

progressive

OSCR

Scottish Charity Survey 2018

General Public

March Reporting



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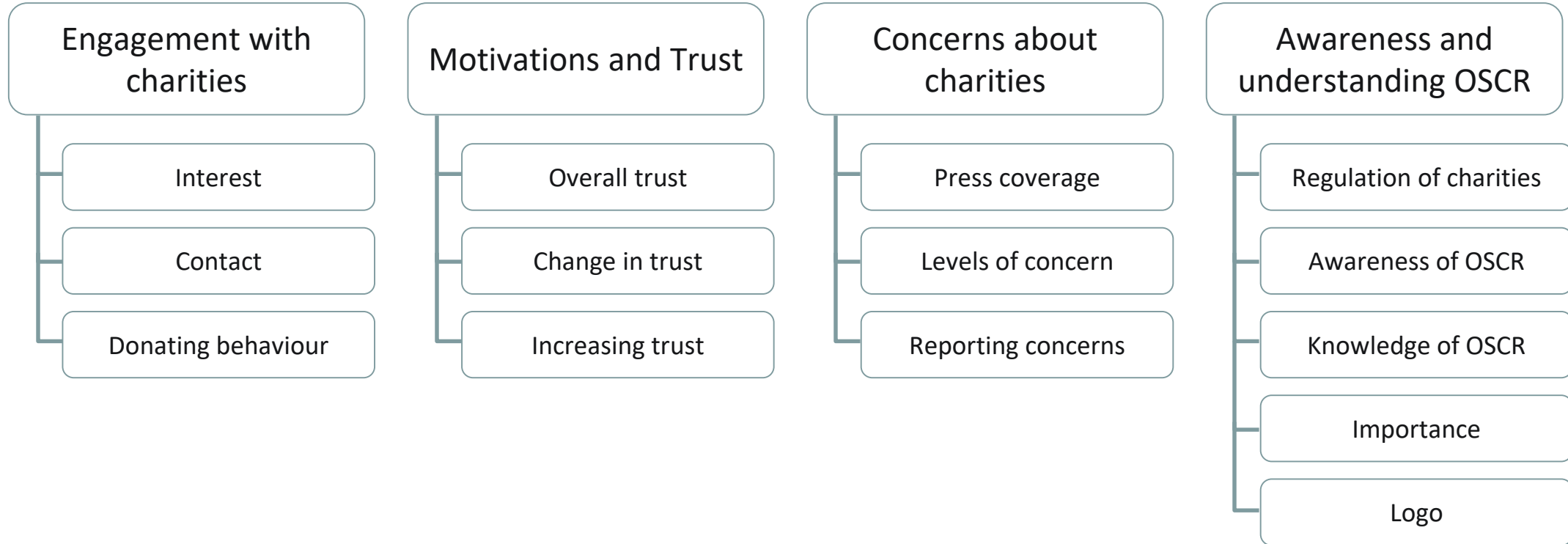


Conclusions

Background



Objectives



Method & sample



Qualitative research

- Four focus groups discussions
- Held in:
 - Glasgow
 - Aberdeen
- In Aberdeen 6 respondents per group, 7 in the Glasgow groups
- Two with high level donors, two with lower level donors
- Fieldwork dates –24th and 31st January 2018
- Groups in Glasgow were viewed by members of OSCR
- Each lasted 90 minutes




Quantitative research

- Online self-complete questionnaire
- Representative Sample of the Scottish population - Weighted to Census data for:
 - Age
 - Gender
 - SEG
- Final weighted sample size – 1,010
- Conducted in partnership with Research Now via an online panel
- Fieldwork dates – between 14th February and 7th March 2018
- Margins of error for the results shown are between +/- 0.61% and +/- 3.08%
- The quantitative element started a week after the news about aid workers in Haiti was first reported. Rather than avoiding the issue OSCR decided to ask a direct question about people's views and how it may affect them. Results are reported on slide 80.



Notes for interpretation



- Where differences between years and/or subgroups have been highlighted, they have been tested to ensure that those differences are statistically significant. Year on year differences have only been highlighted between 2018 and 2016.
- On figures and tables, significant increases have been circled in green or highlighted with a green arrow. Significant decreases have been highlighted with a red arrow.
- Significance testing is a statistical tool for reducing the chance that random natural fluctuations in the data are reported as true findings. According to market research industry standard, a difference is deemed statistically significant if there is less than a 5% chance that it could be a false positive.
- For the purpose of clarity, not all statistically significant differences between subgroups have been highlighted. Full data tables that highlight all statistically significant differences between subgroups will be provided alongside this report.
- As it is an anonymous survey method, online surveys allow respondents to provide critical responses without a misplaced fear of offence to an interviewer. As such, this can lead to a more realistic but negative response to questions.
- Due to rounding, the sum of responses may in some cases exceed or fall short of 100%.
- The sum of multi-coded or open ended responses will usually exceed 100%, except in those cases in which responses below a certain percentage have been excluded.
- Qualitative findings are marked with the following label. 
- The qualitative element of this research took place before the news broke (week commencing 5th Feb) of charity workers behaviour in Haiti. The quantitative element started a week after the news was first reported.

Sample Profile Quantitative



	2016	2018		2016	2018
Gender			Age		
Male	48%	48%	16-24	15%	15%
Female	52%	52%	25-34	15%	15%
Location			35-44	17%	17%
North East Scotland	18%	16%	45-54	18%	18%
Highlands & Islands	6%	6%	55-64	15%	15%
South Scotland	4%	4%	65+	20%	20%
West Scotland	15%	15%	SEG		
Central	19%	20%	AB	20%	19%
Mid-Scotland & Fife	8%	9%	C1	33%	32%
Lothians	13%	14%	C2	20%	22%
Glasgow	17%	16%	DE	27%	28%
BASE:	1,010	1,010	BASE:	1,010	1,010

Short Summary

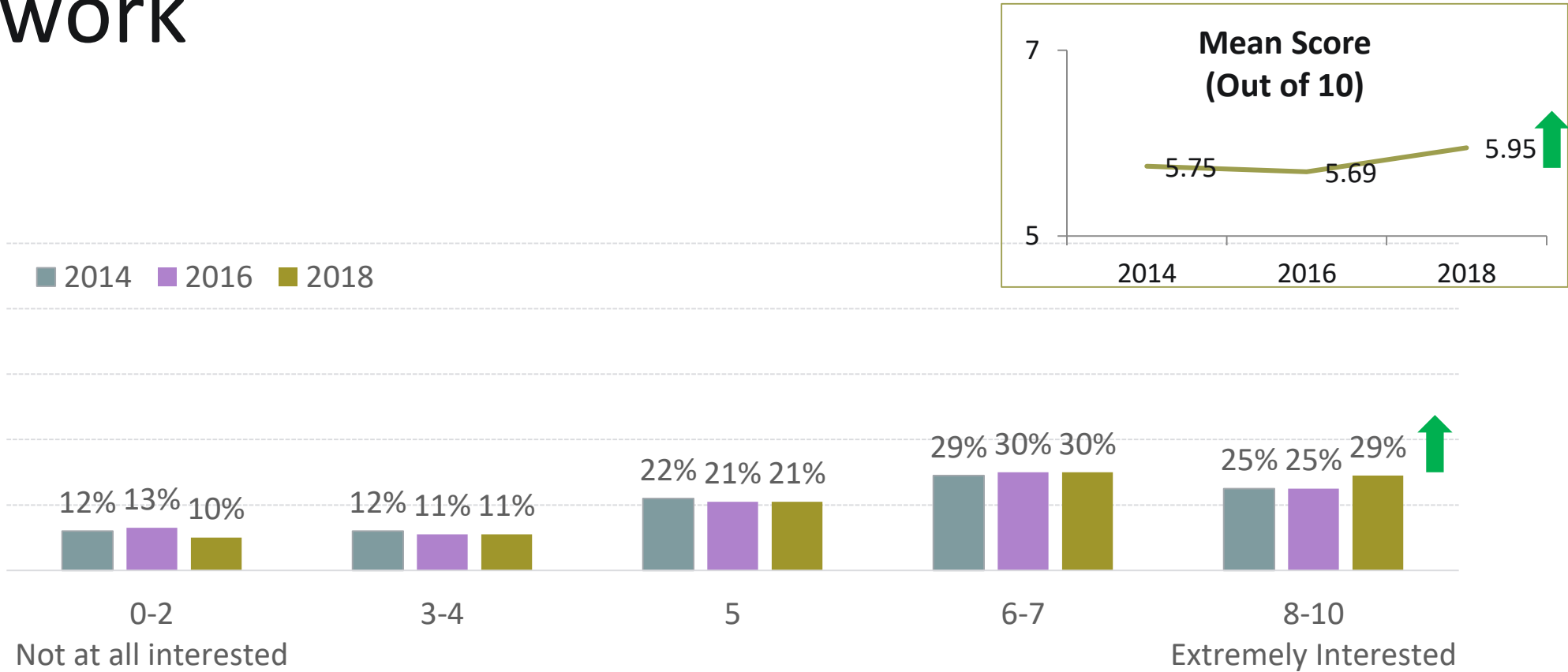


- Interest in charities was stable (see slide 10)
- Contact via volunteering has decreased (see slide 14)
- Overall donations reported were stable (see slide 17)
- No change in the amounts donated (see slide 18)
- Overall trust has not changed (see slide 30)
- Those who were aware of OSCR have greater levels of trust (see slide 31)
- Local charities were granted higher levels of trust (see slide 34)
- There were some responses to the negative stories in the press which led to a larger number of people saying they trust charities less than they did 2 years ago (see slide 41)
- Including the OSCR logo significantly improved likelihood to donate (see slide 76)

Engagement with Charities



Interest in charities and their work



Interest in charities has remained very stable since 2014, with a majority expressing an interest (58% scoring at least 6 in 2018). The proportion who are extremely interested (scoring 8-10) increased significantly in 2018, and the overall mean score for interest has also increased.

Base (all respondents): 2014 – 1000, 2016 – 1010, 2018 - 1010

Profile of those most interested in charities



2014	% scoring 8-10 2014	Mean Score 2014	2016	% scoring 8-10 2016	Mean Score 2016	2018	% scoring 8-10 2018	Mean Score 2018
Total (1,000)	25%	5.75	Total (1,010)	25%	5.69	Total (1,010)	29%	5.95
Male (480)	24%	5.54	Male (485)	21%	5.32	Male (485)	26%	5.61
Female (520)	26%	5.95	Female (525)	28%	6.03	Female (525)	31%	6.27
16-24 (150)	37%	6.63	16-24 (152)	27%	6.17	16-24 (152)	34%	6.47
25-34 (150)	34%	6.25	25-34 (152)	28%	5.88	25-34 (152)	33%	6.24
35-44 (170)	21%	5.50	35-44 (172)	22%	5.65	35-44 (173)	31%	6.27
45-54 (180)	22%	5.64	45-54 (182)	23%	5.67	45-54 (182)	30%	5.74
55-64 (150)	19%	5.10	55-64 (152)	26%	5.94	55-64 (151)	22%	5.58
65+ (200)	22%	5.52	65+ (202)	22%	5.06	65+ (200)	25%	5.55
AB (185)	33%	6.21	AB (187)	32%	6.26	AB (200)	30%	6.28
C1 (315)	27%	5.95	C1 (318)	23%	5.83	C1 (301)	31%	6.08
C2 (220)	16%	5.33	C2 (222)	23%	5.61	C2 (224)	30%	6.16
DE (280)	26%	5.55	DE (283)	24%	5.22	DE (285)	25%	5.43

The profile of subgroups in terms of scoring remains largely the same as 2016. However the mean score value for 45-54 year olds and the eldest (65+) rose. The mean score for men rose but remains below women. The mean score for social grade C2 has risen significantly since 2016 but is still behind that for AB.

Interested in charities – sub-groups



Gender

- On the scale from 0 (not at all interested) to 10 (extremely interested), women (6.27) posted a higher mean score than men (5.61) in regard to their interest in charities and their work.
- Men (14%) were more likely than women (6%) to rate their interest as two or less and were less likely than women to post a score of eight or more (men 26%, women 31%).

Age

- The eldest, 65+ cohort (5.55) posted a lower mean score in regard to their interest in charities than all other age groups (16-24 6.47, 25-34 6.24, 35-44 6.27, 45-54 5.74 and 55-64 5.58).
- The eldest cohorts (15% aged 65+ and 13% aged 55-64) were also more likely than all younger respondents to rate their interest in charities as two or less out of ten.

SEG

- Those from a higher socio-economic group, AB (6.28), C2 (6.16) and C1 (6.08), registered higher interest in charities than the lowest group, DE (5.43).
- AB, C1 and C2 respondents were roughly equally likely to give an interest score of eight or higher (30%, 31% and 30% respectively), whereas as for the lowest grades, DE, the figure was 25%.
- DEs (17%) were more likely than ABs (8%), C1s (8%) and C2s (6%) to provide a score of two or less out of ten.

Interested in charities – sub-groups



Awareness of OSCR

- Those who were aware of OSCR (6.70) posted a higher mean score than those who were not (5.54).
- Those aware of OSCR (43%) were more likely than those who were not (22%) to rate their interest as eight or more and less likely to rate it as two or less (aware 7%, not aware 12%).

Perceived importance of OSCR

- Respondents who rated OSCR as important (6.18) posted a higher mean score than those who were neutral (4.95).
- Those who rated OSCR as important (31%) were more likely than those who were neutral (15%) to rate their interest as eight or more and less likely than those who were neutral to rate their interest as two or less (OSCR important 7%, neutral 18%).

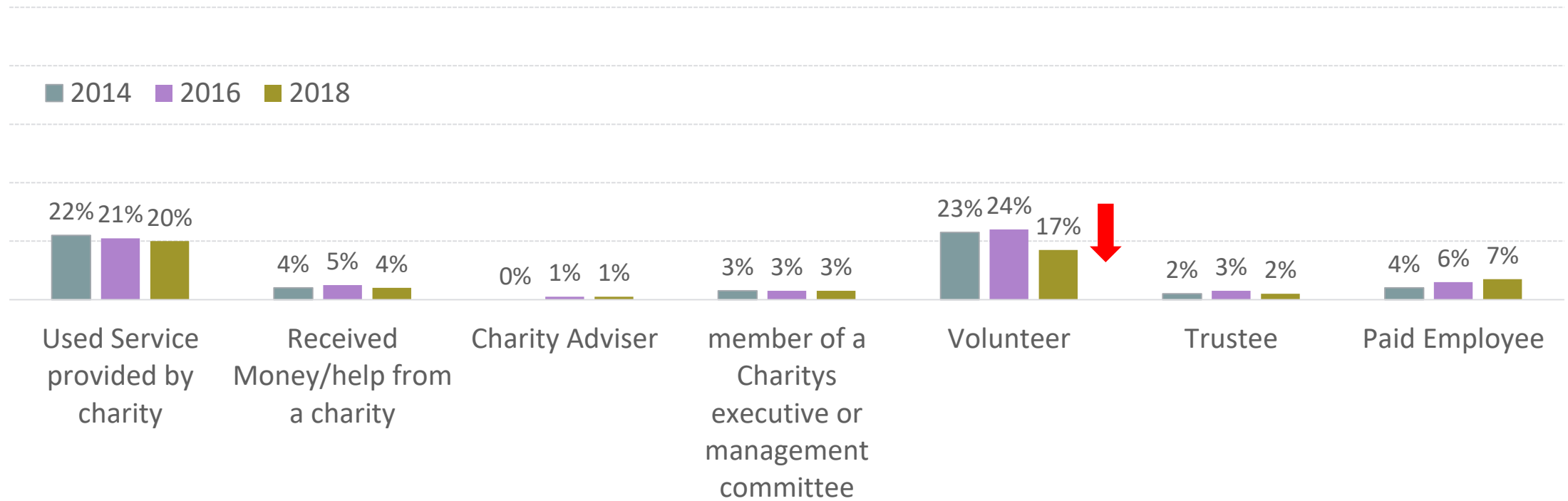
Giving to charity

- Those who had given to charity in the last year (6.22) posted a higher mean score than those who did not (3.14) in regard to their interest in charity.
- Those who had given to charity in the last year (31%) were more likely than those who had not (8%) to rate their interest as eight or more and less likely to rate it as two or less (given 7%, not given 44%).

Trust

- Those who had high trust in charities (6.82) posted a higher mean score than those who were neutral (5.15) or had low trust (3.65).
- Those who had high trust in charities (40%) were more likely than those who were neutral (13%) or had low trust (5%) to rate their interest as eight or more and less likely to rate it as two or less (high trust 3%, neutral 9%, low trust 34%).

Contact with charity



Rates of contact with charity remained broadly similar to 2016, although contact via volunteering is down.

Base (all respondents): 2014 – 1000, 2016 – 1010, 2018 - 1010

Contact with charity – sub-groups



Gender

- Men (60%) were more likely than women (49%) to have had no contact with a charity.
- Looking at individual modes of contact, women were more likely than men to have volunteered (20% vs. 15%) or used a service provided by a charity (23% vs. 17%).

Age

- The youngest, 16-24 year old, respondents were less likely than all other age groups to have had no contact with a charity (33% vs. scores ranging from 47% aged 25-34 to 66% aged 55-64). In particular, they were more likely to have volunteered than any other age group (30% vs. scores ranging from 14% aged 55-64 to 17% aged 45-54).

SEG

- AB respondents were more likely than DE respondents to have had contact through volunteering (AB 21%, DE 13%).
- C2 respondents (25%) were more likely than AB (17%) and DE (18%) respondents to have used a service provided by a charity.

Contact with charity – sub-groups



Awareness of OSCR

- Those aware of OSCR (50%) were more likely than those not aware (35%) to have had any contact with a charity, including volunteering (aware 21%, not aware 15%).

Giving to charity

- Those who had given to charity in the last 12 months (43%) were more likely than those who hadn't (17%) to have had any contact with a charity, including volunteering (given 18%, not given 7%) and using a service provided by a charity (given 22%, not given 6%).

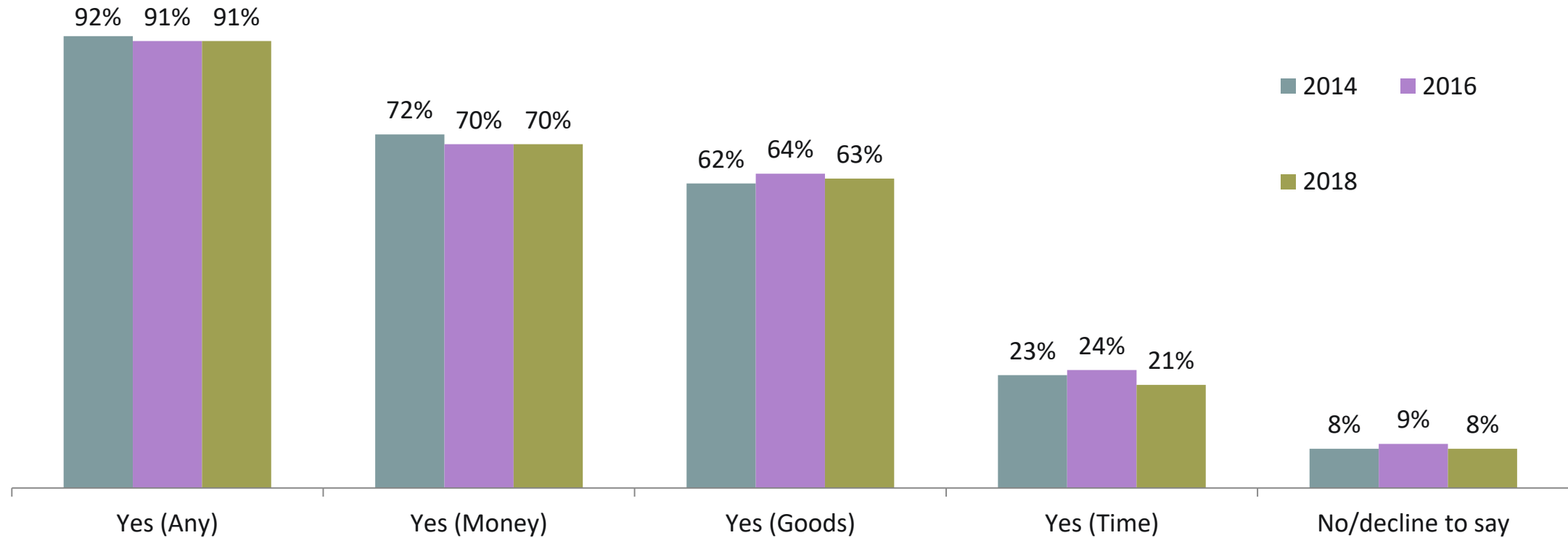
Interest in charity

- Those most interested in charities (50%), scoring 8-10 in terms of interest, were more likely than those scoring their interest lower (24%) to have had any contact with a charity; including volunteering (24% vs. 7%) and using a service provided by a charity (24% vs. 9%).

Trust

- Those most trusting of charities (49%) were more likely than those scoring their trust lower (22%) to have had any contact with a charity; including volunteering (21% vs. 10%) and using a service provided by a charity (25% vs. 7%).

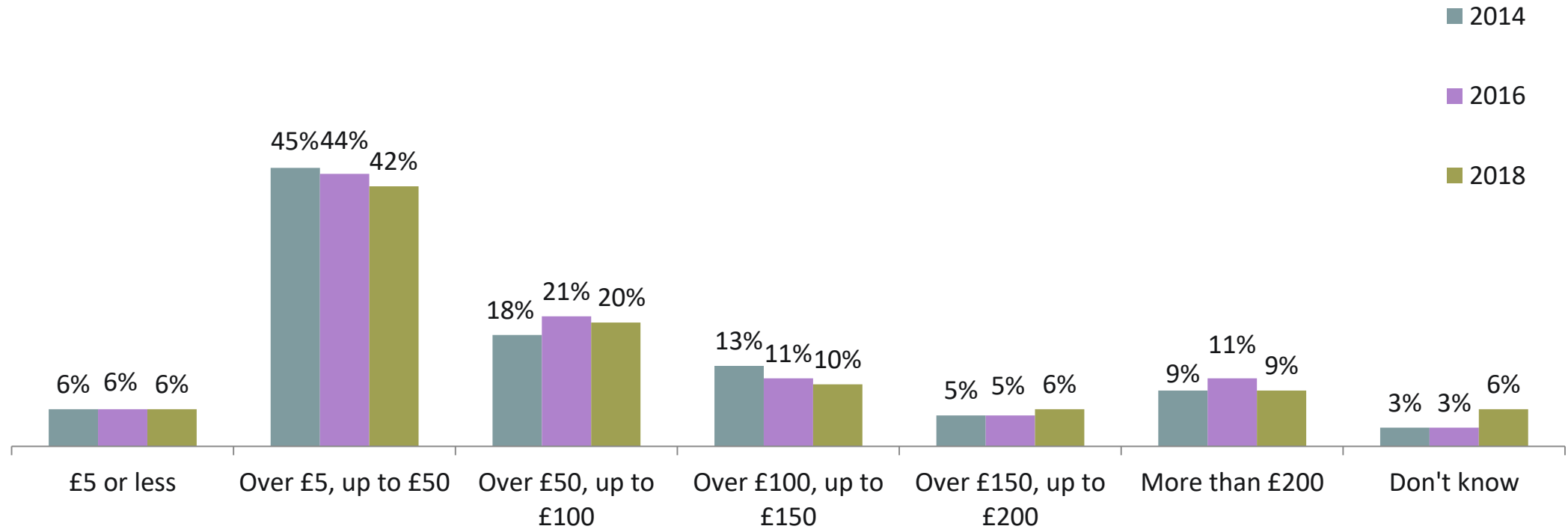
Donation of time, goods and/or money in the last year



Donations of all kinds remained stable in 2018 compared with previous years.

Base (all) 2014 – 1000, 2016 – 1010, 2018 -1010

Amount of money donated to charity



In 2018, the distribution of donation amounts remained consistent with 2016, with no statistically significant changes.

Base (all who donated): 2014 – 715, 2016 – 711, 2018 – 704 (Unweighted) 705 (Weighted)

Donations to charity – sub-groups



Gender

- More women (94%) than men (89%) had given anything to charity in the last twelve months.
- Women (65%) were more likely than men (60%) to have donated goods to charity in the last twelve months, whereas men (73%) were more likely than women (67%) to have given money.

Age

- In keeping with their higher propensity to volunteer, 16-24s (37%) were more likely than those in all other age groups (scores ranging from 14% aged 55-64 to 21% aged 35-44) to donate their time.
- However, under 25s (59%) were less likely than those aged 35 and over (72%) to donate money.
- Over 65s (18%) were more likely than all other age groups (7%) to donate over £200 per year.

SEG

- AB (78%), C1 (71%) and C2 (73%) respondents were all more likely than DE respondents (60%) to have donated money to charity. This group (21%) were also more likely to have donated over £200 than all lower socio-economic groups: C1 (10%), C2 (4%), DE (4%), and £150-£200: AB (13%) vs. C1 (5%), C2 (4%) and DE (3%).
- AB respondents (27%) were less likely than those from socio-economic groups C2 (19%) and DE (17%) to have donated time.

Donations to charity – sub-groups



Awareness of OSCR

- Those who are aware of OSCR were more likely than those who were not to have given to charity overall (98% vs. 88%)
- Those who are aware of OSCR were more likely than those who were not to have donated money (78% vs. 66%) or goods (68% vs. 61%) to charity in the last twelve months. They were also more likely to give over £200 per year (15% aware vs. 7% not aware).
- Respondents who said that they were aware of OSCR (27%) were also more likely than those who were not aware (16%) to have donated their time to charity in the last twelve months.

Interest in charity

- Across all modes of giving to charity, those with higher interest in charities and their work were more likely than those with lower interest to have given, with the exception of low level monetary donations (under £50).

Trust

- Again, across all modes of giving to charity, those with higher trust in charities and their work were more likely than those with lower trust to have given.

How money was donated to charity



	2018	2016	2014		2018	2016	2014
Bought goods	50%	50%	55%	Credit / debit card or cheque	14%	16%	15%
Cash	↓ 47%	55%	59%	Text donation	↓ 13%	20%	14%
Raffle/lottery ticket	38%	41%	42%	TV appeal	13%	15%	15%
Street fundraising	29%	29%	29%	Membership fees and subscriptions	10%	10%	10%
Attended a fundraising event	27%	29%	28%	Appeal website	8%	10%	12%
Direct Debit, standing order or covenant	25%	26%	28%	Regular donation by payroll/salary	6%	5%	8%
Social media / Just Giving	25%	25%	20%				



Methods of donation have remained largely similar to 2016, although cash and text donations have declined.

Base (all who donated): 2014 – 715, 2016 – 711, 2018 – 704 (Unweighted) 705 (Weighted)

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

Types of charity supported

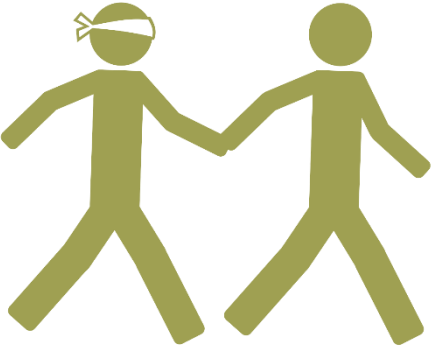


	2018	2016	2014		2018	2016	2014
Medical or health related charities	48%	52%	51%	Big charities	16%	18%	17%
Children's charities	40%	38%	40%	'Mainstream' charities	15%	15%	16%
Local charities 	40%	35%	36%	Charities supporting ongoing needs	13%	12%	13%
Animal charities	34%	30%	33%	Domestic charities	13%	11%	11%
Military or ex-service charities	21%	21%	19%	International charities	11%	15%	17%
National charities	18%	19%	21%	Environmental charities	11%	8%	8%
Small charities	18%	18%	17%	'Neglected' charities	6%	5%	5%
Charities supporting urgent needs / emergency appeals 	16%	21%	22%	Art / cultural charities	5%	5%	5%
People charities	16%	17%	20%	Don't know	2%	2%	3%

The types of charities supported in 2018 remained mostly consistent with those in 2016. However, donations to charities supporting urgent needs/emergency appeals and to international charities have declined, whilst donations to local charities have increased.

Base (all who donated money) 2016 – 921, 2014 – 921, 2018 (Unweighted) 924, (Weighted) 922

Motivations and Trust Towards Charities



Motivations to be involved – Qual



- The primary drivers of interest remain personal experiences and connections:
 - *I got involved with the hospice, because my father passed away from hospice.*
 - *Well, I'm an animal lover, so SSPC is something I've loved since a young age. Just kind of animal welfare, and one that's run nationally. I've had to use the service myself, for animals that have been injured or whatever.*
- Local charities are important because the way money is spent is evidenced in a very real way:
 - *I like to see the good what the charity does. And the school, they'll have regular fundraisers, and the charity always provides those in that case for a donation, and tell you exactly how the money's been spent.*
 - *I tend to trust more local charities. It's a client, a friend who was diagnosed with blood cancer. He did a big appeal and he raised 20,000 pounds*
- Getting feedback from international charities about what donations are spent on maintains motivations:
 - *We used to send people out to the countries where the need was the greatest, and they would actually ... you know, they would design and implement the solutions that we were looking at. So you get a constant feedback of what's actually been done, and talking to somebody who's actually doing it, and that gives you a great focus I think, to see that the money's being well spent.*



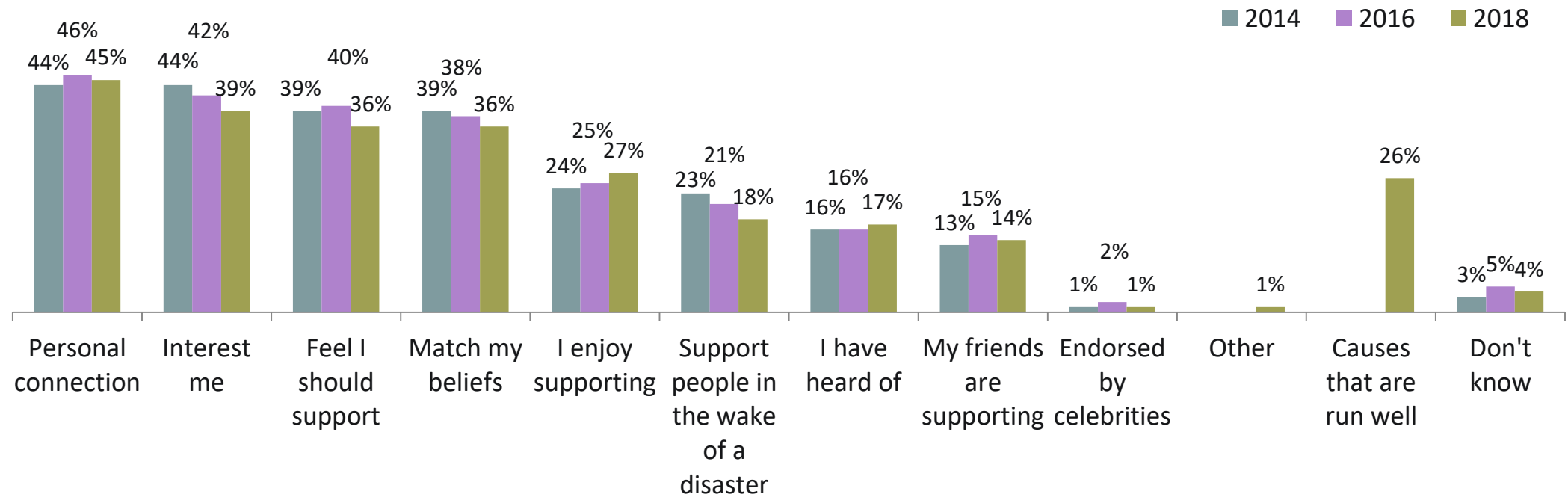
Demotivation – Qual



- Cold calling and being asked for direct debits or money on the doorstep, being asked to give more and chugging:
 - *They get paid a salary for doing that, and my thoughts are I'll donate my money to a charity often on that without paying a wage for somebody to come to my door and do it like that. It bothers me more.*
 - *I think it's I don't like providing my bank details to anybody and I'd rather just give whenever I want to or if something comes on my doorstep or whatever.*
- Compassion fatigue:
 - *When I was really, really young, something would come on and you'd watch it. It really pulled at your heartstrings a lot more because you didn't see quite as much of that kind of thing. It wasn't on the TV all the time. But now, every show you watch on, and between shows, on the channel, about a dog getting abused in our country or something else horrible. It's a horrible thing and that. But you almost want to switch off.*
- Too much advertising/money spent on celebrities for promotion
 - *Maybe they don't need our money, if they're spending so much money on advertising.*
- Bad news lasts a very long time and people mentioned stories from years ago:
 - *There's a lady in Bristol committed suicide because they discovered she had something like 40 direct debits.*



Reasons for supporting charities and causes



The reasons for supporting charities remains consistent with 2014, with personal connection, interest, and feeling they ‘should’ support it remaining key. Just over a quarter were also motivated to support causes that are ‘run well’, a new code in the 2018 survey.

Base (all who donated money) 2014 – 921, 2016 – 921, 2018 (Unweighted) 924, (Weighted) 922

Reasons for supporting – sub-groups



Gender

- Women (17%) were more likely than men (11%) to support charities that their friends were helping to support.

Age

- Respondents aged under 25 (27%) were more likely than all other age groups (25-34 16%, 35-44 13%, 45-54 16%, 55-64 14%), bar 65+ (21%*), to support charities that support people in the wake of a disaster.

*Difference not statistically significant

SEG

- Respondents from higher socio-economic groups were more likely to support a charity because it matches their beliefs (AB 48% vs. C1 35% C2 33%, DE 31%) and less likely to support it because they have heard of it (AB 8% vs. C1 21%, C2 19%, DE 18%).

Reasons for supporting – sub-groups



Awareness of OSCR

- Respondents who were aware of OSCR were more likely than those who weren't to support charities that:
 - match their beliefs (aware 42%, not aware 34%)
 - interest them (aware 44%, not aware 35%)
 - they enjoy supporting (aware 31%, not aware 26%)
 - they have a personal connection with (aware 49%, not aware 42%)
 - support people in the wake of a disaster (aware 22%, not aware 17%)
 - are well run (aware 31%, not aware 24%)

Interest in charity

- The likelihood of respondents finding each of the reasons for donating to a particular charity convincing increased with overall interest in charities.

Trust

- Similarly, the likelihood of respondents finding each of the reasons for donating to a particular charity convincing increased with trust in charities.

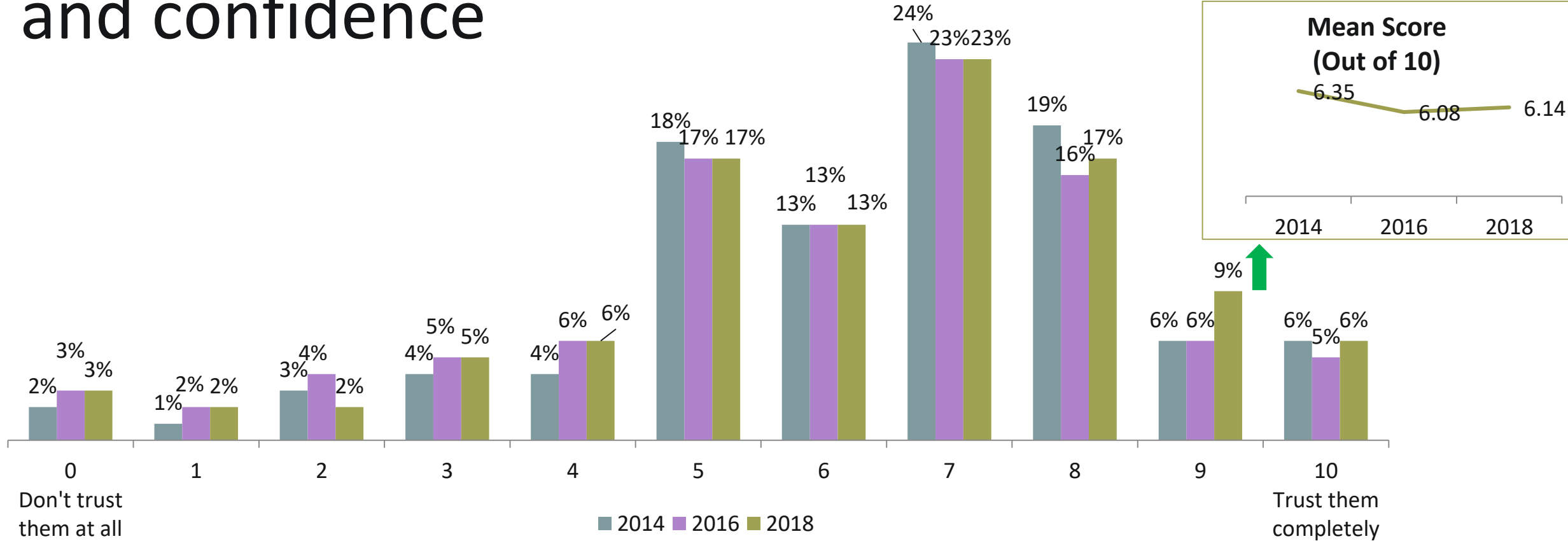
Trust– Qual



- While the qualitative work was being conducted there was no negative news coverage about charities. Nonetheless, respondents exhibited some scepticism about trusting all charities.
- The main concerns in terms of trust were not knowing fully where donated money was spent. Local charities were seen as more trustworthy because respondents could see first hand where donations had gone. Open accounting and full transparency of finances was regarded as being more important than knowing who is running the charity. Links to charities accounts was a compelling idea.
 - *If I knew that, that money was going, and there's good coming out of that and they were regulated, as opposed to giving to somebody that have been running a charity a couple of years, and you can't see anything they've done with their money, I think I'd go for the other one.*
- Knowing who the Trustees are was of some interest and it reportedly could be useful if checking the credentials of a charity but when we probed the response the reality was that very few were likely to do that.
- Knowing the charity is regulated was of high importance to respondents who thought of regulation as a quality check and a prompt to donate more.
 - *I'd feel as if maybe I'd give more.*
 - *So I'll feel a lot happier giving it if it was really transparent where it was all going.*
 - *I think as well with today's technology, we've got mobile phones, why can't they put an app out, something like this, like how much is getting donated to such and such charities today, and this is the percentage, or something like that. So people have got a clear vision of actually what's happening.*



Overall trust and confidence



- There was a decrease in the trust and confidence mean score between 2014 and 2016 due to a shift from higher to lower levels of trust. However, the 2018 mean score has stabilised.

Overall trust in charities – sub-groups



	% scoring 6-10 2018		% scoring 6-10 2016		% scoring 6-10 2014	
	Base	%	Base	%	Base	%
Total	1,010	65%	1,010	64%	1,000	68%
Aware of OSCAR	338	75%	224	75%	209	81%
Not aware of OSCAR	589	58%	786	61%	791	64%
Given to charity in the last year	922	68%	921	67%	921	71%
Not given to charity in the last year	88	24%	89	33%	79	28%
Interest in charities 0-4	214	34%	247	30%	235	41%
Interest in charities 5	210	43%	212	53%	221	55%
Interest in charities 6-10	586	83%	551	83%	543	85%

Trust remains greatest amongst those with greater awareness of OSCAR, those who have given to charity in the last year, and those with an interest in charities.

Trust in charities – sub-groups

Gender

- Women (mean score 6.44) had greater trust and confidence in charities than men (5.82).

Age

- Confidence in charities decreased with age, with the youngest groups (16-24 6.65, 25-34 6.32, 35-44 6.42) scoring higher than the oldest group (65+ 5.76).

SEG

- Confidence in charities was higher among the most affluent respondents (AB 6.62) than the least affluent (DE 5.70).

Trust in charities – sub-groups

Awareness of OSCR

- Trust was higher amongst those with an awareness of OSCR (mean score 6.73) than those who were not aware (5.82).

Giving to charity

- Respondents who had given to charity in the last year (6.38) showed greater levels of confidence in charity than those who had not (3.62).

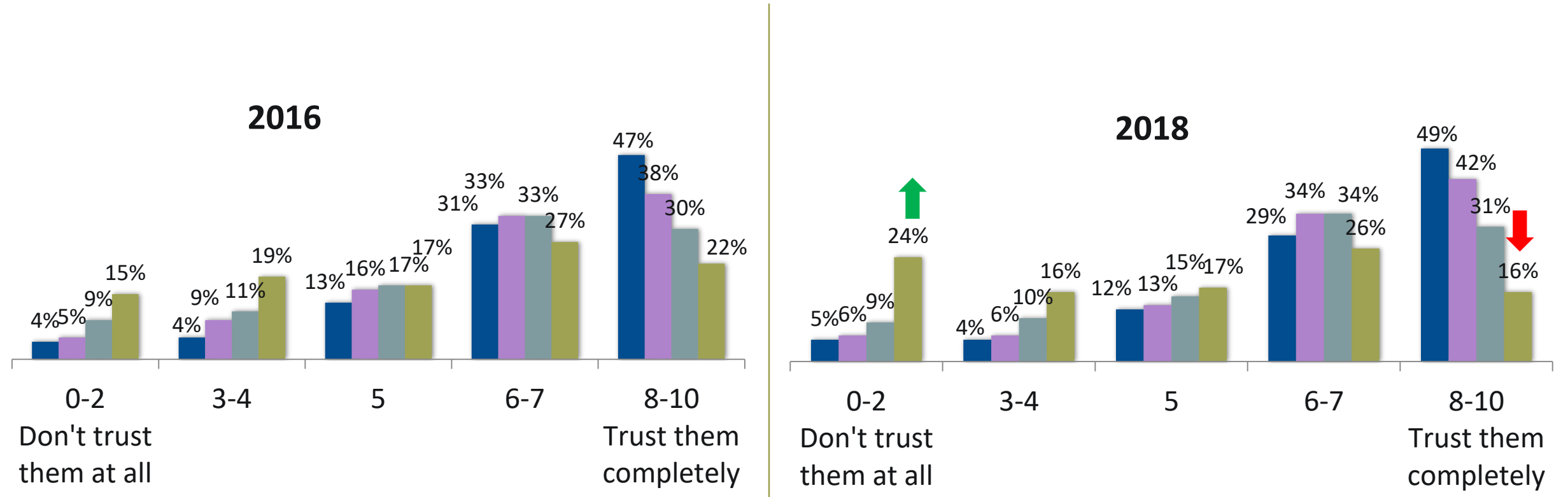
Interest in charity

- Trust in charity was very closely tied to interest in charities, with those with the least interest (0-2 out of 10 4.29) scoring much lower levels of trust than those in the most interested group (8-10 out of 10 7.05).

Trust according to type of charity



■ Local Charities
 ■ Scottish National Charities
 ■ UK National Charities
 ■ International Charities

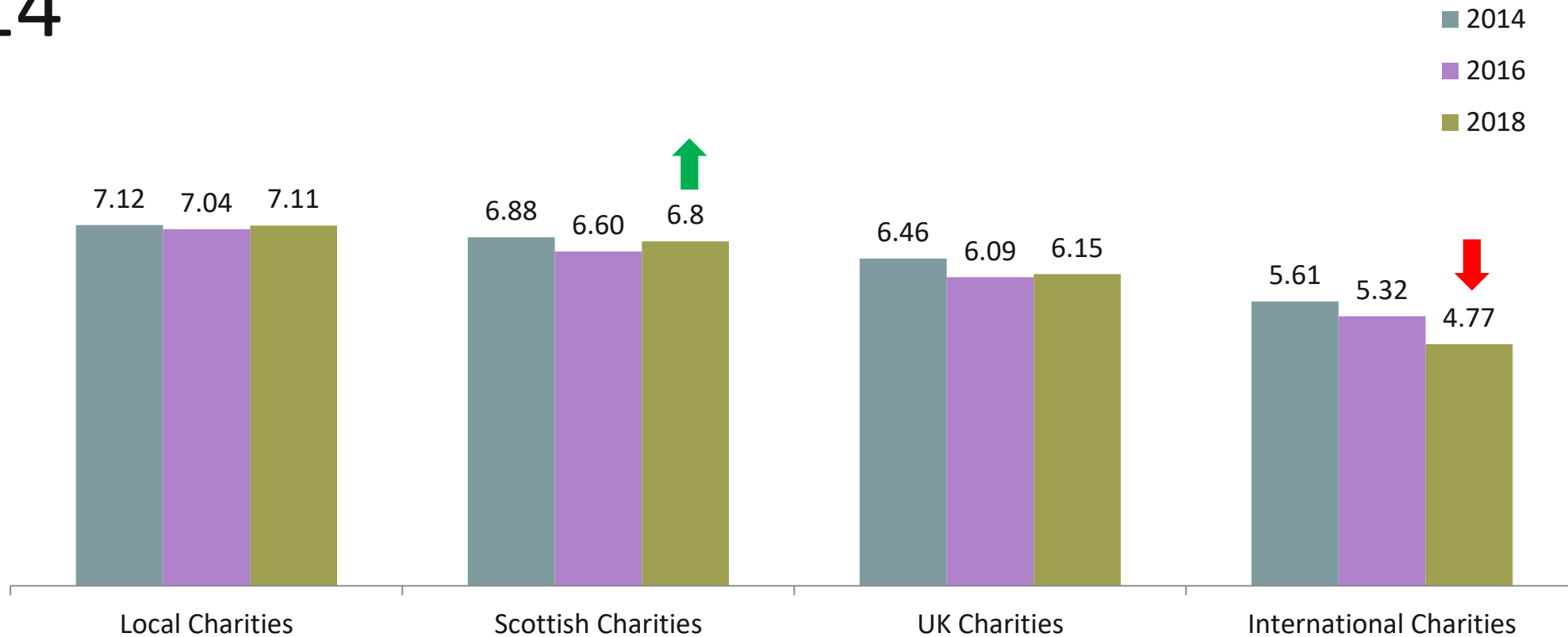


As in previous years, trust was higher for local charities than Scottish, UK and international charities. Strength of trust decreased with geographical scale.

Q6a-d. Now thinking about how much trust and confidence you have in LOCAL/SCOTTISH NATIONAL/UK NATIONAL /INTERNATIONAL charities, on a scale of 0 to 10 where 10 means you trust them completely and 0 means you don't trust them at all, how much trust and confidence do you have in local charities?

Base (all respondents) 2016 - 1010, 2018 - 1010

Trust according to type of charity – since 2014



A decrease in trust mean score has been seen in relation to international charities. Trust in relation to other charities have remained relatively stable.

Q6a-d. Now thinking about how much trust and confidence you have in LOCAL/SCOTTISH NATIONAL/UK NATIONAL /INTERNATIONAL charities, on a scale of 0 to 10 where 10 means you trust them completely and 0 means you don't trust them at all, how much trust and confidence do you have in local charities?

Base (all) 2014 – 1000, 2016 - 1010, 2018 - 1010

Trust in charity by type – sub-groups



Gender

- Women, again, showed consistently higher levels of trust across all charity sizes

Age

- Whilst there was little difference in the levels in trust towards local and Scottish charities in relation to age of respondent, the youngest people were more trusting than some older age groups when it came UK national charities (16-24 6.50 vs. 45-54 5.95 and 55-64 5.79). The youngest respondents (16-24) were more trusting than older age groups in relation to international charities (16-24 5.89 vs. 25-34 5.02, 35-44 5.12, 45-54 4.43, 55-64 4.30 and 65+ 4.12).

SEG

- Higher socio-economic groups showed higher levels of trust in local charities (AB 7.42, DE 6.71) and international charities (AB 5.19, DE 4.40). Trends in the data suggest that this is also true for Scottish and UK charities, although these results are not statistically significant.

Trust in charity by type – sub-groups



Awareness of OSCR

- Those who are aware of OSCR showed higher trust in all four sizes of charity

Giving to charity

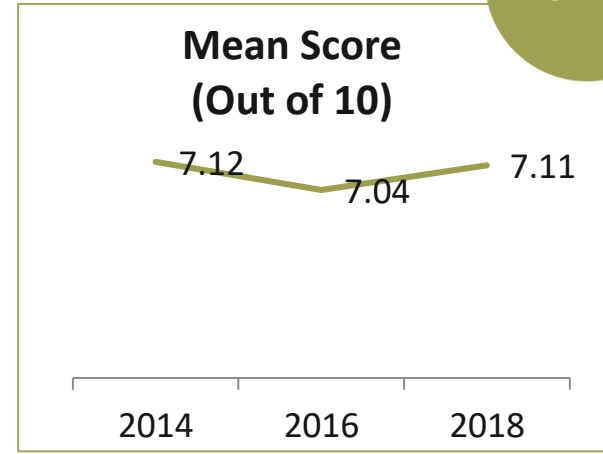
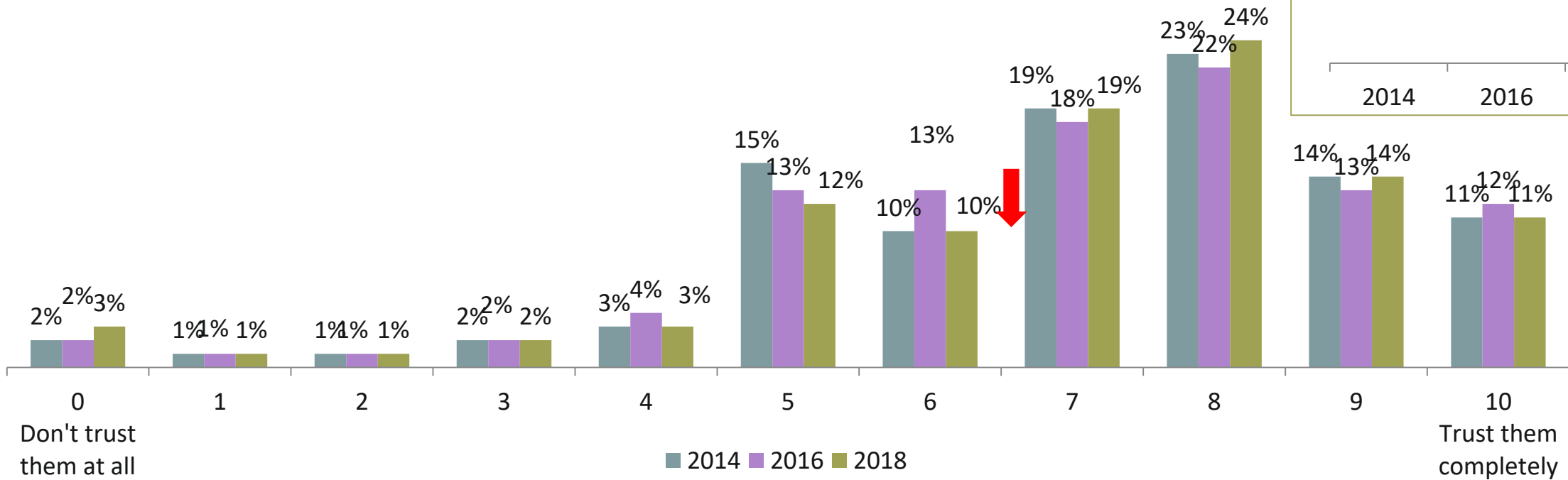
- Those who had given to charity in the last 12 months showed higher trust in all four sizes of charity

Interest in charity

- Those with higher interest in charity showed higher trust in all four sizes of charity

Q6b-e. Now thinking about how much trust and confidence you have in LOCAL/SCOTTISH NATIONAL/UK NATIONAL /INTERNATIONAL charities, on a scale of 0 to 10 where 10 means you trust them completely and 0 means you don't trust them at all, how much trust and confidence do you have in local charities?

Trust and confidence in Local charities



Trust and confidence in local charities remained stable, and higher than trust in charities overall.

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

Base (all) 2014 – 1000, 2016 – 1010, 2018 -1010

Trust in local charities – sub-groups

Patterns were similar to those relating to charities overall

Gender

- Women (mean score 7.40) had greater trust and confidence in local charities than men (6.80).

Age

- Confidence in local charities was fairly similar across most age groups, although those aged 45-54 (mean score 6.74) were less confident than those aged under 25 (7.20), 35-44 (7.22), and 65+ (7.45).

SEG

- Confidence in local charities was higher among the most affluent respondents (AB 7.42) than the least affluent (DE 6.71).

Trust in local charities – sub-groups

Awareness of OSCR

- Trust was much higher amongst those with an awareness of OSCR (mean score 7.65) than those who were not aware (6.85).

Giving to charity

- Respondents who had given to charity in the last year (7.36) showed greater levels of confidence in local charities than those who had not (4.49).

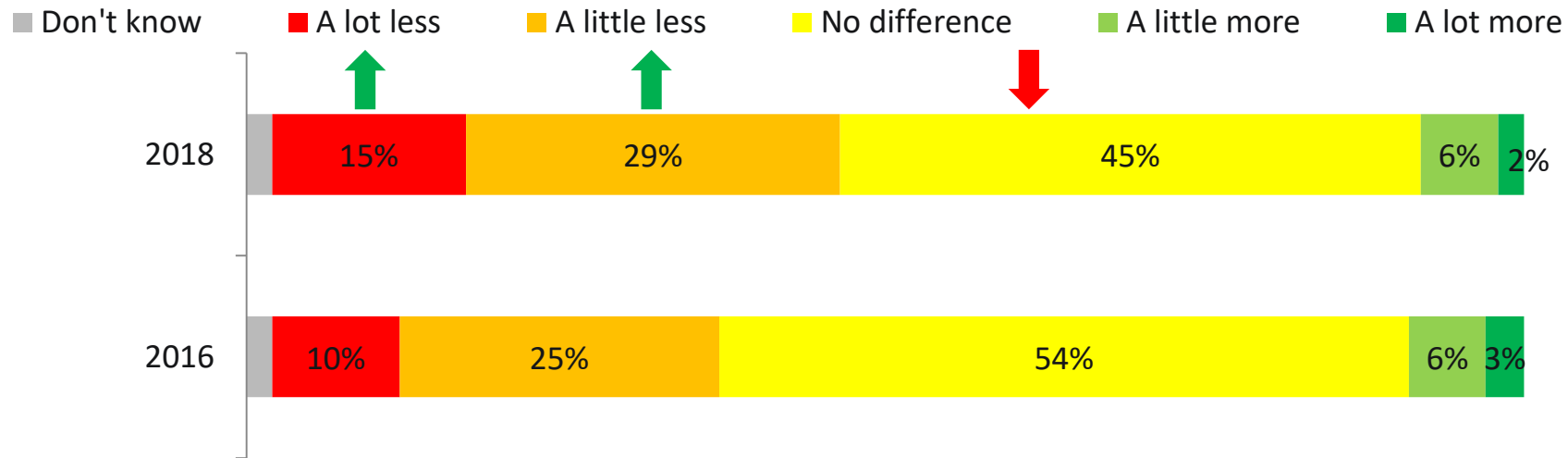
Interest in charity

- Trust in charity was closely tied to interest in charities, with those with the least interest (0-2 out of 10 5.54) scoring much lower levels of trust than those in the most interested group (8-10 out of 10 7.84).

Trust in charities overall

- Trust in charities overall correlated with trust in local charities. Those with higher levels of trust overall (mean score 7.96) showed greater levels of trust in local charities than those with lower levels of trust overall (4.78).

Perceived change in trust



The proportion of respondents who feel that they trust charities more compared with two years ago has remained stable (2016 9%, 2018 8%). There has been an increase in the number who feel that they trust charities less (2016 35%, 2018 44%).

Change in trust – sub-groups



Age

- Those in the younger age groups (16-24 18%, 25-34 15%) were more likely than those in the oldest groups (45-54 4%, 55-64 4%, 65+ 1%) to report an increase in trust in the last two years. These groups (16-24 36%, 25-34 35%) were also less likely than the oldest respondents (45-54 46%, 55-64 51%, 65+ 53%) to report a decrease in trust.

Gender

- Men were more likely than women to say their trust had decreased a lot (19% vs. 12%).

Interest in charities

- Those with low interest in charities (27%) were more likely than those with high interest (11%) to say their trust had decreased a lot.

Given to charity

- Similarly, those who had not given (30%) were more likely to say their trust had declined a lot than those who had given (13%)

Trust

- Those with low trust were more likely to say their trust had decreased (a little and a lot combined) than those with higher trust (65% vs. 38%).

Change in trust – sub-groups



2016	Increased Trust (%)	Decreased Trust (%)	2018	Increased Trust (%)	Decreased Trust (%)
Total (B: 1,010)	8%	35%	Total (B: 1,010)	8%	44% ↑
Aware of OSCR (B:224)	16%	29%	Aware of OSCR (B:338)	10%	45% ↑
Not aware of OSCR (B:786)	6%	37%	Not aware of OSCR (B:589)	7%	46% ↑
Given to charity in the last year (B:921)	9%	35%	Given to charity in the last year (B:922)	8%	44% ↑
Not given to charity in the last year (B:89)	6%	39%	Not given to charity in the last year (B:88)	6%	44%
Interest in charities 0-4 (B:247)	4%	43%	Interest in charities 0-4 (B:214)	4%	48%
Interest in charities 5 (B:212)	5%	39%	Interest in charities 5 (B:210)	4%	45%
Interest in charities 6-10 (B:551)	11%	30%	Interest in charities 6-10 (B:586)	11%	43% ↑

Awareness of OSCR, giving to charity and high interest in charities were all indicators of increase likelihood to feel greater trust and decreased likelihood to have lowered levels of trust. However, for all subgroups measured here, decreased trust compared to two years ago was more common than increased trust – significantly so, in most cases.

Reasons for decreased trust



	2016 (B:351)		2018 (B:446)	
	%.	Total	%.	Total
Negative Press and media Coverage of Charity Scandals	54%	191	40% ↓	177
Oxfam scandal comments			26%	114
Perception Money Does Not Reach where it is Meant To	32%	114	25% ↓	109
Concerned about charity CEOs/ Management pay	35%	123	20% ↓	87
Too Many Charities	-	-	1%	6
Hounding/harassing people	12%	41	1% ↓	4
Concern about the size/scale of charities	-	-	1%	4
Internet scams	-	-	1%	5
Doorstep scams	-	-	1%	5

When prompted to provide a reason for decreased trust, respondents most often referred to negative stories in the press.

Base (all who had decreased trust and provided an answer; unweighted)

Reasons for decreased trust



I had previously known people who worked for the Red Cross overseas while backpacking and knew they were not very reputable. However, my trust in local charities has been lowered in the past two years because of bad practices/press.

Watched the waste of money on paid management and also the recent Oxfam scandal

I tend to give less to charities when you read all the bad publicity they are getting.

I have read various articles about the percentage of £ donated that actually helps the recipients.

Money not being used as intended....money collected for the charity being taken to pay high wages for business people employed by the charity

When I see the amount of money that CEO's receive, it puts me off giving.

When prompted to provide a reason for decreased trust, respondents most often referred to negative stories in the press.

Regulation– Qual



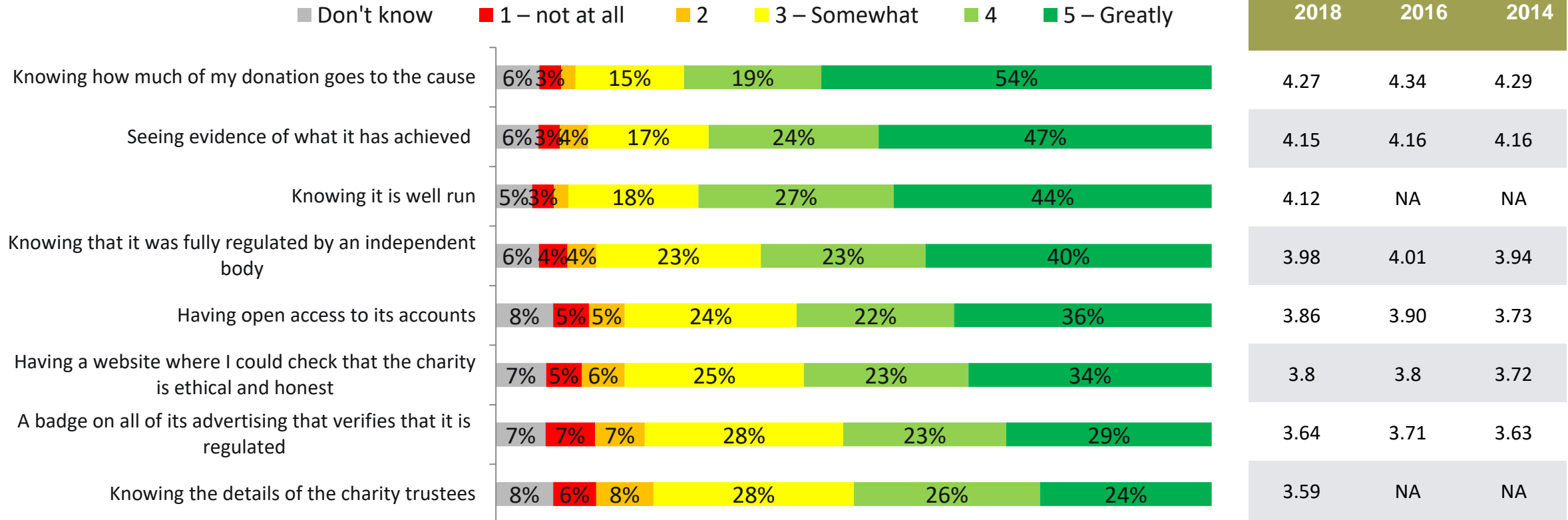
- The notion that all charities should be regulated was met with very high levels of enthusiasm. Very few respondents could name a place where they would go to report malpractice but all felt it would be good to have one.
- The main function of a regulator was thought to be:
 - *Ensure standards are met*
 - *Regulate the amount of donations that are spent on the cause*
 - *Audit the charities accounts*
 - *Make them readily identifiable if they are registered*
 - *Provide a clear link to all charities in Scotland*
 - *Ensure that donations do not get consumed by high salaries*
- None had heard of OSCR but all were curious to know more about it and all were enthusiastic about its existence.
 - *It's just holding people to account, actually making sure that they are doing exactly what they should be doing. It's checking them before they offer down that they're doing the right thing, for the right reason, with all the right checks.*
- Many commented that OSCR should make them more aware of what it does.
 - *It could probably make us more aware of what it does, be it like an advert or something, or in the paper, or on the TV, like I never heard of it so, if I was more aware of that then I'd probably in turn trust more of the charities, because I'd know I can check.*



Ways of increasing levels of trust



Mean score
(1 to 5)



As in previous years, knowing how much money goes to the cause was the most popular of the suggested strategies for increasing trust in Scottish charities. This was again followed by having evidence of what is achieved, knowing it is well run (a new code for 2018), and knowing the organisation is fully regulated. In 2018, there was little change in support for the idea of open access to accounts.

Base (all) 2014 – 1000, 2016 - 1010, 2018 - 1010

Building trust – sub-groups



Gender

- Women were more likely than men to feel that a badge verifying a charity's status (women mean score 3.80, men 3.48), having a website to check the charity is ethical and honest (women 3.98, men 3.60), knowing the details of the charity trustees (women 3.69, men 3.48), and knowing it is well run (women 4.20, men 4.03) increased their trust in charity.

Awareness of OSCR

- Those aware of OSCR were more likely than those not aware to feel that knowing it is fully regulated by an independent body (aware mean score 4.21, not aware 3.87), having open access to its accounts (aware 4.01, not aware 3.77), seeing evidence of what a charity has achieved (aware 4.33, not aware 4.06), having a website to check the charity is honest and ethical (aware 3.99, not aware 3.69), knowing the details of the charity trustees (aware 3.73, not aware 3.49), and knowing it is well run (aware 4.28, not aware 4.03) increased their trust in charity.

Building trust – sub-groups



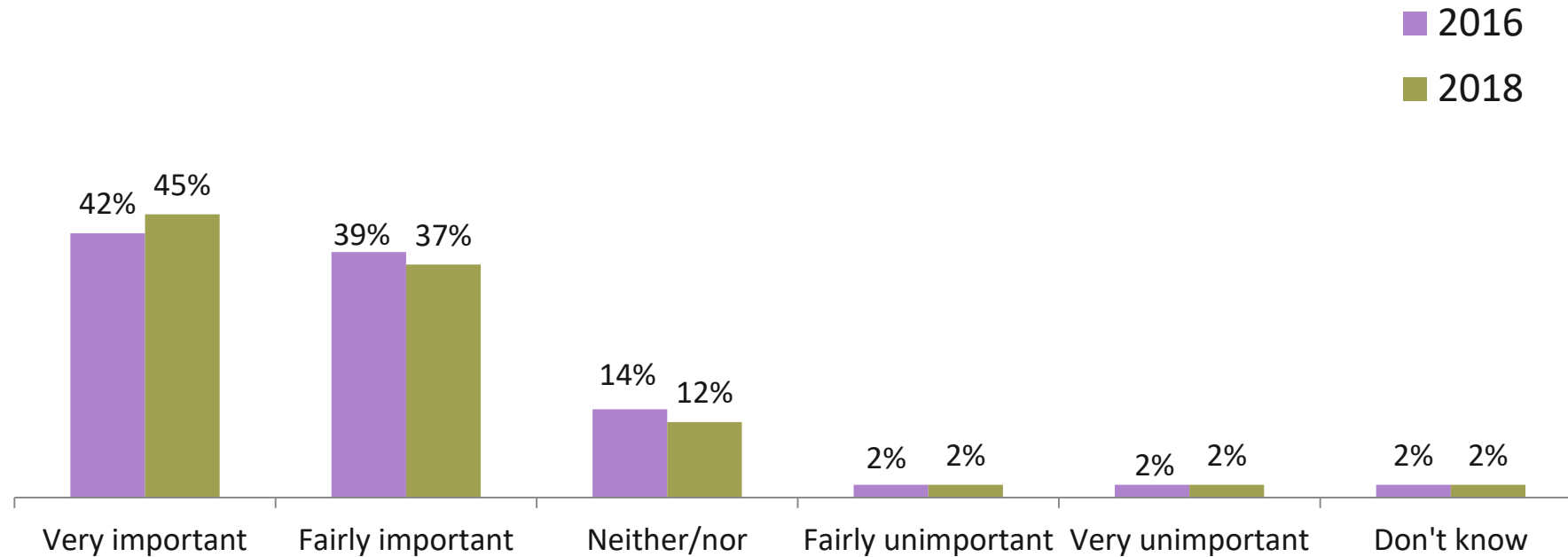
Giving to charity

- Those who had given to charity in the last year were more likely than those who had not to feel that all of the recommendations would increase their trust in charity.

Interest in charity

- Those with the highest interest in charity were more likely than those with the lowest interest to feel that all of the recommendations would increase their trust in charity.

Importance of trust when donating to charity



As in 2016, trust was found to be a critical element in encouraging increased donations from the general public. With 86% of respondents stating that knowing that the charity sector is fully regulated by an independent body contributed somewhat or greatly to their confidence in charities, OSCR continues to play a central role in supporting generous giving. 82% of respondents said trust was important when it comes to determining how much to donate. This figure is inline with 2016's findings (81%).

Base (all) 2016 - 1010, 2018 - 1010

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

Importance of trust – sub-groups



SEG

- Those from an AB (84%) or C2 (84%) background were more likely than those from a DE household (78%) to feel that trust is important to how much they choose to donate.

Age

- Those aged under 25 (70%) were less likely than the oldest age groups (45-54 84%, 55-64 86%, and 65+ 85%) to feel that trust is important to how much they choose to donate.

Giving to charity

- Those who had given to charity (84%) in the last year were more likely than those who had not (60%) to feel that trust is important to how much they choose to donate.

Interest in charity

- Those with higher interest in charity (86%) were more likely than those with lower interest (70%) to feel that trust is important to how much they choose to donate.

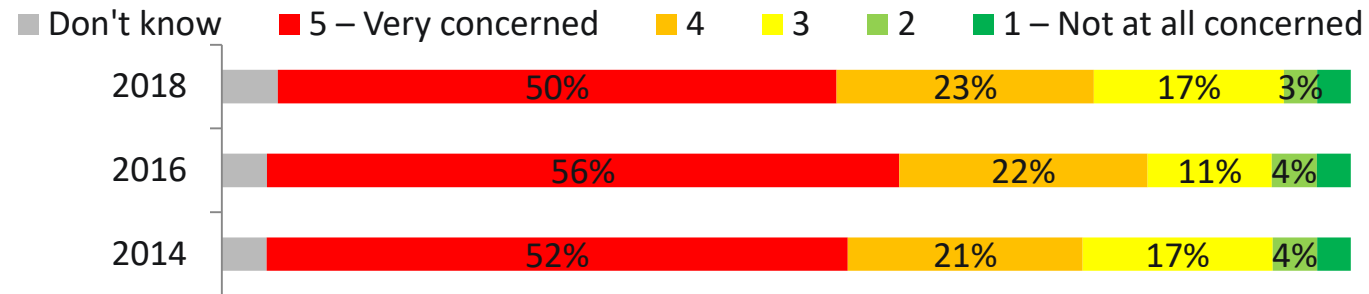
Concerns about Charities



Levels of concern relating to charities



Charity chief executives' salaries



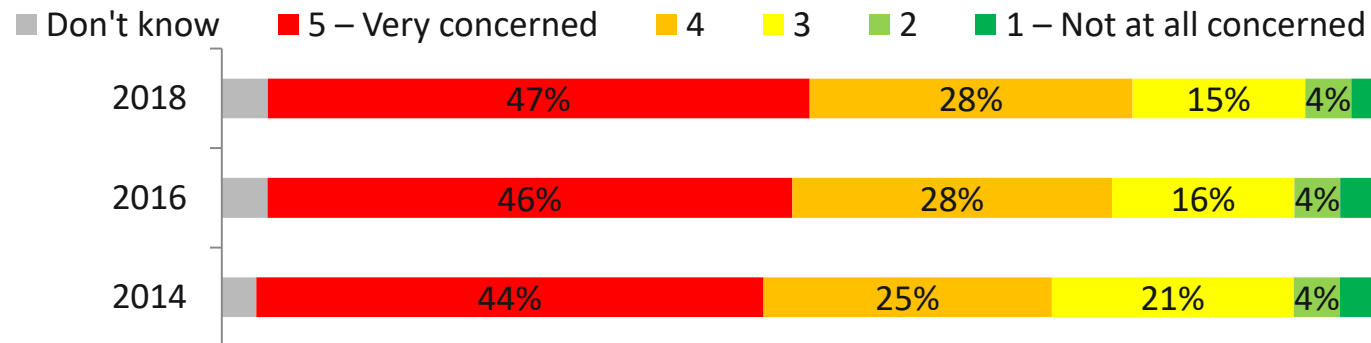
Mean Score (1 to 5)

4.19

4.29

4.20

Amount of donations spent on administration/running costs of charities



Mean Score (1 to 5)

4.18

4.13

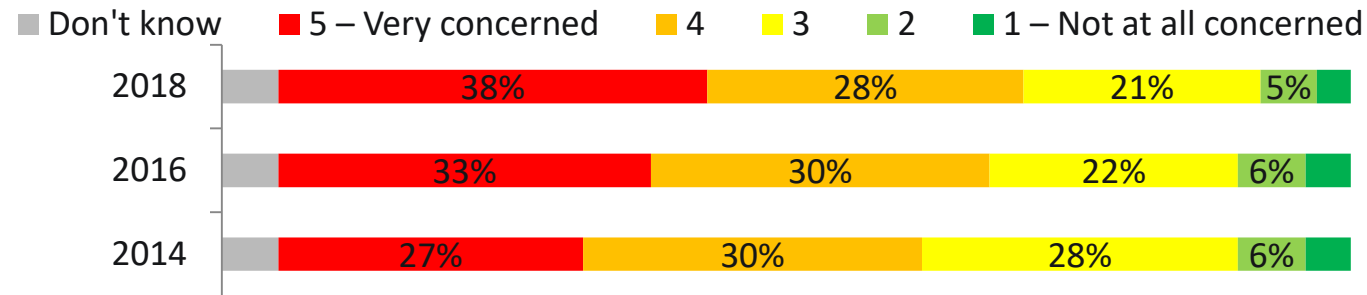
4.08

Levels of concern relating to charities



Accuracy of charities' accounts

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

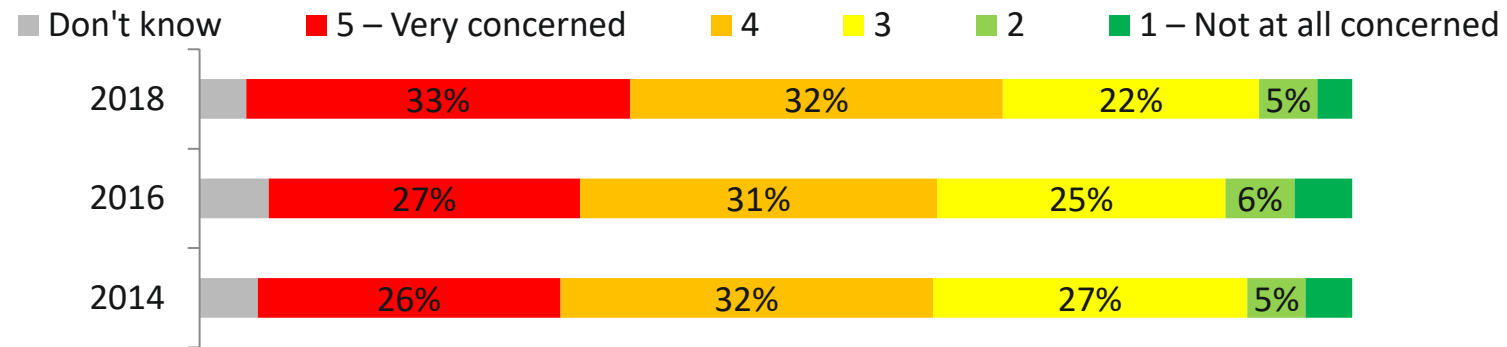


Mean Score (1 to 5)

3.97

3.86

3.72



Mean Score (1 to 5)

↑ 3.91

3.75

3.76

Base (all respondents) 2014 – 1000, 2016 – 1010, 2018 - 1010

Q8. Please state how concerned you are about each of the following issues.

Levels of concern relating to charities

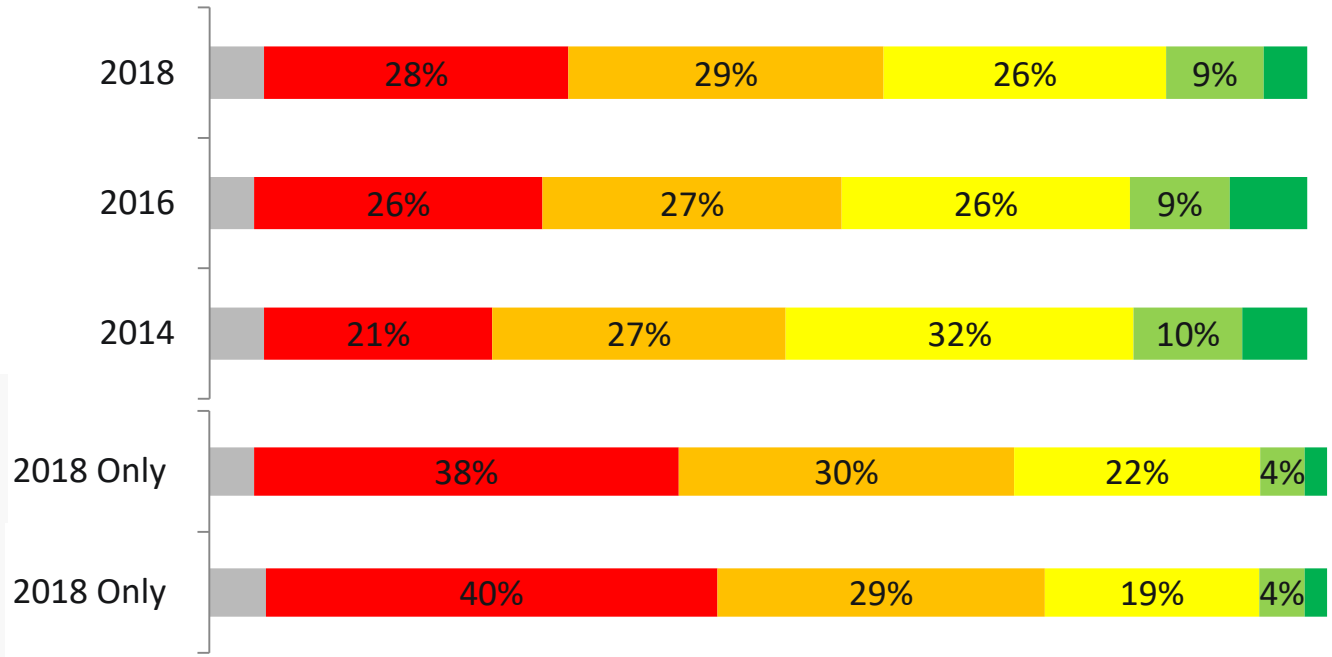


■ Don't know
 ■ 5 – Very concerned
 ■ 4
 ■ 3
 ■ 2
 ■ 1 – Not at all concerned

Methods of fundraising used by charities

A lack of information about how the charity is run

Knowing what the charity has achieved



Issue	Mean score (1 to 5)
Methods of fundraising used by charities	3.71 (↑ from 3.57)
A lack of information about how the charity is run	4.01
Knowing what the charity has achieved	4.05

Levels of concern for each of the five statements have remained largely unchanged since 2014. Methods of fundraising (2016 3.57, 2018 3.71) and the existence of charity regulation (2016 3.75, 2018 3.91) have both seen small increases in the mean level of concern. The existence of charity regulation (2016 27%, 2018 33%) has seen an increase in those 'very' concerned about it.

Base (all respondents) 2014 – 1000, 2016 – 1010, 2018 - 1010

Q8. Please state how concerned you are about each of the following issues.

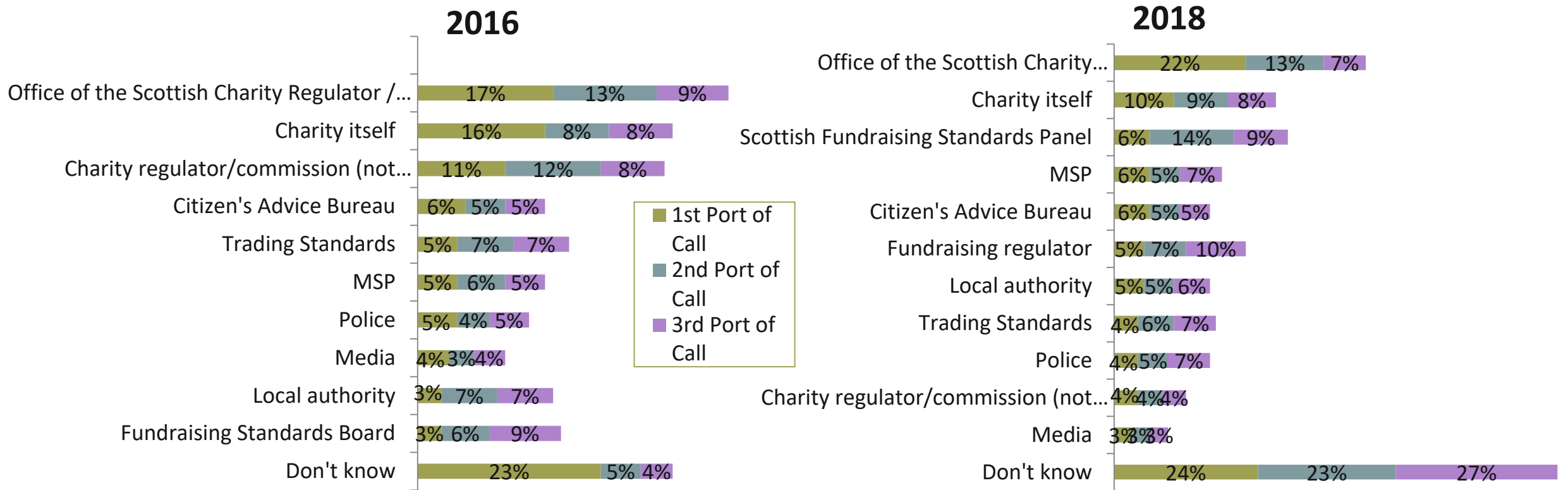
Concern about charities – sub-groups



Trust

- Those with lower levels of trust were more concerned than those with higher levels of trust across all seven statements.
- Higher levels of concern consistently displayed by older age groups

Where to express concerns about Scottish charities (prompted)



When prompted, OSCR as the most common choice for expressing concerns about charity, followed by the charity itself. This is similar to 2016.

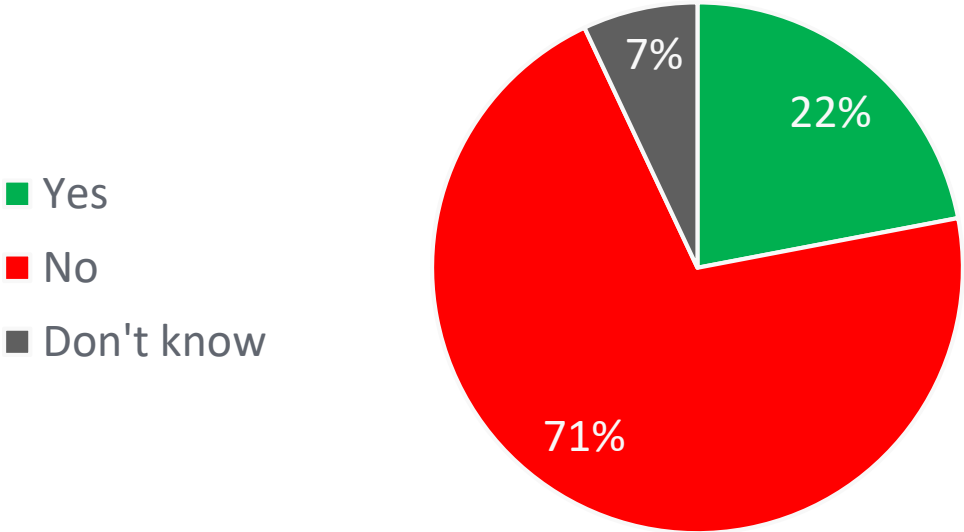
Q9. Looking at the following list, if you had a concern about a Scottish Charity, where might you turn to express your concerns? Please select which three would be your first, second and third port of call. (Randomised list)

Awareness and knowledge of OSCR

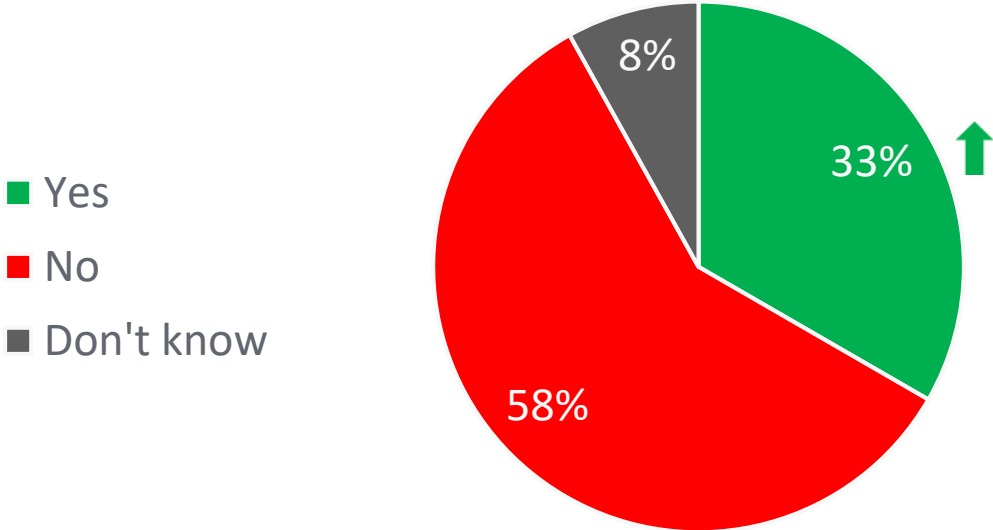


Awareness of OSCR

2016



2018



Around one third of people have heard of the Scottish Charity Regulator, but over half have not. This is a significant increase in awareness from 2016, when only 22% were aware.

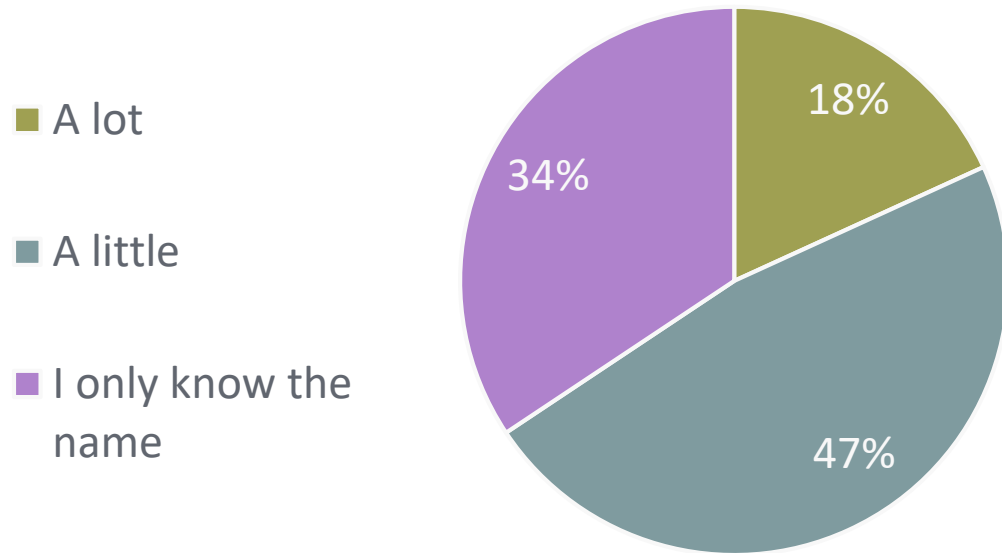
Q10a. Have you heard of the Scottish Charity Regulator?

Base (all respondents) 2014 – 1000, 2016 – 1010, 2018 – 1010,

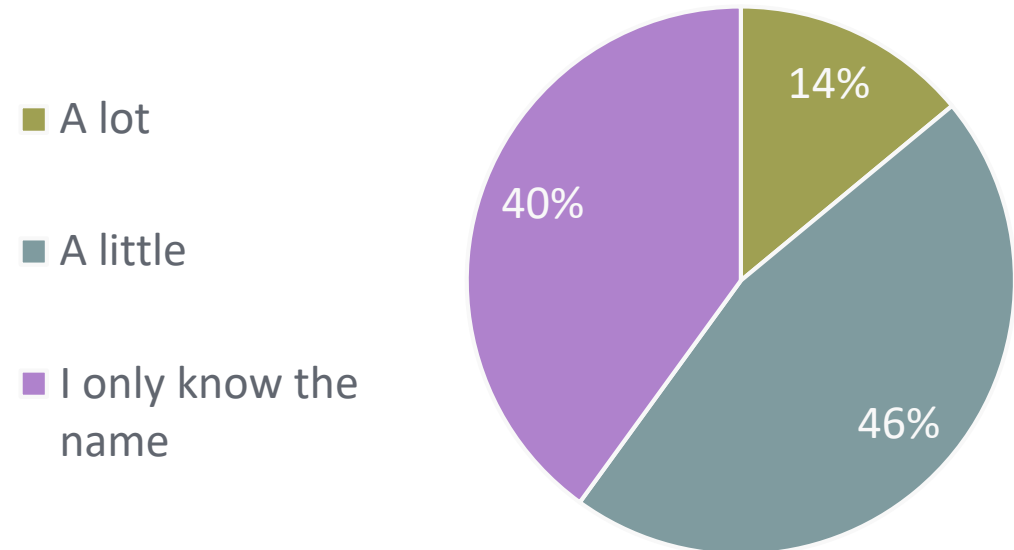
Knowledge of OSCR



2016



2018



Of those who are aware of OSCR, a majority (60%) say they know at least a little, although only a small minority say they know a lot. The differences are not significant.

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

Base (Those who are aware) 2016 – 224, 2018 – 338

Awareness and knowledge of OSCR

– sub-groups



	Aware (%) 2016	Aware (%) 2018
Total (2016 - B: 1,010; 2018 – B:1010)	22%	33%
Given to charity in the last year (2016 - B:921; 2018 – B=922)	23%	36%
Not given to charity in the last year (2016 - B:89; 2018 – B=88)	17%	10%
Interest in charities 0-4 (B:247)	13%	22%
Interest in charities 5 (B:212)	17%	28%
Interest in charities 6-10 (B:303)	29%	40%

High interest in charities was an indicator of awareness of OSCR. Overall, giving to charity did not make respondents significantly more likely to have heard of OSCR. Awareness of OSCR rose significantly across all levels of interest in charities.

Base (all respondents) 2016 – 1,010, 2018 – 1,010

Where heard about OSCR

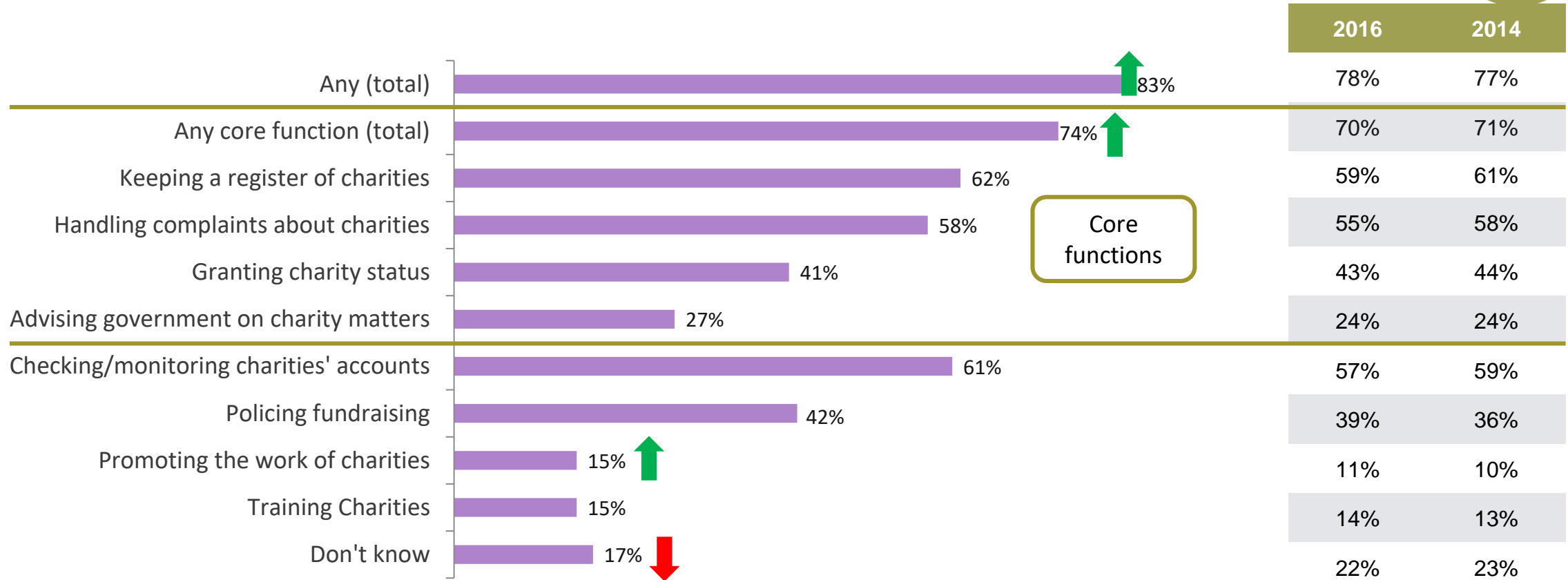


	(B:113) 2016 %	(B:198) 2018 %
Through a charity I'm involved with	43%	37%
Newspaper/ Print media / TV / Media	23%	20%
Online/ Internet Search	12%	15%
Friends/ Family / Word of Mouth	6%	7%
"In the News" (unspecified)	-	3%
Online News	-	1%
Social Media	-	1%
Radio	-	2%
Charity / Advertising	4%	-

The single most common way of hearing about OSCR was through a charity. Overall, the profile of sources remained in line with 2016 findings.

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

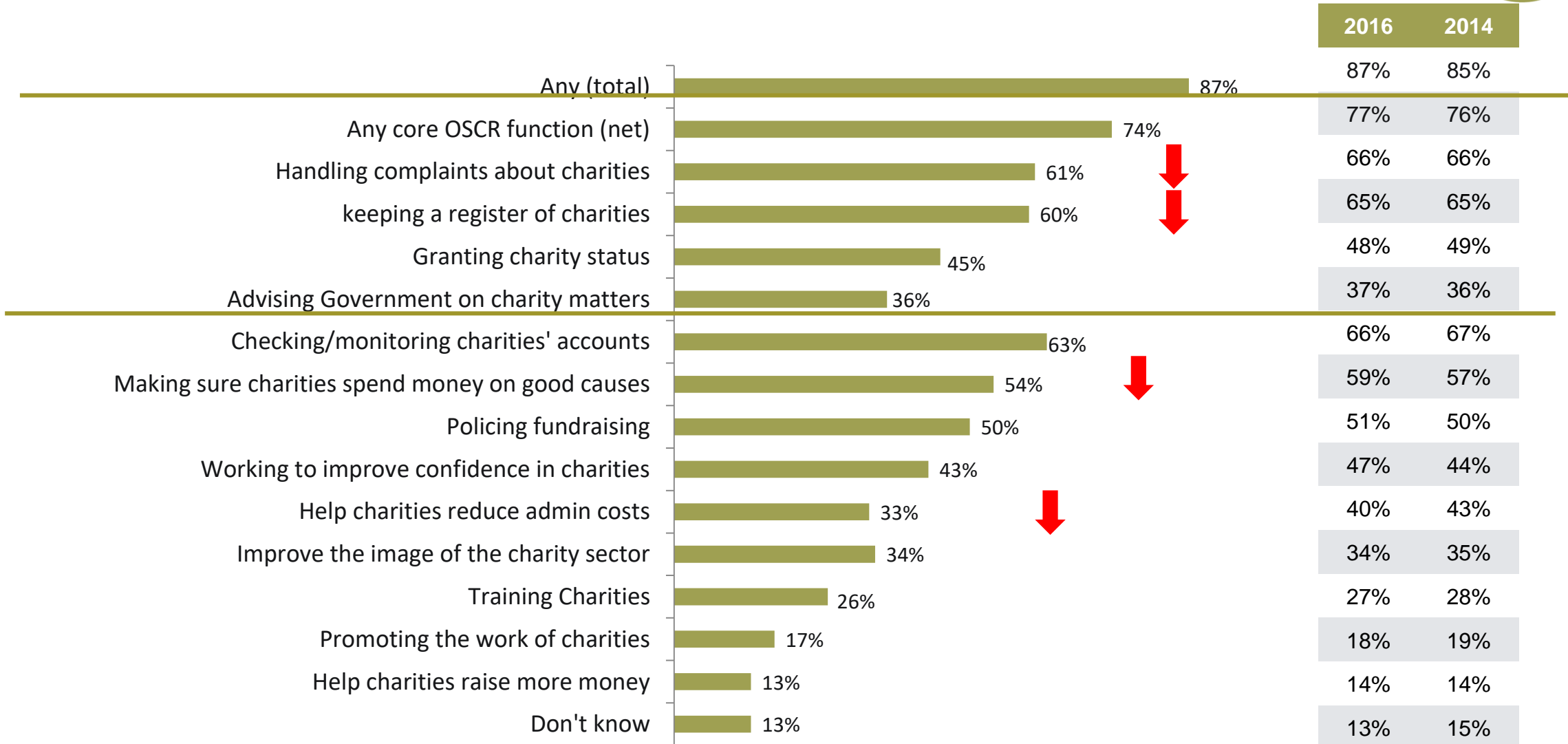
Awareness of OSCR's functions



Awareness of OSCR's functions were significantly higher than 2016's results. OSCR's subsidiary role of monitoring charities' accounts once again registered very high awareness, with just over six in ten choosing this. Awareness of at least one core function was significantly higher than in 2016.

Base (all respondents): 2014 – 1,000, 2016 - 1,010, 2018 - 1010

What OSCR's functions should be



Base (all respondents): 2014 – 1000, 2016 - 1,010, 2018 – 1010

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

OSCR's services– Qual



Website

- All were in favour of this and felt it should give a full list of all charities registered in Scotland. Some suggested indexing charities by the cause they supported.
 - *If someone had asked you for money for a particular charity, you would have a look at the list and see if they're on it.*

List of Trustees

- While this was met with enthusiasm the idea was not as strong as having a link to accounts or charities bearing the OSCR logo. Respondents felt it would be good to have mini CVs for trustees that explained their backgrounds.

Links to charities' accounts

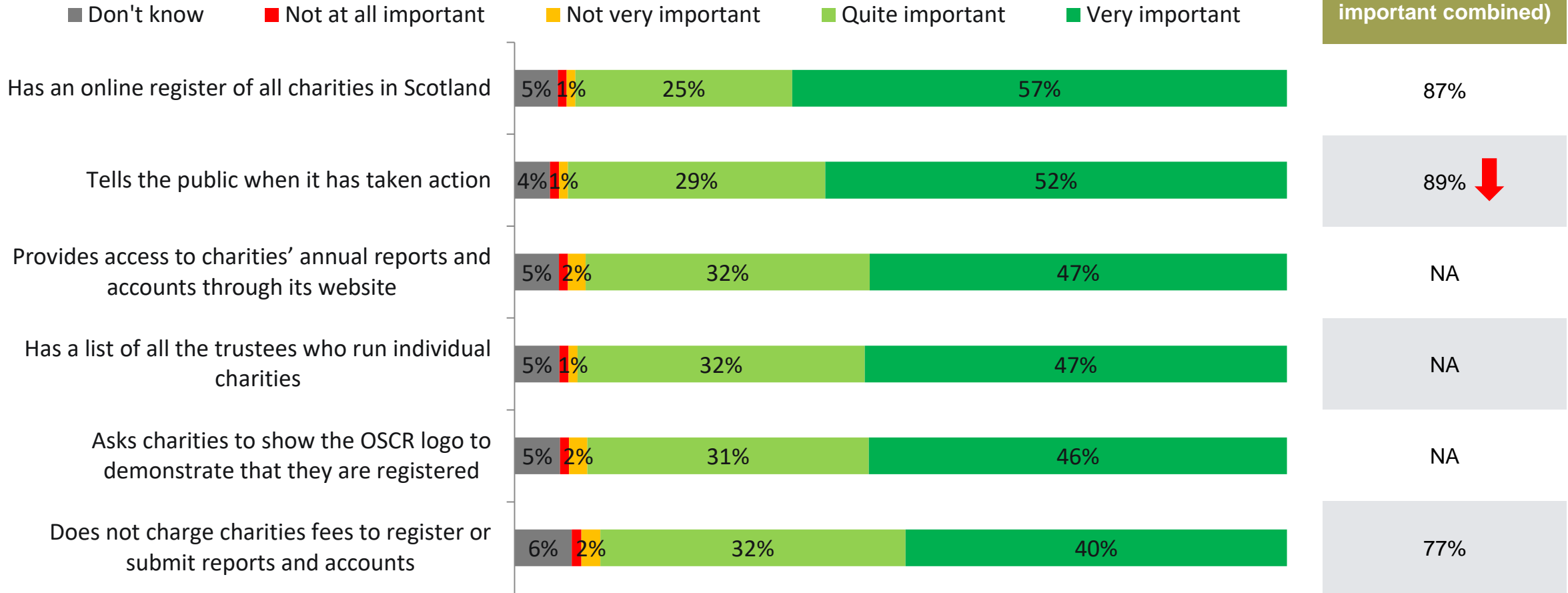
- This was met with widespread enthusiasm.
- People would be able to see exactly how they're operating, be able to see what percentage, is going to the cause ... you think twice about who you want to give your money to.

Displaying the OSCR logo

- Respondents were incredibly enthusiastic about his idea and spontaneously suggested that it should be made mandatory. They could not understand why a charity would not be keen to display the OSCR logo and claimed it would prompt them into being more likely to donate.
 - *If they were a bona fide charity, why wouldn't they want to let people know?*



Importance of OSCR's operations



Base (all respondents): 2016 - 1,010, 2018 - 1010

Q13c. Thinking about how the Scottish Charity Regulator (OSCR) should operate, how important or unimportant are the following issues?

Importance of operations – sub-groups



All of the listed operations were seen as important. For each one, over three quarters of respondents saw it as at least quite important, with a majority seeing each one as very important. An online register of all charities in Scotland was seen as very important by the largest proportion of respondents (57%).

Age

- The oldest respondents (65+) were more likely than all groups of younger respondents to feel that each of the mentioned functions is important, with the exception of 'Asks charities to show the OSCR logo', where the oldest respondents (mean score 4.40) were only significantly more likely than those aged under 25 (mean score 3.92) and 35-44 (4.18) to feel it was important.

Aware of OSCR

- For all six functions, those who were aware of OSCR were more likely than those who were not to think it was important.

Interest in charities

- For all six functions, those who were interested in charities were more likely than those who were not to think it was important.

Given to charity

- For all six functions, those who were interested in charities were more likely than those who were not to think it was important.

Importance of operations – sub-groups



Trust in charities

- Those with higher trust in charities (mean score 4.47) were more likely than those with lower trust (4.25) to think that having an online register of all charities in Scotland was important.

Importance of OSCR's operations – comparison to OSCR Stakeholder Survey

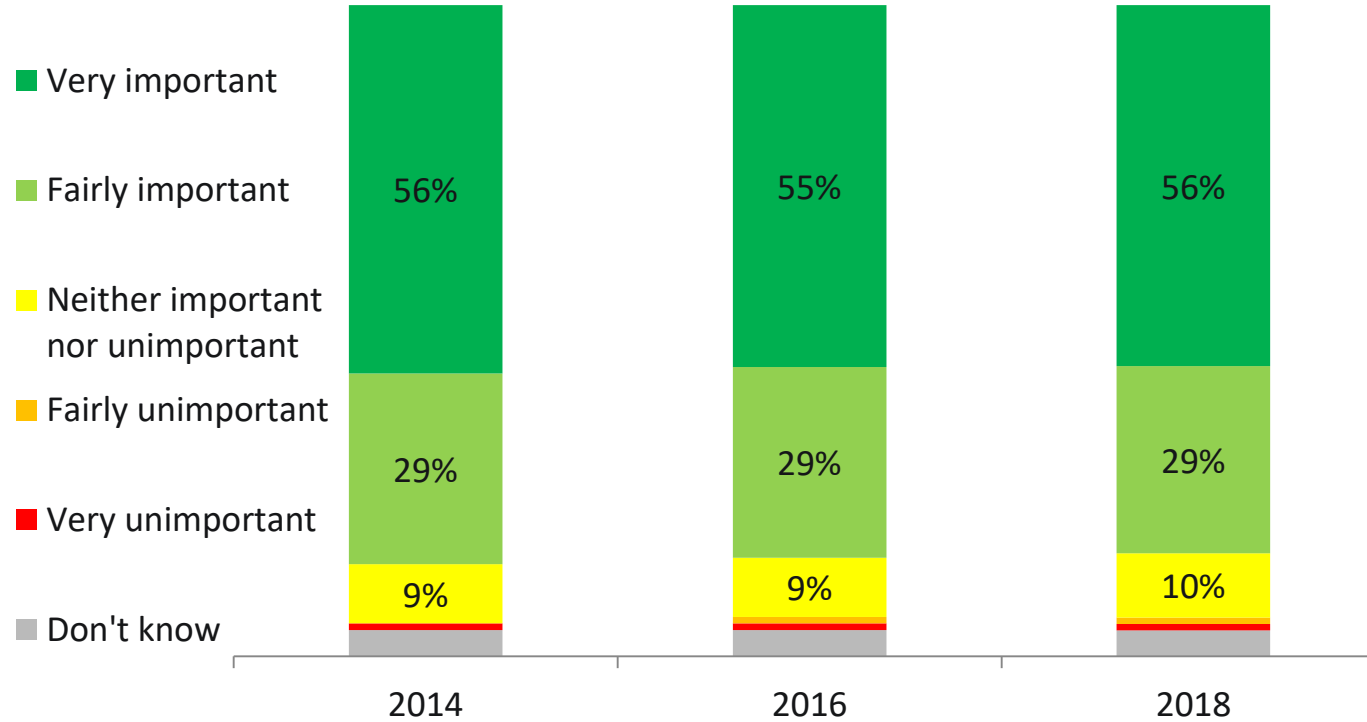


% 'very important'	General Population 2016 (B1,010)	Stakeholder Survey 2016 (B: 1,215)	General Population 2018 (B1,010)	Stakeholder Survey 2018 (B: 1,215)
Has a list of all trustees who run individual charities	-	-	47%	47%
Makes the public aware that it has taken action on misconduct (2016) / Tells the public it has taken action (2018)	60%	74%	52% ↓	59% ↓
Provides access to charities' annual reports and accounts through its website	-	-	47%	53%
Has a publicly accessible register of all charities (2016) / Has an online register of all charities (2018)	54%	74%	57%	79%
Asks charities to show the OSCR logo to demonstrate that they are registered by them	-	-	46%	26%
Does not charge charities fees to register or submit accounts	41%	79%	40%	79%

Arrows indicate significant changes between 2016 and 2018. **Circles** indicate where 2018 stakeholder figures are significantly higher (green) or lower (red) than general population figures

In 2016, both the public and OSCR's charity stakeholders selected 'taking action where there has been misconduct in a charity' as the most important of OSCR's roles. This has declined in 2018, but may be due to a change in question wording. In 2018 the most important across both audiences was 'an online register of all charities'. The public attached markedly more importance to the idea of displaying the OSCR logo than stakeholders.

Importance of OSCR's role



The importance of OSCR in the public's eyes remains clear, with 85% of respondents stating its role to be fairly or very important (84% in 2016).

Importance of OSCR's role – sub-groups



Awareness of OSCR

- Those who were aware of OSCR (93%) were more likely than those who were unaware (86%) to feel OSCR plays an important role.

Giving to charity

- Those who had given to charity in the last year (89%) were more likely than those who had not (62%) to feel that OSCR plays an important role.

Interest in charity

- The view that OSCR's role is important increased in line with interest in charities, from 78% of with low interest stating that OSCR plays an important role to 91% of those who rated their interest from 6-10.

Trust in charities

- Those with higher trust in charities (90%) were more likely than those with lower trust (80%) to feel that OSCR plays an important role.

Importance of OSCR's role – sub-groups



	% scoring Very Important 2016	% scoring Very Important 2018
Total (1,010)	55%	56%
Aware of OSCR (2016 – B:224; 2018 B:338)	66%	70%
Not aware of OSCR (2016 – B:786; 2018 – B:589)	52%	50%
Higher trust in charities (2018 – B:651)	-	61%
Low trust in charities (2018 – B:184)	-	42%
Given to charity in the last year (2016 – B:921; 2018 – B:922)	57%	58%
Not given to charity in the last year (2016 – B:89; 2018 – B:88)	37%	30%
Low interest in charities (2018 – B:212)	-	38%
Higher interest in charities (2018 – B:248)	-	63%

Awareness of OSCR, higher trust in charities and high interest in charities were indicators of perceptions of importance of OSCR's role.

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

Base : 2016 – 1010, 2018
1010

Sources of information about charity regulation (spontaneous)

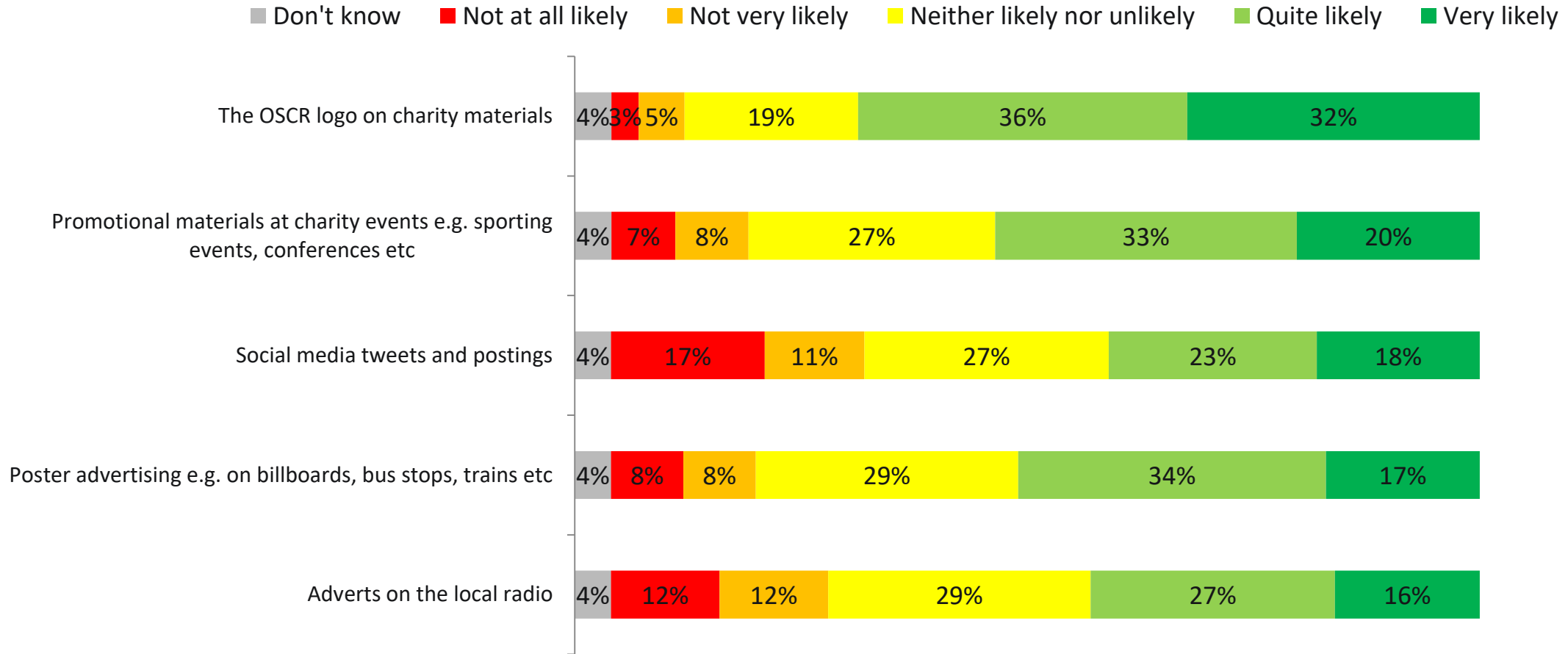


	2016 (B:1,010) %	2018 (B: 969) %
Internet/ Google Search / Other Website (unspecified)	46%	46%
OSCR	15%	16%
Local Council / Authority / MSP / Government	4%	6%
Other	11%	5% ↓
Citizens Advice	4%	4%
Trading standards	-	1%
Charities Commission	-	1%
Library	-	1%
Social Media	-	<1%
N/A / Don't Know	21%	24%

As with 2016 the Internet was the most often mentioned source of information when it comes to getting informational about charity regulation. OSCR was mentioned by 16% of the sample, a very slight increase on last wave.

Base (all respondents, unweighted)

OSCR's communications



Q16. OSCR is very keen for the public to know more about the good work it does. How likely would you be to pay attention to:

How else could OSCR inform you of what it does?



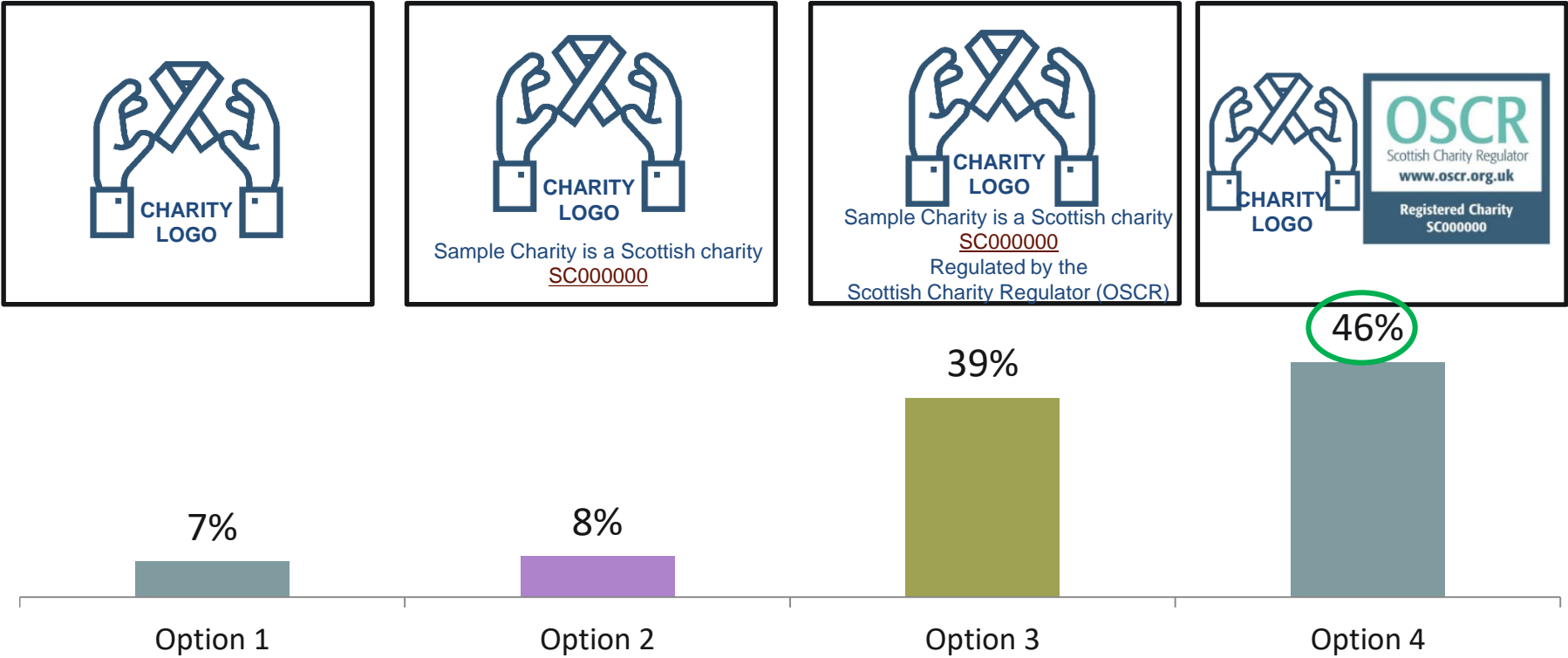
	%	Total
Emails	11%	103
Website	9%	86
Leaflet	8%	75
General media (unspecified)	5%	47
Social media	5%	45
TV Adverts	4%	36
Adverts (unspecified)	4%	42
Newsletter	4%	41

	%	Total
Magazines / Newspapers	4%	42
Letters / Direct mail	4%	33
Poster	2%	15
Roadshows/Local meetings/events	2%	19
Radio Adverts	1%	6
Word of mouth	1%	8
Text message	1%	6
Phone call	0%	4
N/A / Don't know	45%	424

Base (all respondents, unweighted)

Choice of Logo

Which would you be likely to donate to?



Results show that a significantly higher proportion of people would donate to a charity with OSCR’s logo included when compared to all other options.

Q15a - The following logo is for illustration only and doesn’t represent an actual charity. But if it did represent a charity you are interested in which would you be most likely to donate to if you saw the logo as follows:

Which logo design would you be most likely to donate to – Why?



	Option 1	Option 2	Option 3	Option 4
Looks clear / Simple / Easy to understand	38%	37%	16%	12%
More detail / Information (than others)	0%	12%	29%	13%
Looks the best	12%	8%	10%	8%
Stands out the most	2%	7%	3%	7%
Has charity/OSCR number	0%	10%	9%	4%
Has a Logo / the OSCR logo	0%	2%	9%	17%
Looks official	0%	0%	3%	7%
Shows the charity is regulated / registered	2%	4%	28%	25%
Looks professional	0%	1%	2%	4%
Trustworthy	0%	1%	5%	6%
N/A / Don't know	50%	28%	11%	11%

Why would you chose #4



It looks more professional as it has a logo.

It is easy to understand and more visual.

Clearer and provides all info including charity number.

Confidence that that charity is regulated and its accounts are checked.

Looks more professional and logo would need to be given to approved charities to use.

Visually appealing and quick to recognise representation.

Better explanation of what it stands for.

Looks the most trustworthy.

It shows more on it and that would give me trust.

Base (all who gave a response 991; unweighted)

OSCR's Communications– Qual



- All were keen to know more about OSCR and many suggestions were made of how to make people more aware. These included:
 - Getting charities to do the promotion for OSCR by carrying it logo with a strapline stating “an OSCR regulated charity”
 - Utilising social media
 - Creating a phone app
 - Local and Scottish radio
 - Attending local charity events like the Kilt Walk
 - Posters on public transport
 - Speak at public functions like the Rotary Club
- *There's a kind of mutual benefit there, because if they're saying, "We're part of OSCR," then we have more trust in the charity. But also for OSCR, they're raising their visibility. So I think it's definitely a win win.*
- *I think there should be OSCR's all over Glasgow, with nothing else. And everybody would be desperate to know, "Who is OSCR?"*



Current reporting of charities

	%	Total
Not enough information/transparency available about charities	14%	121
Reporting on charities is good	10%	87
Makes me think about which ones I donate to	9%	74
Oxfam scandal comments (-)	7%	62
Bad media/publicity (not mentioning Oxfam)	6%	51
General positive comments	6%	47
Has made me less likely to support charities	5%	44

	%	Total
General negative comments	5%	44
Made me lose confidence in charities	3%	25
Has not affected my behaviour	3%	25
Staff/execs are paid too much	3%	24
Should be easier to access public reports	2%	19
Admin spending too high	1%	9
Media reports are unfair	1%	12
Do not have a view on this	10%	87
N/A / Don't know	36%	302

Base (all respondents, unweighted)

Current reporting of charities



There does seem to be a lot of negative views of charities in the media at moment and makes me think twice before lending my support to them.

I don't think most charities are well administered, especially the international ones so I would never donate to them.

Top salaries are hidden and far too costly which puts me off donating

There is a distinct lack of transparency on how charities are run. The donating public inherently put a great deal of trust in them and it is disturbing when news filters out through the media about how badly and inefficiently some are run. This can cause a lot of damage across charity wide. When public trust is gone the donations will suffer. So charities need to embrace regulation and transparency for their own survival.

It is important that if a charity is proved to have done something wrong, it should be widely reported. It is then up to the public if they still want to support it. I personally would not

I think it is very disturbing and will put me off donating cash.

Base (all who gave a response 991; unweighted)

Conclusions



Summary

Engagement in charities

- The proportion of people who were extremely interested in charities increased significantly in 2018 compared to 2016 (29% vs. 25%) which led to a significant increase in the mean score for interest which was 5.95 out of a maximum score of 10. Those who have highest levels of interest tended to be in socio-economic group AB, female and younger age group (16 to 24).
- While the overall figure for *you, close friends or family* volunteering has dropped significantly it was reassuring to find that when asked about *you* giving time within the last year the figure remained stable this year at 21%. All other forms of donation (money, goods) remained stable compared with previous years.
- The amount of money donated remained consistent with 2016, with no statistically significant changes. Methods of donation have remained largely similar to 2016, although cash and text donations have declined.
- Support for charities supporting urgent needs/emergency appeals has dropped but local charities have seen an increase in support. However, when asked reasons for supporting a charity, *support in the wake of a disaster* remained stable.

Motivation and Trust

- The primary drivers for trust continued to be *personal connection, interest, the feeling that I should support and match in beliefs*. The qualitative element of research was in line with this as people described how they supported a charity that had given help to a loved one.
- When asked how much trust and confidence respondents had in charities overall, findings were consistent with last year. The average score of 6.14 out of 10 was given and we saw a significant increase in the number of people awarding 9 out of 10 for trust. However, when we asked *has your trust increased, decreased or stayed the same* we saw a significant increase in numbers of people who said it had decreased with 44% saying *a little* or *a lot* this year compared to 35% in 2016.
- Bad press coverage for some charities was ongoing during the survey. When asked to give a reason for a decrease in trust the most often mentioned reasons were negative press coverage and the Oxfam scandal.
- Local charities were given higher scores for trust (7.11 out of 10) than charities overall (6.14 out of 10).

Summary

Motivation and Trust

- As in previous years, trust was higher for local charities (49% saying *trust completely*) than Scottish (42% saying *trust completely*), UK (31% saying *trust completely*) and international charities (16% saying *trust completely*). A decrease in the trust mean score has been seen in relation to international charities with a mean score of 4.77 out of 10 this year compared to 5.32 in 2016. An increase in trust for Scottish charities was seen this year with a mean score of 6.8 compared to 6.60 in 2016.
- The notion that all charities should be regulated was met with very high levels of enthusiasm in the qualitative research. Very few respondents could name a place where they would go to report malpractice but all felt it would be good to have one.
- As with previous years findings, *knowing that money goes to the cause* was a primary driver of trust for Scottish charities. *Seeing evidence of achievements, knowing it is well run and fully regulated* were also popular strategies for increasing trust. There was little change in support for the ideas of *open access to accounts, having a website where I could check ethics* and having *a badge that verifies regulation*. *Knowing the details of trustees* was the least liked strategy for increasing trust.
- As in 2016, trust was found to be a critical element in encouraging increased donations from the general public. With 86% of respondents stating that knowing that the charity sector is fully regulated by an independent body contributed somewhat or greatly to their confidence in charities, OSCR continues to play a central role in supporting generous giving. 82% of respondents said trust was important when it comes to determining how much to donate. This figure is in line with 2016's findings (81%).

Summary

Concerns

- The existence of charity regulation has gained a higher level of importance this year with 74% saying they were fairly or very concerned compared to 63% in 2016. A *lack of information about how a charity is run* gained 68% of respondents saying very or fairly concerned and 69% were concerned about *knowing what the charity has achieved*. *Salaries for chief executives* remains an issue of concern for 73%, and 75% were concerned about donations spent on administration.
- When prompted, OSCR was the most common choice for expressing concerns about a charity, followed by the charity itself. This is similar to 2016.

Awareness of OSCR

- Awareness of OSCR has significantly increased from 22% in 2016 to 33% this year.
- The levels of knowledge about OSCR are in line with 2016.
- The single most common way of hearing about OSCR was through a charity. Overall, the profile of sources remained in line with 2016 findings.
- Overall awareness of OSCR's functions significantly increased this year with 83% being aware compared to 78% in 2016.
- Awareness of OSCR's core functions significantly increased this year from 70% in 2016 to 74% in 2018.
- Fewer people this year felt that OSCR should be responsible for: handling complaints, keeping a register, monitoring how charities spend donations, and helping them reduce admin costs.
- All of the listed operations were seen as important. For each one, over three quarters of respondents saw it as at least quite important, with a majority seeing each one as very important.
- An online register of all charities in Scotland was seen as very important by the largest proportion of respondents (57%).

Summary

OSCR's logo

- The importance of OSCR in the public's eyes remains clear, with 85% of respondents stating its role to be fairly or very important (84% in 2016).
- Over three quarters (77%) of respondents thought it was quite or very important that charities show the OSCR logo.
- Over half (58%) of respondents said they would pay attention to OSCR's logo on charity materials.
- Over half (53%) said they would pay attention to promotional materials at charity events.
- Nearly half (46%) would donate to a charity with OSCR's logo included, which is significantly higher when compared to all other options that did not include the OSCR logo.

Reporting on the behaviour of charities

- A large number claimed there was not enough transparency in the ways charities operate. 9% claimed it would make them think about who to donate to in the future and 7% of the sample mentioned Oxfam in a negative light.

Conclusions

- In general public attitudes towards charities in Scotland are positive, overall levels of trust have not decreased and levels of interest in charities has increased.
- However, findings indicate that poor press coverage on charities has led to an increase in those who said they trust charities less than they did 2 years ago.
- Trust in local charities remain high and is higher than for national UK or International charities.
- It is clear from the findings that trust is paramount when it comes to making donations and the existence of regulation is even more important to the public now than in the past.
- OSCR and its functions continue to be seen as important.
- Awareness of OSCR is growing but more could be done to promote a full understanding of its functions.
- It is clear from the findings that seeing the OSCR logo is important. The use of OSCR logo on charity websites and materials is highly likely to engender trust and lead to an increase in donations.

Progressive's services



Core qualitative techniques
A full range of qualitative research methods



Language and behaviour
Gets communications right in tone and content



Mobile ethnography
Captures real consumer behaviour in real time



The View on Scotland
Glasgow city centre viewing facility provides comfort convenience and first class facilities



Brand mapping
Discovers core brand values, benchmarks and maps progress



Core quantitative techniques
A full range of quantitative research methods



Progressive Scottish Opinion
Offers fast and inexpensive access to over 1,000 Scottish consumers



Progressive Business Panel
Takes soundings from companies across Scotland quickly and efficiently



Field and tab
Bespoke stand alone Field and Tab services for qualitative and quantitative methods



Data services
We have a wide range of analytical services

Thank you



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Technical appendix

qualitative: method and sampling



- **Method:**
- The data was collected by focus groups
- The target group for this research study was charity donors amongst the general population in Scotland
- In total, four group discussions were undertaken. The groups comprised 26 respondents, 7 each in the Glasgow Groups of which there were two, and 6 in the Aberdeen groups of which there were two.
- The Glasgow groups were viewed by the client.
- Fieldwork was undertaken between 24th and 31st January 2018
- Respondents were recruited face to face by Progressive's team of skilled qualitative recruiters. These recruiters worked to predetermined quota controls to ensure that the final sample reflected the requirements of the project. All respondents were screened to ensure that they had not participated in a group discussion or depth interview relating to a similar subject in the last 6 months prior to recruitment.
- An incentive of £35 was used to compensate respondents for their time and to encourage a positive response.
- In total, two moderators were involved in the fieldwork for this project.
- Each recruiter's work is validated as per the requirements of the international standard ISO 20252. Therefore, all respondents were subject to validation, either between recruitment and the date of the group discussion, or on the day of the group discussion. Validation involved respondents completing a short questionnaire asking pertinent profiling questions, and checking that they have not participated in similar research in the past 6 months.
- It should be noted that, due to the small sample sizes involved and the methods of respondent selection, qualitative research findings do not provide statistically robust data. This type of research does, however, facilitate valid and extremely valuable consumer insight and understanding.
- All research projects undertaken by Progressive comply fully with the requirements of ISO 20252.

Technical appendix

quantitative: method and sampling



Method:

- The data was collected online
- The target group for this research study was members of the Scottish public
- The target sample size was 1,000, with 1,010 interviews completed
- The sample was weighted to reflect Scottish Census 2011 statistics in regard to age, gender and SEG
- Fieldwork was undertaken between 14th February and 7th March 2018
- The sample frame included all individuals in Scotland who are enrolled on Research Now's online panel. Research Now, also complies with the rules of the MRS and ESOMAR. All research projects undertaken by Progressive comply fully with the requirements of ISO 20252.
- Quota controls were used to guide sample selection for this study. This means that we cannot provide statistically precise margins of error or significance testing as the sampling type is non-probability. The margins of error outlined below should therefore be treated as indicative, based on an equivalent probability sample.

Data Processing and Analysis:

- Margins of error (all calculated at the 95% confidence level (market research industry standard)):
 - sample of 1,010 provides a dataset with a margin of error of between +/- 0.61% and +/- 3.08%
- Our data processing department undertakes a number of quality checks on the data to ensure its validity and integrity. These checks include:
 - All responses are checked manually for completeness and sense. Any errors or omissions detected at this stage are referred back to the field department, who are required to re-contact respondents to check and, if necessary, correct the data.
 - A computer edit of the data is carried out prior to analysis, involving both range and inter-field checks. Any further inconsistencies identified at this stage are investigated by reference back to the raw data on the questionnaire.
 - Our analysis package is used and a programme set up with the aim of providing the client with useable and comprehensive data. Cross breaks to be imposed on the data are discussed with the client in order to ensure that all informational needs are being met.
 - Where "other" type questions are used, the responses to these are checked against the parent question for possible up-coding.
- All data is stored directly on Progressive's secure server