



The public view: trust, confidence and support of charities in Scotland

SCVO Briefing, February 2018

About this briefing

This briefing presents and analyses the findings from a survey of the general public in Scotland on trust, confidence and support of charities. The key findings are based on a telephone survey of 1,088 respondents (adults aged 16+) commissioned by SCVO and conducted by Ipsos MORI during 27th Nov and 5th Dec 2017. The 2017 results are compared against the 2015 SCVO/Ipsos MORI poll, and with other Scottish and UK surveys by OSCR and the Charity Commission.

Key Findings

- General trust in charities has dropped.**
In 2017, 73% of Scottish respondents agreed or strongly agreed that most charities are trustworthy and act in the public interest, a nine percentage point drop from 2015 (82%). Further, 57% of Scottish respondents gave charities trust scores of 6/10 and above in 2017, down ten percentage points from 67% in 2015.
- However, personal trust remains high**
Personal connections with charities continues to be linked with very high levels of trust and confidence. More than three-quarters of respondents (77%) gave the charities they are familiar with scores of 6/10 and above - no significant change from 2015 (78%). A fifth gave the charities they engage with a top score of 10 out of 10.
- Scotland's trust and confidence in charities continues to be higher than the rest of the UK... but the gap is narrowing**
73% of Scottish respondents agree that charities are trustworthy and act in the public interest, compared with only 61% south of the border. However, the gap between Scotland and UK charity trust ratings is narrowing.
- More people in Scotland are saying their trust in charities has decreased**
A third (32%) of Scottish respondents said their trust in charities had decreased in the last year, up from 28% in 2015.
- Negative media stories continue to be a major factor in the loss of trust**
Over a third (38%) of respondents felt that media stories have had a negative impact on their trust. Younger and older people are more likely to report that recent media stories made them lose confidence in charities.
- Slight rise in number of people reporting that personal experiences made them lose confidence in charities.**

21% of respondents said that recent personal experiences had made them lose confidence, up from 15% in 2015. Younger and older people are also more likely to report that personal experiences have made them lose confidence in charities.

- **Despite these negative influences and the drop in trust, charities remain amongst the most trusted institutions in the UK.**
Charities are just behind doctors and police in terms of trust, well above others such as the media, politicians, businesses, banks, even ahead of the man/women in the street.
- **8 out of 10 Scottish households use charity services.**
Personal connections remain very high. 82% of Scottish households used a charity in 2017, with 74% taking part in a charity-run social or cultural activity and 43% helped in some way by a charity.
- **77% of Scottish respondents believe that charities play an important role in their communities.**

Key facts

- 73% of people agree that charities are trustworthy and act in the public interest
- 77% of people believe that charities play an important role in their communities
- 57% of the public gave charities scores of 6/10 or above for trust and confidence.
- 77% who have personally used a charity score them 6/10 or above for trust.
- Public trust and confidence in charities in general has dropped from 67% to 57% (people giving a trust score of 6/10 and above).
- Trust and confidence in charities where there is a personal connection has remained stable – 77% in 2017, against 78% in 2015.
- There has been a drop in the percentage of people agreeing or strongly agreeing that most charities are trustworthy and act in the public interest, from 82% to 73%.
- 38% agree that recent stories in the media have made them lose confidence in charities
- 82% of Scottish households used a charity services last year...
 - Half (49%) used a community centre, village hall or church hall last year.
 - More than half (54%) visited an attraction such as a museum, nature reserve or historic property run by a charity.
 - A quarter (26%) attended a charity-run sports, arts, music or youth club.
 - Two fifths (40%) accessed information or advice from a charity.

The public view: trust, confidence and support of charities in Scotland

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1. Context: Scotland's charities

Scotland has more charities per head of population than any other UK region, with charities playing a key role in all communities, but particularly vital in our more remote rural areas and islands. The high number of charities is reflected in the high levels of personal engagement people have with charities, with 8 in every 10 households using some form of service or activity provided by a charity.

Half of all households visited a charity-run cultural attraction or outdoor space last year, half used a local community or church hall, 2 in 5 accessed information from a charity, and 1 in 5 attended a charity run club, and 1 in 10 used a charity care service.

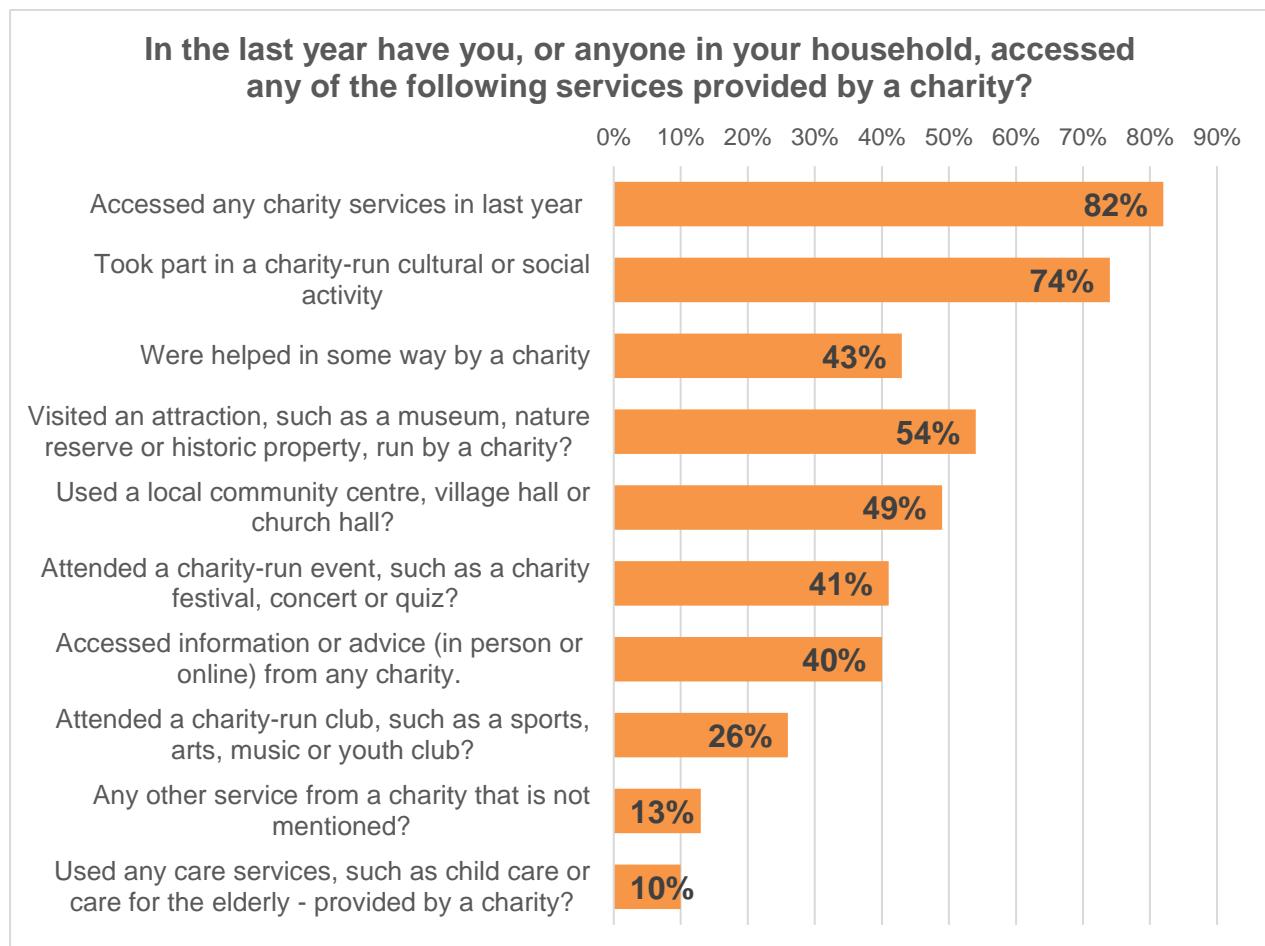


Figure 1 Engagement with charity services (note: top three bars are based on combined respondent data)

2. High trust levels linked with personal connections

When asked to score their trust and confidence in charities, the majority of respondents gave medium to high scores with a mean score of 5.9/10 in 2017. 57% gave scores of 6/10 and higher.

When asked about the charities whose services they have used, this figure rose by 20 percentage points. 77% of respondents gave trust scores of 6/10 and above for trust. The mean score rose significantly, to 7.51/10.

As figure 2 below shows, the number of people giving top scores of 9 and 10 jumps from 10% to 40%.

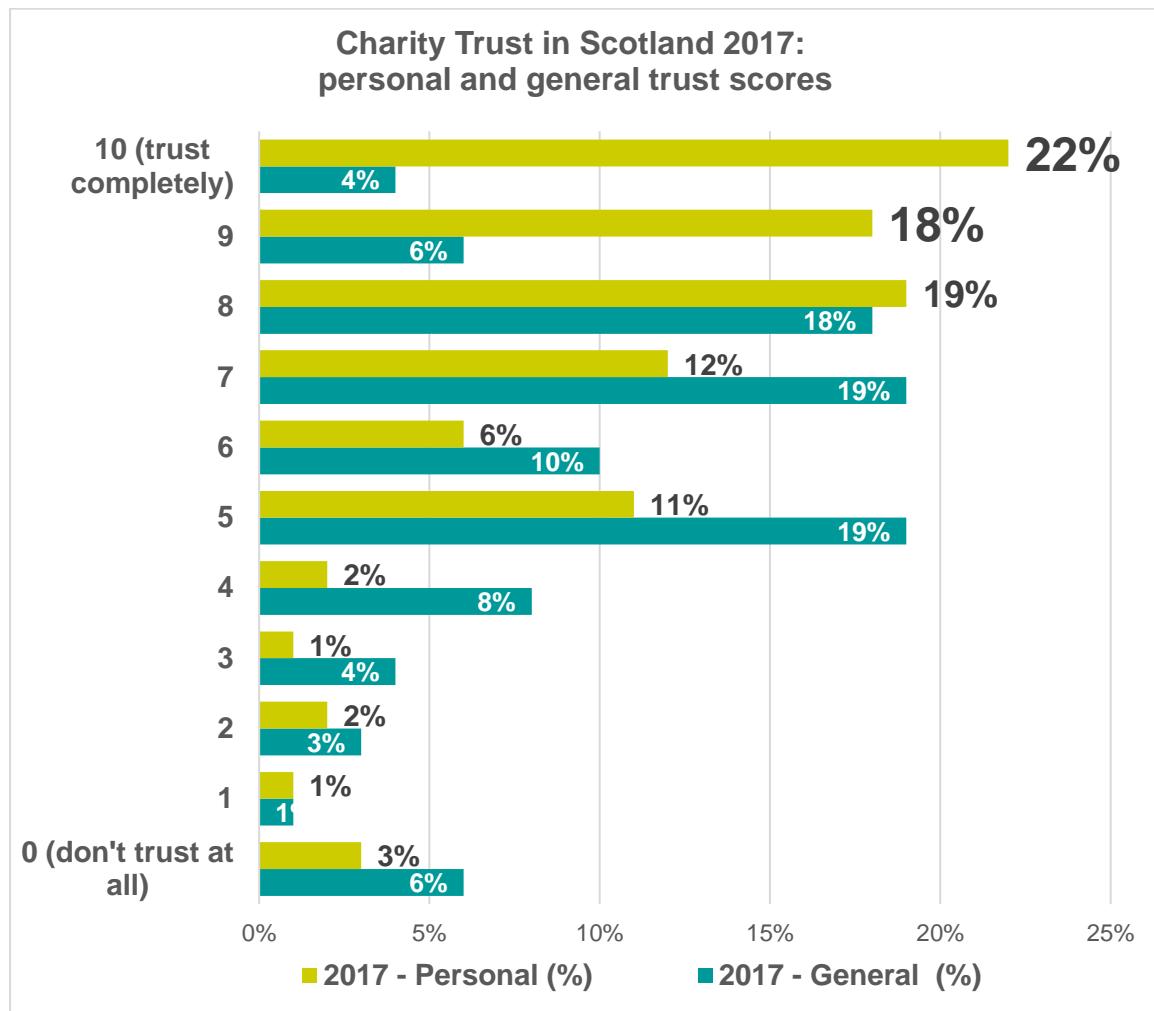


Figure 2 Comparison of general trust in charities against trust in charities that respondent has used/supported

3. Majority of public trusts charities and believe they are important

72% of respondents agree that charities are important to them and their communities, with 42% strongly agreeing – see figure 3 below.

The majority of respondents (73%) also believe that most charities are trustworthy and act in the public interest. However, despite this figure being very high, it does show a drop from 2015, when 82% agreed with this statement – see figure 3 below.

This is mainly due to a drop in trust at the highest end, with an 8 percentage point drop in those 'strongly agreeing' that charities are trustworthy. (2015: 34%, 2017: 26%).

Factors influencing this drop in trust are discussed [section 5](#) below.

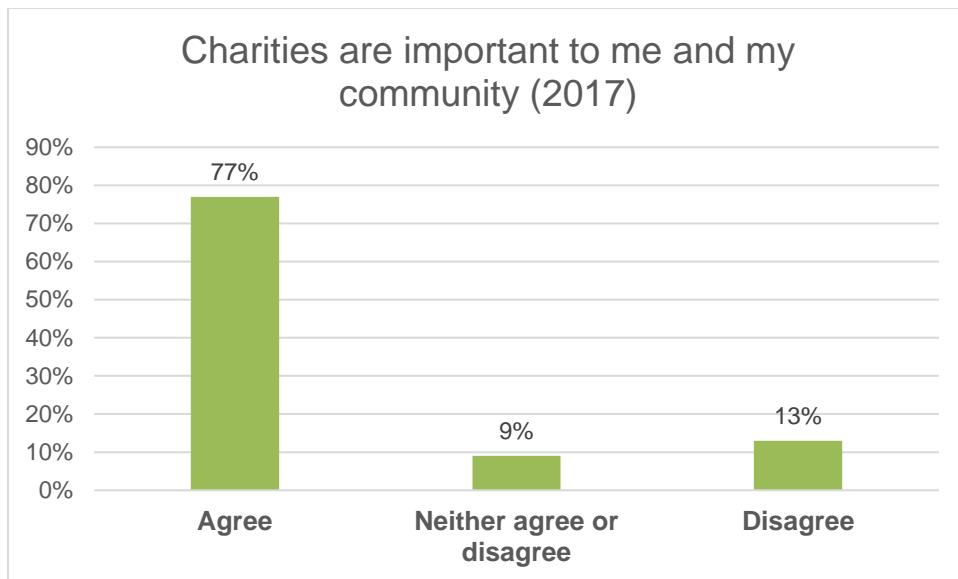


Figure 3 Percentage agreeing/disagreeing that charities are important to them and their communities

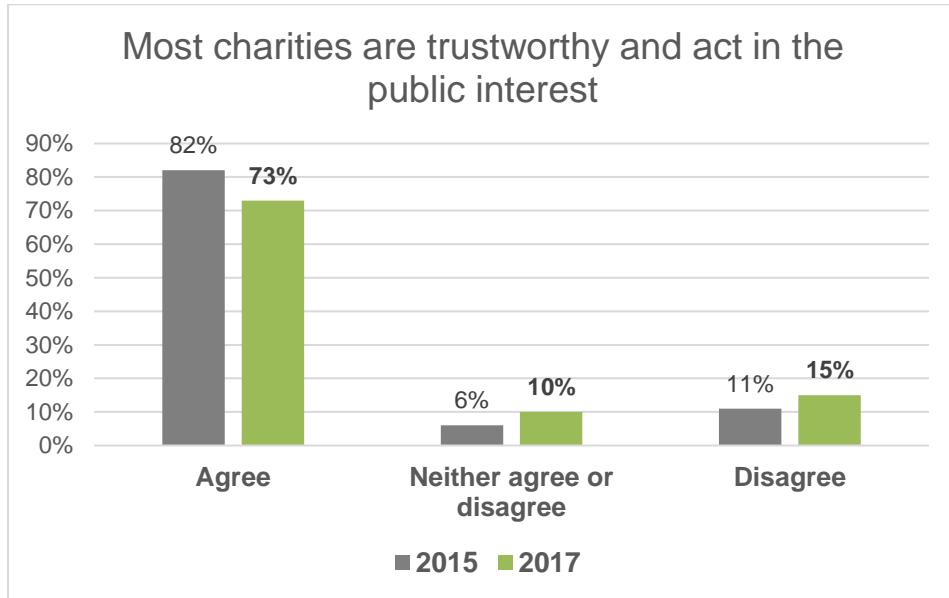


Figure 4 Percentage agreeing/disagreeing that charities are trustworthy and act in the public interest

4. Trust showing some downward trends

Both mean scores and the percentage of people giving charities high scores for trust have shown some downward trends – see figures 5 and 6 below. While OSCR figures to date appear to be relatively stable, both the 2016 Charity Commission and 2017 SCVO figures show a drop. Both the Charity Commission and OSCR are currently carrying out their 2018 public trust surveys, and we await the results with great interest.

Scotland continues to have a higher mean score for charity trust (5.9 versus 5.7 out of 10) – see figure 5. However, as figure 6 shows, the gap is closing, with 57% of Scottish respondents giving scores of 6/10+, compared with 56% south of the border, suggesting Scottish charities cannot be complacent.

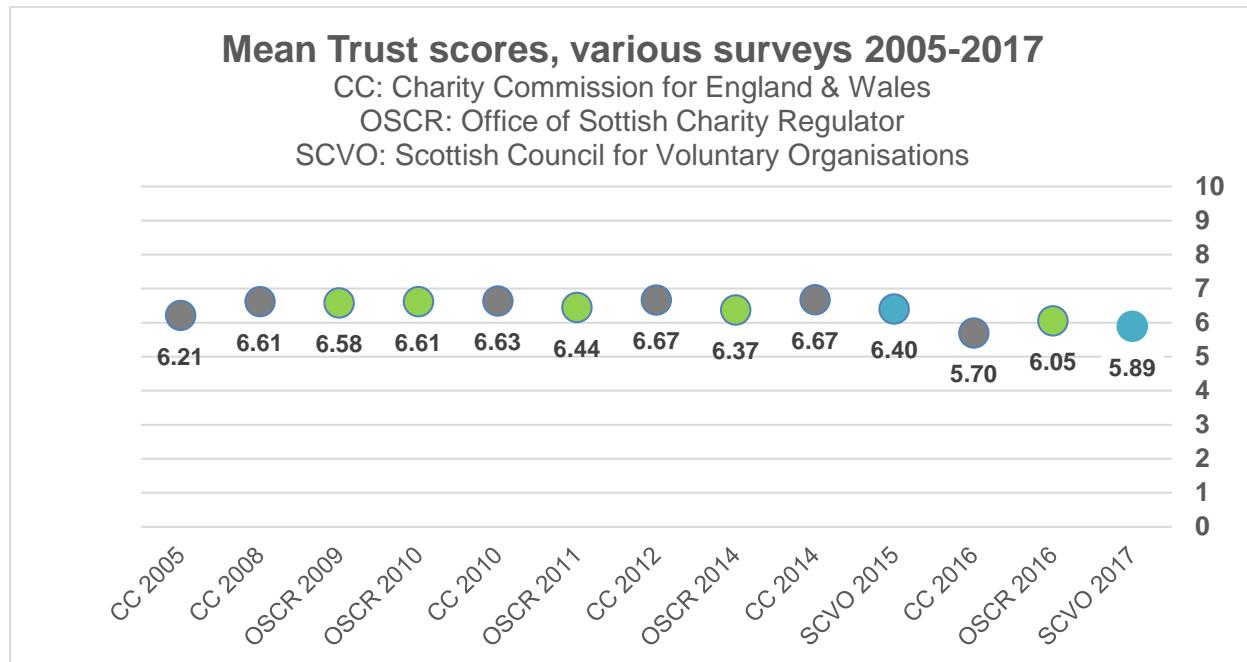


Figure 5 Mean charity trust scores, 2005-2017

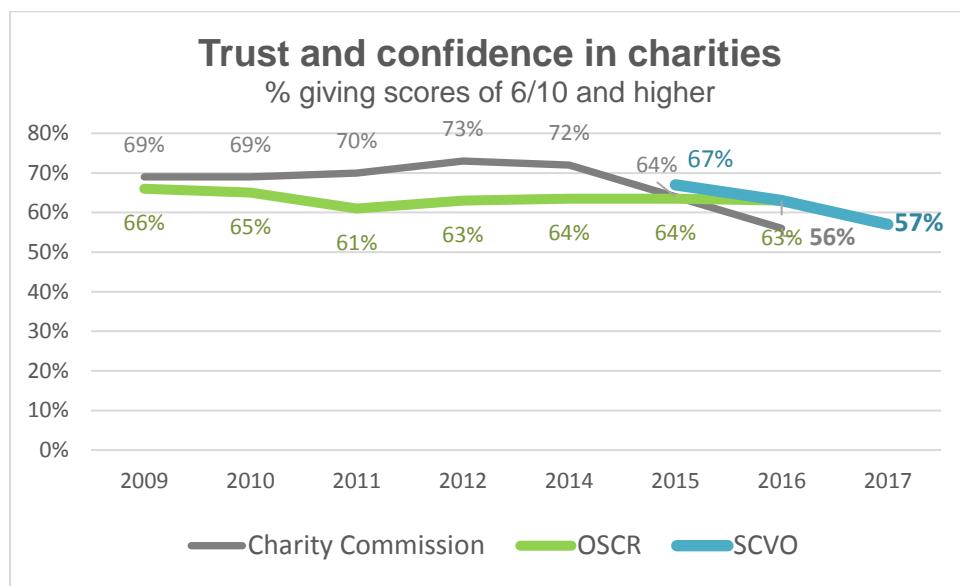


Figure 6 Trust in charities by % giving high scores, Scotland and UK

More than half the respondents (55%) to the SCVO survey said there had been no change in their trust in charities over the previous year, and 12% of respondents said that their trust had increased. However, there is some cause for concern.

From figure 7 below we can see that there has been a slight shift towards decreasing trust, with 32% saying their trust had decreased in 2017, up from 28% in 2015.

While the change from 2015 to 2017 is not statistically significant, the trend towards decreasing trust has been notable over recent years, although as Figure 8 suggests, things may now be levelling out.

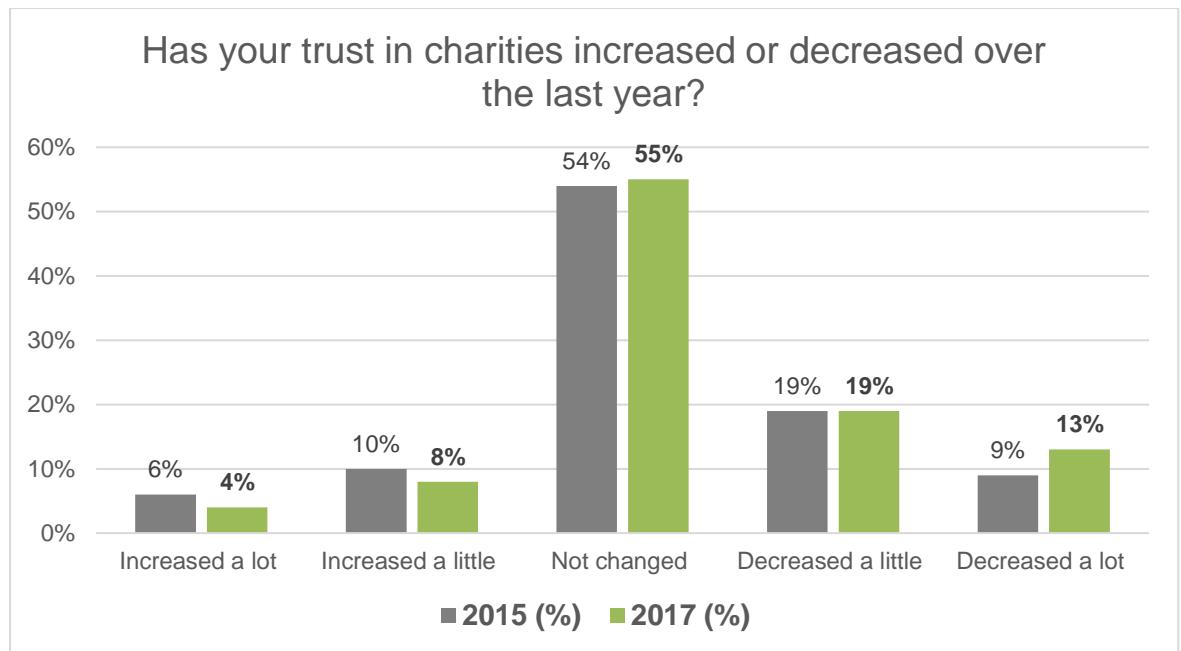


Figure 7 Increasing / decreasing trust in charities

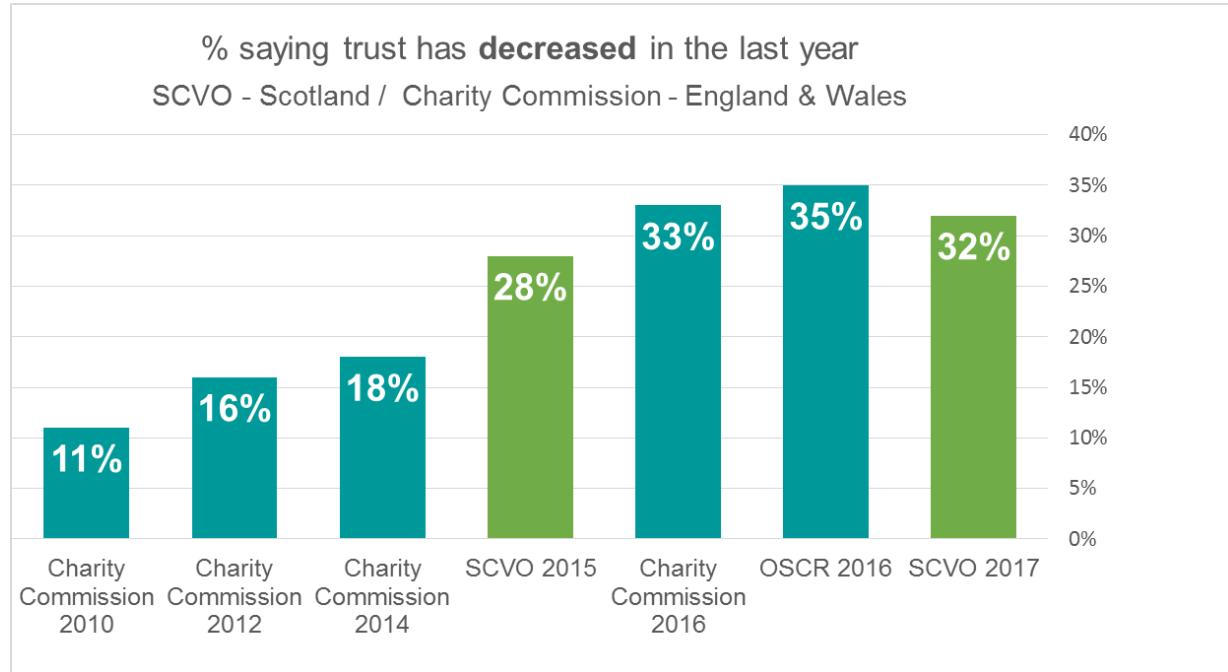


Figure 8 Percentage saying trust has decreased 2010-2017

5. Why are trust levels changing?

While there may be a number of factors behind changes in trust, the two key areas that the survey asked about are media and personal experiences.

Media stories

Almost 2 in every 5 respondents (38%) said that recent stories in the media have made them lose confidence in charities, highlighting the important role of the media in shaping public attitudes. While the good news is that this figure has dropped from 41% in 2015 we did also see a *decrease* in the numbers disagreeing that the media had made them

lose confidence, with more people unsure and sitting on the fence – see figure 9. (Note that neither the increases nor decreases are large enough to be statistically significant on the public overall.)

We are also seeing the influence of the media impacting differently on different age groups, with higher proportions of both older people and younger people saying the media had a negative influence on them.

40% of young people agreed that recent stories in the media had made them lose trust, (up from only 27% in 2015) as did almost half (45%) of older respondents.

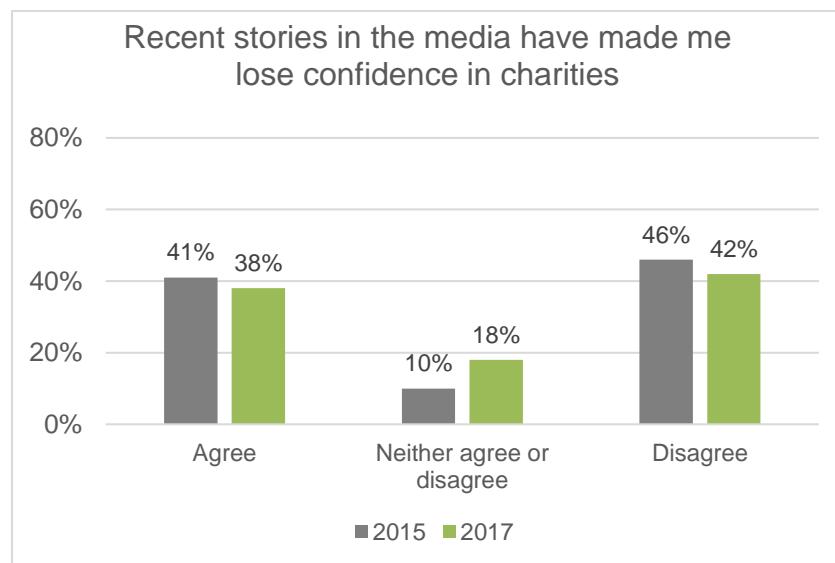


Figure 9 Percentage saying media stories have negatively influenced trust

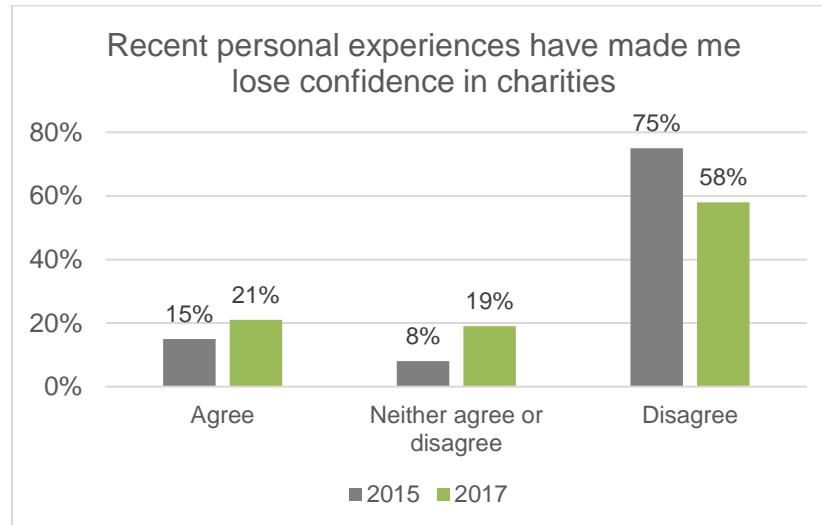


Figure 10 Percentage saying personal experiences have negatively influenced trust

Personal experiences

21% of respondents reported having personal experiences which made them lose confidence in charities. Negative personal experiences appear to continue to affect far fewer people than negative media stories.

However, charities should be concerned not only that the number agreeing has risen slightly from 15% in 2015, but that once again there has been a drop in those disagreeing that personal experiences have influenced them negatively, with a rise in those sitting in the middle or responding as 'don't knows' – see figure 10. In other words, the number of those strongly disagreeing that their personal experiences have made them lose trust has dropped.

The largest increases in the numbers reporting negative personal experiences influencing their trust were both the younger and older respondent groups. For young people the figure rose from 8% in 2015 to 21% in 2017. For older people it rose from 20% to 28% in 2017.

The fact that negative personal experiences have increased across all age groups should ring alarm bells with the sector, as we cannot simply blame an unsupportive media environment.

6. Scotland compared to UK and other UK regions

Comparing the results of the SCVO poll with the Charity Commission's poll for *Public trust and confidence in charities 2016*, we can see that in most areas relating to trust Scotland scores better than England and Wales. However, the changing, decreasing trust patterns that we see in Scotland are reflected at a UK level.

The proportion of people in Scotland who agree that most charities are trustworthy and act in the public interest has dropped nine percentage points from 82% to 73%. While this is a significant drop, Scotland still rates charities as more trustworthy than those south of the border, where in 2016 only 61% agreed that charities are trustworthy, a drop of ten percentage points from 2014 (see below).

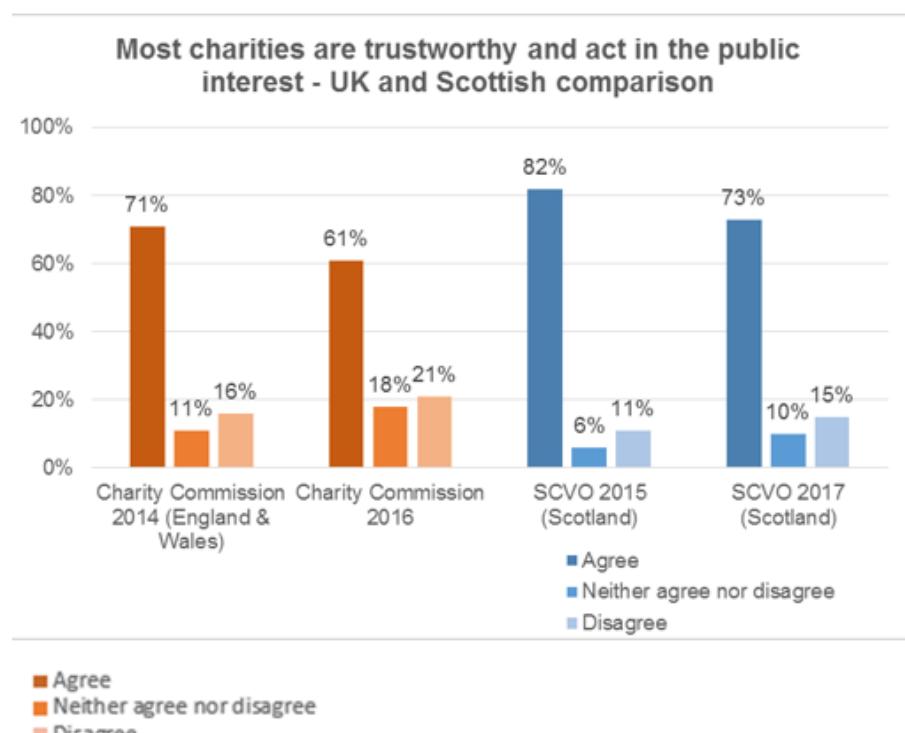


Figure 11 Percentage agreeing/disagreeing that charities are trustworthy and act in the public interest

UK Regions

From the Charity Commission regional data, we can also see that Scotland consistently scores above all other UK regions for trust and confidence – see tables 1 and 2 below.

In Table 3 we can see that while Scotland has the largest percentage of **increase** in trust of any region (12%), we do now sit at the midpoint in terms of the decrease in trust (32%), with regions such as East Anglia and the North West all showing smaller decreases in trust closer to our 2015 figure of 28%.

Table 4 gives an indication of how much respondents across the UK say they value charities. While the Scottish and UK regional figures are not directly comparable due to slightly different wording of the question, the table does highlight an important and interesting feature. Low trust is not, as you might reasonably expect, simply linked with regions that tend to not believe that charities are important – quite the opposite in some cases. For example, looking at Table 2 we see that East and West Midlands give low scores for trustworthiness, but 72% and 74% of people in the Midlands believe that charities play an important role in society (table 4). Likewise, Wales tops the other UK regions in terms of how important they see the role of charities, but their mean trust score is near the bottom of Table 1.

There appears to be additional complexity interacting with trust, in that many people who believe charities are important also want to see those charities operating at the top of their game and held to highest account re transparency. Scotland appears to go against this trend by scoring top for trust AND importance of charities.

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?	Mean trust score
Scotland	5.90
East Anglia	5.89
South East	5.85
North	5.79
Yorks & Humber	5.78
Greater London	5.77
East Midlands	5.73
ENGLAND & WALES OVERALL	5.70
Wales	5.65
South West	5.63
North West	5.52
West Midlands	5.37

Table 1 Trust and confidence mean scores, by UK region

Most charities are trustworthy and act in the public interest (sorted by % Agree)	Agree	Neither agree or disagree	Disagree	Mean
Scotland	74%	10%	16%	0.80

North	70%	13%	18%	0.68
Yorks & Humber	68%	16%	17%	0.61
North West	66%	15%	19%	0.57
Wales	65%	12%	23%	0.58
Greater London	65%	16%	19%	0.53
ENGLAND & WALES OVERALL	61%	18%	21%	0.48
South West	60%	17%	23%	0.43
South East	59%	22%	19%	0.45
East Anglia	58%	23%	18%	0.44
East Midlands	58%	22%	20%	0.38
West Midlands	49%	19%	32%	0.19

Table 2 Percentages agreeing/disagreeing that most charities are trustworthy, by UK region (Mean score calculation based on: Strongly agree = +2, agree = +1, disagree = -1, strongly disagree = -2)

Has your trust in charities increased or decreased over the last year? (UK: last two years) Sorted by 'Increased'	Increased	Stayed the same	Decreased
Scotland	12%	55%	32%
Greater London	9%	60%	31%
South East	8%	54%	39%
East Anglia	8%	64%	28%
North	7%	61%	31%
ENGLAND & WALES OVERALL	6%	61%	33%
West Midlands	6%	61%	34%
East Midlands	5%	60%	35%
Wales	5%	64%	31%
North West	5%	65%	30%
Yorks & Humber	4%	60%	35%
South West	3%	60%	36%

Table 3 Percentages reporting increase/decrease in trust, by UK region

Scotland: charities are important to me and my community	Strongly agree/agree
UK: how important a role do you think charities play in society today?	Essential/very important
Scotland	77%
Wales	75%
West Midlands	74%
East Midlands	72%
Yorks & Humber	71%
South East	71%
ENGLAND & WALES OVERALL	68%
North West	68%
East Anglia	67%
South West	66%
Greater London	64%
North	59%

Table 4 Percentages agreeing that charities are important, by UK region (note that the questions asked by SCVO and Charity Commission differ slightly and so are not directly comparable)

7. Charities compared to other sectors

Despite trust in charities being slightly down on previous years, charities both in Scotland and the UK remain amongst the most trusted sectors in society. The Charity Commission's 2016 research into public trust found charities to be second only to Doctors and the Police, and well ahead of Newspapers, MPs, Private companies, Banks, and even the ordinary man/woman in the street (figure 15).

However, from nfpSynergy's 2017 research (which while welcome, does seem to buck other research finding trends by showing trust in charities rising steadily) we can see that charities do appear to be particularly vulnerable to volatility in public attitudes, with a notable dip in 2015, around the time that there were a number of stories highlighting shortcomings in charity fundraising practices.

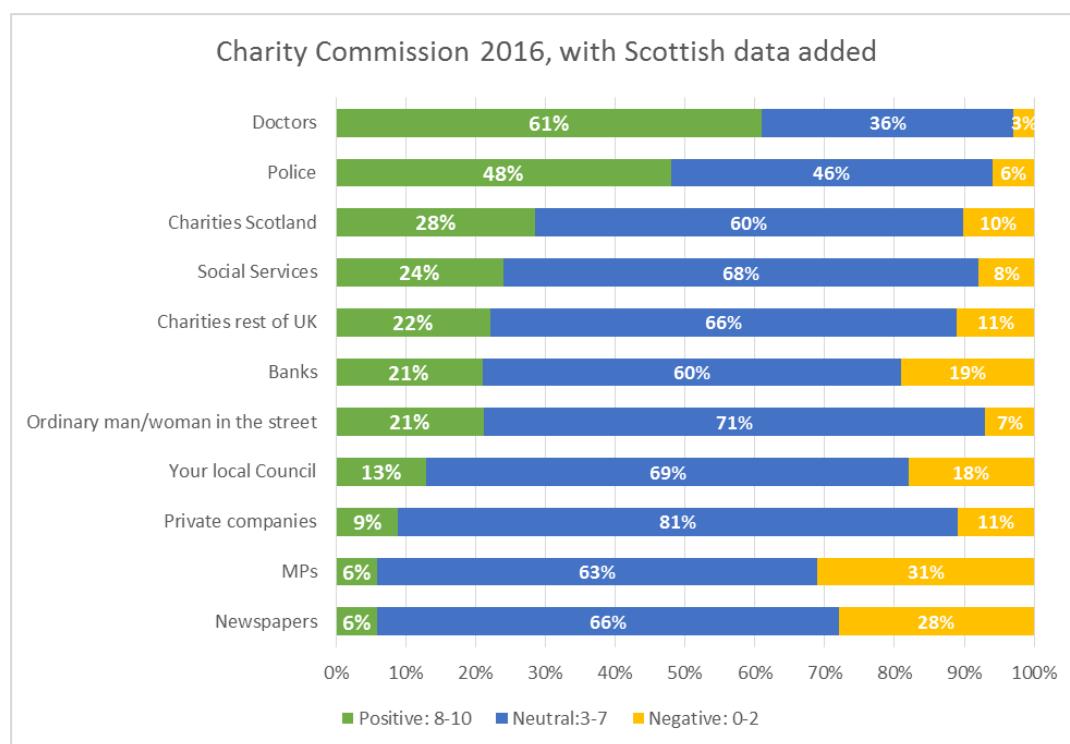


Figure 12 Trust in different types of organisations and professions, Charity Commission 2016 (see appendix)

Trend data

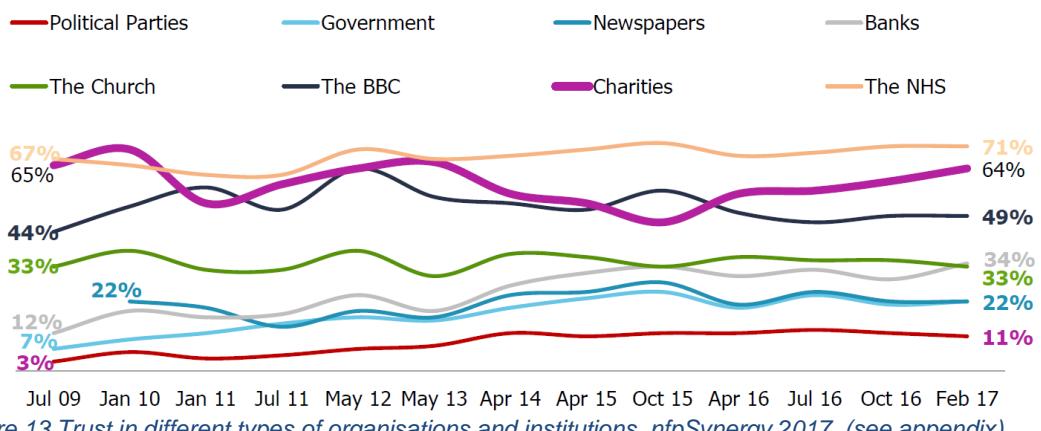


Figure 13 Trust in different types of organisations and institutions, nfpSynergy 2017 (see appendix)

8. Conclusion

Trust in charities remains high in Scotland, but there are some red lights warning us as a sector not to take that trust for granted. Both personal experiences as well as negative media stories have led to people losing trust. As a sector we need to address that, and earn people's trust and respect through good governance, transparency and communication.

9. Appendix - Data tables

Q1 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?	2015		2017	
	(%)	(%)	(%)	(%)
Base: 2015 = 1,028 2017 = 1,088				
0 (don't trust at all)	3	6		
1	0	1		
2	3	3		
3	3	4		
4	4	8		
5	18	19		
6	12	10		
7	23	19		
8	21	18		
9	5	6		
10 (trust completely)	6	4		
Don't know	2	1		
Mean	6.39	5.90		

Q2 In the last year have you or anyone in your household or close family accessed any of the following services provided by a charity?	Yes	No	Don't know
Base: 1,088	(%)	(%)	(%)
Visited an attraction, such as a museum, nature reserve or historic property, run by a charity?	54	44	2
Attended a charity-run club, such as a sports, arts, music or youth club?	26	73	1
Used a local community centre, village hall or church hall?	49	51	0
Attended a charity-run event, such as a charity festival, concert or quiz?	41	58	1
Accessed information or advice (in person or online) from any charity. (For example, Citizens Advice Scotland or Macmillan Cancer Support)	40	59	1
Used any care services, such as child care or care for the elderly - provided by a charity?	10	90	1
Any other service from a charity that is not mentioned?	13	86	1

Q3 And thinking about the charities whose services you have used, on a scale of 0 to 10, how much trust and confidence do you have in them, where 10 means you trust them completely and 0 that you don't trust them at all?	2015	2017
Base: 2015 = 1,028 2017 = 1,088	(%)	(%)
0 (don't trust at all)	2	3
1	0	1
2	1	2
3	1	1
4	1	2
5	11	11
6	4	6
7	15	12
8	22	19
9	14	18
10 (trust completely)	23	22
Don't know	5	4
refused	0	1
Mean	7.68	7.51

Q4 Has your trust in charities increased or decreased over the last year? Would you say it has...?	2015	2017
Base: 1,028	(%)	(%)
Increased a lot	6	4
Increased a little	10	8

Not changed	54	55
Decreased a little	19	19
Decreased a lot	9	13
Don't know/ remember	1	1

Q5 To what extent do you agree or disagree with the following statements?	Strongly agree	Tend to agree	Neither agree nor disagree	Tend to disagree	Strongly disagree	Don't know
<i>Base: 1,088</i>	(%)	(%)	(%)	(%)	(%)	(%)
Recent stories in the media have made me lose confidence in charities	14	24	18	27	15	2
Recent personal experiences have made me lose confidence in charities	9	12	19	28	30	2
Most charities are trustworthy and act in the public interest	26	47	10	9	6	2
Charities are important to me and my community	42	35	9	8	5	1

Related surveys and data sources

Commissioner	Conducted by	Year	Region	Link
SCVO	Ipsos Mori	2017	Scotland	
SCVO	Ipsos Mori	2015	Scotland	
OSCR	Progressive/ Research Now	2016	Scotland	https://www.oscr.org.uk/news/surveys-show-strong-support-for-charities-in-scotland
OSCR	Progressive/ Research Now	2014	Scotland	http://www.oscr.org.uk/media/1871/2014-04-22_scottish_chairty_surveys_2014_-_general_public-1.pdf
Charity Commission	Ipsos Mori	2016	England & Wales	https://www.gov.uk/government/publications/public-trust-and-confidence-in-charities-2016
Charity Commission	Ipsos Mori	2014	England & Wales	https://www.ipsos-mori.com/researchpublications/publications/1679/Public-Trust-and-Confidence-in-Charities-2014.aspx
nfpSynergy	nfpSynergy	2017	UK-wide	https://nfp synergy.net/free-report/trust-charities-and-other-public-institutions-may-2017
nfpSynergy	nfpSynergy	2015	UK-wide	http://nfp synergy.net/slidezone/trust-oct-15
NPC Jan 2014	Ipsos Mori	2014	UK-wide	http://www.thinknpc.org/publications/mind-the-gap/
NPC Oct 2014	Ipsos Mori	2014	UK-wide	http://www.thinknpc.org/publications/matter-of-trust/

CAF Scotland Giving		2017	UK-wide	https://www.cafonline.org/about-us/publications/2017-publications/scotland-giving
CAF Under the Microscope	CAF/ ComRes	2015	UK-wide	https://www.cafonline.org/about-us/publications/2015-publications/future-of-charities-in-britain
CAF UK Giving		2014	UK-wide	https://www.cafonline.org/docs/default-source/about-us-publications/caf-ukgiving2014

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