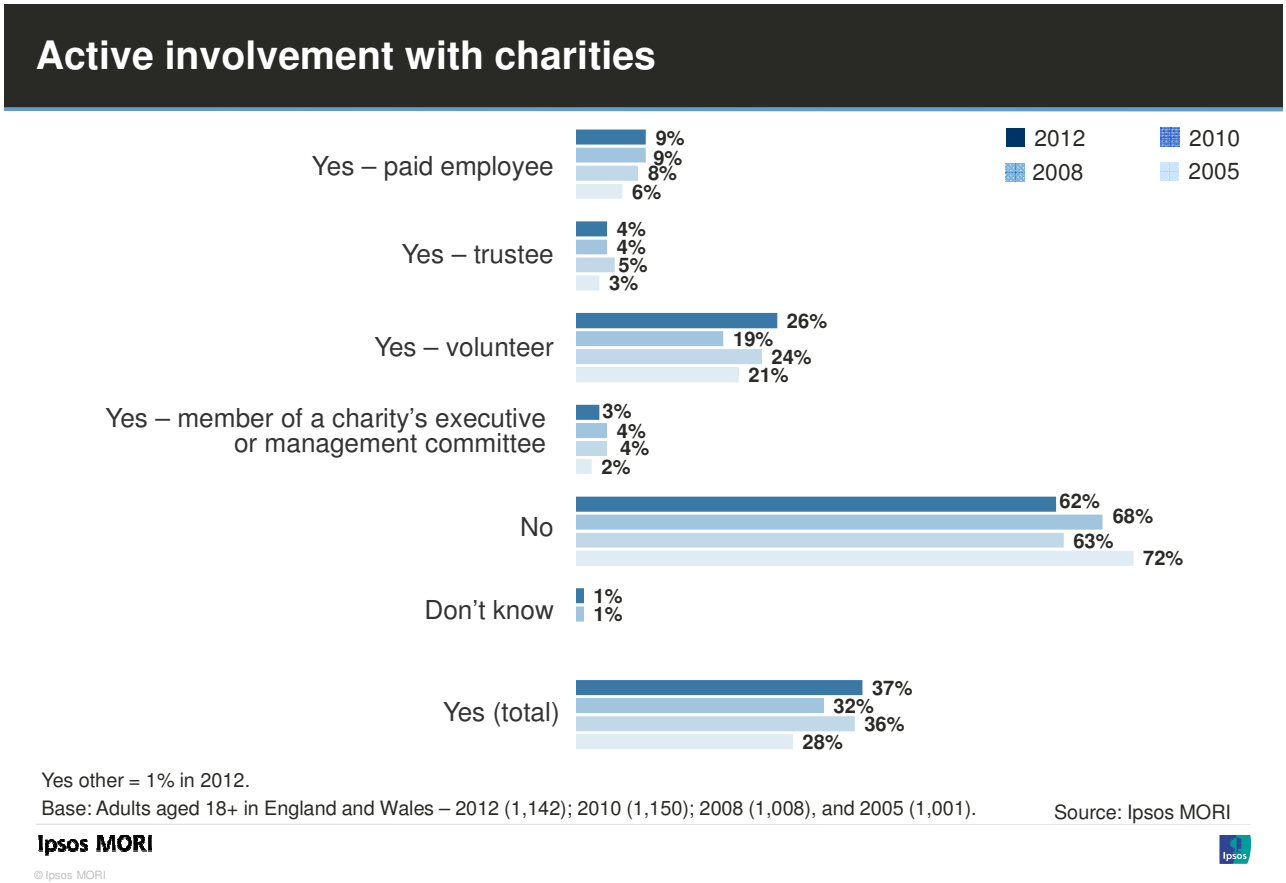


Older people aged 65+ are less likely to say that they have personally benefited from a charity (or have close family or friends who have benefited from a charity), one in five (22%) of those aged 65+ say they have benefited compared with two in five (38%) of those aged 18-64. This is also true for all the options on the prompted list excluding *visited a National Trust property*. As the question asks about experience of close friends or family as well as the individual, the potentially smaller social circle of older people should be considered when interpreting these results. People with high trust and confidence in charities are more likely to say that they or close friends or family have benefited from or used the services of a charity; 36% of people who gave a trust and confidence rating of 5 or more say they have benefited compared with 22% of those who with no or a low trust and confidence rating (a score of 0-4). This again demonstrates the relationship between awareness, familiarity and use of charities and trust and confidence in them.

Active public involvement with charities

Over a third (37%) say they, or close friends or family members, are actively involved with charities in some capacity (either as an employee, volunteer or trustee) compared to 32% in 2010, 36% in 2008, and 28% in 2005.

Q – Do you or any of your close family or friends work for a charity, either as a paid employee, a trustee, a volunteer, or member of a charity's executive or management committee?



People living in Wales are least likely to have active involvement with charities, with significantly more people saying no (72%) than average (62%).

As might be expected, those who personally work for a charity, or have close friends or family that do so, are more likely than those who do not to give a higher overall trust rating (42% give a score of 8-10 vs. 34% of those who do not).

Those in social classes ABC1 are more likely to work for a charity, or have close friends or family that do so (44% vs. 30% of those in classes C2DE). People in social classes AB have higher trust and confidence in charities generally.

This reflects the qualitative research findings: those who are actively involved with a charity, for example as a trustee or volunteer, tend to have more faith in charities more generally, as they feel more informed about how they operate.

Key drivers of trust and confidence in charities

Key drivers of trust and confidence in charities

Approach

Key Drivers Analysis (KDA) is a multivariate technique that has been used to identify how strongly attitudes and behaviour towards charities are associated with overall trust and confidence in charities. It is arguably a more 'objective' measure of what drives overall trust and confidence as it examines a range of responses that people give to a number of questions throughout the survey rather than relying simply on what people *say* is most important to them when asked directly. A good example of this working in practice is in the context of staff satisfaction surveys, where employees often cite pay as most important to them when asked directly, but KDA can reveal that other factors, such as finding their day-to-day work interesting and varied for example, are in fact more strongly associated with overall job satisfaction.

KDA performed on the 2005 trust and public confidence survey showed that overall trust and confidence was primarily explained by five key beliefs in how charities operate, namely: the belief that charities spend their money wisely and effectively; are well managed; ensure that a reasonable proportion of donations make it to the end cause; make a positive difference to the cause they work for; and ensure that fundraisers are ethical and honest.

The 2008 research looked to build on the insights of the 2005 KDA by 'unpacking' the five key beliefs, which have been shown to drive overall trust and confidence, enabling further insight into the results. A two-tiered approach was used. Question three in the survey asks respondents to directly state which one of the five qualities is most important to their trust and confidence in charities overall, showing the reported relative importance of each of the five key beliefs on overall trust and confidence. For the first (top) tier of the Key Drivers Analysis we conduct regression analysis to identify the correlation of these five variables with the first question in the survey, in which respondents state their level of overall trust using a ten point scale. This allows us to identify which of these attributes at Q3 are strongest drivers of trust at Q1.

The second (lower level) analysis then uses regression analysis to explore the correlations between these five beliefs and other questions included in the survey to identify the key drivers of these attributes.

In 2010, a change was made to the questionnaire, replacing the measure *trust in charities to spend their money wisely and effectively,* with *trust in charities to make independent decisions to further the cause they work for.* In order to investigate the relative importance of this belief in comparison to the other four key beliefs a two-tiered KDA approach was again conducted.

In 2012, the two-tiered approach has been maintained, but a slightly different regression technique has been used called 'categorical regression' which provides a more reliable approach to model categorical variables. This approach is particularly suited to datasets based on large number of response variables based on Likert scales. In essence, categorical regression enables the selection of drivers to only those factors that have a strong and unequivocal impact on the measure of interest, allowing us to focus in on the most relevant drivers for each model.

In 2012, the following questions were included in the second tier analysis (see appended topline for full details): Q6, Q7, Q10a, Q10b, Q11, Q13 (a and b combined), Q14, Q14g.

Findings

When asked to select which one quality is most important to their trust and confidence in charities overall 43% of the public state *ensure a reasonable proportion of donations make it to the end cause*, while 31% say *make a positive difference to the cause they are working for*. A lower proportion (13%) select *ensure that its fundraisers are honest and ethical*.

However, in the 2012 Key Drivers Analysis ensuring charities *make a positive difference to the cause they are working for* comes through as the strongest driver of overall trust in charities. *Ensuring a reasonable proportion of donations make it to the end cause* is much lower in the Key Drivers Analysis than the direct question ranking. This indicates that while respondents may state the importance of donations reaching the end cause, it is actually the impact that charities have that has the strongest impact on their overall trust levels.

We can see this elsewhere in the data set where the proportion of the public who feel charities play an essential role in society has increased, along with an increase in the proportion of people who or whose close friends/family use various charitable services, highlighting the increasing levels of direct experience that people have of charitable services. We know through the sub-group data analysis that people who have had direct experience of charities tend to have higher overall trust levels.

This shows an interesting contrast in perceptions of the sector – negative media stories about wastage have a hugely negative impact on the sector as a whole, which is possibly leading to respondents citing donations reaching the end cause as a more top of mind issue that drives trust in charities. This would be in response to this assumption having been challenged by the media. However, positive levels of trust are actually more likely to be driven by user experience and the good work that charities do. It would appear that positive perceptions can be overshadowed by these negative stories.

This is supported by the Key Drivers Analysis – in reality each of the five measures are quite closely intertwined and it is just *ensuring a reasonable proportion of donations make it to the end cause* that stands up by itself as a Key Driver i.e. in a more conservative running of the model to remove attributes that are not intertwined this would likely be one of the few remaining drivers that holds in isolation (another would possibly be *ensure that its fundraisers are honest and ethical*.)

The following KDA model presents the results of this first tier of analysis graphically:

Tier 1 analysis – overall trust and confidence in charities

NB '% of total variation in the results is explained by the model' refers to the strength of each model; that is to say, the amount of each measure (in this case 'overall trust and confidence in charities' that is explained by the contributing variables in the model (those listed on the right hand side).

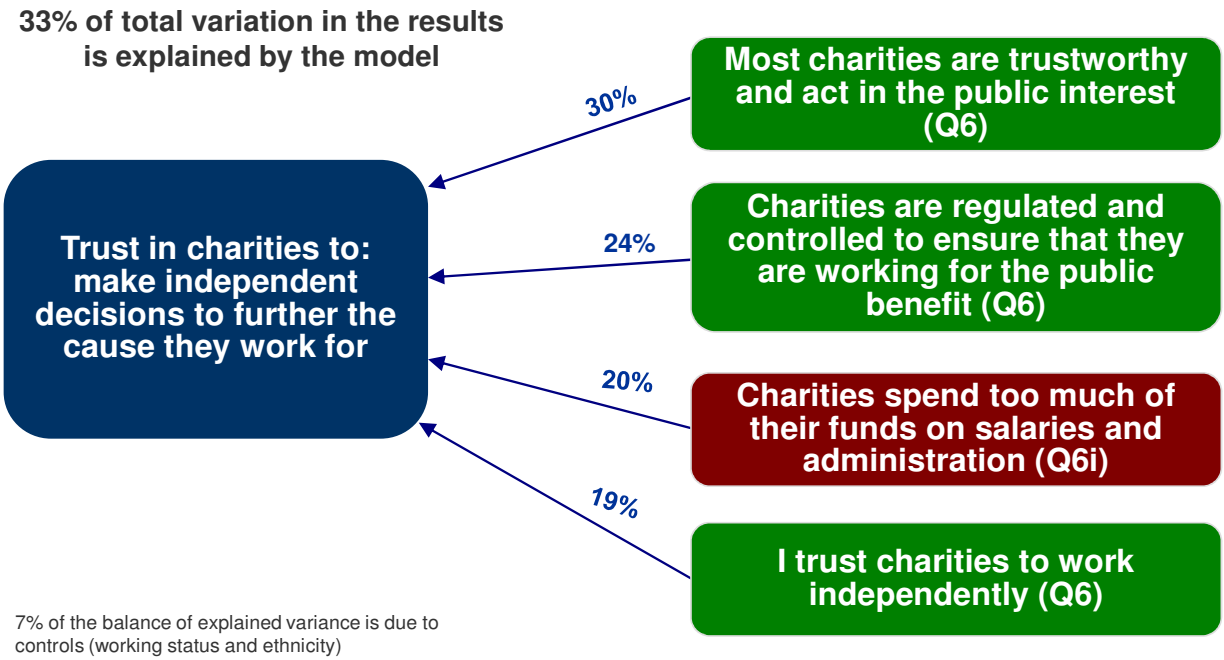
'% of the balance of explained variance' refers to the breakdown of the explained variance into the contribution by each driver to that explained variance; hence the sum in each model is always 100%.

The second tier analysis, conducted for each of the five key belief measures is illustrated below. The beliefs and attitudes shown in green are positive drivers. For example, looking at the first chart, *most charities are trustworthy and act in the public interest* is a positive driver, meaning that agreement with this statement is strongly associated with *higher* levels of *trust in charities to make independent decisions*. The beliefs shown in red are negative drivers, for example, *charities spend too much of their funds on salaries and administration*, meaning that agreement with this is associated with *lower* levels of trust in *charities to make independent decisions.*

There is a degree of consistency in the factors most strongly associated with each quality of a charity across the five tier two models. Like 2010, agreement that *most charities are trustworthy and act in the public interest* consistently appears as a driver of higher trust scores across all five qualities, while agreement that *charities spend too much of their funds on salaries and administration* is consistently associated with a lower trust score. Again, this indicates the large impact that negative media coverage can have.

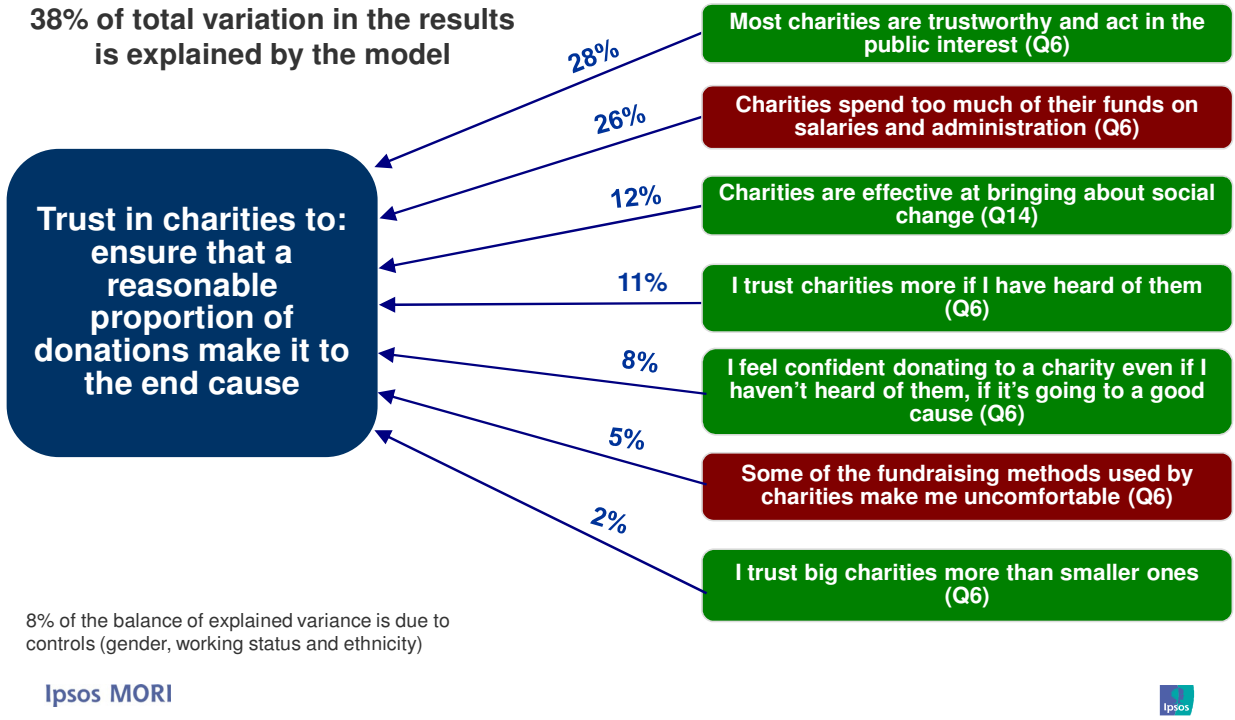
With regard to positive drivers, user experience and an appreciation of the important societal role that charities play is particularly important – for example, positive responses to the question *overall, how important do you think charities play in society today* are particular drivers of trust in charities to *make a positive difference to the cause they're working for*.

Tier 2 analysis – trust in charities to make independent decisions



A particular concern of the public is that too great a proportion of donations is spent on administration and advertising compared with the end cause. Unsurprisingly, then, the view that *charities spend too much on salaries and administration* has a strong negative association with *trust in charities to ensure that a reasonable proportion of donations* make it to the end cause, as shown below.

Tier 2 analysis – trust in charities to ensure that donations reach the end cause



8% of the balance of explained variance is due to controls (gender, working status and ethnicity)

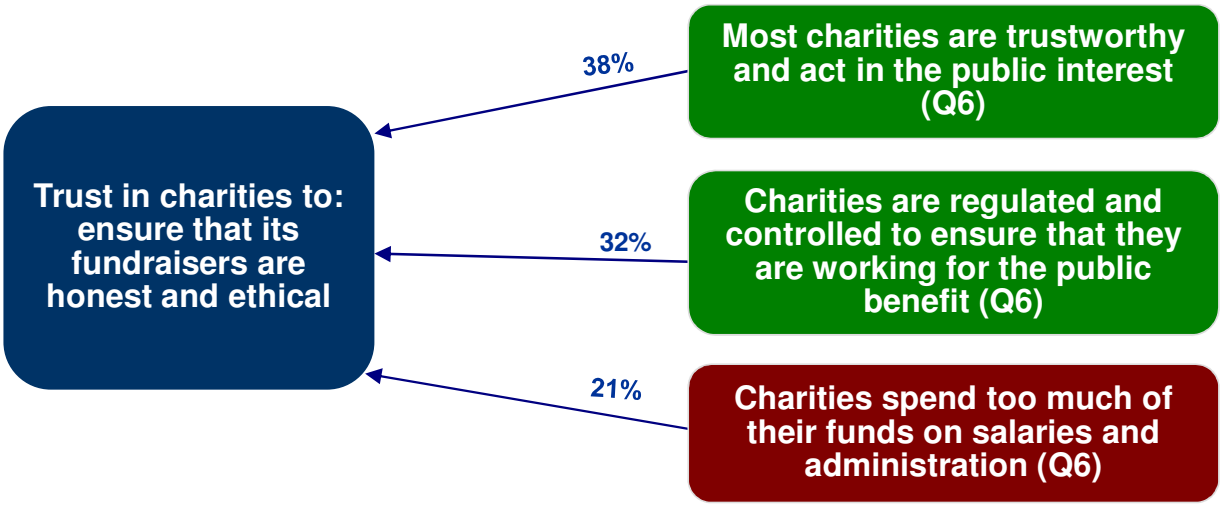
Ipsos MORI

Thinking specifically about the Charity Commission's role, regulation is very important for the public in relation to their *trust in charities to ensure that fundraisers are honest and ethical*. Agreement that *charities are trustworthy and act in the public interest* is the strongest driver. This is clearly an intuitive relationship, and one which appears to a degree in the qualitative research with the link between techniques of fundraisers and feeling that charities are acting in the public interest.

Thinking that *charities are regulated and controlled* is a relatively strong second driver, having also been the second-highest driver in 2010.

Tier 2 analysis – trust in charities to make ensure its fundraisers are honest and ethical

27% of total variation in the results is explained by the model

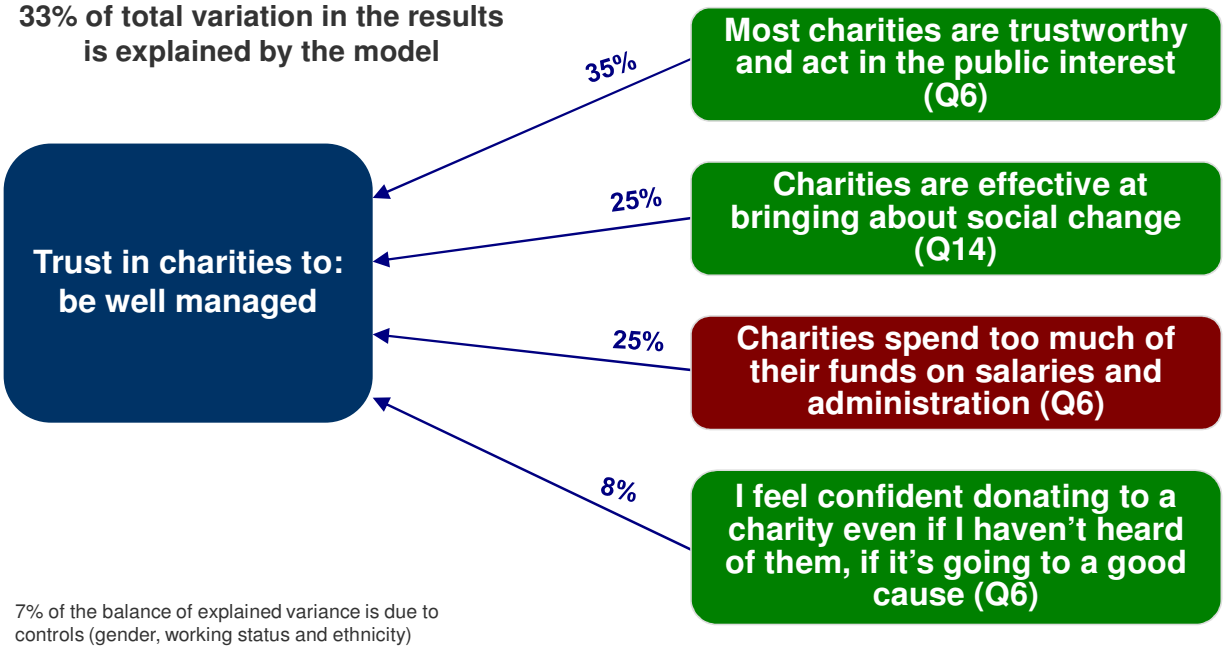


9% of the balance of explained variance is due to controls (working status and ethnicity)

Ipsos MORI

The chart below shows that believing that *most charities are trustworthy and act in the public interest* is a key driver of *believing that charities are well managed*

Tier 2 analysis – trust in charities to be well managed

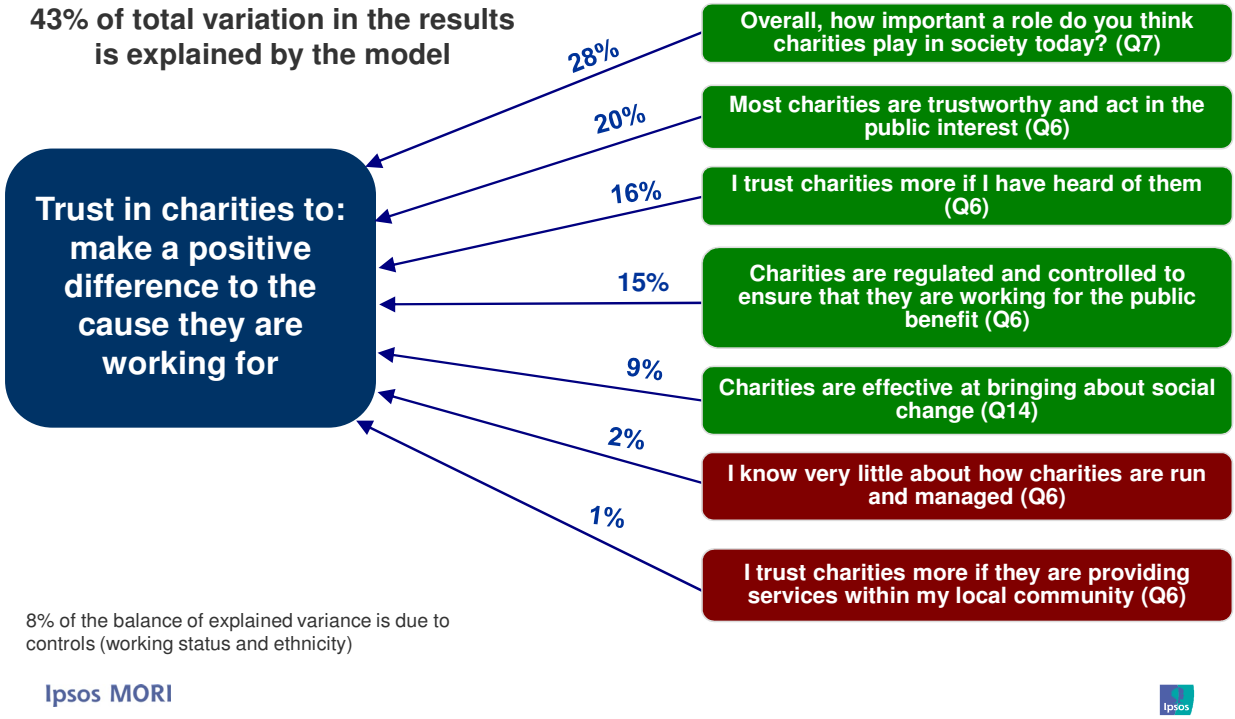


7% of the balance of explained variance is due to controls (gender, working status and ethnicity)

Ipsos MORI

There is a clear association between those who think positively about the importance of charities' role in society today and trust in charities to *make a positive difference to the cause they are working for*. Equally intuitively, the feeling that *most charities are trustworthy and act in the public interest* is driving trust in charities to *make a positive difference to the cause they are working for*, as shown below.

Tier 2 analysis – trust in charities to make a positive difference to the cause they are working for



8% of the balance of explained variance is due to controls (working status and ethnicity)

Ipsos MORI

Appendices

Appendices

Guide to statistical reliability

The sampling tolerances that apply to the percentage results are given in the table below. This table shows the possible variation that might be anticipated because a sample, rather than the entire population, was interviewed. **As indicated below, sampling tolerances vary with the size of the sample and the size of the percentage result.** For example, on a question where 50% of the people in a sample of c.1,150 respond with a particular answer, the chances are 95 in 100 that this result would not vary by more than 3 percentage points, plus or minus, from a complete coverage of the entire population using the same procedures (i.e., between 47% and 53%).

Approximate sampling tolerances applicable to percentages at or near these levels					
	10% or 90%	**20% or 80%**	**30% or 70%**	**40% or 60%**	**50%**
Size of sample on which survey result is based					
1,142	2	2	3	3	3

Source: Ipsos MORI

Tolerances are also involved in the comparison of results from different parts of the sample. A difference, in other words, must be of at least a certain size to be considered statistically significant. The following table is a guide to the sampling tolerances applicable to comparisons.

It should be highlighted that these tolerances are based on perfect random samples, and design effects such as clustering and weighting are likely to increase them. In practice, good quality quota sampling has been found to be as accurate as random samples with a similar design.

Approximate differences required for significant at or near these percentages					
	10% or 90%	**20% or 80%**	**30% or 70%**	**40% or 60%**	**50%**
Men vs. Women (532 vs. 610)	4	5	5	6	6
18-24 year olds vs. 65+ (295 vs. 256)	5	7	8	8	8

Source: Ipsos MORI

Topline findings

1,142 respondents aged 18+ across England and Wales

Interviews carried out by telephone, using CATI (Computer Assisted Telephone Interviewing)

Fieldwork conducted between 4 and 21 May 2012.

Results based on all unless otherwise stated.

Results are weighted to the known population profile of England and Wales.

An asterisk (*) denotes a finding of less than 0.5%, but greater than zero.

Where figures do not add up to 100, this is due to multiple coding or computer rounding.

Where available, trend data from 2005, 2008 and 2010 has been added.

Fieldwork for the 2010 survey was conducted between 7 and 17 May 2010. Results for 2010 are based on all (1,150) unless otherwise stated.

Fieldwork for the 2008 survey was conducted between 8 and 24 February 2008. Results for 2008 are based on all (1,008) unless otherwise stated.

Fieldwork for the 2005 survey was conducted in February 2005. Results for 2005 are based on all (1,001) unless otherwise stated.

OVERALL TRUST METRIC

ASK ALL

Q1. Firstly, thinking about how much trust and confidence you have in charities overall, on a scale of 0-10 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? IF DEPENDS**: Generally speaking, how much trust and confidence do you have in charities?** SINGLE CODE ONLY

		0 Don't trust them	1	2	3	4	5	6	7	8	9	10 Trust them completely	DK/ No answer	Mean
2012	%	2	*	2	3	3	16	13	23	23	8	6	2	6.68
2010	%	1	1	2	4	4	17	10	19	26	9	5	1	6.64
2008	%	1	1	2	3	4	18	11	22	22	8	6	1	6.56
2005	%	3	1	3	3	5	23	10	19	20	5	6	3	6.27

TRUST AND PERFORMANCE

ASK ALL

Q2. And on the same 0-10 scale, how much would you trust charities to…

READ OUT A-E RANDOMISE ORDER

				0 Don't trust them	1	2	3	4	5	6	7	8	9	10 Trust them completely	DK/ No answer
A	Make independent decisions, to further the cause they work for	**2005**	%	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
		2008	%	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
		2010	%	1	1	2	2	3	17	12	19	24	8	7	2
		2012	%	2	1	2	2	4	14	13	20	22	9	6	5
B	Ensure that a reasonable proportion of donations make it to the end cause	**2005**	%	2	1	5	7	7	19	12	18	14	6	5	4
		2008	%	2	2	3	7	7	18	15	20	15	5	5	2
		2010	%	1	2	4	5	8	15	14	21	18	6	5	1
		2012	%	2	1	4	5	7	17	16	17	17	7	5	2
C	Ensure that its fundraisers are honest and ethical	**2005**	%	2	*	2	3	5	17	13	19	20	6	8	4
		2008	%	1	1	1	3	6	15	12	21	23	8	7	2
		2010	%	1	1	2	2	4	16	12	18	24	10	8	1
		2012	%	2	*	2	2	4	13	15	20	22	10	7	2
D	Be well managed	**2005**	%	1	1	3	4	7	21	13	17	18	4	6	4
		2008	%	1	1	2	4	5	18	15	21	19	6	5	2
		2010	%	1	1	3	3	5	15	14	21	22	7	6	2
		2012	%	2	1	1	4	5	14	15	25	20	7	5	3
E	Make a positive difference to the cause they are working for	**2005**	%	1	*	1	4	3	14	11	17	23	11	11	3
		2008	%	1	1	2	3	4	13	11	22	22	11	9	2
		2010	%	1	1	2	2	3	15	8	18	24	15	10	1
		2012	%	1	1	1	2	4	8	9	20	28	13	12	2

ASK ALL

Q3. Which one, if any, of these qualities is <u>most</u> important to your trust and confidence in charities overall?

RANDOMISE ORDER. REPEAT LIST IF NECESSARY. SINGLE CODE ONLY

	2005	2008	2010	2012
	%	%	%	%
Ensure that a reasonable proportion of donations make it to the end cause	30	32	42	43
Make a positive difference to the cause they are working for	27	35	31	31
Ensure that its fundraisers are honest and ethical	11	8	15	13
Be well managed	9	5	8	9
Make independent decisions, to further the cause they work for	n/a	n/a	3	3
Don't know	3	2	1	1

TRUST AND SPECIFIC CHARITIES

ASK ALL

Q4A. Are there any specific charities or types of charities that you would trust more than others? DO NOT PROMPT. IF YES PROBE FOR NAMES
TOP MENTIONS ONLY – 1% OR MORE (2012)

	2005 %	2008 %	2010 %	2012 %
Charities by name				
Cancer Research UK	12	15	12	12
Oxfam	6	9	4	6
British Heart Foundation	3	4	5	5
British Red Cross	4	4	3	5
Macmillan Cancer Support	1	6	3	4
NSPCC	4	9	6	4
RSPCA	2	6	3	3
Save the Children	2	3	1	3
The Salvation Army	2	2	2	3
Barnardo's	*	2	1	2
RNLI	1	4	2	2
Christian Aid	1	2	1	2
Marie Curie	-	2	1	1
Air Ambulance	1	1	1	1
Age UK (Combination of Age Concern + Help the Aged)	1	2	1	1
British Legion	-	2	1	1
Unicef	1	1	1	1
Guide Dogs for the Blind	*	1	1	1
ChildLine	1	2	1	1
Breakthrough Breast Cancer	*	1	1	1
Alzheimer's Society	*	*	*	1
WaterAid	*	*	*	1
National Trust	*	1	*	1
Samaritans	*	1	*	1
CAFOD	-	1	*	1
WWF	*	1	1	1
Scope	*	*	1	1
Amnesty International	1	1	1	1
MS Society	*	*	1	1
Charities by type				
Health-related charities	2	2	4	6
Local charities	3	5	3	6
Animal charities	3	4	4	6
Well-known charities	1	4	4	5
Children's charities	3	3	2	4
Small charities	*	2	2	3
Big charities	3	2	2	3
Hospital/hospice charities	N/A	N/A	1	3
Cancer charities	3	2	2	2
Religious charities	2	3	2	2
Armed Forces charities/Help for Heroes	-	-	1	2
UK/British based charities	N/A	N/A	1	1
Environmental/farming charities	-	-	*	1
Charities that alleviate hardship	*	1	1	1
International charities	2	1	1	1
Don't know/None	50	34	39	36

Plus 'other' responses – not shown (11% in 2012, inc. responses of less than 1%)

ASK Q4B OF ALL THOSE WHO MENTIONED A CHARITY (OR CHARITY TYPE) AT Q4A. ASK Q4B FOR **EACH CHARITY/CHARITY TYPE** MENTIONED AT Q4A.

Q4B. Why do you say that? Why do you trust xxx more than others?
DO NOT PROMPT. MULTICODE OK
TOP MENTIONS ONLY – 2% OR MORE (2012)

	2005	**2008**	**2010**	**2012**
Base: All who mention a charity/charity type	(725)	(678)	(702)	(742)
	%	%	%	%
Because I have seen/ experienced what they do	27	38	39	38
Because I believe in the cause/ what they are trying to do	25	30	25	31
Because they have a good reputation†	-	24	21	27
Because they are well-known†	-	23	21	20
Because they do an important job	11	15	7	17
Because I have heard (lots) about them	6	10	9	13
Because they are set up for the public good	6	10	8	9
Because they are regulated	8	6	5	9
Because they are big	5	9	6	8
Because they are local	2	7	5	8
Because they are small	-	2	2	4
Because they are national	4	6	4	3
Because a public figure is associated with them	3	2	1	2
New codes raised in 2008				
The money they raise goes to the end cause/where it's meant to	N/A	7	2	6
Transparency/openness/visibility	N/A	4	2	4
Well managed/organised/professional organisation	N/A	4	2	4
More trustworthy in general/just a feeling	N/A	1	1	3
I know someone who works/I work/have worked for/with them	N/A	3	2	3
Well established/been around a long time	N/A	3	1	3
Communicate well/provide feedback/updates	N/A	1	1	2
They make a difference/improvement to people's lives	N/A	4	1	2
Due to my/their religious beliefs	N/A	3	1	2
High profile through advertising/media	N/A	4	1	2
New codes raised in 2012				
Animals need all the help they can get/I like animals	N/A	N/A	N/A	2
I like the cause of the charity	N/A	N/A	N/A	2
Not government funded/no help from the government	N/A	N/A	N/A	2
Don't know/No answer	5	2	2	2

Plus 'other' responses – not shown (14% in 2012, including responses of less than 2%)
† These two statements were asked as one question in the 2005 survey "Because they are well known/have a good reputation" so the results from 2008 are not comparable. The 2005 result for the combined question was 30%

ASK ALL

Q5A. Are there any specific charities or types of charities that you trust <u>less</u> than others?
DO NOT PROMPT. IF YES PROBE FOR NAMES.
TOP MENTIONS ONLY – 1% OR MORE (2010)

	2005 %	2008 %	2010 %	2012 %
Charities by name				
Oxfam	3	4	3	3
RSPCA	1	1	1	1
Cancer Research UK	1	1	*	1
Save the Children	*	1	*	1
British Red Cross	*	*	*	1
Charities by type				
International charities	2	7	5	5
Clothing charities	N/A	1	1	3
Small charities	2	3	3	3
Animal charities	1	3	3	3
Foreign/abroad/overseas charities	N/A	N/A	2	3
Charities that come up to you in the street/other public places†	N/A	2	1	3
Big charities	1	2	1	3
Religious charities	1	1	1	1
Less well known charities	-	3	1	1
Door to door collections/charities†	N/A	2	1	1
Charities I haven't heard of	N/A	N/A	1	1
Political charities	-	-	-	1
Third world country charities	N/A	*	1	1
Children's charities	N/A	*	1	1
Health-related charities	*	*	1	1
Environmental/farming charities	-	-	*	1
None/NA/Don't know	80	60	65	57

Plus 'other' responses – not shown (11% in 2012, inc. responses of less than 1%)

† Combined as street/door collection in 2005 (3%)

ASK Q5B OF ALL THOSE WHO MENTION A CHARITY (OR CHARITY TYPE) AT Q5A. NULL/DK/REF GO TO Q6. ASK Q5B FOR **EACH CHARITY** MENTIONED AT Q5A

Q5B. Why do you say that? Why do you trust xxx less than others?
DO NOT PROMPT. MULTICODE OK
TOP MENTIONS ONLY – 1% OR MORE (2012)

Base: All who mention a charity/charity type	**2005** (214) %	**2008** (419) %	**2010** (409) %	**2012** (493) %
Because I don't know how they spend their money	31	30	35	36
Because I have heard bad stories about them	20	21	18	21
Because they use fundraising techniques I don't like	16	14	9	14
Because I don't know them/haven't heard of them	12	12	13	11
Because they don't work for the public good	6	6	5	7
Because they are big	2	2	3	3
Because they are international	1	4	2	3
They waste money/Don't like the way they spend their money	13	3	2	3
Because they are small	1	2	1	1
New codes raised in 2008				
Money lost through corruption/open to abuse/doesn't get to end cause	N/A	12	6	11
Due to personal experience	N/A	2	2	4
Mistrust their motives	N/A	10	3	3
They take a political slant	N/A	1	*	3
Don't believe in their cause	N/A	*	*	3
Badly managed/Mismanagement	N/A	3	2	2
Large administration costs	N/A	2	1	2
They don't seem to make a difference/cannot see the improvement	N/A	3	2	2
Don't seem genuine	N/A	*	*	2
Not well regulated	N/A	1	2	1
Unethical	N/A	2	1	1
They are less well known	N/A	3	1	1
Charity shouldn't be about religion/mistrust religious charities	N/A	1	1	1
Too much money goes on advertising	N/A	1	1	1
Run too much like a business	N/A	1	*	1
New codes raised in 2010				
They aren't transparent/can't check on them	N/A	N/A	*	2
My own opinion/no evidence	N/A	N/A	2	1
They are getting paid to do it	N/A	N/A	1	1
They are not accountable	N/A	N/A	1	1
New codes raised in 2012				
They're doing it for the wrong reasons/run it for tax purposes/to claim from government	N/A	N/A	N/A	4
CEOs/Executives getting paid too much/big bonuses	N/A	N/A	N/A	2
Too many of them	N/A	N/A	N/A	1
Prefer to donate to a different/human charity	N/A	N/A	N/A	1
Don't know/no answer	6	3	2	2

Plus 'other' responses – not shown (1% in 2012, inc. responses of less than 1%)

TRUST AND ATTITUDES

ASK ALL

2008 AND 2010 RESULTS ONLY ARE SHOWN BELOW – THE ANSWER SCALE FOR 2008 INCLUDES 'NEITHER DISAGREE NOR DISAGREE', SO RESULTS FROM 2005 ARE NOT COMPARABLE

Q6. I'm now going to read you a list of statements and ask you how much you agree or disagree with each of them. Firstly, … *Next, …* Is that *strongly* or *tend to* agree/disagree?
READ OUT A-K. RANDOMISE ORDER, REPEAT SCALE IF NECESSARY.

				Strongly agree	Tend to agree	Neither agree nor disagree	Tend to disagree	Strongly disagree	Don't know/ No opinion
A	I trust big charities more than smaller ones	**2008**	%	15	23	10	32	19	1
		2010	%	17	20	14	31	16	1
		2012	%	15	22	14	27	20	2
B	I trust charities more if I have heard of them	**2008**	%	44	41	4	8	4	*
		2010	%	44	39	5	8	4	*
		2012	%	44	38	6	7	5	1
C	I trust charities more if they have well-known people as patrons	**2008**	%	15	26	10	33	14	1
		2010	%	16	24	18	27	14	1
		2012	%	16	23	17	26	16	1
D	I trust charities more if they are providing services within my local community	**2008**	%	30	29	11	20	8	1
		2010	%	26	31	17	18	7	1
		2012	%	31	28	14	17	7	2
E	I trust charities to work independently	**2008**	%	N/A	N/A	N/A	N/A	N/A	N/A
		2010	%	20	49	15	10	4	2
		2012	%	17	47	14	12	5	5
F	I feel confident donating to a charity even if I haven't heard of them, if it's going to a good cause	**2008**	%	9	20	6	32	32	1
		2010	%	9	21	8	32	28	1
		2012	%	9	20	9	34	27	1
G	Charities are regulated and controlled to ensure that they are working for the public benefit	**2008**	%	20	44	10	14	6	7
		2010	%	22	46	12	11	5	4
		2012	%	20	44	12	12	6	6
H	I know very little about how charities are run and managed	**2008**	%	22	36	7	21	11	2
		2010	%	20	37	9	21	13	1
		2012	%	21	35	8	22	12	2
I	Charities spend too much of their funds on salaries and administration	**2008**	%	31	28	11	16	6	8
		2010	%	30	27	16	15	6	6
		2012	%	32	27	14	14	5	9

Q6 (continued)

J	Most charities are trustworthy and act in the public interest	**2008**	%	21	55	7	11	6	2
		2010	%	20	55	10	8	5	1
		2012	%	21	53	10	8	6	2
K	Some of the fundraising methods used by charities make me uncomfortable	**2008**	%	N/A	N/A	N/A	N/A	N/A	N/A
		2010	%	27	33	9	19	10	2
		2012	%	36	32	7	15	10	1

TRUST AND IMPORTANCE

ASK ALL

Q7. Overall, how important a role do you think charities play in society today?
SINGLE CODE ONLY

	2005	**2008**	**2010**	**2012**
	%	%	%	%
Essential†	29	32	30	37
Very important	34	40	37	39
Fairly important†	32	24	29	20
Not very important	3	3	3	2
Not at all important	1	*	1	1
Don't know	1	*	*	1

† The answer scale for this question was changed in the 2008 Survey. 'Essential' was used instead of 'Extremely important' and 'Fairly important' instead of 'Quite important'. The 2005 data are therefore not directly comparable.

Q8-9 NOT ASKED FROM 2010

TRUST AND BENEFICIARY

ASK ALL

Q10A. Have you, or any of your close family or friends, ever benefited from or used the services of a charity? (Question wording in 2005/2008 was: Have you, or any of your close family or friends, ever received money, support or help from a charity?)
SINGLE CODE ONLY

	2005	**2008**	**2010**	**2012**
	%	%	%	%
Yes	9	21	30	34
No	90	78	69	64
Don't know	1	2	1	1

ASK ALL

Q10B. Have you, or any of your close family or friends, ever done any of the following?
READ OUT A-H. ROTATE ORDER. MULTICODE OK
TOP MENTIONS ONLY – 2% OR MORE (2010)

	2005	2008	2010	2012
	%	%	%	%
Visited an art gallery	51	60	68	73
Visited a National Trust property	47	61	70	71
Attended a youth club provided by a charity – for example Girl Guides, Scouts or Girls or Boys Brigade	N/A	N/A	51	52
Attended or had a child who attended university	N/A	N/A	44	46
Used the services of a charity	17	23	33	37
Received advice from a charity	16	26	31	37
Telephoned a charity's information or helpline	N/A	N/A	27	30
Received emotional support or counselling from a charity	N/A	N/A	21	26
Been a patient in a local hospice	15	16	19	22
Received personal care from charity workers	8	12	16	20
Received financial help from a charity	4	8	8	11
Support/help with health/ illnesses/medical treatment	N/A	N/A	1	2
Gained pleasure from helping/being a volunteer	N/A	N/A	1	2
Benefited from a charity in any† other way	N/A	N/A	2	2
None of these/Don't know†	27	17	7	8

† 'Other specify' option added in 2010 – therefore the none/don't know figures are not comparable (new codes have also been created from 'other specify')

ASK ALL

Q10C. Over the past two years, has your trust and confidence in charities increased, decreased or stayed the same? SINGLE CODE

	2010	2012
	%	%
Increased	7	9
Decreased	11	16
Stayed the same	81	75
Don't know	*	*

ASK THOSE WHO SAID INCREASED (CODE 1) AT Q10C

Q10D. Why do you think your trust and confidence in charities has increased? THEN PROMPT (UNLESS RESPONDENT SAYS DON'T KNOW) **And has anything else influenced this change?** MULTICODE OK.

	2010	2012
Base: all who say their trust has increased	(90)	(96)
	%	%
Using/experiencing a charity's services directly	34	38
Media stories about a charity/charities (generally)	10	17
Began volunteering or working for a charity	17	15
Someone I know using/experiencing a charity's services	13	13
Media coverage about how charities spend donations – e.g. expenses claims, bonuses etc	10	8
Lots of charities now	N/A	7
Knowing more about them – e.g. staff, different charities	8	7
Doing a good job/what they are supposed to do	6	6
They need donations/they're finding it hard to obtain money	N/A	4
Increased need due to wars/natural disasters/poverty/hunger	N/A	2
Political pressure	N/A	2
The work of the Charity Commission	1	1
Other/Other positive comments	7	2
Don't know	2	5

CAUTION: SMALL BASE SIZE (<100) – INDICATIVE ONLY

ASK THOSE WHO SAID DECREASED (CODE 2) AT Q10C

Q10E. Why do you think your trust and confidence in charities has decreased? THEN PROMPT (UNLESS RESPONDENT SAYS DON'T KNOW) **And has anything else influenced this change?** MULTICODE OK.

	2010	**2012**
Base: all who say their trust has decreased	(127)	(179)
	%	%
Media coverage about how charities spend donations – e.g. expenses claims, bonuses etc	28	22
Media stories about a charity/charities (generally)	24	18
Don't trust them/I distrust/don't know where the money goes/waste a lot of money	9	16
Too many of them now	4	9
Using/experiencing a charity's services directly	11	8
They use pressurising techniques/I receive a lot of post from charities	6	8
The expenses scandal (generally)	21	7
Political bias/pressure	2	7
You never see the benefits/don't think they make a difference	3	5
Began volunteering or working for a charity	2	5
Someone I know using/experiencing a charity's services	5	5
They are being treated as a business/profit-making	-	5
Too much money is spent on advertising/ wages/administration	-	3
They need to be become more efficient/better run/organised	1	3
Don't know if charity bags are a charity/don't think the money goes to the cause	2	2
I know more about them e.g. staff, different charities	-	1
Media coverage about private schools being classed as charities	1	1
Other negative comments	6	8
Other	6	1
Don't know	1	1

TRUST AND INVOLVEMENT

ASK ALL

Q11. Do you or any of your close family or friends work for a charity, either as a paid employee, a trustee, a volunteer or member of a charity's executive or management committee? PROMPT IF NECESSARY. MULTICODE OK

	2005	2008	2010	2012
	%	%	%	%
Yes - Paid employee	6	8	9	9
Yes - Trustee	3	5	4	4
Yes - Volunteer	21	24	19	26
Yes - Member of a charity's executive or management committee	2	4	4	3
Yes – other [specify]	*	1	*	1
No	72	63	68	62
Don't know/No answer	1	1	*	*

Q12 NOT ASKED SINCE 2010

TRUST AND CHARITY COMMISSION

ASK ALL

Q13A. Have you ever heard of the Charity Commission? SINGLE CODE ONLY

	2005	2008	2010	2012
	%	%	%	%
Yes	46	54	53	55
No	54	45	47	44
Don't know	0	1	*	1

ASK Q13B OF ALL WHO ANSWERED 'YES' AT Q13A (CODE 1). OTHERS GO TO Q14

Q13B. How well, if at all, do you feel you know the Charity Commission and what it does? SINGLE CODE ONLY

	2005	2008	2010	2012
Base: all who have heard of the Charity Commission	(460)	(540)	(622)	(638)
	%	%	%	%
Very well	7	6	6	7
Fairly well†	17	24	26	26
Not very well	50	43	47	47
Not at all well	25	27	21	20
Don't know	0	*	*	*

†Answer scale was changed in 2008 from 'Fairly well' to 'Quite well' so results not strictly comparable

ASK ALL

Q14. **The Charity Commission is an independent body responsible for registering and regulating charities in England and Wales. They register applicants for registration as a charity after examining their purposes, accounts and structure. They regulate charities by ensuring they stay within the law and are run for the public benefit, and by investigating any allegations of wrong-doing by charities.**

How important do you personally regard this role? SINGLE CODE ONLY

	2005	2008	2010	2012
	%	%	%	%
Essential†	45	53	54	56
Very important	34	38	33	35
Fairly important†	14	8	11	7
Not very important	3	1	1	1
Not at all important	1	1	1	1
Don't know	2	*	*	*

† Answer scale as changed in the 2008 questionnaire: from 'Extremely important' to 'Essential'; and 'Quite important' to 'Fairly important'. Results from 2005 are therefore not strictly comparable.

Q14B, C, D AND E NOT ASKED IN 2012

ASK OF ALL AWARE OF THE CHARITY COMMISSION AT Q13A (CODE 1). OTHERS GO TO Q15

Q14F. **Have you used the Charity Commission's website in the past year?** SINGLE CODE ONLY

	2010	2012
Base: all who have heard of the Charity Commission	(622)	(638)
	%	%
Yes	11	11
No	89	88
Don't know	*	*

ASK ALL

Q14G Thinking about charities in general, to what extent do you agree or disagree with each of the following statements. Is that *strongly* or *tend to* agree/disagree?

READ OUT. SINGLE CODE ONLY

			Strongly agree	Tend to agree	Neither agree nor disagree	Tend to disagree	Strongly disagree	DK/ No opinion
Charities are effective at bringing about social change	**2008**	%	20	51	11	12	4	2
	2010	%	22	50	11	10	4	2
	2012	%	24	45	12	11	4	3
Charities are unprofessional (not asked in 2012)	**2008**	%	2	8	7	50	30	2
	2010	%	4	8	8	42	35	2
	2012	%	N/A	N/A	N/A	N/A	N/A	N/A
It is crucial that charities demonstrate how they benefit the public	**2008**	%	N/A	N/A	N/A	N/A	N/A	N/A
	2010	%	58	35	2	3	1	1
	2012	%	63	31	2	2	1	1
It is important to me that charities explain in a published annual report what they have actually achieved	**2008**	%	59	30	3	5	1	1
	2010	%	60	28	4	5	2	1
	2012	%	66	24	3	5	2	*
It is important to me that charities provide the public with information about how they spend their money	**2008**	%	74	22	1	1	1	*
	2010	%	73	22	1	2	1	*
	2012	%	76	20	1	2	1	*
Charities provide society with something unique	**2008**	%	N/A	N/A	N/A	N/A	N/A	N/A
	2010	%	38	44	8	6	2	1
	2012	%	38	39	8	9	3	2

TRUST IN OTHER ORGANISATIONS

ASK ALL

Q15. Now for some other types of organisations.
I'm going to read out some different types of organisations and professions. On a scale of 0-10 where 10 means you trust them completely and 0 means you don't trust them at all, please tell me how much trust and confidence you have in each? IF DEPENDS**: Generally speaking, how much trust and confidence do you have?**
ROTATE ORDER, SINGLE CODE ONLY

				0 Don't trust them	1	2	3	4	5	6	7	8	9	10 Trust them compl-etely	DK
A	Private companies	**2008**	%	4	3	5	7	12	28	17	14	5	1	1	
		2010	%	3	2	2	5	10	30	19	16	8	1	1	2
		2012	%	3	1	5	6	10	29	19	18	6	1	1	3
B	Newspapers	**2008**	%	9	6	12	13	16	22	11	6	3	*	1	1
		2010	%	9	6	9	13	17	23	11	7	3	1	1	*
		2012	%	8	6	11	12	17	21	9	9	2	1	1	2
C	Social services	**2008**	%	3	2	4	6	6	18	17	19	15	5	4	1
		2010	%	4	1	3	4	8	20	15	20	16	4	3	2
		2012	%	2	1	3	4	6	19	15	21	16	6	4	2
D	MPs	**2008**	%	11	7	10	10	13	19	13	10	5	1	1	*
		2010	%	11	7	11	13	11	19	12	9	4	1	1	*
		2012	%	11	6	10	10	15	19	12	9	4	1	1	1
E	Government Ministers	**2008**	%	12	6	13	10	13	18	12	9	4	1	1	1
		2010	%	11	7	11	13	11	20	12	9	4	1	1	1
		2012	%	13	7	10	12	13	19	12	8	4	1	1	1
F	Your local Council	**2008**	%	6	5	7	8	12	21	13	16	8	2	2	1
		2010	%	7	5	7	9	10	22	15	12	9	2	2	1
		2012	%	7	3	6	6	11	21	15	14	9	3	2	1

Q15 (continued)

G	Banks	**2008**	%	5	3	5	7	10	18	14	15	15	5	4	*
		2010	%	6	5	6	8	12	19	13	12	11	4	3	*
		2012	%	7	3	6	9	10	18	14	16	8	3	3	1
H	Doctors	**2008**	%	1	*	1	2	2	8	9	16	28	18	14	*
		2010	%	1	*	1	1	2	8	8	15	32	19	14	-
		2012	%	1	*	*	1	2	7	9	18	29	18	13	*
I	Police	**2008**	%	2	1	2	3	4	11	12	18	24	15	10	*
		2010	%	1	1	2	3	3	11	12	18	26	15	9	*
		2012	%	1	1	1	1	4	10	11	20	26	12	11	*
J	Ordinary man/woman in the street	**2008**	%	4	2	4	5	6	29	13	18	12	4	2	2
		2010	%	4	2	3	4	5	31	16	19	13	2	1	1
		2012	%	3	1	3	4	6	26	15	20	14	4	2	2

TRUST AND SERVICE PROVISION

ASK ALL

Q15B **Some charities and some private companies receive funding from government to provide certain public services, such as healthcare services, care for the elderly and services for disabled people etc. Other public services are provided directly by public authorities such as the NHS or local councils.**

Which of these – charities, private companies or public authorities – do you think would be best at providing each of the following types of services or does it make no difference?

IF NECESSARY REPEAT OPTIONS: CHARITIES, PRIVATE COMPANIES AND PUBLIC AUTHORITIES OR NO DIFFERENCE. READ OUT A-F. RANDOMISE ORDER

		Charities		Private companies		Public authorities		Makes no difference		Don't know	
		2010	2012	2010	2012	2010	2012	2010	2012	2010	2012
Care homes	%	14	16	14	13	48	49	21	18	3	5
Social housing	%	9	10	8	9	58	59	21	18	3	4
Leisure or sports centres	%	4	4	23	24	45	44	26	25	2	3
Hospitals	%	3	3	9	8	72	72	15	14	2	3
Schools	%	2	3	8	8	73	71	15	14	2	4
Information and advice, for example on money, legal or housing issues	%	16	20	16	13	38	39	26	24	4	4

ASK ALL

Q15C And which of these do you think would be best at each of the following, or does it make no difference…?

IF NECESSARY REPEAT OPTIONS: CHARITIES, PRIVATE COMPANIES AND PUBLIC AUTHORITIES OR NO DIFFERENCE

READ OUT. ROTATE ORDER

		Charities		Private companies		Public authorities		Makes no difference		Don't know	
		2010	2012	2010	2012	2010	2012	2010	2012	2010	2012
Providing a high quality service	%	12	13	25	26	24	24	35	32	4	4
Providing a professional service	%	6	7	32	29	25	27	35	33	2	5
Providing the best value for money	%	18	22	24	19	25	27	29	27	4	6
Being open and accountable, for example to service users and regulators	%	17	20	11	8	34	33	33	31	5	7
A caring approach	%	40	47	6	4	21	19	30	26	3	4

ASK ALL

Q15D Thinking generally, if you or your family needed support from a public service, would you be more or less confident if the service was provided by a charity than another type of service provider, or would it make no difference?

IF MORE OR LESS THEN ASK: **Is that much or a little more/less?**

SINGLE CODE

	2010	**2012**
	%	%
Much more confident	6	10
A little more confident	13	15
No difference	73	65
Slightly less confident	5	5
Much less confident	2	3
Don't know	1	2

DEMOGRAPHICS 2012 – ASK ALL

UNWEIGHTED DATA

Gender

	%
Male	47
Female	53

Age

	%
18-24	10
25-34	16
35-44	18
45-54	18
55-64	15
65+	22

Working Status of Respondent:

	%
Working - Full time (30+ hrs)	44
- Part-time (9-29 hrs)	14
Unemployed	4
Not working - retired	25
- looking after house/children	5
- invalid/disabled	2
Student	5
Other	1

Social Class

	%
AB	27
C1	30
C2	17
DE	25

Respondent is:

	%
Chief Income Earner	72
Not Chief Income Earner	28

What is your ethnic group?
SINGLE CODE ONLY

	%
WHITE	91
British	85
Irish	1
Any other white background	5
MIXED	1
White and Black Caribbean	*
White and Black African	*
White and Asian	*
Any other mixed background	*
ASIAN OR ASIAN BRITISH	4
Indian	2
Pakistani	1
Bangladeshi	*
Any other Asian background	1
BLACK OR BLACK BRITISH	3
Caribbean	1
African	1
Any other black background	*
CHINESE OR OTHER ETHNIC GROUP	*
Chinese	*
Refused	1

Region

	%
South East	13
East of England	10
London	13
South West	9
West Midlands	9
East Midlands	9
Yorkshire and the Humber	9
North West/Merseyside	11
North East	9
Wales	9