

Fundraising Regulator

The public's experience and expectations of charitable fundraising

29 May 2024



OPINIUM RESEARCH

58 Great Sutton St
London, EC1V 0DG
T +44 (0)20 7566 3190
helloUK@opinium.com



Agency of the Year

Contents

Executive Summary	2
Introduction	9
Methodology	11
Perceptions, trust and experiences of charities and charitable fundraisers	14
Experience of Charitable Fundraising	21
Deep dive into fundraising approaches.....	29
Understanding the public's priorities	66
Summary and recommendations	72
Appendix.....	76

Executive Summary

Introduction

This report presents the findings of research commissioned by the Fundraising Regulator to better understand the public's perceptions, experience, and expectations of, charitable fundraising.

Specifically, the key aims of the research were to support the Fundraising Regulator in:

- building on its current understanding of public perceptions and experience.
- informing its regulatory function.
- adding to the evidence base from which the Fundraising Regulator can promote best practice to fundraisers.

The findings from the research will also feed into the 2022-25 review of the Code of Fundraising Practice ('the code') by delivering insights into how the public (donors and non-donors) perceive charitable fundraising, their practical experience of it, and what they expect to see from fundraisers – including what they consider to be good and / or poor practice.

Approach

To provide the Fundraising Regulator with a robust and representative picture of the public's experiences, Opinium conducted a three-stage mixed-method research programme.

Stage 1 involved two phases of qualitative research:

Phase I consisted of eight 45-minute in-depth interviews with internal and external stakeholders from the Fundraising Regulator and the wider sector. The findings from this phase are not separately referenced in this report but were used during the initial design stages to:

- ensure buy-in to the research
- understand the deeper context behind the objectives
- learn about the work already undertaken by the Fundraising Regulator team in this area

Phase II was a three-day qualitative pop-up community, which ran from 30th October to 5th November 2023. Twenty-two UK adults (aged 18+) with a spread of demographics were recruited to an online platform where they shared their feedback on their current perceptions and experiences of charitable fundraising, and the charity landscape more broadly.

The research also explored their past experiences supporting fundraising initiatives, views on different kinds of methods of fundraising and expectations for the future of the fundraising sector.

Stage 2 followed on from this, and took the form of an online quantitative survey:

A 15-minute survey was fielded to 3,019 UK adults (aged 16+) between the 6th and the 13th of December 2023. The sample was weighted to be nationally representative with targets on UK nations and English regions, age interlocked with gender, employment status, social grade and ethnicity. The sample was down weighted to 3,000 participants to allow a 100n base for Northern Ireland.

The survey covered the following four areas to meet the objectives of the research:

- demographics
- general perceptions and attitudes towards charitable fundraising
- experiences of different fundraising methods
- awareness and expectations of charity and charitable fundraising regulators

The insights gathered through the stakeholder interviews and the pop-up community were used to inform the design of the questionnaire.

Stage 3 was the final phase. Following analysis of the quantitative data it was agreed that there would be value in exploring some of the key themes in more detail. Therefore, as a third and final stage of the research Opinium conducted two 90-minute online qualitative focus groups. Thirteen UK adults were recruited to take part in the groups which were conducted online on the 6th and 8th of February 2024.

The groups were split by age, with one group consisting of a younger audience of 18-45 year olds and the second with older participants aged over 46.

The majority of the report draws on the findings from the quantitative stage with key themes brought to life with case studies and quotes from participants who took part in the qualitative stages.

Key findings

Perceptions, trust and experiences of charities and charitable fundraisers

Public perception of the charity sector is generally positive, especially when compared to other established institutions. Half of those surveyed stated they trust charities in general to deliver on their promises. This is equal to the trust given to health professions and higher than levels of trust in regulators and watchdogs (32%), public bodies (22%), private business (17%) and local (13%) and national (10%) governments.

Trust levels however vary by age, with significantly lower levels of trust for charities seen among those aged 55 and over, compared to those who are younger (aged 18-34). When exploring trust in charitable fundraising specifically, the picture is mixed, with more than two-thirds claiming to trust at least *some* charity fundraisers. The remainder are relatively evenly split between trusting all charity fundraisers (15%) or trusting none (16%).

As with charities in general, trust is higher among those who are younger and those who live in urban areas – and we see that London has higher levels of trust than other areas of the UK.

Lack of trust stems from both personal experience and general concerns about where money donated is going. When personal experiences are negative for example, they can have a lasting impact on perceptions. Specific mentions were made in the qualitative stages of the investigation into a high profile charity and the perception more generally that there is a high prevalence of fraudulent appeals and scams around nowadays – no doubt heightened by media coverage.

Despite concerns, the research highlighted high levels of support for charities - in the form of financial or goods donations - among the public, either regularly or on an ad hoc basis. Whilst under a third (29%) don't currently support a charity, only around one-in-ten (12%) went on to say that they wouldn't consider doing so in the future.

Although those in the higher age groups have lower levels of trust for charities and charity fundraisers, they are more likely to currently support charities, either financially or through goods donation. This is driven by the positive impact of donating, especially at the local level and the emotional connection that individuals have to specific charities or causes.

There are multiple ways in which charities are supported, with goods and financial donations being the most common. Women are significantly more likely than men to

donate goods, whilst men more commonly make financial donations (these are typically 'one-off' rather than a regular commitment).

When it comes to the experience of those who support charities, this is generally reported positively. Whilst there was some regional variance, with Londoners less likely to report positive experiences, there was no difference when we look at a more national level i.e. across England, Wales, Scotland and Northern Ireland.

Through the qualitative work we learnt that positive experiences are often led by the participant (e.g. donation to a local charity shop) and leaves them with a good feeling about providing support. Whereas negative experiences are often out of their control and caused by an unplanned interaction, which can be difficult to walk away from.

"I am being increasingly turned off supporting charities by the aggressive stance taken by some charities on the high street, as people try to get you to sign up to a direct debit payment every month to support a charity."

Experience of charitable fundraising

In order to understand perceptions and experiences of charitable fundraising at a more granular level, the research also explored attitudes to a number of specific charitable fundraising approaches. Nine were covered and included a mix of direct and indirect approaches. To ensure that all participants had the same understanding of each of the fundraising methods, a short definition was provided for each one in the survey (this information can be found in the body of the report and in the questionnaire in the annex). The approaches covered were:

- Charity bags
- Convenience giving
- Door-to-door fundraising
- Fundraising marketing
- Lotteries/ raffles/ prize draws (excluding the national lottery)
- Online fundraising
- Public fundraising
- Sponsorship of individuals
- Personal cause fundraising

Personal cause fundraising was tested although this is not charitable fundraising and is not an area regulated by the Fundraising Regulator.

The research showed a clear divide between direct and indirect methods and levels of comfort with them among the public. Face-to-face fundraising approaches, which are also those which the public have less agency over, are the methods participants are least comfortable with, especially door-to-door fundraising.

The more indirect methods such as sponsorship of individuals, lotteries/ raffles/ prize draws and charity bags have much higher levels of comfort. This is also where the public have more choice and control. Despite this, levels of discomfort were still consistently higher for these methods among those in the older age groups.

Door-to-door fundraising was the approach with the lowest levels of comfort, with three-quarters of those surveyed saying they would not be comfortable being asked to support a charity via this method. Although to a slightly lesser extent, this was also the case for public fundraising.

In both instances these high levels of discomfort were strongly driven by those in older age groups with nine-in-ten of those aged over 55 saying they were not comfortable with fundraisers asking for support through a door-to-door approach.

The majority of those who took part in the research (85%) claimed to have experienced some form of fundraising, whether they took any action or not, in the last year. On average, less than half of this group, however, rated that experience positively. Across all of the approaches, a quarter claimed that their experience was negative and a slightly higher proportion were unable to state whether the experience was positive or negative.

It is worth noting, however, that these negative experiences were largely driven by face-to-face methods (door-to-door and public fundraising); other fundraising methods were seen much more positively. Indeed, if you filter out face-to-face fundraising methods, the proportion rating their experience as negative across the other approaches drops from 24% to 16%

When looking across all of the fundraising approaches that were included in the research, we saw that negative experiences were largely related to door-to-door experiences, where over three-fifths (62%) reported either a somewhat or very negative, experience. As might be expected this translated into only a small proportion taking any positive action, with only one-in-ten stating that they donated or signed up following their experience (a further 10% did some research, but nothing more). Among this minority who donated, a motivator to take action was the individual undertaking the fundraising being deemed as credible.

Of concern is the potential impact on future behaviour, with three-fifths (60%) stating they would be unlikely to engage in the future with this type of fundraising and half

suggesting they would be less likely to engage with supporting charities in general again.

Public fundraising was also perceived poorly. Less than a third reported positive experiences of being approached in public to support a charity. Consequently, more than three-fifths reported that they took no action following their interaction. Disapproving of the approach was a barrier to taking action, followed by being too busy and a concern over where the donation was going. A small proportion did donate, and this was because for those particular individuals, it was convenient, and it was a cause that they wanted to support.

Overwhelmingly however, this is not a favoured fundraising approach with participants associating it with being pressured, inconvenient and for some, aggressive. Of concern is the fifth who found the experienced 'pressured' yet still donated / signed up.

This indicates that charities may only serve to harm their cause by not giving due consideration to the impact it may have when adopting more direct means of trying to raise support.

Conclusion

In order to engage and take action, the public need to feel safe and comfortable when interacting with charitable fundraising. They want to feel they can engage securely and to feel confident their donation is going where it was intended.

Moreover, the public appreciate agency over their supporting decisions and reject approaches that are intrusive and inconvenient. This was a consistent theme from the majority who took part in the research but of particular note is the impact on the vulnerable, such as those in the older age groups, who have higher levels of discomfort with certain, more direct, fundraising approaches.

The research shows that the Fundraising Regulator could play an important role in increasing trust and confidence in charitable fundraising for the public through the promotion of their role and function. For charities themselves, registering with the Fundraising Regulator and displaying the badge will go some way to reassuring the public, but it is also important to ensure compliance with the code and closely managed fundraising behaviour.

Charities also need to operate more mindfully as to the impact of certain fundraising approaches and additionally, the broader economic climate in which they are operating. Trust, reassurance and transparency is key, be that through more general

communications or through the behaviours of the individuals fundraising on their behalf.

Recommendations

Charities and fundraising organisations should:

- Ensure fundraising staff have appropriate training, support and monitoring to meet Code of Fundraising Practice standards, being particularly sensitive to the needs of people in vulnerable circumstances and older people.
- Use their experience of fundraising with the public to identify what works well and test ways in which unsolicited fundraising can be made less intrusive.
- Continuously consider and promote safeguards to promote public confidence that donations are going to the right place and that data is secure.
- If registered with the Fundraising Regulator, display the fundraising badge and be able to explain to the public what this means in practice.

The regulator should:

- Work with fundraisers, other regulators, and membership bodies to identify areas where further information and guidance is needed.
- Consider how it can increase public awareness of the role it plays and the standards that fundraisers need to comply with.
- Continue to promote the benefits of registration to charities and fundraising organisations and the value of displaying the badge.

The regulator and charities / fundraising organisations should:

- Consider conducting follow-up research to identify what actions can be taken to further improve public trust and confidence in fundraising.

Introduction

Background to the research

The Fundraising Regulator is the independent regulator for charity fundraising in England, Wales and Northern Ireland. They work alongside other regulators, such as the Charity Commission and other representative bodies, across the charitable sector ensuring **public protection, accountability and excellence in fundraising**.

A key aim of the Fundraising Regulator is to **build public trust and confidence and ensure consistently high fundraising standards** across the UK. Among other important areas of work, this is done through setting and maintaining standards for fundraising, through a Code of Fundraising Practice ('the code') and investigating complaints about fundraising.

The organisation has a vision of:

A society where charitable fundraising is legal, open, honest, and respectful, so that people have confidence and trust in fundraising and charitable fundraising thrives.

In order to be able to successfully deliver against this vision and support the work that it does in relation to the code, guidance and case work, it is vital that the Fundraising Regulator understands the public's views and experience of charitable fundraising.

As such, Opinium were commissioned to lead a programme of research into the public's experience and expectations of charitable fundraising to support the Fundraising Regulator in:

- building on its current understanding of this area.
- informing its regulatory function.
- adding to the evidence base from which the Fundraising Regulator can promote best practice to fundraisers.

Objectives

The aim of this research is to build on the existing body of research in this area and feed into the Fundraising Regulator's strategic objective to better understand the public's experience and expectations of charitable fundraising.

It also aims to feed into the 2022-25 review of the code by understanding how the public (donor's and non-donor's) perceive charitable fundraising, their practical



OPINIUM RESEARCH

58 Great Sutton St
London, EC1V 0DG
T +44 (0)20 7566 3190
helloUK@opinium.com



experience of it, and what they expect to see from fundraisers – including what they consider to be good and / or poor practice.

This report therefore presents the findings of this research which are based on a multi-phased approach incorporating both qualitative and quantitative surveying of the public. Full details of the methodology used is laid out in the next section.

Methodology

In order to meet the requirements outlined by the Fundraising Regulator, Opinium designed a multi-phase mixed-method research approach which involved three main stages carried out between October 2023 and February 2024. Following each stage of the research the findings were analysed and the insights used to inform the design of the subsequent stage.

Stage 1: Qualitative Research

The research process began with the research team immersing themselves in the subject matter and the current context. This included two phases:

Phase I: Internal 45-minute in-depth interviews with a mix of eight internal and external stakeholders. These were conducted to provide context into the key issues surrounding charitable fundraising, to ensure buy-in to the research from stakeholders across the Fundraising Regulator, and to understand expectations for the research, enabling Opinium to ensure the research would answer all key business questions.

All stakeholders were directly invited by the Fundraising Regulator to participate in the research. Of those who consented, they were contacted by a member of the Opinium research team to arrange an interview slot at a time and date that was convenient to them.

The interviews were audio and video recorded for use by the research team. Aggregated feedback was included in the discussion guides for Phase II of the research, but no stakeholder feedback was individually shared.

Phase II: Following the interviews, Opinium conducted a three-day qualitative pop-up community, from 30th October to 5th November 2023, with 22 UK adults to uncover current perceptions and experiences of charitable fundraising, and the charity landscape more broadly. This included a positive skew to those who were open to charitable fundraising and a minority of those who are not open to charitable fundraising within the next 12 months.

Participants were recruited using one of our trusted recruitment partners. They were recruited from across England, Scotland, Northern Ireland, and Wales. All participants were over 16 years old and were spread across age brackets (16-24, 25-34, 35-44, 45-54, 55-64, and 65+). Additionally, a mix of household compositions were included e.g. single or living with children.

The research was conducted using an online platform which enabled participants to privately share feedback with the research team through a range of interactive tasks and also participate in group discussions.

The research explored their past experiences supporting fundraising initiatives, views on different methods of fundraising and expectations for the future of the fundraising sector.

Anonymised quotes are included within this report. Where names have been given, these have been changed to protect the identity of the research participants.

Stage 2: Quantitative Methodology

Following the qualitative stage a core quantitative stage was conducted in order to provide robust data and insights with a nationally representative sample.

This second phase took the form of a 15-minute online survey with 3,019 UK adults (aged 16+). The questionnaire included a mix of multiple choice and single response questions and some with open free text answers to add to the richness of the data. It was designed, building on themes identified during the initial stakeholder interviews and the qualitative stage and allowed analysis by key subgroups, such as age and vulnerability as well as region. Statistical differences between subgroups are detailed throughout the report.

Quantitative fieldwork was conducted between the 6th and the 13th of December 2023.

The sample was weighted to be nationally representative with targets on UK nations and English regions, age interlocked with gender, employment status, social grade, and ethnicity. The sample was down weighted to 3,000 participants to allow a 100n base for Northern Ireland.

The survey had four components: demographics, general perceptions and attitudes towards charitable fundraising, experiences of different fundraising methods, and awareness and expectations of charity and charitable fundraising regulators.

The section on experiences of fundraising methods was designed to ensure participants answered questions on a maximum of three methods they had experienced in the last 12 months. This prevented survey fatigue and a drop in engagement for those who may have experienced multiple fundraising methods. The questionnaire is provided in the annex to this report.

Stage 3: Qualitative Research

Following analysis of the quantitative data and an initial debrief, two 90-minute online qualitative focus groups with 13 UK adults in total were conducted on the 6th and 8th of February 2024 to deep dive into key areas that emerged from the quantitative survey and understand levers for change/improvement for the Fundraising Regulator to focus on. The core team from the Fundraising Regulator were able to view the focus groups live and were able to (via a back door function and via the moderator) probe on certain issues as they arose.

One of the groups consisted of a younger audience of 18-45 year olds while the second group comprised an older audience of those aged over 46. This included a mix of those who have experience in door-to-door fundraising, public fundraising and convenience giving. Within each group there was a mix of demographics such as region and household composition.

The focus group participants included a mix of ten participants who were re-invited back from the online pop-up community and three fresh recruits for the research. This enabled us to build upon their existing knowledge about charitable fundraising and probe on specific experiences that they shared in the earlier stage of the research.

These sessions were also audio and video recorded for reporting purposes with anonymised quotes included within this report. As before, where names are mentioned, these have been changed to protect the anonymity of the participants.

Perceptions, trust and experiences of charities and charitable fundraisers

To set the tone for the research and to ground our findings within the context of how charitable fundraisers are seen by the public, we first explored perceptions of charities in general. This included understanding supporting habits and any barriers and drivers to engaging with charities and those who raise funds for them.

Charities in general perform well in terms of being trusted by the public to deliver what they promise

When questioned about organisations that the public trust to deliver on their promises, charities in general performed well – with half of those surveyed generally trusting charities to deliver what they promise. This is equal to the trust that is given to health professionals (50%) and higher than stated trust levels in regulators and watchdogs (32%), public bodies (22%), private business (17%) and local (13%) and national (10%) governments.

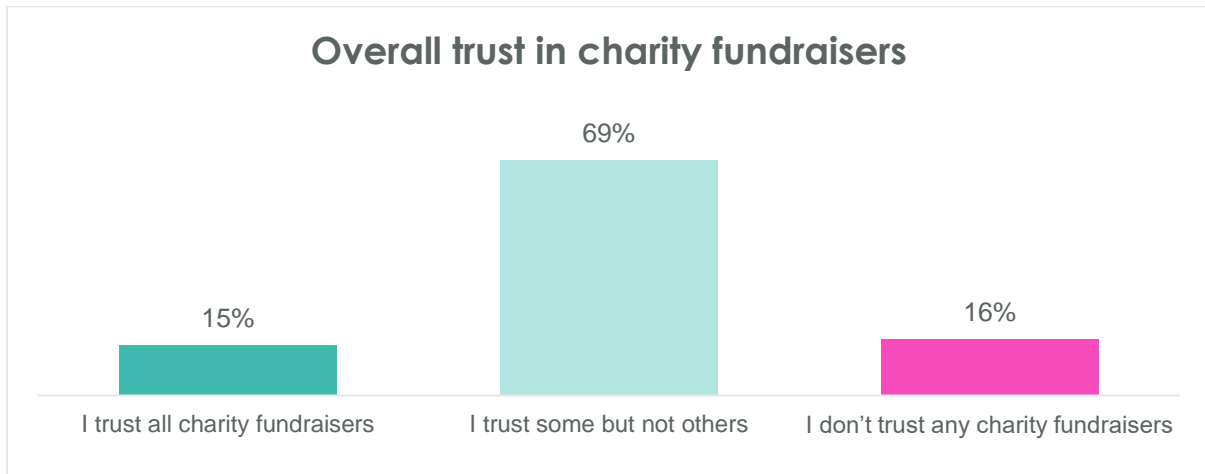
At a more granular level, survey participants reported higher levels of trust for those charities which they perceive to be local (42%) in comparison to national charities, where trust levels drop to 32%. This aligns with a charity being ‘local’ as a motivator for the public to take some sort of action when engaging with charitable fundraising.

Trust in charities in general is higher among those in younger age groups (those between the ages of 16 and 34) with significantly lower levels of trust seen among those aged 55 and over. The research also found that trust for charities was higher among those in higher social grades (ABC1).

When we put a closer lens on trust in charities and more specifically, trust in charity fundraisers¹ we can see that the majority of those surveyed (84%) trust at least some charity fundraisers.

¹ by fundraisers we mean someone who asks you to donate money or goods to a charity

A proportion of the public however (16%) don't trust any charity fundraisers. We are much more likely to see men in this group, who are significantly more likely than women (20% compared to 13%) to not trust any charity fundraisers.



Q2. Thinking now about charity fundraisers, (by fundraisers we mean someone who asks you to donate money or goods to a charity). Overall, how much would you say that you trust charity fundraisers? Base: all (3,019)

Those in the older age groups have more mixed views and are more likely to trust some but not others. Younger members of the public, those under 35, have much higher levels of trust, and are significantly more likely to trust *all* charitable fundraisers. This is in line with the higher levels of trust for charities in general to deliver on their promises, that we saw among this group.

Trust in *all* charitable fundraisers is also more common among those living in urban areas (18% compared to 12% in rural areas). From a regional perspective, we see higher levels of trust among those living in London, than in other areas of the UK.

Lack of trust in charity fundraisers is driven by concerns over transparency of financials, corruption and scams

When probed around why they had a lack of trust in charity fundraisers, survey participants, who don't trust some or all charity fundraisers, referred back to their own past negative experiences and also press around charity scandals, that have all left a lasting impact. Key themes that arose included:

- Lack of transparency over where the money is going, mentioned by more than two-fifths (42%)
- Concerns over corruption and scams, mentioned by a quarter (26%)

- Reputation and scandals (11%)
- And dishonesty and a lack of regulation, cited by just under one-in-ten (9%)

Quantitative participants shared examples of some of the scandals they recalled as having an impact on their perceptions of charity fundraising:

"There are so many fraudulent appeals and scams around nowadays it is sometimes difficult to know which are the genuine ones."

"Because they take money themselves, for expenses, administration or other reasons. They should give freely, like the people donating."

"You just hear stories sometimes about very little going to the actual cause. If you want to support a charity, be wary of bad practices."

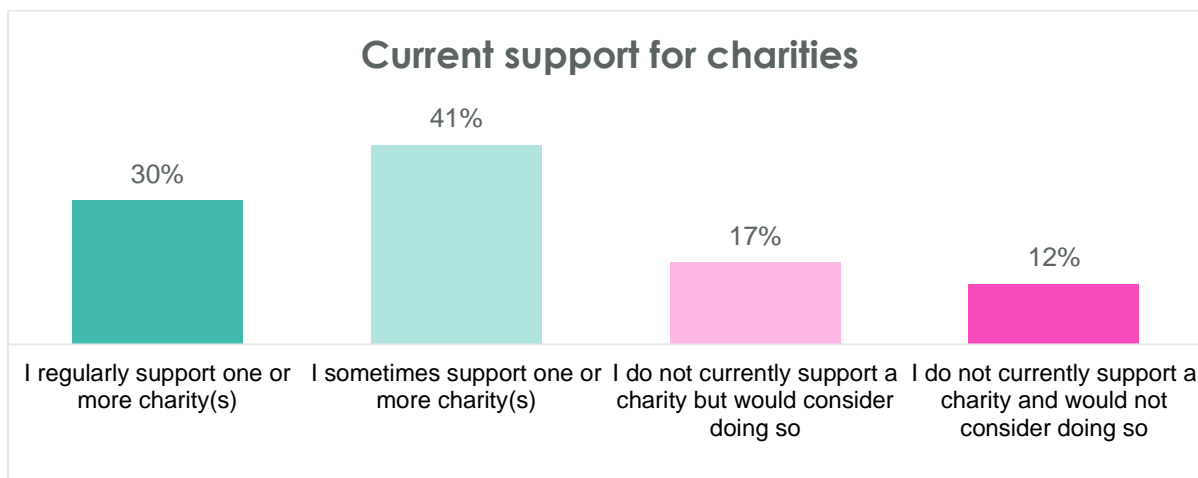
"I've donated to a charity through a fundraiser and later found out that they were committing fraud, and none of the money went to the charity."

In summary, whilst the sector performs well in comparison to other established institutions, there are varying degrees of trust given to charitable fundraising in general by the public. This emphasises the importance of good regulation and the corresponding need for high levels of compliance among fundraisers.

After establishing an understanding of how the public perceive charities and fundraising in general, the research then looked at supporting habits and how participants would rate the experiences they have had.

Almost three-quarters claim to currently support a charity regularly or occasionally

Less than a third (30%) claim to 'regularly' support a charity, with participants more likely to state they 'sometimes' support one or more charities (41%). More than one-in-ten (12%) state they do not support a charity at all and would not consider doing so.



Q4. Which of the following describes your habits when it comes to supporting charities? By supporting we mean anything from donating money or goods, participating in an event to volunteering to raising awareness through social media. Base: all (3,019)

There are some demographic skews when we look in more detail at supporting habits, with females (74% versus 67% males) and older members of the public (81% of those aged 55 and over, versus 63% of those in the youngest age group aged from 16 to 34) more likely to be current supporters.

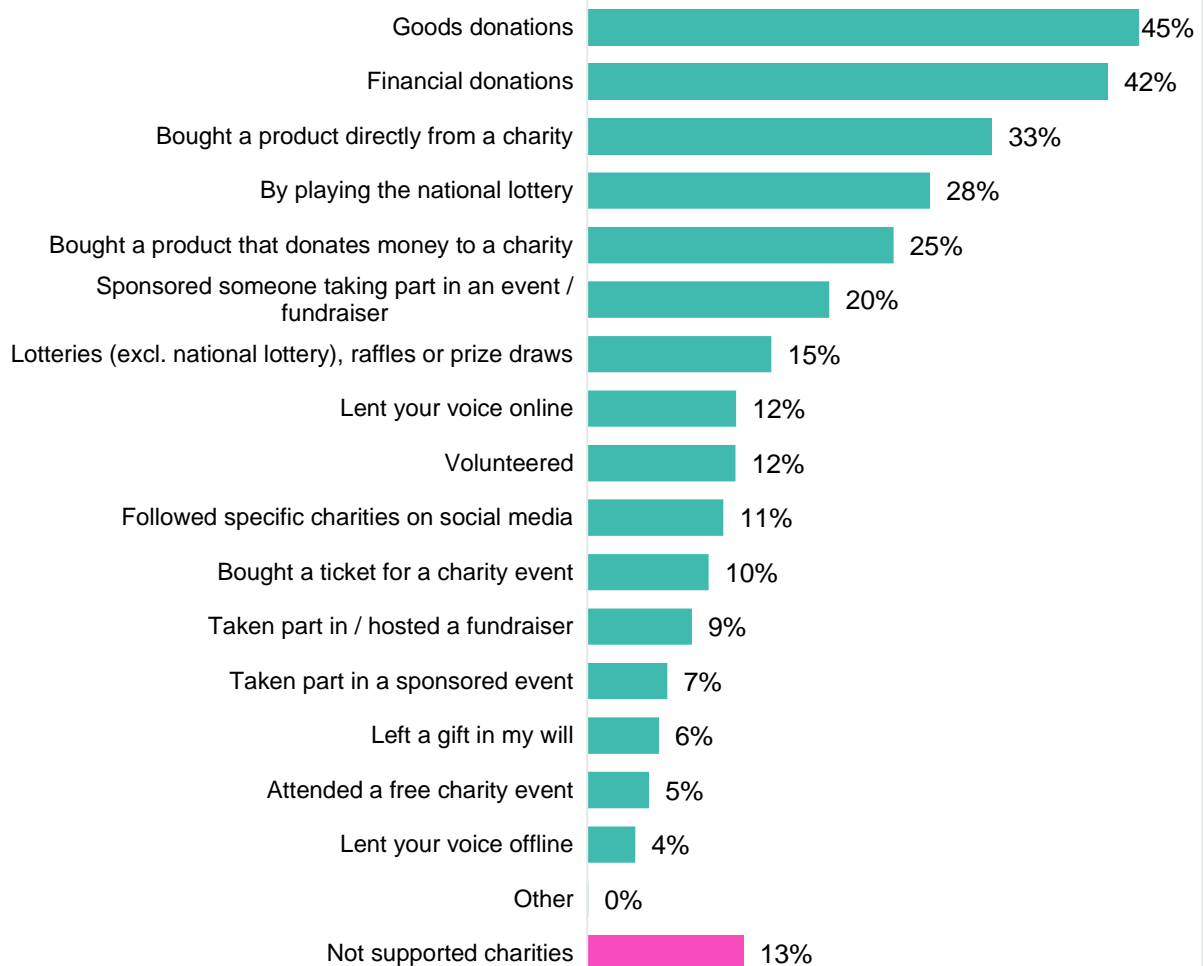
Qualitatively, some of the key drivers to supporting charities include the positive impact of the work the charity does, particularly at a local level; the emotional connection that individuals have to specific charities or the causes they seek to address; the joy they feel from helping out and their confidence in charities more broadly.

However, mirroring the insights seen in the quantitative phase, there are still some qualitative participants who worry about how the charity will use the funds and who carry the weight of previous negative experiences. These are explored in more detail later in this section of the report.

Goods and financial donations are the most common ways of supporting a charity

There are multiple ways in which charities are supported, with goods and financial donations being the most common. Women are significantly more likely than men to donate goods, whilst men more commonly make financial donations.

Ways of supporting charities in the past 12 months



Q5. In which of the following ways have you supported charities in the last 12 months? Please select all that apply. Base: all (3,019)

Among those who make financial donations, this is more typically one-off, and is the case for almost three-quarters (73%) of those who donate financially.

Just under half (47%) make 'regular' financial donations, and this is more common among those who are older (55% of those who are over 55 donate in this way compared to 37% of those who are in our youngest age category of 16 to 34). Those in higher social grades (ABC1) are also more likely to donate regularly. It naturally correlates that those who are older, in better financial situations and potentially at a more stable life stage, are able to commit to more regular donating.

Qualitatively, those who regularly financially support charities are more likely to do this using mechanisms such as direct debit or payroll giving, which enables them to

regularly give to their selected charities. Those who support on a one-off basis are more likely to do so because of a specific event or interaction (e.g. someone who is participating in an event).

“I work for the NHS so there's an abundance of things like coffee mornings. I think that sort of event kind of brings everyone into one room and you're able to eat and chat. It almost feels like it's something that you're doing for the group as much as to raise money for charity too. It almost has a dual purpose.” - Open to support, Scotland, 25-34

Around two-thirds of survey participants reported a positive experience supporting charities over the last 12 months

As we have seen, despite some levels of distrust towards charities, support is given in a variety of ways and the experience is, at an overall level, reported positively. Women are more likely to report positive supporting experiences (70%) compared to men (64%).

The research also highlights regional disparities in the experience of supporting charities. Those living in London are less likely to rate their supporting experiences positively (62%), with this being lower than any other area in the UK and significantly lower than those in the Southwest and West Midlands (both 71%) and those in the Northwest (70%). It may be the case that the lower rates of positivity seen in London are a result of the increased likelihood of experiencing the face-to-face approaches such as public fundraising - which we know is perceived less well by the public.

At a broader level however, there are no significant differences in the experiences (either negative or positive) of those across the nations (England, Wales, Scotland and Northern Ireland).

Participants in the qualitative phase of the research highlighted the lasting impact of negative experiences when supporting charities, with these tending to stay with them more than positive experiences. Positive experiences are often led by the participant (e.g. donation to a local charity shop) and leave them with a good feeling about providing support. Whereas negative experiences are often out of their control and caused by fundraisers (e.g. being approached by a public fundraiser) and are typically unplanned or challenging to walk away from.

"I have shopped at charity shops all my life. They were the only way that we could afford clothes etc as a child and even though they have started pricing things ridiculously now I think that if you look hard enough you can always find a bargain. My most treasured possessions tend to come from charity shops. I am never sure what the money I am spending is going towards, I just hope that it is good things." - Open to support, Wales, 16-24

"I am being increasingly turned off supporting charities by the aggressive stance taken by some charities on the high street as people try to get you to sign up to a direct debit payment every month to support a charity." - Not Open to Support, Northern Ireland, 45-54

Case study 1: Joan, Open to support, England, 45-54

Joan (not her real name) is a parent, living a busy life. She spends a lot of time on the go and taking care of the family, so quick and local charity options are the best fit for her. Often when she is doing a clear out of the house or the pantry, she will donate goods instead of throwing them away. Joan tends to donate money to causes she has a personal connection with. This could be a one-off to a cancer foundation or sponsoring friends for events.

"Any other donations are kind of more for like sponsoring people for doing events for specific causes and like local, as Sam mentioned, sort of food bank stuff and things like that."

"I had a bit of a clear-out a couple of weeks ago, so I took that down to the charity shops. I [have] actually just done my will about four months ago, and I've left a donation in my will to cancer."

The impact...

Donating locally feels like a win-win situation to Joan. She can see the direct impact she is making on the community while also improving and decluttering her own life. It enables her to donate to places that fit into her lifestyle rather than being forced to go out of her way or be in situations she's uncomfortable with. She enjoys the agency that comes with deciding when and where she donates.

She also benefits by shopping at charity shops, so she gets back from the community what she's giving to others.

"So, we try to go to the charity shops and see what we can buy in terms of gifts. That way we can support them and also get our Christmas cards and the standard stuff as well"

Experience of Charitable Fundraising

The research demonstrates that in general, the public have had positive experiences supporting charities in the 12 months previous to the research being conducted. Alongside this, however, we have also seen mixed levels of trust for charity fundraisers, which at an overall level is largely driven by a perceived lack of transparency over where donations go, scandals in the news and worries about fraudulent scams and appeals.

In order to explore perceptions and experiences of charitable fundraising at a more granular level, the research went on to examine the publics' attitudes to a number of specific charitable fundraising approaches, all of which were explored individually through both the quantitative and qualitative phases of the research.

The fundraising methods tested in the research, included some more direct approaches such as door-to-door fundraising and public fundraising and also some which are less direct, such as fundraising marketing. Personal cause fundraising was also tested although this is not charitable fundraising and is not an area regulated by the Fundraising Regulator. The complete list is as follows:

- Charity bags
- Convenience giving
- Door-to-door fundraising
- Fundraising marketing
- Lotteries/ raffles/ prize draws (excluding the national lottery)
- Online fundraising
- Public fundraising
- Sponsorship of individuals
- Personal cause fundraising

To ensure that all participants had the same understanding of each of the fundraising methods, a short definition was provided for each one in the survey, these definitions are available in the deep dive section of this report and also in the appendix.

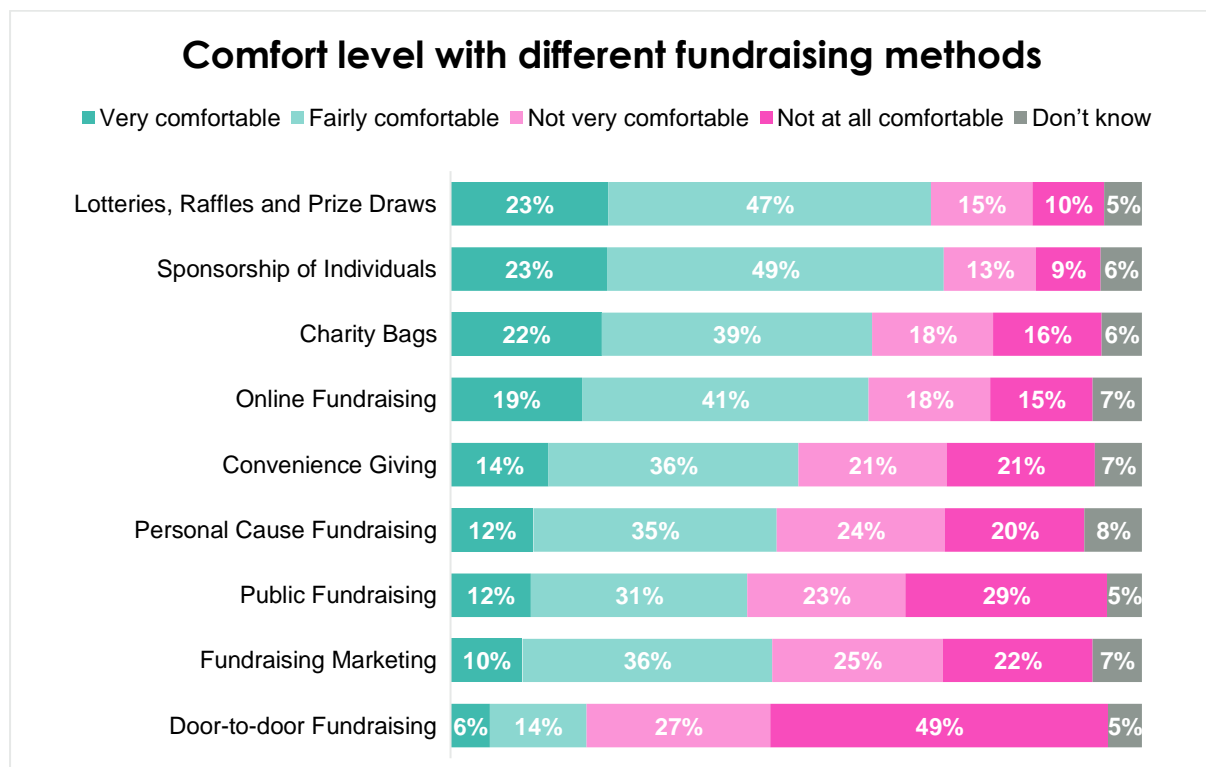
Face-to-face fundraising approaches are the methods participants are least comfortable with, especially those which are door-to-door

On average, just over half of those surveyed (52%) stated they were comfortable (either very or fairly) across all the methods combined, that were covered by the

research. This is largely driven by those who are younger, with those aged over 55 significantly less likely to be comfortable with the fundraising methods on average (41% of those aged 55+, compared to 66% of those aged 16 to 34 and 53% of those aged 35 to 54).

Whilst we don't see any differences in comfort levels across the nations, those who live in urban areas are on average, more likely to be comfortable with the fundraising methods tested, compared to those living in suburban or rural areas (57% compared to 50% and 51% respectively).

However, the research highlighted varying levels of comfort when we look in more detail at the different approaches. Participants were much more comfortable with indirect methods such as sponsorship of individuals, lotteries/ raffles/ prize draws and charity bags, than those which were more direct, such as public fundraising and door-to-door approaches.



Q10. Please think about the following ways in which charities can raise funds and get support from the public. How comfortable are you with these methods of charitable fundraising? Please consider how you would feel if you experienced any of these forms of fundraising. Base: all participants (3,019)

Door-to-door fundraising was the method with the lowest levels of comfort with three-quarters of those surveyed (75%) stating they were either ‘not very’ or ‘not at all’ comfortable being asked to support a charity through this approach. Those who are uncomfortable with a door-to-door approach are significantly more likely to be older, female and living in a suburban or rural area. The research also highlighted those with a disability as significantly more likely to be uncomfortable with door-to-door fundraising. The levels of discomfort with this approach should not be underestimated, with nine-in-ten of those aged over 55 uncomfortable with fundraisers trying to obtain support via this means.

This demonstrates that those in more vulnerable circumstances are less likely to be comfortable, and engage, with charities who fundraise using this method and sends a stark message to the regulator that further guidance on this area may be needed.

SUBGROUP	% UNCOMFORTABLE WITH DOOR-TO-DOOR FUNDRAISING
Female	79% (compared to 72% male)
Aged 55+	90% (compared to 56% 16-34)
Rural	79% (compared to 69% urban)
Disability	80% (compared to 74% no disability)

“I think when you live on your own, it can be a bit more frightening. As a woman living on her own, that can probably be a bit more threatening as well.” – Open to support, Scotland, 55 – 64

Whilst there were slightly higher levels of comfort with public fundraising than door-to-door, it is still an approach which more than half (52%) of those surveyed are not comfortable with. Again, this is driven by those in older age groups with two-thirds of those aged over 55 uncomfortable with this form of fundraising. This is also the case for females and those in suburban/ rural areas, where we saw significantly higher levels of discomfort with this more direct approach.

SUBGROUP	% UNCOMFORTABLE WITH PUBLIC FUNDRAISING
Female	55% (compared to 49% male)
Aged 55+	67% (compared to 32% 16-34)
Suburban	56% (compared to 44% urban)
Disability	57% (compared to 50% no disability)

At the other end of the spectrum, the approaches where we saw the highest levels of comfort were sponsorship of individuals, lotteries/ raffles/ prize draws, charity bags and online fundraising. These are methods where the public have greater agency and choice over whether they interact, thus potentially resulting in greater acceptance. Levels of discomfort were still consistently higher among those in the older age groups, however for three of these four methods (sponsorship of individuals, lotteries/ prize draws and online fundraising) there was minimal difference by gender and region.

In contrast to a number of the other approaches, women had significantly higher levels of comfort than men with respect to charity bags (65% of women compared to 57% of men said they were comfortable, either very or fairly, with charity bags as a method of charitable fundraising).

Whilst there is potential for this approach to have variance by location due to the way they're distributed and collected, we saw very little regional difference with comfort levels when looking specifically at charity bags.

Reasons shared for the lack of comfort in certain approaches were consistent with the themes surrounding lack of trust in charities and charitable fundraising in general

When probed for why they were less comfortable with certain methods, participants cited concerns over where donations were going, corruption and scams and more specific to door-to-door and public fundraising, the lack of control over the situation and its intrusive nature, and, at times, the behaviour of the fundraiser e.g. being too pushy.

These themes all align with reasons given for lack of trust in charity fundraisers more generally and talk to methods where the public has less agency.

“I'm not comfortable with being approached and asked for money. I don't have much myself. If they're just standing with a collection box I usually put change in it if I have some, otherwise the answer is no.”

“Find it as quite an awkward conversation, and most of the time people will give money even if they have not got enough money for themselves”

“I don't like this at all, they're disturbing me to ask me for money and it's usually a regular donation and not a one off. I prefer to choose when I donate and who to.”

When this was explored in more detail during the qualitative phase, we saw that at an overall level participants felt more comfortable with approaches that were perceived as easier for them. It is also the case that these are methods that they had more control over and were less invasive i.e. they didn't have to directly interact with a charitable fundraiser in order to donate. The public also appreciate the flexibility of being able to donate at a time that is convenient to them, both in terms of time and when they were more financially able to do so.

“Charity bags, I would probably say feel a little bit easier to do because it doesn't feel as though you're parting with actual cash. You can always do a bit of a clean out and get rid of the stuff that you maybe don't necessarily want anyway... if it actually ends up where it's meant to it can still do some good for some people, it feels like a bit of a win-win” – Open to Support, Scotland, 25-34

“I would like more flexibility in terms of supporting charities so that if some months I have more money, I can increase my giving but in other months when I have less money, I can decrease my giving”. – Open to support, Northern Ireland, 45-54

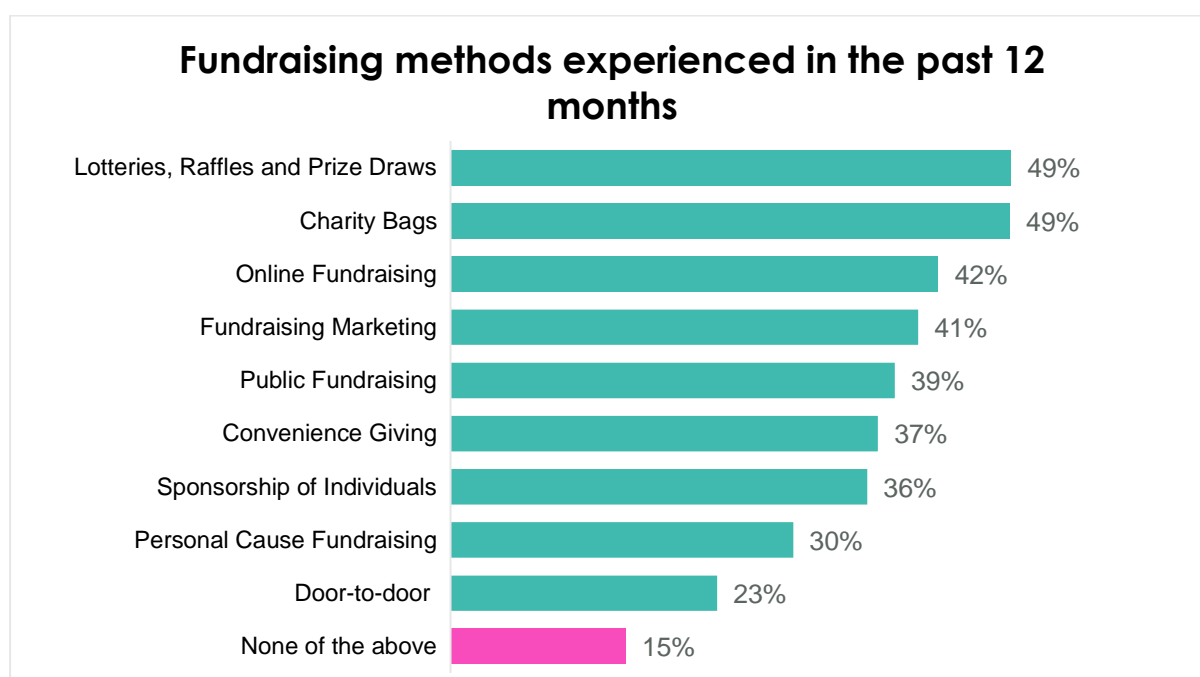
Further to exploring perceived levels of comfort with charitable fundraising methods, the research also explored *actual* experiences and whether these were rated positively or negatively.

When prompted, more than four-fifths (85%) claimed to have experienced some form of fundraising, whether they took any action or not, in the last year

This was less likely to be the case for those living in Wales (79%) and Scotland (80%) compared to those living in England (86%).

Across all participants, the most commonly experienced forms of fundraising were lotteries/raffles/prize draws and charity bags – which were mentioned by almost half of those we spoke to (both 49%).

Two-fifths (39%) had experienced public fundraising and whilst door-to-door fundraising was the least experienced method, with less than a quarter (23%) reporting having seen or experienced this in the last 12 months, this meant that overall, almost half (46%) of all those surveyed claimed that the fundraising they experienced was face-to-face.



Q12. Which of the following types of charitable fundraising do you remember seeing or experiencing (whether you took any action as a result or not) over the last 12 months? Please select all that apply. Base: all (3,019)

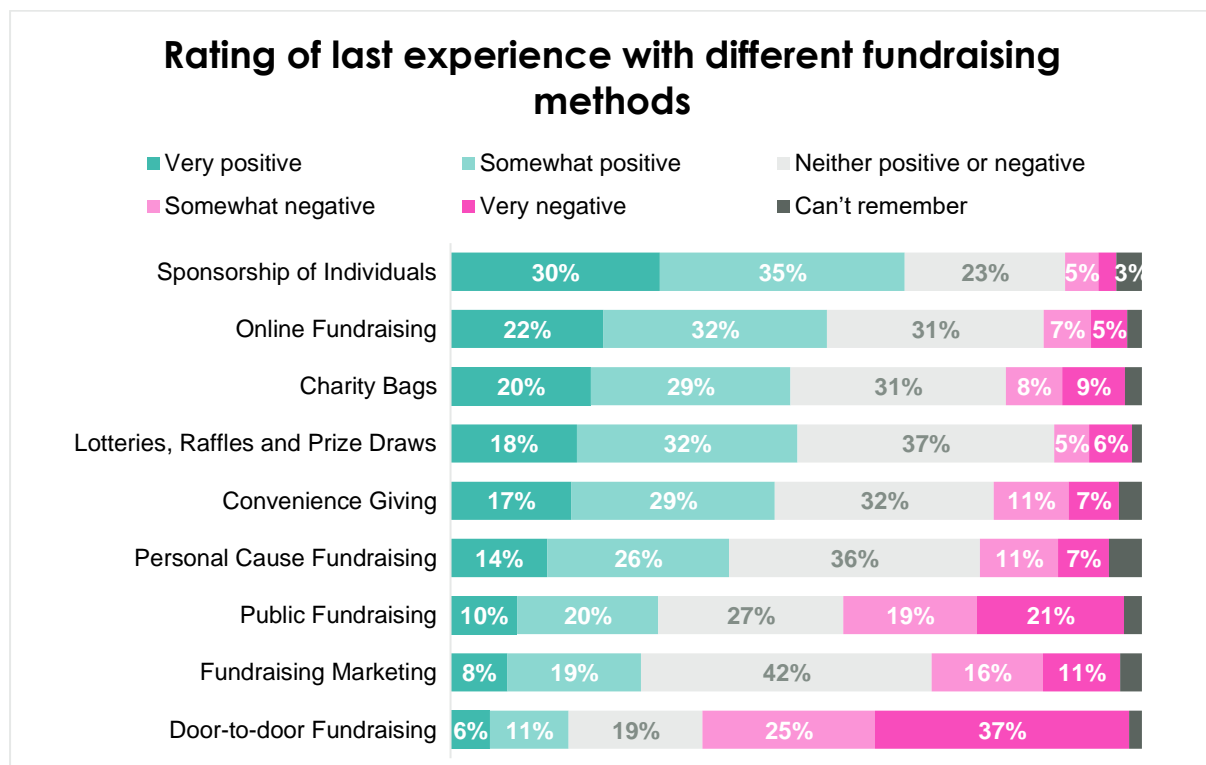
Although no significant differences were seen across urban and rural locations, or the nations, those living in London were significantly more likely than those in the North (East and West), Yorkshire and Humberside, East Midlands, and the South (East and West) to have experienced face-to-face fundraising.

At an overall level, just over two-fifths (42%) of those who experienced charitable fundraising in the last 12 months, rated it positively

A quarter however (24%) claimed that their experience was negative. A slightly higher proportion (31%) were unable to state whether the experience was positive or negative.

In line with what we have seen with respect to trust in charity fundraisers and comfort levels towards certain fundraising approaches, those aged 55 and over are more likely to report negatives experiences with charitable fundraising. This is also true of those who live in suburban areas (26%) versus urban (20%) areas., but not the case for those who lived more rurally. No significant differences were seen across the nations in the proportions who either had positive or negative experiences.

Whilst we have no evidence from this research to suggest a direct correlation, it is also interesting to note that those who have higher awareness of the Fundraising Regulator are also more likely to rate their experience as positive (48% of those aware of the Fundraising Regulator versus 35% not aware).



Q13. And overall, how would you rate the experience that you had? If you have had multiple experiences, please rate the last one. Base: participants who experienced that form of fundraising in the past 12 months.

When looking across all of the fundraising approaches that were included in the research, we can see that negative experiences are largely related to door-to-door experiences, where over three-fifths (62%) reported either a somewhat or very negative, experience. This is significantly higher than was reported for any of the other fundraising approaches. Among those who experienced door-to-door fundraising, those who are older (who are consistently more likely to have had a negative

experience across all methods, although to a lesser extent with sponsorship of individuals and lotteries/prize draws) are typically more likely to rate their experience as negative. Those in suburban areas are also more likely to rate their experience as negative than those in urban areas (68% compared to 51% respectively).

The findings do highlight that across most of the individual approaches (with the exception of door-to-door) there is a significant proportion who rated their experience as *neither* positive nor negative. Whilst it is encouraging that in the main, experiences are not regarded negatively, other than among those experiencing face-to-face approaches, there is still scope across the board to make the experience of charitable fundraising more positive.

The next chapter provides a deeper exploration of each of the individual types of charitable fundraising, the action taken as a result of experiencing that form of fundraising, and where improvements could be made to create more positive experiences for the public.

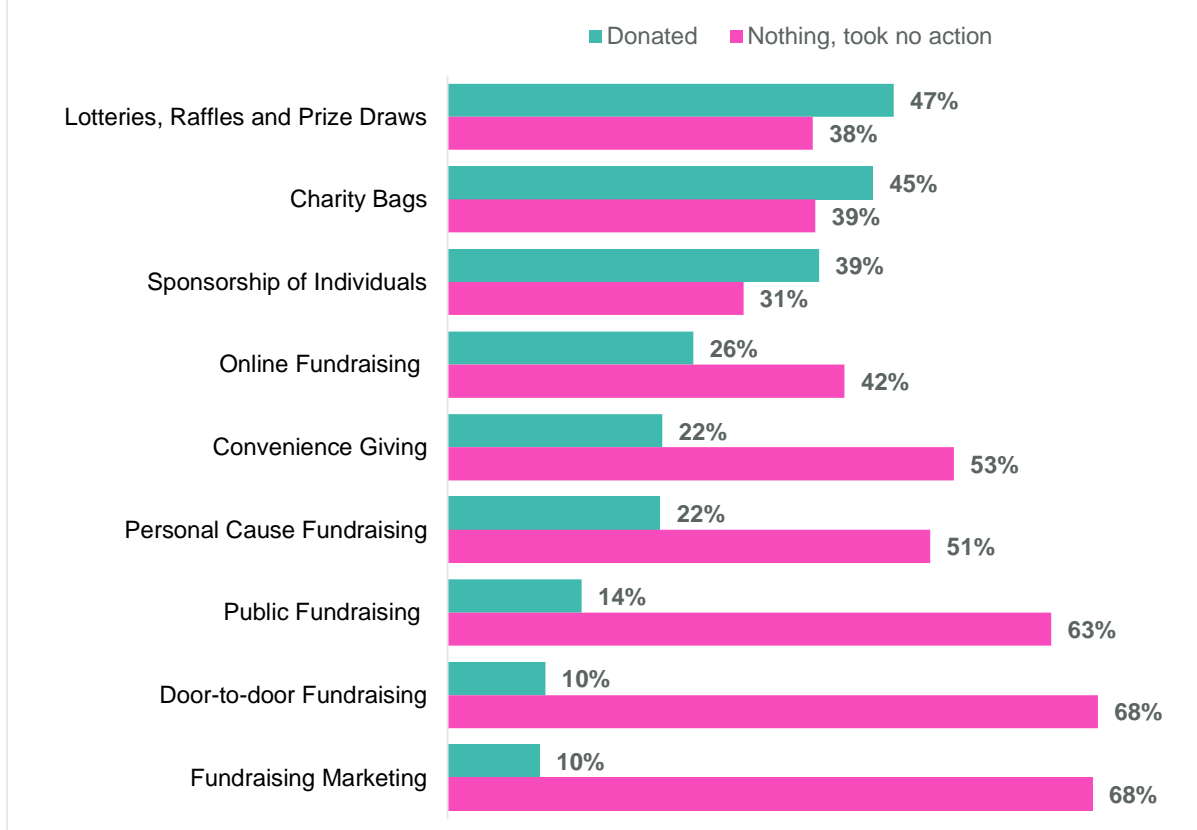
Deep dive into fundraising approaches

The research has explored overall perceptions and attitudes towards each of the fundraising approaches, how they are rated and what is behind both negative and positive perceptions.

This section of the report focuses in more detail on each of the specific approaches, exploring what happened as a result of the experiences we have reported on, what action, if any, was taken and the barriers and motivators to engaging and supporting.

At an overall level, when just looking at whether people went on to make a donation or took no action at all following their experience with the different forms of fundraising, we can see that convenience giving, personal cause fundraising, public fundraising, door-to-door fundraising and fundraising marketing are all more likely to result in **no action being taken**. The opposite is true when the public experience sponsorship of individuals, charity bags and lotteries/ prize draws.

Action taken after experience with different fundraising methods



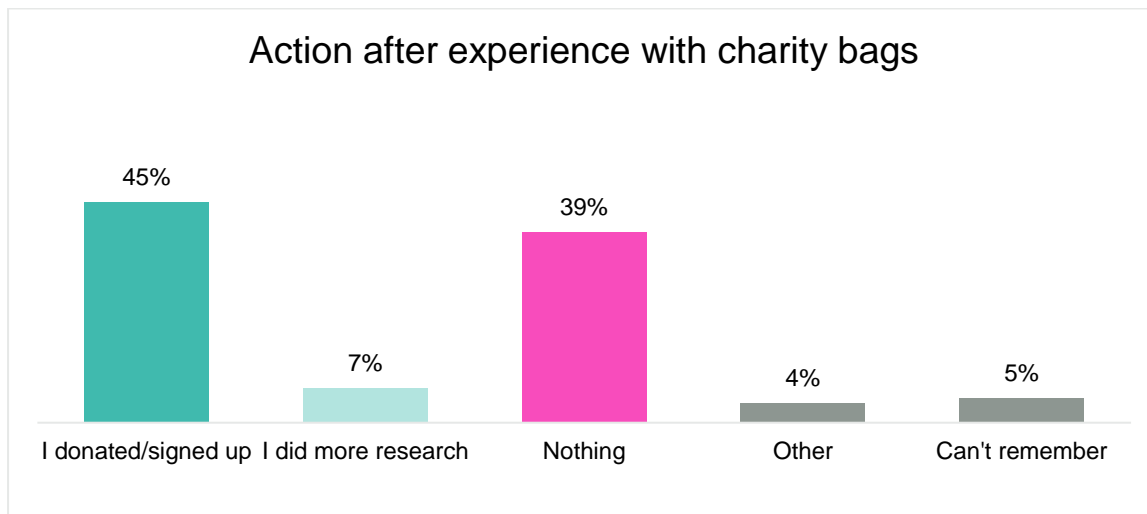
Q13. What did you do as a result of experiencing this type of fundraising. Please again think of your last experience of this form of fundraising. Base: participants who experienced that form of fundraising in the past 12 months.

Charity bags

Bags posted through your door for you to fill with unwanted clothing or other items which are then collected at a later date so the items can be sold to raise money for charity

Just under half (49%) of participants experienced charity bags as a fundraising tool within the past 12 months. Of these, half (49%) had a generally positive experience in comparison to 17% who have had a negative experience. It is worth noting that a larger proportion (31%) of participants do not feel strongly either way.

The level of positive experiences generally correlates to the actions taken by participants with 45% of participants donating following their experience.



Q15. What did you do as a result of experiencing this type of fundraising. Please again think of your last experience of this form of fundraising. Charity Bags. Base: experienced charity bags in the past 12 months (712)

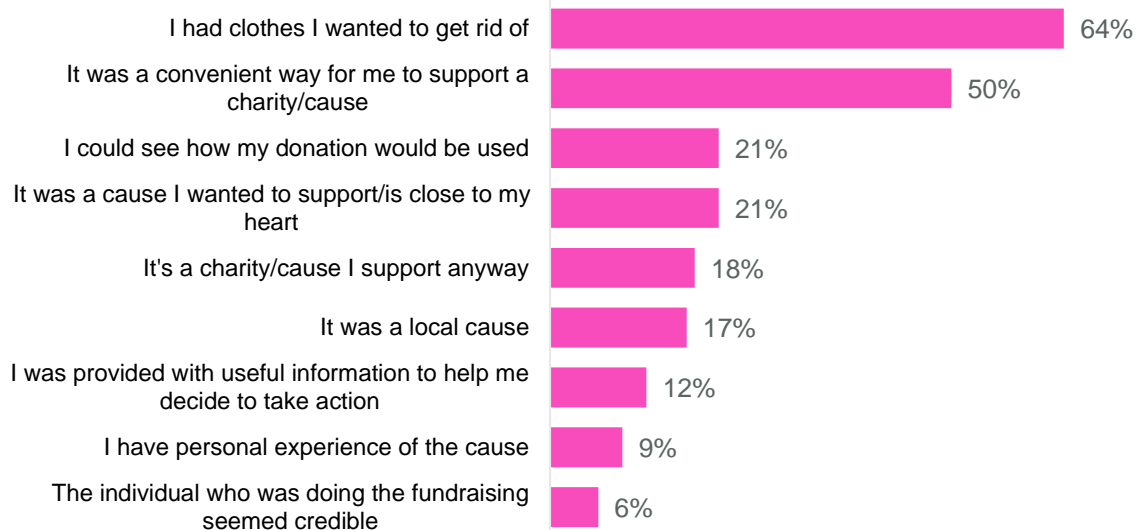
Looking further into the demographics regarding those who donated/ signed up we see some interesting patterns. Female participants were significantly more likely to have donated/signed up in comparison to their male counterparts. Furthermore, those living in urban areas were more likely to donate/ sign up in comparison to participants in rural areas.

SUBGROUP	% DONATED/ SIGNED UP
Female	51% (compared to 36% male)
Urban	47% (compared to 38% rural)

No significant differences were seen across age groups or among those with unpaid caring responsibilities.

Those who donated following their experience with this fundraising method did so as they had clothes they wanted to get rid of (64%). Aside from this, other reasons given were the convenience of this method (50%), they could see how their donation was going to be used and that it was a cause close to their hearts (21% both).

Motivations for engaging in charity bags



Q16. You said that you took some form of action after your experience with this type of fundraising – what were the main reasons that motivated you to take action? Base: participants who took action from charity bags experience (315)

Conversely, there were also a variety of reasons why participants took no to minimal action having received a charity bag. For just over a quarter (28%) of participants this was simply due to not having anything they wanted to donate.

Participants also cited their uncertainty around where their donation would be going (24%). Additionally, a further 15% of participants did not approve with this particular method of fundraising.

Participants were asked to select words they most associated with this fundraising method.



When associating words with this fundraising method, the top three words chosen by participants were 'convenient' at a third (33%), 'straightforward' at 30% and 'helpful' for nearly a quarter of participants (24%).

ASSOCIATION	TOTAL	% DONATED / SIGNED UP	% TOOK NO ACTION
Convenient	33%	51%	18%
Straightforward	30%	44%	14%
Helpful	24%	40%	8%
Satisfied	17%	31%	3%
Relaxed	16%	24%	6%
Friendly	14%	23%	4%
Honest	13%	20%	2%
Inconvenient	10%	1%	19%
Polite	10%	13%	3%
Ethical	7%	11%	3%
Transparent	7%	13%	1%
Pressured	6%	1%	11%
Unethical	6%	1%	9%
Informative	6%	8%	3%

Q18. Which if the following words would you most associate with your experience. All who experienced charity bags (711)

Participants' experiences of charity bags in the last 12 months have, to some extent, impacted their likelihood to engage in this fundraising method in the future. Over a third (36%) of participants stated they were now more likely to engage in the future in comparison to 19% who believed they would be less likely, with a significant 45% saying it would not impact their decision.

When looking further into demographics, ethnic minority participants were significantly more likely to further engage in comparison to their white counterparts. Further, those in urban areas were significantly more likely to engage in comparison to participants in rural areas.

SUBGROUP	% MORE LIKELY
Ethnic minority	56% (compared to 33% white)
Urban	45% (compared to 28% rural)

"Well, if you leave donation bags outside your door in the past they are never collected so in the end I drop items to another charity" – Open to support, Wales, 45-54

"Do you know with the charity bags, there was an investigation into where charity bags end up and they found out that they get washed and sold on and the money they make is pocketed by the people that are selling them. I mean they get out the house but they don't go to the destination you want it to" – Open to support, England, 25-34

Convenience giving

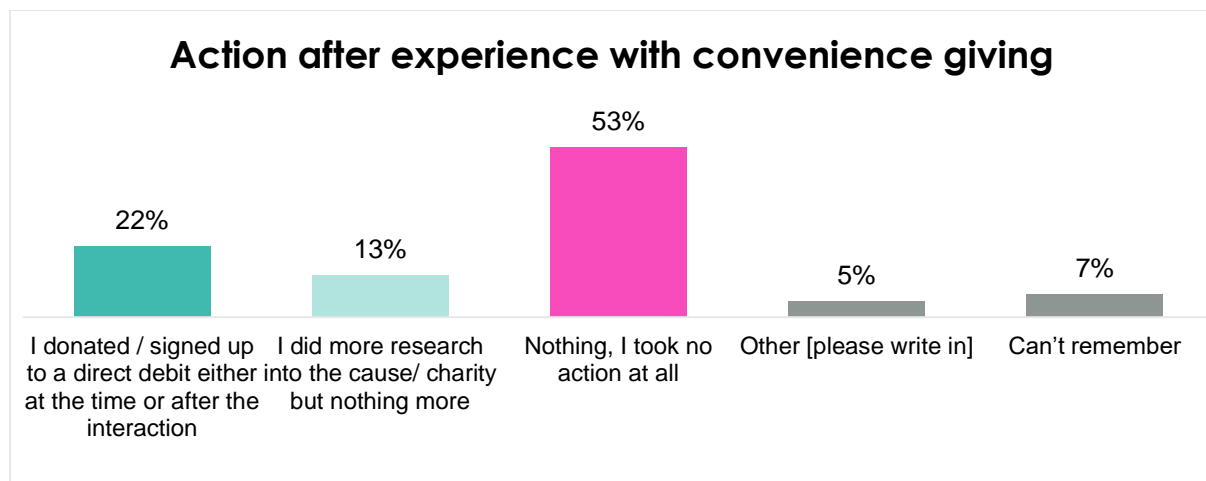
Donating small amounts to a charity by tapping a contactless card machine; rounding up the cost of a bill in a restaurant or shop; or sending a text message to donate automatically e.g. "GIVE10" to donate £10.

Just under two-fifths (37%) of participants experienced convenience giving as a fundraising method within the past 12 months. Further, disabled adults (41% vs 36% not disabled) and those with unpaid caring responsibilities (40% vs 36% no caring responsibilities) are more likely to have experienced this form of fundraising.

Of the participants who experienced convenience giving in the last 12 months, just under half (47%) had a generally positive experience in comparison to almost a fifth (18%) who had a negative experience. It is also worth noting that a notable proportion (32%) of participants did not feel strongly either way.

Over half (53%) of participants took no action after their experience with this fundraising method in contrast to those who took at least some action (35%). A fifth (22%) of participants donated or signed up in response to their interaction with convenience giving.

Of those that took at least some action, 53% of participants were aged 16-34 in comparison to those aged over 55 where only a fifth (21%) of participants acted.



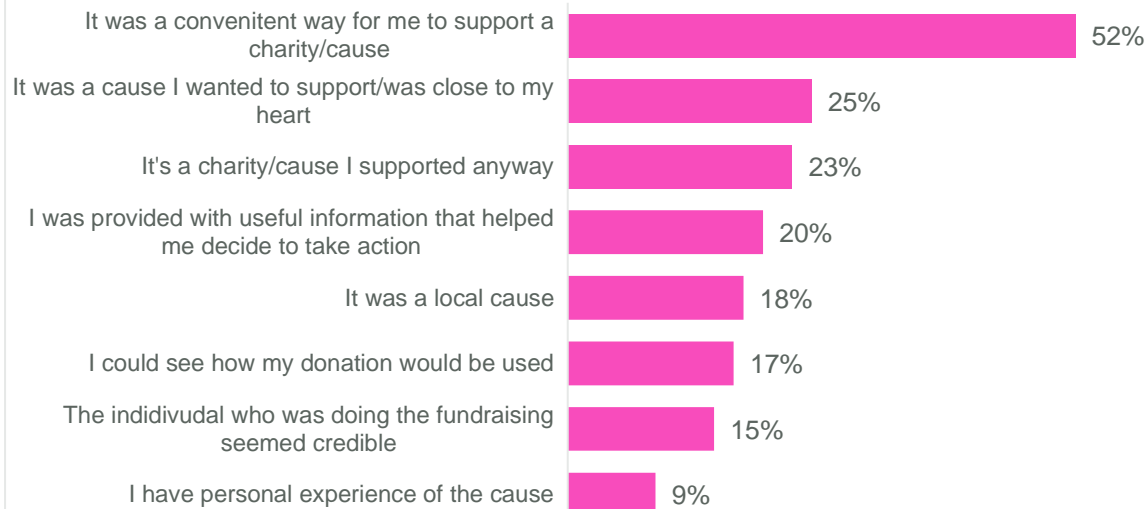
Q15. What did you do as a result of experiencing this type of fundraising. Please again think of your last experience of this form of fundraising. Base: experienced convenience giving in the past 12 months (663)

Further, those with unpaid caring responsibilities and those within an ethnic minority were significantly more likely to act upon the convenience giving fundraising method.

SUBGROUP	% DONATED/ SIGNED UP
Ethnic minority	31% (compared to 21% white)
Unpaid caring responsibilities	31% (compared to 19% no caring responsibility)

Those who took some action following their experience with this fundraising method did so largely because it was a convenient way to support a cause or charity, with more than half (52%) selecting this. A quarter (25%) of participants cited that the cause was close to their heart with a further 23% citing that they already supported the charity/cause.

Motivations for engaging with convenience giving



Q16. You said that you took some form of action after your experience with this type of fundraising – what were the main reasons that motivated you to take action? Base: participants who did take action from convenience giving (150)

Conversely there are numerous reasons as to why participants took no to minimal action following their interaction with this fundraising method. A quarter (26%) of participants cited that they were unable to afford to, with a further 24% of participants stating that they do not approve of this fundraising method.

Participants were asked to select words they most associated with this fundraising method.



When associating words with this fundraising method, the top three words chosen by participants were 'convenient' at 29%, 'pressured' at 27%, and 'straightforward' at a quarter (26%) of participants.

ASSOCIATION	TOTAL	% DONATED/ SIGNED UP	% TOOK NO ACTION
Convenient	29%	54%	18%
Pressured	27%	4%	40%
Straightforward	26%	49%	16%
Helpful	12%	27%	4%
Relaxed	12%	27%	5%
Guilt	10%	3%	13%
Inconvenient	10%	0%	17%
Honest	10%	20%	3%
Polite	10%	18%	3%
Transparent	10%	14%	5%
Unethical	9%	1%	15%
Friendly	9%	24%	3%
Satisfied	9%	20%	4%
Aggressive	8%	2%	11%
Rude	7%	4%	9%
Ethical	7%	10%	3%
Confusing	6%	2%	7%
Informative	6%	10%	3%

Q18. Which if the following words would you most associate with your experience. All who experienced convenience giving (663)

Participants' experiences of convenience giving in the last 12 months, to some degree, impacted their likelihood to engage with this method in the future. Just under a fifth (18%) of participants said they were now more likely to engage with a quarter (25%) of participants, less likely. It is worth noting that a significant 46% are saying that their experience would not impact their decision.

“I would like more charities to use QR codes. I've seen them in some charity shop windows, and I think it's a really good, a quick way to donate without actually interacting with anyone, which can be off-putting if you don't want the pressure!” – Open to support, England, 35-44

Qualitatively, participants were receptive of convenience giving when it was done discreetly and with their permission rather than automatically. However, they were against being asked to donate in front of others, or for establishments like restaurants adding this to a bill by default.

“I think it was supermarket that I went in to and I was paying for something at the till. And essentially the person at the till asked me if I wanted to donate. I think it was maybe like two or three pounds to a breast cancer charity. And I just remember thinking, well, ‘I can't say no because other people are going to hear that. I'm going to be judged’.” – Open to support, Wales, 45-54

“I mean you can't presume someone would want to give that and then it's against your will. Again, it's not right.” – Open to support, England, 35-44

The unsolicited nature of some convenience giving could explain the more mixed response seen in the word cloud to this method when compared with other fundraising approaches.

Door-to-door fundraising

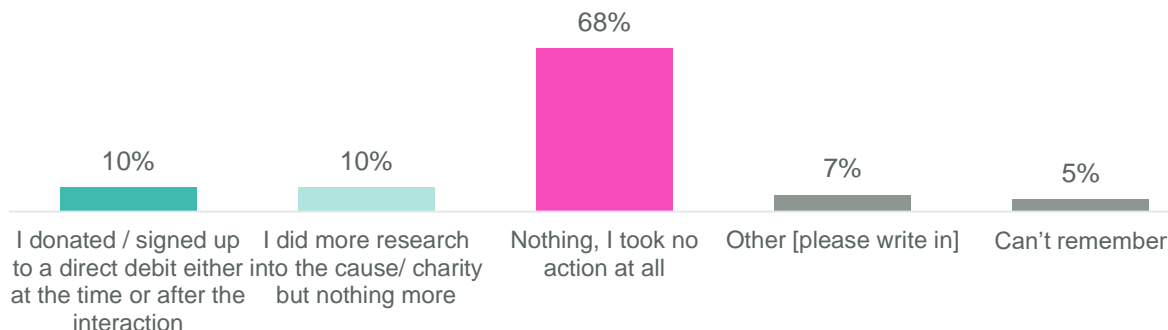
Charity representatives knock on your door to ask you to give money to support a charity.

Just under a quarter (23%) of our sample experienced door-to-door fundraising in the 12 months prior to this research. For a large proportion (62%), that experience was more negative than positive, but about a fifth (19%) didn't feel strongly either way. This left 17% who were positive about their experience.

A fifth (20%) took at least some action as a result of experiencing this method of fundraising. Over two-thirds (68%) reported that they took no action following their experience at all. A tenth donated or signed up following their experience (10%), and another tenth (10%) did more research into the cause/charity but did nothing more.

Qualitatively most participants reported negative experiences on the door. They expressed that having someone within their personal space made them feel uncomfortable and they found it difficult to say no when a request was made to support a charity.

Action taken after experience with door to door



Q15. What did you do as a result of experiencing this type of fundraising. Please again think of your last experience of this form of fundraising. Base: experienced door-to-door fundraising in the past 12 months (714)

Whilst only a relatively small proportion did donate or sign up compared to those who took no action at all, we did see some significant differences in terms of age and location type for this group. Those who are younger or lived in urban areas were more likely to respond to this form of charitable fundraising than their older counterparts or those in suburban areas. No significant differences were seen across disability or gender.

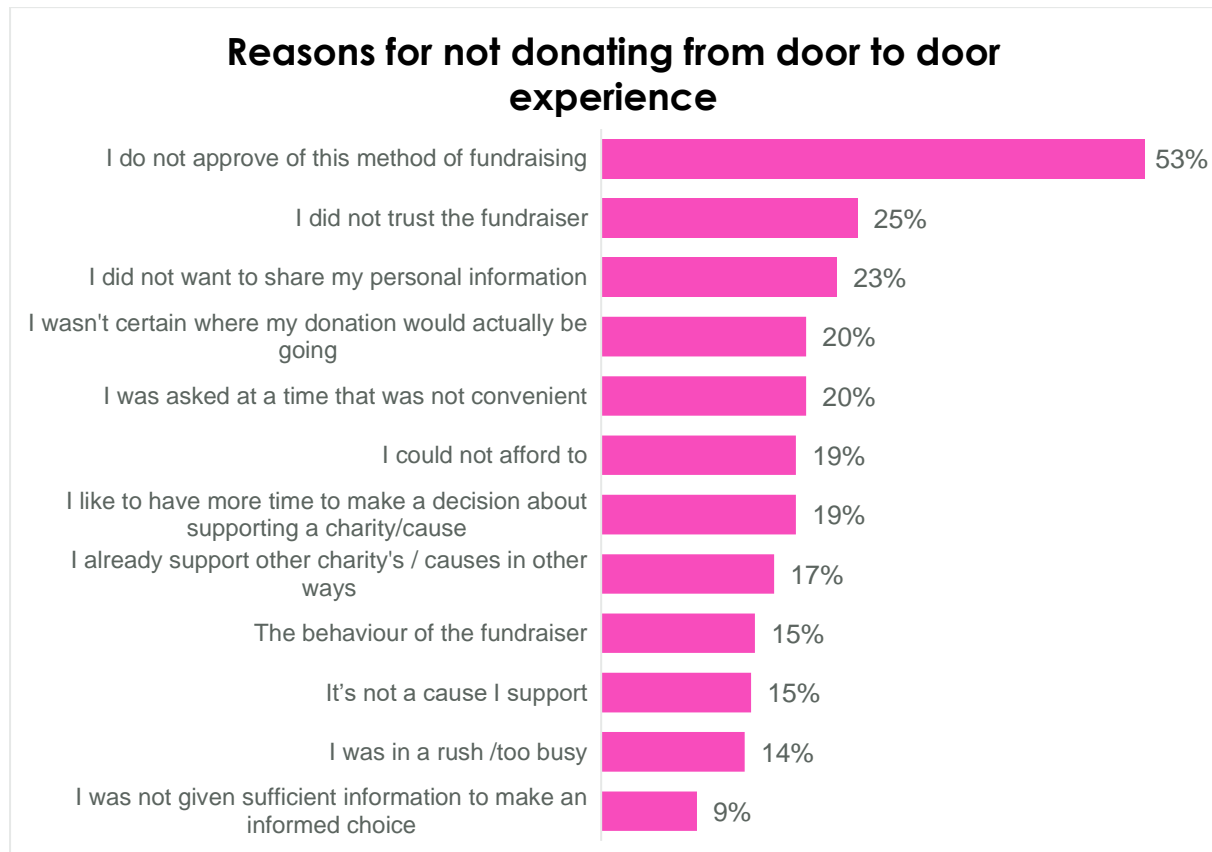
SUBGROUP	% DONATED/ SIGNED UP
Aged 16-34	20% (compared to 7% aged 35+)
Urban	18% (compared to 9% rural)

Among those who took some form of action following their interaction, this was largely because the individual who was doing the fundraising seemed credible (39%).

There were numerous reasons given as to why, having experienced door-to-door fundraising, a large proportion took no action. For most (53%), this was simply their disapproval of the method, highlighting that irrespective of the cause or the individual fundraiser's behaviour a proportion of the public are unlikely to engage in this type of charitable fundraising.

A quarter cited not trusting the fundraiser (25%), with slightly fewer not wanting to share personal information (23%). A fifth also said they were asked at a time that was

not convenient (20%) or that they like to have more time to make a decision about supporting a charity/cause (19%).



Q17. You said that you took no or minimal action after your interaction with this type of fundraising – why was that? Please select all that apply. Base: participants who did not take action from door-to-door fundraising (644) (Top 12 reasons shown)

“I had a guy here recently during the day, on a day where I was working from home and I was just about to go on to a work routine call and I told him that and he was like, well what time will you be finished and I'll call back. I find as well whenever people like that come it makes me feel bad because they're usually very friendly outgoing people and they're obviously fundraising for what I'm sure is a worthy cause which I would otherwise be sympathetic to but I would agree that it does feel like you're being pressured into doing something in what should be your safest space where you don't worry about that sort of thing” – Open to support, Northern Ireland, 35-44

“...it's not like you can pretend to be on your phone. And it feels like they've made an extra effort to actually come up to your front door and you feel even worse to say no to it. So it's almost like the public fundraising, but the pressure's like doubled or tripled almost” – Open to support, Scotland, 25-34

In line with how experiences were reported, the words used to describe the experience were far more negative than positive.



ASSOCIATION	TOTAL	% DONATED/ SIGNED UP	% TOOK NO ACTION
Pressured	54%	21%	63%
Inconvenient	42%	11%	47%
Rude	22%	9%	25%
Unethical	21%	3%	24%
Aggressive	20%	3%	21%
Guilt	16%	8%	18%
Upsetting	13%	8%	14%
Friendly	10%	29%	7%
Polite	9%	28%	6%
Disappointment	8%	3%	7%
Illegal	7%	4%	6%
Straightforward	7%	27%	4%
Helpful	6%	35%	1%
Informative	6%	23%	3%

Q18. Which if the following words would you most associate with your experience. All who experienced door-to-door fundraising (714)

Similarly to public fundraising, of concern is the 21% who felt the experience was 'pressured', yet still donated.

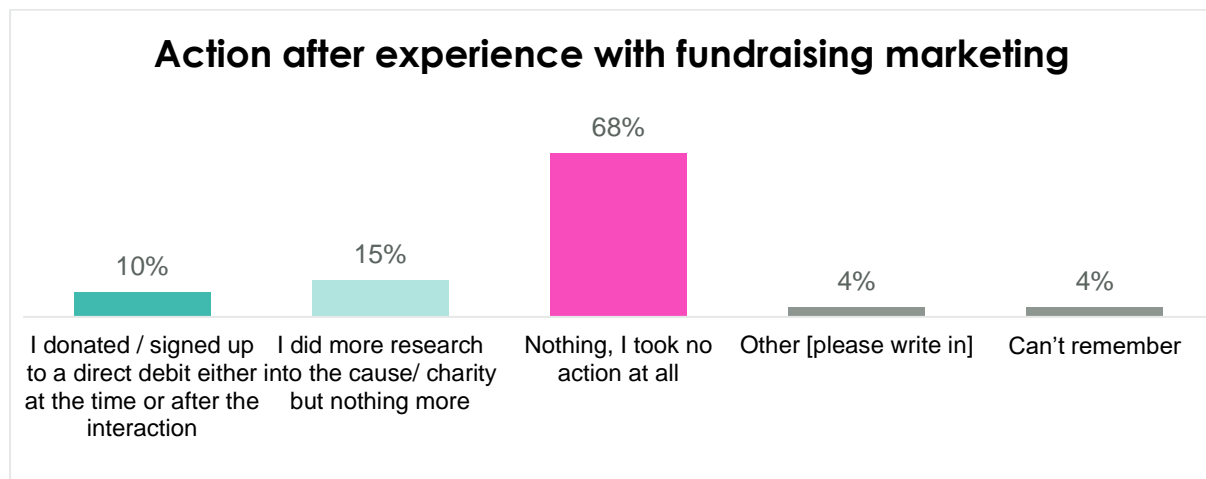
Fundraising marketing

Adverts by charities asking you to donate, on TV, the radio, in print, on social media or as mailings through your letterbox

Two-fifths (41%) of participants experienced some form of fundraising marketing within the past 12 months. When looking further into gender, we can see that female participants were more likely to have experienced this at 43% in comparison to just under two-fifths (38%) of male participants.

Of the participants who have experienced this form of fundraising, over a quarter (28%) had a generally positive experience, however, a similar proportion (27%) also reported a negative experience. It is worth noting that a larger proportion of participants (42%) did not feel strongly either way.

More than two-thirds (68%) took no action at all after experiencing fundraising marketing. Of those who took some kind of action, this was more likely to be research (15%) than donating or signing up (10%).



Q15. What did you do as a result of experiencing this type of fundraising. Please again think of your last experience of this form of fundraising. Base: experienced fundraising marketing in the past 12 months (668)

Of the participants who donated or signed up, these were most likely to be aged 16-34 (13% compared to only 7% of those aged over 55).

SUBGROUP

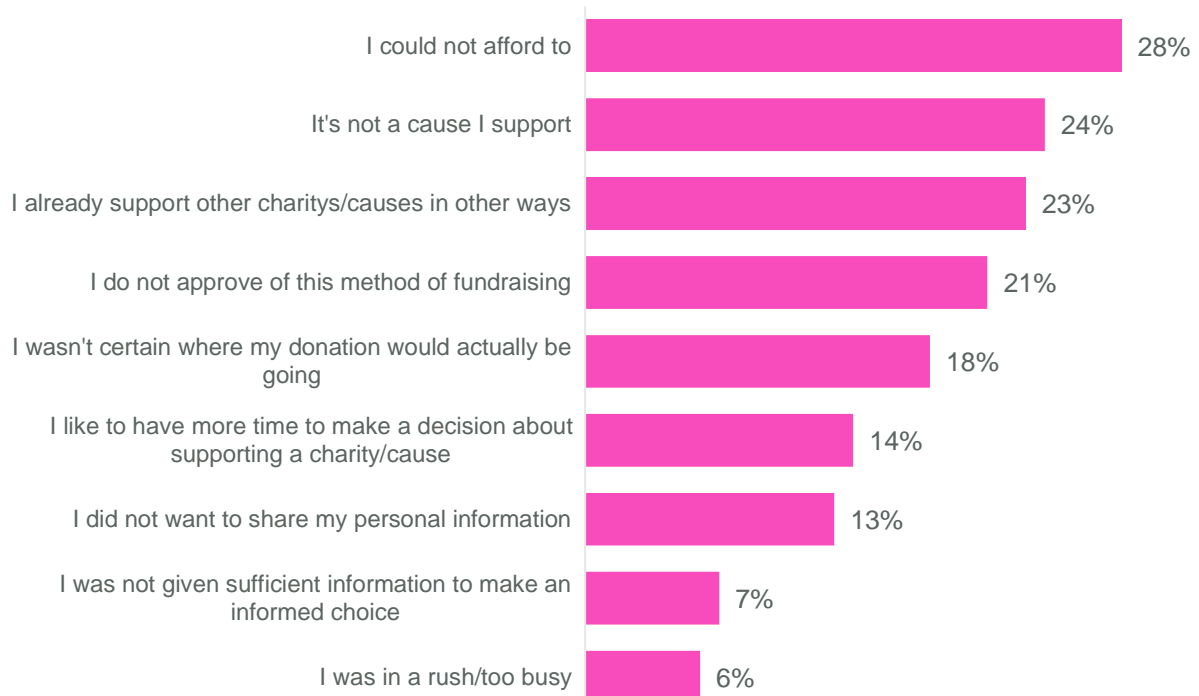
% DONATED/ SIGNED UP

Aged 16-34 13% (compared to 7% aged 55+)

The reason given by those who took some action following their experiences with this fundraising method was largely due to the cause being one they wanted to support (57%). More than a third (36%) said that it was a cause they already supported and 29% said that they could see how their donation would be used – this is likely due to the nature of the method and the ability for the charity to provide more information.

Among those who did not donate or take any action, for more than a quarter (28%) this was because they could not afford to. A quarter said it wasn't a cause they supported (24%) and a similar proportion (23%) said they already supported other causes.

Reasons for not donating after Fundraising Marketing



Q17. You said that you took no or minimal action after your interaction with this type of fundraising – why was that? Please select all that apply. Base: participants who did not take action from fundraising marketing (589)

Participants were asked to select words they most associated with this fundraising method.



When associating words with this fundraising method, more than a quarter felt it was 'pressured' (28%), however a fifth also stated it was 'informative' (20%) and the same proportion 'thought-provoking'.

ASSOCIATION	TOTAL	% DONATED/ SIGNED UP	% TOOK NO ACTION
Pressured	28%	6%	33%
Informative	20%	42%	15%
Thought-provoking	20%	40%	15%
Guilt	16%	6%	17%
Straightforward	15%	32%	12%
Upsetting	12%	10%	13%
Aggressive	11%	4%	12%
Convenient	10%	25%	5%
Inconvenient	9%	4%	11%
Friendly	8%	14%	4%
Helpful	8%	25%	4%
Unethical	7%	1%	9%
Honest	7%	23%	3%
Polite	7%	10%	5%
Ethical	5%	18%	2%

Q18. Which if the following words would you most associate with your experience. All who experienced fundraising marketing (668)

More than half who experienced fundraising marketing (55%) claimed it would have no impact on whether they would be likely to engage again with this type of fundraising in the future. Around one-in-three (29%) said it would make them less likely. When it came to the impact on supporting charities in general, just under a quarter (23%), stated that the experience of fundraising marketing would make them less likely to engage with charities in general in the future, however for the majority (62%) it would have no impact.

“But then they [my grandchildren] saw an advert on TV and it was for water poverty. And it was the grandma taking the child to them having water. So, they said, what can we give to that? And it was so good for them to understand the meaning of not just always getting things but being able to give.” – Open to support, Scotland, 55-

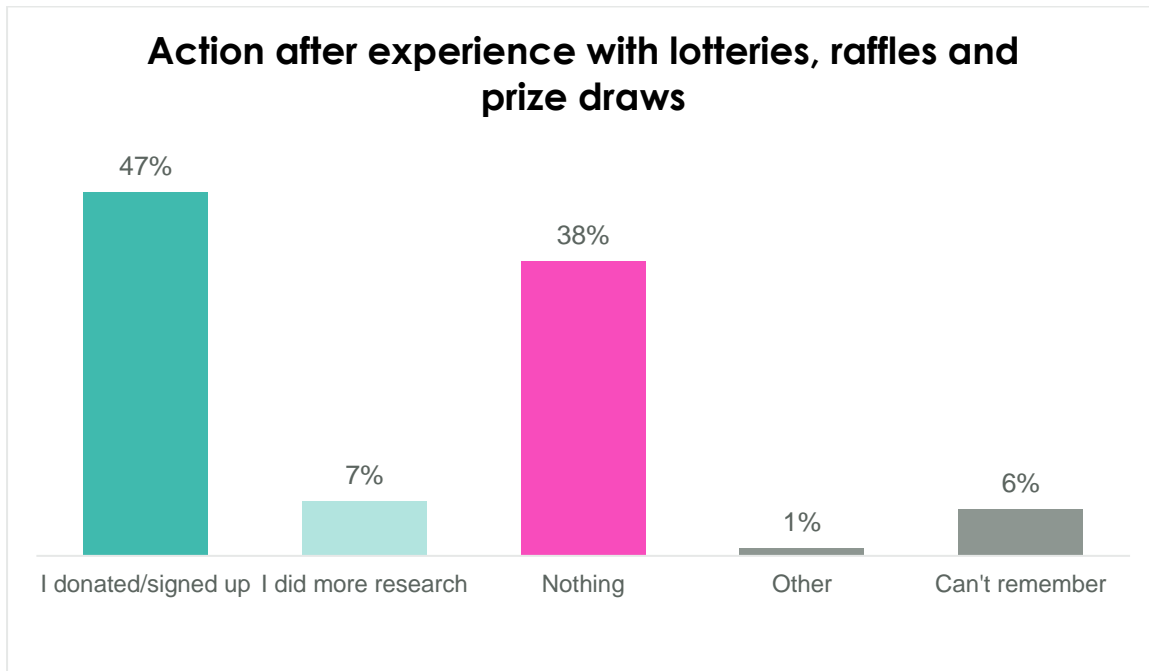
64

Lotteries, raffles and prize draws

A form of fundraising where you pay for entry and can win a prize or money. This could range from a small prize you win as part of a raffle, to a big prize like a house which you win in a prize draw. This does not include the National Lottery.

Just under half (49%) of participants experienced Lotteries, raffles and prize draws as a fundraising tool within the past 12 months. Half (50%) had a generally positive experience in comparison to 11% whose experience was reported as negative. A larger proportion (37%) of participants do not feel strongly either way.

The level of positive experiences generally correlates to action taken by participants. More than half (54%) took at least some action compared to 38% of participants who took no action at all following their interactions. Of those that took at least some action, just under half of participants (47%) donated or signed up to direct debit payments following their experience. The remainder did some research, but nothing further.



Q15. What did you do as a result of experiencing this type of fundraising. Please again think of your last experience of this form of fundraising. Base: experienced lotteries, raffles and prize draws in the past 12 months (707)

Of the participants who donated or signed up, there are some notable differences in terms of age and gender. Females were more likely to state they donated or signed up in comparison to male participants. Further, when looking at the age brackets of participants, those who are younger (16-24) were more likely to respond to this form of charitable fundraising compared to their older counterparts.

SUBGROUP	% DONATED/ SIGNED UP
Female	51% (compared to 42% male)
Aged 16-24	61% (compared to 42% aged 65+)

Those who took some action following their experiences with this fundraising method stated this was largely due to the opportunity to win (45%) and to it being a convenient way to support a charity/cause (32%). Further, for 29% of participants it was a charity they already supported anyway.

Motivations for engaging in lotteries, raffles and prize draws



Q16. You said that you took some form of action after your experience with this type of fundraising – what were the main reasons that motivated you to take action? Base: participants who did take action from lottery, raffle, and prize draw experience (327)

Conversely, there are numerous reasons as to why participants took no action following their interaction with this fundraising method. Over a quarter (28%) of participants cited this was due to their inability to afford this form of fundraising whilst a further fifth (20%) of participants did not approve of this method of fundraising.

Participants also cited the importance of the charity cause and transparency in terms of where the donations go, with 15% saying it was not a cause they support and a further 17% citing that they were uncertain where their donation would go.

Participants were asked to select words they most associated with this fundraising method.



When associating words with this fundraising method, the top three words chosen by participants were 'straightforward' (29%), 'convenient' (24%) and 'friendly' (19%).

ASSOCIATION	TOTAL	% DONATED/ SIGNED UP	% TOOK NO ACTION
Straightforward	29%	42%	18%
Convenient	24%	38%	8%
Friendly	19%	27%	8%
Relaxed	17%	24%	9%
Satisfied	15%	23%	5%
Honest	11%	18%	3%
Helpful	10%	16%	5%
Informative	10%	15%	5%
Transparent	10%	16%	4%
Polite	9%	13%	3%
Pressured	8%	3%	13%
Unethical	7%	1%	13%
Inconvenient	6%	1%	10%
Disappointment	5%	4%	6%

Q18. Which if the following words would you most associate with your experience. All who lotteries, raffles and prize draws (707).

Participants' experiences of lotteries, raffles and prize draws in the last 12 months have, to some degree, impacted their likelihood to engage in this method in the future. A quarter (26%) said they were now more likely to engage in the future in comparison

to 13% who are less likely, with a significant 61% saying it would not impact their decision.

“I pay direct debit £10 a month to [organisation], you can win a house every month. So I do that. But it's almost like for self-benefit, isn't it? So you don't kind of think about it as being a charity.” – Open to support, Scotland, 55-64

Online fundraising

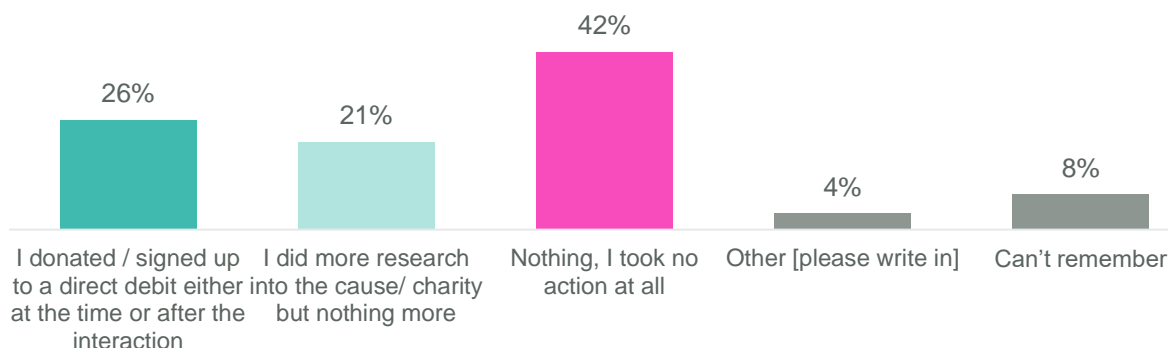
Methods charities use to let you donate online; through platforms like Just Giving, or on the charity's own website

Two fifths (42%) of participants experienced online fundraising in the last 12 months. This proportion is similar across age groups but is higher among those in higher-income households or in a higher social grade.

Most participants rated their last experience of online fundraising as either positive (54%) or neutral (31%); with only a minority saying they had a negative experience (12%). As with other methods, there are large discrepancies between age groups, with negative experiences increasing with age, most sharply among those aged 65 and over. For example, over two thirds (69%) of 16 to 34 year olds had a positive experience, while a tenth (8%) reported a negative experience. In contrast among those aged 65 and over only a third (35%) reported a positive experience, and just under a quarter (23%) a negative experience. Among those aged 75 or over, the proportion who rated their experience as negative increased to three in ten (29%).

Almost half (46%) took some form of action from their experience with online fundraising; 26% donated, and 21% researched the cause/charity. Compared to other fundraising methods, the proportion donating was in line with the average (26%), but the proportion researching the cause was higher (13%).

Action after experience with online fundraising



Q15. What did you do as a result of experiencing this type of fundraising. Please again think of your last experience of this form of fundraising. Online Fundraising. Base: experienced online fundraising in the past 12 months (695)

In line with younger age groups being more likely to have had a positive experience with online fundraising, they were also more likely to have taken action, both to donate and research. Two-thirds (68%) of under 35s took some form of action, compared to only a quarter of those aged 65 or over (25%).

SUBGROUP	% DONATED/ SIGNED UP
Aged 16-34	34% (compared to 15% aged 55+)

Compared to most other fundraising methods, there are fewer differences between demographic groups for those that took action in terms of donating/ signing up. There are no significant differences among gender, urban versus rural, unpaid caring responsibilities, and social grade.

Reasons for donating were varied. The most common was it being a cause close to their heart, (45%), convenience (35%), already supporting the charity/cause (30%), and seeing how the donation would be used (29%).

In contrast the main reasons for not donating were because they could not afford to (25%), and already supporting other charity's/causes in other ways (23%). Those aged 65 or over were more likely to cite already supporting other charities (31%), not supporting cause (24%), and not approving of the method (20%) than younger participants.

Reasons for not donating from online fundraising experience



Q17. You said that you took no or minimal action after your interaction with this type of fundraising – why was that? Please select all that apply. Base: participants who did not take action from online fundraising experience (518) (Top 11 reasons shown)

“But I think even just going online. I have just done it in my will about four months ago, and I've left a donation in my will to cancer. Well, to [a cancer organisation]. So that's the sort of thing I would say. More than my time just now, because I'm still working full-time. So I think it's probably more money-wise than it is in actual time at the moment.” – Open to support, Scotland, 55-64

Participants were asked to select words they most associated with this fundraising method.



Online giving is seen very positively by the public. The most common words participants associated with their experience of online fundraising were 'convenient' (30%), 'straightforward' (29%), and 'informative' (20%), with these being associated more strongly by those who donated (42%, 45%, and 27% respectively).

Unlike the face-to-face methods, the proportion donating but associating the experience with feeling 'pressured' or 'guilty' is negligible.

ASSOCIATION	TOTAL	% DONATED/ SIGNED UP	% TOOK NO ACTION
Convenient	30%	42%	21%
Straightforward	29%	45%	22%
Informative	20%	27%	13%
Helpful	15%	29%	7%
Honest	14%	21%	9%
Relaxed	14%	25%	8%
Satisfied	14%	27%	6%
Friendly	13%	18%	8%
Polite	12%	17%	10%
Transparent	12%	23%	8%
Pressured	10%	2%	16%
Ethical	9%	13%	5%
Thought-provoking	9%	9%	7%
Inconvenient	6%	1%	10%

Q18. Which if the following words would you most associate with your experience. All who experienced online fundraising (695)

For most, their experience of online fundraising had either a positive, or neutral impact on their likelihood to engage with this method again (31% and 54% respectively). The proportion who say they would be more likely to engage with this method increased to over half (57%) of those who donated, and two-fifths (40%) who did not, but were prompted to research the cause/charity. On the flipside, one-in-seven say they are now less likely to engage with this method (15%).

The impact on supporting charities more generally in future is similar. Just under three-fifths said their experience had no impact (58%), a quarter, more likely (26%), and a seventh (16%) less likely.

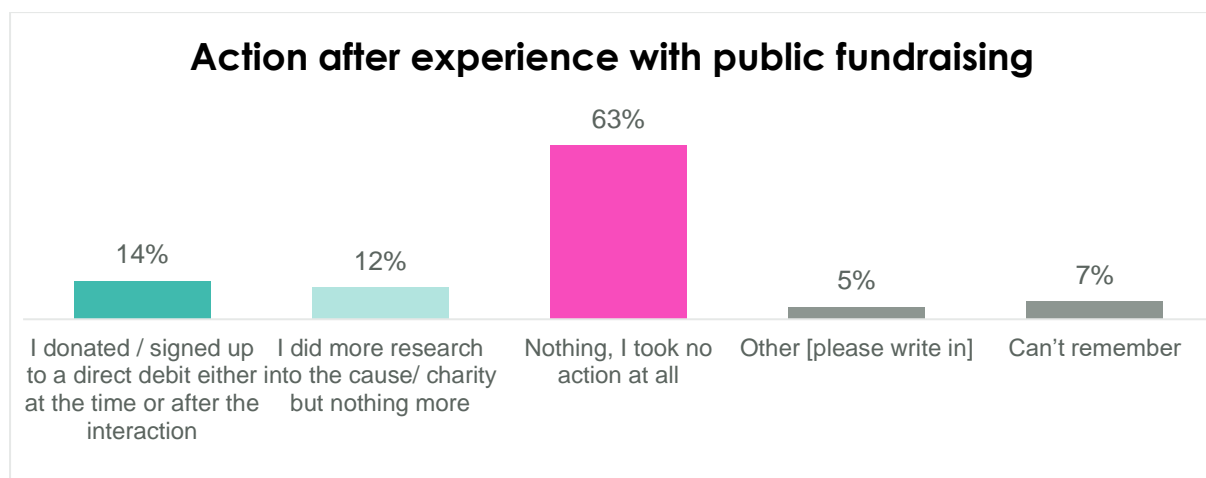
Public Fundraising

Charity representatives approach you in public to ask you to make a one-off or continuing donation. This could be on the street, in shops, or in other public spaces (such as a shopping centre).

Just under two-fifths (39%) of our sample experienced public fundraising in the 12 months prior to the research. For many (41%) that experience was more negative than positive, however just over a quarter (27%) didn't feel strongly either way.

Whilst 30% were positive about their experience, this did not necessarily correlate to taking any action. In fact, around a third of this more positive group (34%) reported that they took no action following their interaction at all (in comparison with the 31% who donated/ signed up).

Looking at all those who experienced public fundraising, a small proportion did take action, with 14% confirming that they donated or signed up following their experience.



Q15. What did you do as a result of experiencing this type of fundraising. Please again think of your last experience. Base: experienced public fundraising in the past 12 months (1,054)

Whilst only a relatively small proportion did donate or sign up compared to those who took no action at all, we did see some significant differences in terms of age and gender of this group. Females and those who are younger were more likely to respond to this form of charitable fundraising than their male and older counterparts.

SUBGROUP	% DONATED/ SIGNED UP
Female	17% (compared to 11% male)
Aged 16-34	22% (compared to 10% aged 55+)

This is interesting given the higher levels of discomfort among females in this area of fundraising, but it was not within the scope of this research to explore why.

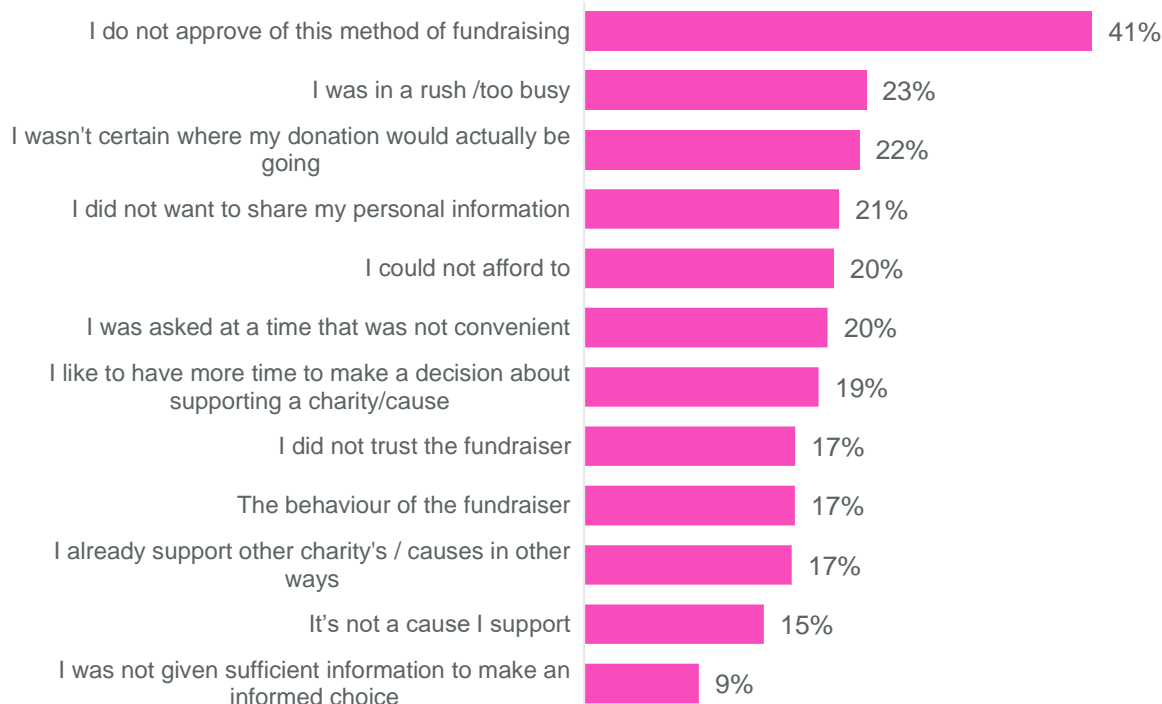
No significant differences were seen across location type i.e. rural versus urban or suburban or among those with unpaid caring responsibilities.

Among those who donated following their interaction this was largely because it was a convenient way for them to support a cause they either wanted to support or already supported. For just over a fifth (22%) they cited being able to see where their donation would be used as a reason to support, and a similar proportion (21%) mentioned being provided with useful information, both of which demonstrating the impact of charity fundraisers alleviating some of the concerns that we have seen when it comes to trusting charity fundraisers in general. For more than a quarter (28%) the credibility of the person doing the fundraising was a driver to donating - emphasising the impact of the personnel that are being used to carry out this approach.

There were numerous reasons given as to why, having engaged with public fundraising, a large proportion took no action. For two-fifths (41%) this was simply their disapproval of the method, highlighting that irrelevant of the cause or the individual fundraiser's behaviour a proportion of the public are unlikely to engage in this type of charitable fundraising.

Participants also cited being in a hurry and it not being convenient and, echoing drivers of distrust in charity fundraisers in general, concerns about where any donation would go and a lack of trust in the fundraiser and how their personal details would be used.

Reasons for not donating from public fundraising experience



Q17. You said that you took no or minimal action after your interaction with this type of fundraising – why was that? Please select all that apply. Base: participants who did not take action from public fundraising experience (907) (Top 12 reasons shown)

“I would not want to be approached in the street or in my home, calls should only be made on an "opt-in" bases. They should wear name tags and numbers that would make it easy for me to check that they are genuine fundraisers. – Not open to support, England, 25-34

I expect fundraising staff to be professional and polite. I don't want to be approached too often in the street, unless it's a really important local cause. I am not comfortable with being "guilt-tripped" – Open to support, England, 35-44

“I tend to avoid people who are doing that., I'm happy to stand and talk to people, but I've just encountered fundraisers who are very pushy, very persistent. It just pushes me further away from the charity. I don't want to make snap decisions. I want to think about things. And yeah, that's just one of my pet hates really.” – Open to support, England, 65+

Participants were asked to select words they most associated with this fundraising method.



Reiterating much of what came through strongly in terms of the barriers, it is immediately clear to see that the public's experiences are largely perceived as negative, with 'pressured', 'inconvenient' and 'aggressive' having the strongest associations.

When looking at the words selected, we can see the direct link between the behaviour of the fundraiser and convenience of the approach, to whether action (i.e. a donation) is taken or not:

ASSOCIATION	TOTAL	% DONATED/ SIGNED UP	% TOOK NO ACTION
Pressured	51%	20%	61%
Inconvenient	32%	7%	41%
Aggressive	22%	9%	28%
Guilt	16%	9%	19%
Rude	16%	3%	19%
Friendly	15%	40%	8%
Unethical	13%	0%	17%
Upsetting	10%	4%	11%
Polite	10%	25%	6%
Straightforward	10%	23%	5%
Informative	8%	26%	3%
Convenient	7%	22%	3%
Helpful	6%	20%	2%
Honest	6%	20%	2%
Relaxed	6%	22%	2%
Satisfied	6%	20%	1%

Q18. Which if the following words would you most associate with your experience. All who experienced public fundraising (1054)

Of concern is the 20% who described the experience as pressured, yet still donated. Whilst it is not possible to assess if this was a result of bad practice, the high incidence of participants stating they felt pressured is nonetheless concerning and highlights the contentious nature of this approach.

The research also explored the impact that the experience would be likely to have on future engagement with both this type of fundraising and supporting charities in general, in the future. Almost half (47%) of those surveyed said their experience of public fundraising would make them less likely to engage again in the future with this type of fundraising. A significant minority (36%) also said they would be less likely to engage with charities in general again.

The following case study brings this to life:

Case study 2: Noah, Open to support, Scotland, 25-34

Noah (not his real name) enjoys spending time with his girlfriend in the city centre. When encountering street fundraisers in public locations he finds it uncomfortable to turn them down.

Additionally, he feels as if they do not use discernment when approaching individuals on the street. He witnessed this when his girlfriend, who speaks English as a second language, was approached by street fundraisers, and was unclear about what their request was.

"I don't want to do my girlfriend a disservice, she's from Spain and she's very competent in English but it's also her second language... I found it happening, it seemed as though they were definitely taking advantage of the fact that she's too polite to say no..."

The impact...

Noah intervened and declined to donate to the fundraisers, but he was left feeling uncertain about how legitimate that organisation was or the fundraisers who were operating.

This left him with a bad impression about this specific fundraising approach and that specific situation, however not charity fundraising as a whole.

"I don't know how legitimate that actually was as a charity or if those were just people trying to get a few a few pounds for free really."

Sponsorship of an individual

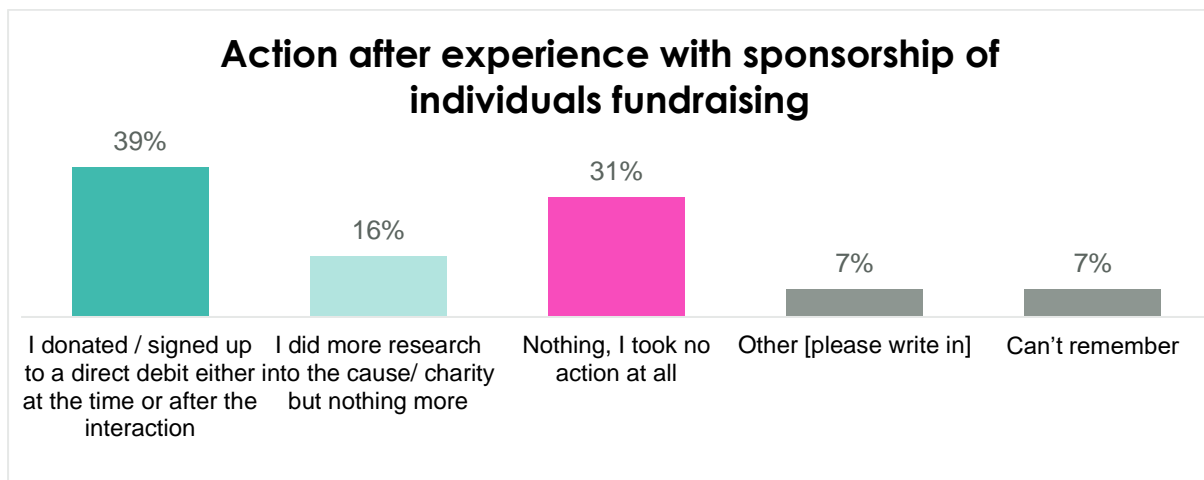
Donating to someone who will complete a challenge e.g. running a marathon, with the money going to a chosen charity/ charities. This could be online or with a paper form.

Just over a third (36%) of the public saw or experienced sponsorship of an individual in the past 12 months. The starkest difference between subgroups is between low-income and high-income households and social grade. The proportion experiencing this method increased from 28% among households with an annual income up to £19,999 to 44% among households with an income over £60,000.

Out of the fundraising methods explored in this research, sponsorship of individuals had the highest proportion of participants rating it as a positive experience (66%), and

the lowest proportion of reported negative experiences. Unlike other methods, there is little variation among demographics, most notably across age groups.

Sponsorship of individuals is among the methods that prompted action the most, two-fifths (39%) donated and a further one in six researched the charity/cause.



Q15. What did you do as a result of experiencing this type of fundraising. Please again think of your last experience of this form of fundraising. Sponsorship of Individuals Fundraising. Base: experienced sponsorship of individuals fundraising in the past 12 months (664)

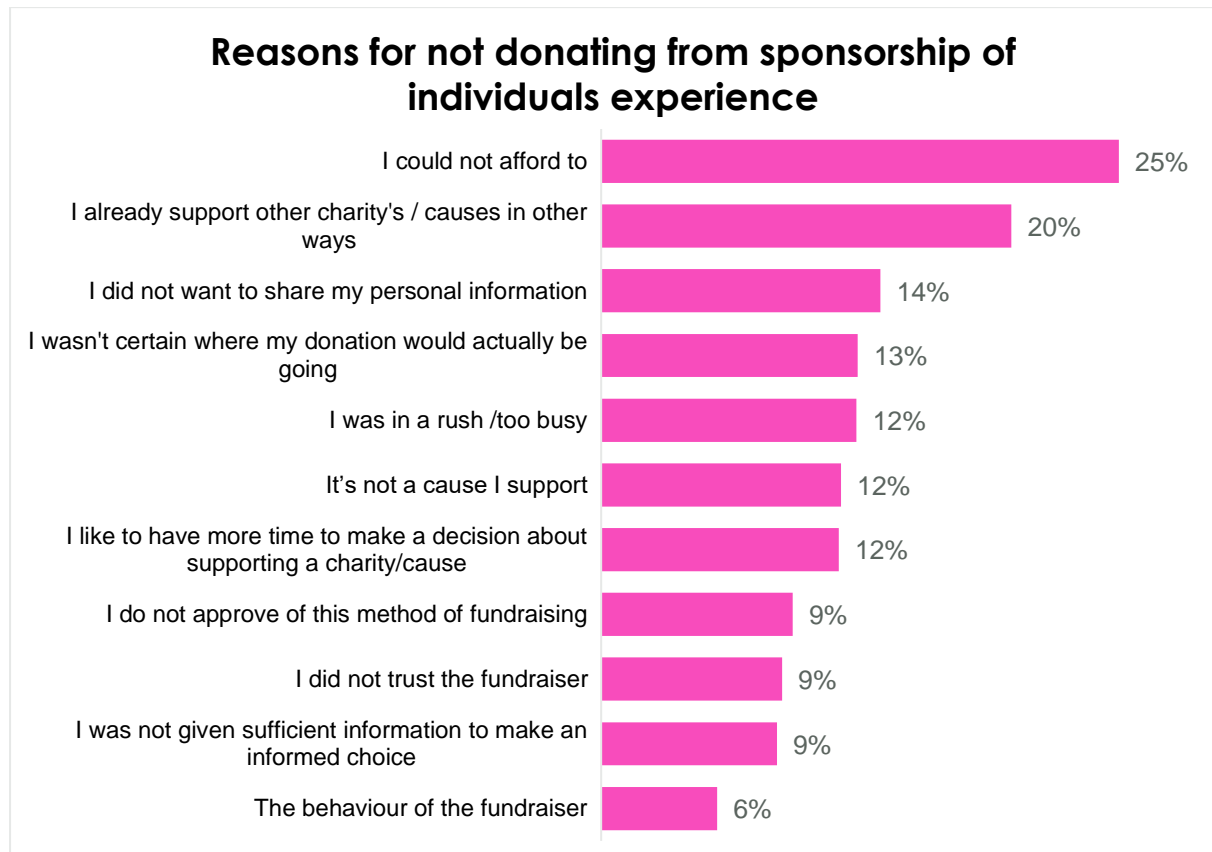
Here again, there was little variation across demographics on who was most likely to have donated; the proportion only drops at a significant level among those in low-income households (annual income of £19,999 or lower).

SUBGROUP	% DONATED/ SIGNED UP
Household income under £19,999	28% (compared to 43% with those with a household income over £60,000)

The majority (66%) who donated named knowing the individual and wanting to support them as the reason to take action. Three-in-ten (30%) also cited the individual doing the fundraising being credible, and just over a quarter (27%), it being a cause they wanted to support.

Reasons for not donating were more split, but the most common were not being able to afford it (25%) and already supporting charity's/causes in other ways. We saw that those that took action were more likely to have a higher household income. This

method also had the lowest proportion citing disapproval of fundraising method as a reason (9%).



Q17. You said that you took no or minimal action after your interaction with this type of fundraising – why was that? Please select all that apply. Base: participants who did not take action from sponsorship of individuals (405) (Top 11 reasons shown)

Participants were asked to select words they most associated with this fundraising method.



Overall, most participants selected words with a positive association, including 'straightforward' (31%), 'friendly' (30%) – much higher association to this method than any other, and 'honest' (23%).

ASSOCIATION	TOTAL	% DONATED/ SIGNED UP	% TOOK NO ACTION
Straightforward	31%	41%	23%
Friendly	30%	41%	22%
Honest	23%	27%	13%
Satisfied	20%	30%	11%
Convenient	18%	26%	11%
Pressured	17%	10%	24%
Relaxed	17%	21%	12%
Polite	15%	18%	9%
Helpful	14%	21%	7%
Informative	12%	15%	5%
Transparent	12%	17%	10%
Ethical	8%	9%	3%
Thought-provoking	8%	9%	5%
Guilt	6%	4%	8%

Q18. Which if the following words would you most associate with your experience. All who experienced sponsorship of individuals fundraising (664)

Experiences of sponsorship of individuals, overall, had a positive impact on future engagement with this method, extending to supporting charities in general – albeit to a lesser degree. Of the public who experienced sponsorship of individuals, three-in-ten (30%) said they would be more likely to engage with this method in the future, for three-fifths (58%) this experience had no impact, and for a tenth (12%) they would now be less likely. These proportions are mirrored when asking about the impact of this experience with supporting charities in general in the future.

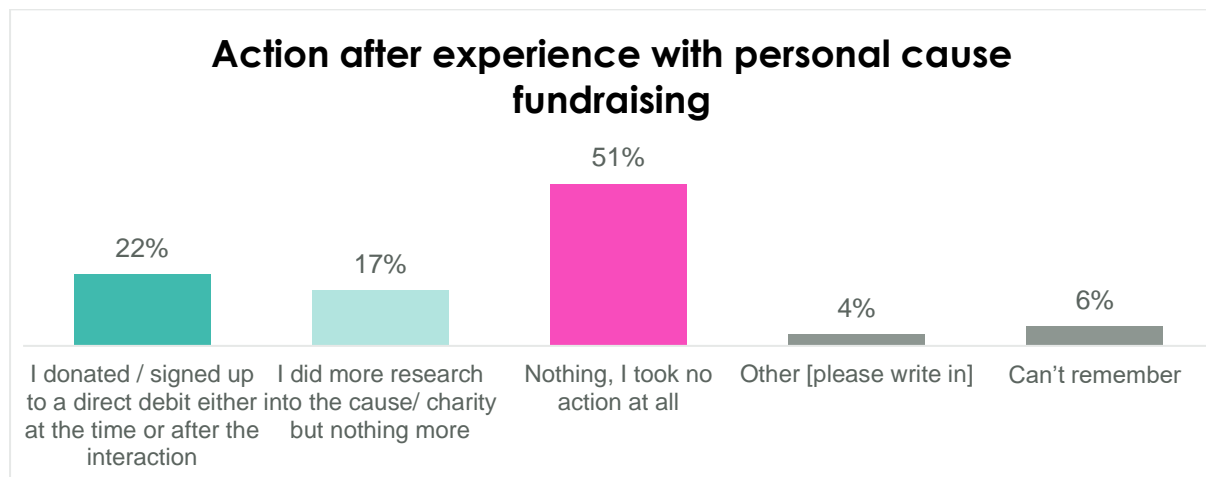
Personal Cause Fundraising

This is not charitable fundraising but someone raising money for themselves or a friend/family member/pet e.g. to pay for an operation or to help them in times of difficulty, using online platforms like GoFundMe.

Three-in-ten participants experienced personal cause fundraising in the past 12 months. While two-fifths (40%) said this was a positive experience, a significant proportion, one-in-five, described it as a negative experience. For more than a third (36%), it was neutral.

In line with the other methods, younger participants are more likely to describe their experience as positive (61% versus 14% of over 65s), and less likely to describe it as negative (9% versus 39%).

Just over a fifth (22%) of participants donated / signed up to a direct debit from this experience, with a further 17% undertaking more research. Half (51%) took no action at all.



Q15. What did you do as a result of experiencing this type of fundraising. Please again think of your last experience of this form of fundraising. Personal Cause Fundraising.
Base: experienced personal cause fundraising in the past 12 months (594)

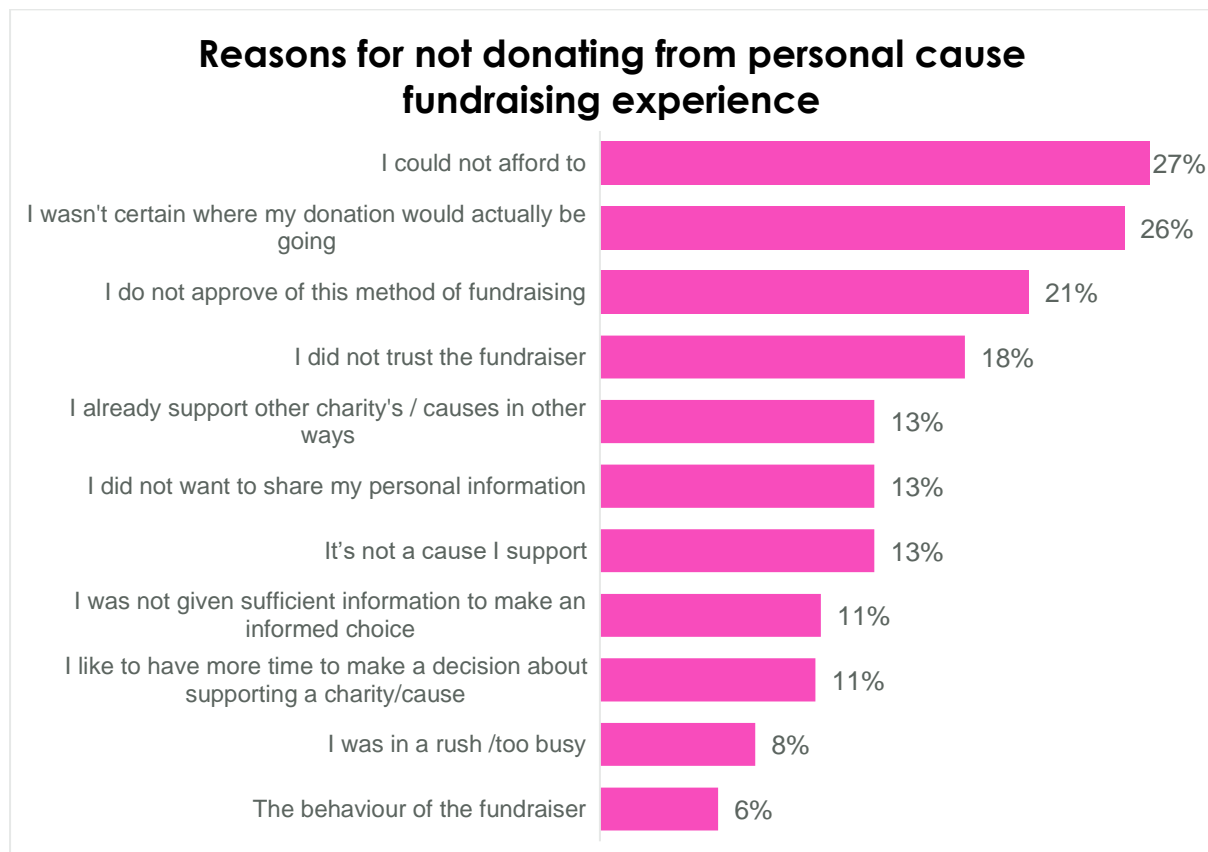
Those under the age of 35 were more likely to have taken any action, compared to those aged 65 and over (59% versus 16%).

SUBGROUP	% DONATED/ SIGNED UP
Aged 16-34	29% (compared to 16% aged 65+)

Participants that donated referenced several reasons. Similarly to sponsorship of individuals, personally knowing the individual and being someone they wanted to support is the most common reason (53%). A significant proportion also cited 'it being a cause close to them', 'seeing how the donation would be used' (30%), and the individual seeming credible (25%).

Among those who did not donate, the main reasons were not being able to afford it (27%), not certain where the donation would go (26%), and not approving of the fundraiser method (21%).

Those under 35 were more likely to state they could not afford to (39%), and less likely to disapprove the method (7%), and over 65s the opposite (12% and 40% respectively).



Q17. You said that you took no or minimal action after your interaction with this type of fundraising – why was that? Please select all that apply. Base: participants who did not take action from personal cause fundraising (458) (Top 11 reasons shown)

Participants were asked to select words they most associated with this fundraising method.



Regarding words participants associated with their experience of personal cause fundraising, the differences between those who donated, and those who did not are stark. For example, two-fifths (42%) of those who donated selected the word 'friendly', this proportion drops to 16% among those who did further research, and 8% for those who took no action at all. 'Pressured' is mentioned by 7% of those who donated, and by 24% of those who did not.

It is clear that personal cause fundraising is a polarising approach, with mixed views from the public.

ASSOCIATION	TOTAL	% DONATED/ SIGNED UP	% TOOK NO ACTION
Pressured	19%	7%	24%
Friendly	18%	42%	8%
Straightforward	18%	35%	11%
Thought-Provoking	16%	20%	13%
Honest	14%	33%	5%
Polite	14%	29%	6%
Unethical	11%	2%	18%
Convenient	10%	25%	7%
Helpful	10%	23%	5%
Transparent	10%	22%	3%
Upsetting	10%	7%	10%
Informative	10%	18%	4%
Guilt	10%	5%	10%
Satisfied	9%	17%	5%
Relaxed	7%	14%	4%
Regrettable	6%	4%	7%
Ethical	6%	11%	2%
Confusing	6%	2%	7%

*Q18. Which of the following words would you most associate with your experience.
All who experienced personal cause fundraising (594)*

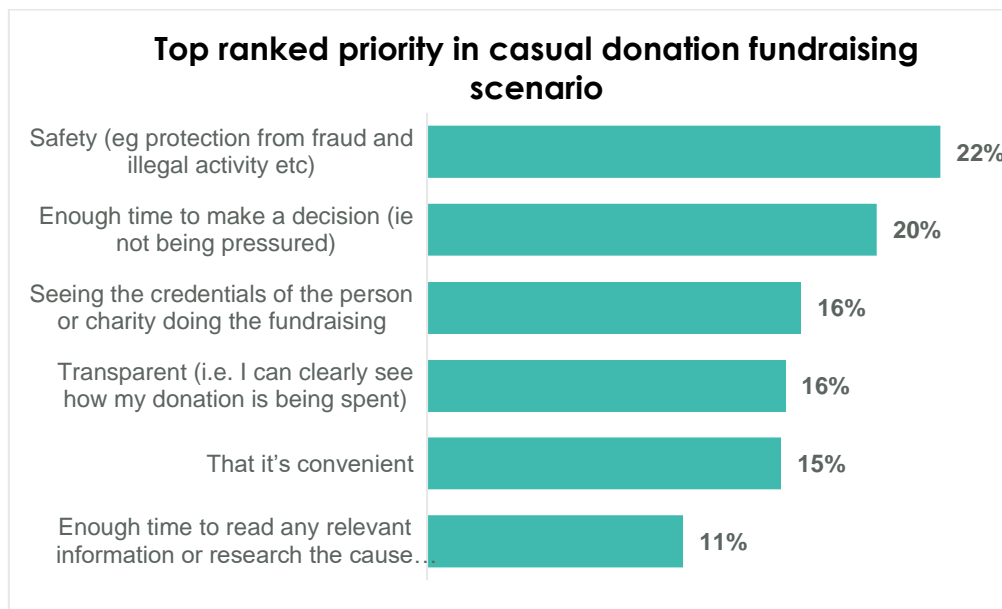
While personal cause fundraising isn't regulated (by any organisation) the Fundraising Regulator was keen to look at this method, given it's an area for which they receive a number of enquiries and complaints.

Our research also shows this approach discourages some who experience it from supporting charities in general in the future. Just under a quarter (23%) say they would be less likely to support charities after this experience, while a fifth state that it increases their likelihood (20%). The figures are similar for engaging with personal cause fundraising, with 23% saying more likely, and 27% less likely.

Understanding the public's priorities

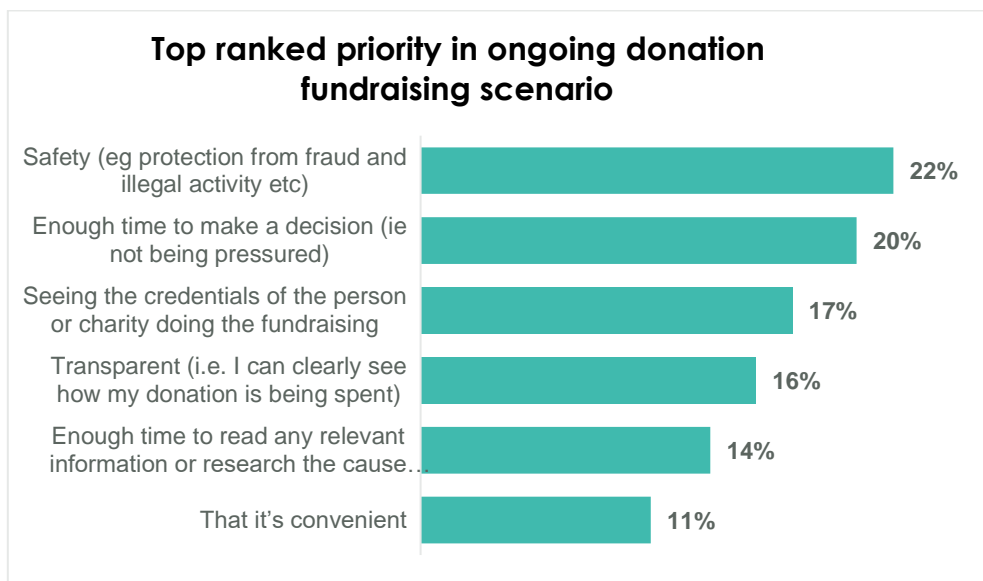
To get a sense of what is most important to the public when they are considering supporting charities, we asked participants what their most important priorities would be if they were asked to make a donation to a charity. This was tested against both making a casual donation, such as rounding up a bill or donating to a collecting tin, and a second scenario that referred to an ongoing donation, such as giving to a charity on a regular basis i.e. via direct debit.

For casual donations, more than a fifth (22%) cited safety i.e. ensuring that they were protected from fraud or illegal activities, as a key priority for them.



Q23. Please rank each item, where 1 is the most important priority if you were being asked to donate in the following situation and 6 is the least important priority for you. Base: all (3,019)

There is little difference in priorities for the public when looking at a more formal ongoing donation.



Q23. Please rank each item, where 1 is the most important priority if you were being asked to donate in the following situation and 6 is the least important priority for you. Base: all (3,019)

This correlates with reasons given for a lack of trust in charity fundraisers in the quantitative stage and as mentioned earlier in this report, highlights the importance of regulation for the public.

Barriers to charitable fundraising among the public and the issues preventing them feeling confident and comfortable being approached (either directly or indirectly) by fundraisers, relate to compliance and governance

Therefore, as part of the research we also explored awareness and knowledge of the Fundraising Regulator and the impact this has on levels of trust for charitable fundraisers among the public.

At an overall level, more than half (52%) of those surveyed had heard, to some degree, of the Fundraising Regulator.

Specific understanding of what they do is low however, with only 3% claiming to know a lot about them and 16% knowing a bit about them. By way of comparison, the Charity Commission has slightly higher levels of awareness, with under a third (30%) reporting they have never heard of them. However, a slightly higher proportion (33%) claimed to know at least a bit about them.

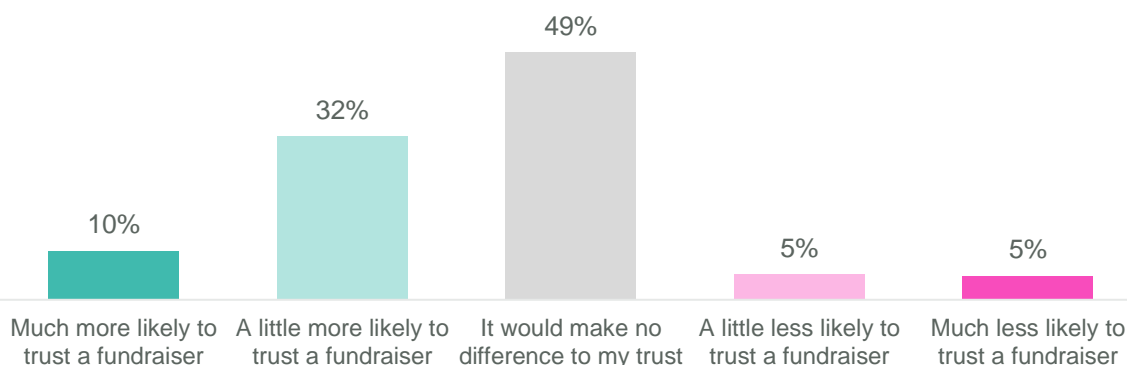
As the research has shown, younger members of the public have higher levels of comfort and engagement with charitable fundraisers. Perhaps aligned, and notwithstanding low levels of awareness across the board, we saw significantly higher levels of awareness of the Fundraising Regulator among this group by comparison to the older segments. Two-fifths (41%) of those aged 16-34 had never heard of the Fundraising Regulator, however, this is lower compared to more than half of those aged over 55 (53%). Those aged under 35 were almost twice as likely to know 'at least something' about the organisation, compared to those aged 35 and over, 30% compared to 16% respectively.

Those living in urban locations were also most likely to know at least a little bit about the Fundraising Regulator (25% compared to 18% for those in rural areas). This is driven by those living in London, who are significantly more likely than participants living in other areas of the UK to have at least some levels of awareness.

SUBGROUP	% KNOW AT LEAST A LITTLE
Aged 16-34	30% (compared to 16% aged 35+)
Urban	25% (compared to 18% in rural areas)
London	30% (compared to 20% UK average)

Whilst we can draw some possible conclusions about the impact of the Fundraising Regulator from the data, we also asked participants explicitly whether knowing about the existence of the organisation made them more or less likely to trust charity fundraisers. Whilst around half (49%) claimed that this made no difference to them, two-fifths (42%) said that it would make them more likely to trust in fundraisers. For charities and fundraising organisations, this demonstrates the value of registering with the regulator and displaying the badge. For the regulator, it highlights the importance of communicating to the public about who it is, and what it does.

Impact of Fundraiser Regulator on public trust of fundraisers



Q25. Does the existence of the Fundraising Regulator make you more or less likely to trust regulated charitable fundraisers (as a reminder by fundraisers we mean someone who asks for money for a charity). Base: all participants (3,019)

The impact is lower for men and those who are older, but females and those aged 16-34 stated that it would make them more likely to trust regulated charitable fundraisers.

SUBGROUP	% MORE LIKELY TO TRUST
Aged 16-34	48% (compared to 36% aged 55+)
Female	44% (compared to 39% males)

The existence of the Fundraising Regulator had less impact among those with a disability, with 38% claiming it would make them more likely to trust fundraisers, compared to 43% without a disability.

So, what could the regulator do to improve the public's experience of charitable fundraising?

Key themes arising from this more open question in the survey, included raising awareness of the regulator and the work that it does, but in the main focused on regulating elements of charities work. For example, greater levels of regulation and oversight with respect to how charities spend their money and the introduction of professional standards and training.

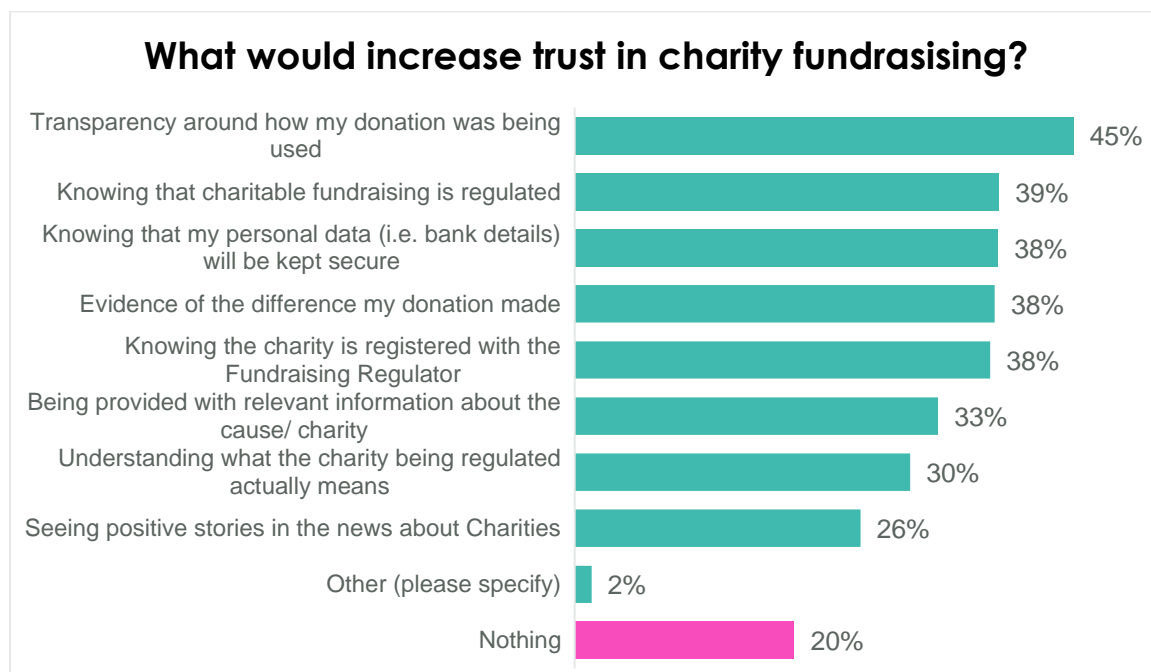
However, much of the commentary from participants included activities that are already being undertaken either by the Fundraising Regulator or another regulator, emphasising the lack of understanding of the role of the regulator and the limited knowledge of the regulation already in place.

“Focus on regulating charities' finance”

“Make itself and its work known. What have they done to regulate? What have they improved? What power do they have to stop rogue collectors?”

“Ensure that if the money doesn't go where it says it's supposed to go, it will either be refunded or sent to a reliable charity”

The survey concluded by asking participants, what, if anything would make them trust charity fundraisers more. Very much correlating with the theme that we have seen throughout, transparency around how the donation was being used was rated most highly, with almost half (45%) wanting more reassurance about the safety of their donation and how it will be used. Around two-fifths (39%) also flagged the importance of regulation, suggesting strongly that the Fundraising Regulator has a key role to play in increasing trust and confidence in charitable fundraisers for the public.



Q27. What, if anything, would make you trust charity fundraisers more? Please select all that apply. Base: all participants (3,019)

In a related discussion about increasing trust, qualitative participants expected the charity sector to continue to evolve and be innovative, this included their approach to raising funds. While participants understood the benefits of conducting fundraising in public places, qualitatively they expressed the necessity for them to maintain some agency in their interactions with charity fundraisers and charities more broadly. Participants strongly believed it is important that they should not feel *guilty* in any interactions with charitable fundraisers.

Many participants expressed an interest in the use of technology to help make the process easier for them (e.g. less paperwork, use of QR codes) as this enabled them to choose when they would like to engage with charities.

Additionally, if someone has a note on their door highlighting that they would prefer fundraisers not visit, then they would like this to be respected.

A minority also recognise a space for other agencies e.g. the council to actively educate residents on what they should be on the lookout for when it comes to fundraisers (e.g. badges).

“Yes, if I feel charity staff are more understanding, I will support most causes when asked for one off payments. I hate being tied to a direct debit. Cold calling stalls or a direct approach in shopping centres can be off putting.” – Open to support, Northern Ireland, 25-34

“I suppose if you put something through your letterbox and say we're going to be coming to your area and want us to come [to you], text this number or something...”
- Open to support, England, 35-44

“And I think, if someone was to come to my door and say, look, I'm not going to ask you to sign up for any money today, we're coming from this charity, can we just tell you for literally one minute what the charity's about, we'll give you a leaflet or you can scan this QR code or something, and you can go away and have a look at it and decide in your own time if you want to give money, that would be good, because that's like instantly, they're not asking me to do anything in the moment.” – Open to support, Scotland, 25-34

Summary and recommendations

Conclusions

Charities in general perform well when it comes to public trust, with half of those surveyed generally trusting charities to deliver what they promise.

Almost three-quarters of participants claim to currently support a charity, and the research demonstrates their experience is regarded largely positively, with around two-thirds reporting positive experiences over the last 12 months. Nevertheless, the findings also highlight there is scope to improve trust and engagement at an overall level.

When we looked at trust in charity fundraisers, the picture is more nuanced. A majority of those surveyed (84%) trust at least some charity fundraisers. A proportion of the public however (16%) don't trust any charity fundraisers.

Perceptions of trust in general for both charities and fundraisers are impacted by concerns over the transparency of financials, corruption and scams. This stems from personal experience and media coverage.

Against this backdrop, the research identified further concerns, specific to the methods examined, which are key for charities and the regulator to take heed of in order to maintain and build public trust and ensure successful fundraising.

The deep dive section in the quantitative survey, details the stark contrast in experiences and therefore engagement, across the nine methods explored. There are various reasons for this, but a key factor seems to be the amount of agency the individual has over the interaction.

The approaches that are more direct, such as door-to-door and public fundraising, were perceived by many as an unsolicited intrusion. Whereas at the other end of the spectrum sponsoring an individual, online fundraising, charity bags and lotteries/ prize draws were much more likely to be rated positively. These were methods that the individual had much more control over how and when they participate and were also rated as convenient and straightforward to engage with.

These methods are also often seen to have some form of self-benefit. Charity bags for example allowed the opportunity to have a clear out and get rid of clothes that are no longer wanted and lotteries / prize draws offer the chance to win something back. Sponsoring an individual was often more associated with supporting the person than

the charity itself and therefore did not always take on the negativity seen for some other methods.

The perceived intrusive nature of some of the fundraising approaches, and the clear lack of agency over the situation, especially when being interrupted in the street or at one's own home, impacted on the public's likelihood to take action - with one-in-ten donating following a door-to-door interaction, compared with 39% donating in response to an individual sponsorship campaign, for example

Whilst a relatively low conversion rate may still be considered worthwhile for fundraisers, this needs to be viewed in the wider context. Our research found that negative fundraising experiences can lead to reduced levels of engagement with fundraising in the future; both for the specific method in question, and when it comes to charitable fundraising more generally.

The manner in which these more direct methods are undertaken can also fuel negative perceptions. The behaviour of fundraisers and the perception of them as sometimes being too pushy and insistent are common associations with public fundraising and door-to-door approaches. This resulted in some people feeling pressured and reluctant to take any action in the form of donating or signing up. This does little to help promote levels of trust and confidence in charities and their fundraising activities.

Some participants highlighted the importance of regulation, with around two-fifths (39%) suggesting that the Fundraising Regulator has a key role to play in increasing trust and confidence in charitable fundraisers for the public.

The public need reassurance that their interests are being protected and - as highlighted by their limited knowledge of the regulator - may benefit from further education on what regulation already exists and what they should expect from charities and charitable fundraisers. This is especially key with respect to more direct approaches, where people feel less in control and potentially more vulnerable.

For charities, registering with the Fundraising Regulator and displaying the badge will go some way to reassuring the public but it is also important to ensure compliance with the Code of Fundraising Practice and closely manage fundraising behaviour. This includes closer contract management, as reported in the Fundraising Regulator's

market inquiry report², and more generally being sensitive of the environment in which they are operating. Taking into consideration the vulnerable circumstances of some members of the public as well as current economic conditions – and adapting behaviours accordingly – would go a long way to promoting trust and confidence and reducing barriers to support.

Recommended next steps

Charities and fundraising organisations should:

- Ensure fundraising staff have the appropriate levels of training, support and monitoring in place to meet the standards in the Code of Fundraising Practice. This includes avoiding undue pressure and unreasonably persistent behaviour, being particularly sensitive to the needs of people in vulnerable circumstances and older people, who the research found had higher levels of discomfort across most fundraising methods. These responsibilities should extend to both charities and all those who fundraise on a charity's behalf, including subcontractors.
- Use their experience of fundraising with the public to identify what works well and test ways in which unsolicited fundraising can be made less intrusive, for example, by giving prior notice that fundraisers will be in the area and respecting 'no cold calling' signs.
- Be mindful of the high levels of concern regarding scams identified in the research, and continuously consider and promote safeguards that will ensure the public are confident their donation is going to the right place, and that their data is safe.
- If registered with the Fundraising Regulator, display the fundraising badge and be able to explain to the public what this means in practice.

The regulator should:

- Work with fundraisers, other regulators, and membership bodies, to identify areas where further information and guidance is needed; particularly for

² [Market inquiry report 2024.pdf \(fundraisingregulator.org.uk\)](#)

methods which recorded high negativity ratings, and in response to the high level of concern towards scams.

- Recognise the value the public place on regulation and consider how it can increase awareness of the role it plays and the standards that fundraisers need to comply with.
- Continue to promote the benefits of registration to charities and fundraising organisations and ensure that organisations registered with it understand the value of displaying the badge.

The regulator and charities / fundraising organisations should:

- Consider conducting follow-up research to identify what actions can be taken to further improve public trust and confidence in fundraising, particularly for those methods associated with high levels of negativity.

Appendix

Questionnaire

Demographics and screeners

Section purpose: Key demographics asked to ensure we are speaking to a representative sample and to collect information on participants to be used in the analysis stage (further demographics are placed at the end of the survey)

D1. ASK ALL SINGLE

Are you

1. Male
2. Female
3. Other
4. Prefer not to say

D2.ASK ALL SINGLE

Please state your age

1. Under 16
2. 16
3. 17
4. 18
5. 19
6. 20
7. 21
8. 22
9. 23
10. 24
11. 25
12. 26

[ETC TO 80]

13. Over 80

D3.ASK ALL SINGLE

I live in...

14. North East
15. North West
16. Yorkshire & Humberside
17. East Midlands

18. West Midlands
19. East of England
20. London
21. South East
22. South West
23. Wales
24. Scotland
25. Northern Ireland
26. Do not live in the UK **[SCREEN OUT]**

D4.ASK ALL
SINGLE**Which type of area do you live in?**

1. Urban area - cities or towns
2. Suburban area – residential areas on the outskirts of cities and towns
3. Rural area - villages or hamlets

D5.ASK ALL
MULTI**Do you have any children in the following age groups?**

1. I am currently expecting a child
2. 0 to 3
3. 4 to 6
4. 7 to 10
5. 11 to 13
6. 14 to 15
7. 16 to 17
8. 18 or older (grown-up children)
9. No children

D6.ASK ALL
SINGLE**Do you look after, or give any help or support to anyone because they have a long-term physical or mental health conditions or illnesses, or problems related to old age?****Please exclude anything you do as part of your paid employment**

1. No
2. Yes, 9 hours a week or less
3. Yes, 10 to 19 hours a week
4. Yes, 20 to 34 hours a week
5. Yes, 35 to 49 hours a week
6. Yes, 50 or more hours a week

D7.ASK ALL
SINGLE**Which of these applies to you?**

1. Working full time (30 or more hours per week)
2. Working part time (8 – 29 hours per week)
3. Working part time (Less than 8 hours a week)
4. Full time student
5. Retired
6. Unemployed
7. Other not working

D8.ASK ALL SINGLE

What is your annual pre-tax household income?

By 'household income' we mean the total income received from all sources, including wages earned by you, your partner and/or any other earner in the household, bonuses, retirement income, benefits, or rents and before tax deductions.

Your data will be kept confidential, not passed on to any third parties, and only analysed at an aggregate level.

1. Up to £5,000 a year
2. £5,000 to £9,999 a year
3. £10,000 to £14,999 a year
4. £15,000 to £19,999 a year
5. £20,000 to £24,999 a year
6. £25,000 to £29,999 a year
7. £30,000 to £34,999 a year
8. £35,000 to £39,999 a year
9. £40,000 to £44,999 a year
10. £45,000 to £49,999 a year
11. £50,000 to £59,999 a year
12. £60,000 to £69,999 a year
13. £70,000 to £79,999 a year
14. £80,000 to £89,999 a year
15. £90,000 to £99,999 a year
16. £100,000 or more a year
17. Prefer not to say

D9.ASK ALL SINGLE

We would now like you to think about the chief income earner in your household, that is the person with the highest income. This may be you or it might be someone else.

Which of the following groups does the chief income earner in your household belong to?

[If the chief income earner is retired with an occupational pension, please enter their former occupation. Please only enter 'retired' if the chief income earner is only receiving the state

pension. If the chief income earner has been unemployed for a period of less than 6 months, please answer based on their previous occupation.]

1. Higher managerial/ professional/ administrative (e.g. established doctor, solicitor, board director in large organisation (200+ employees), top level civil servant/ public service employee, head teacher etc.)
2. Intermediate managerial/ professional/ administrative (e.g. newly qualified (under 3 years) doctor, solicitor, board director of small organisation, middle manager in large organization, principal officer in civil service/ local government etc.)
3. Supervisory or clerical/ junior managerial/ professional/ administrator (e.g. office worker, student doctor, foreman with 25+ employees, sales person, student teacher etc.)
4. Skilled manual worker (e.g. skilled bricklayer, carpenter, plumber, painter, bus/ ambulance driver, HGV driver, unqualified teaching assistant, pub/ bar worker etc.)
5. Semi-skilled or unskilled manual worker (e.g. manual jobs that require no special training or qualifications, apprentices to be skilled trades, caretaker, cleaner, nursery school assistant, park keeper, non-HGV driver, shop assistant etc.)
6. Student
7. Retired and living on state pension only
8. Unemployed for over 6 months or not working due to long term sickness

D10.CONSENT OPT IN

ASK ALL

SINGLE

In this survey, we would like to ask some questions that may be perceived as sensitive such as ethnicity, health and political views.

Providing information in response to these questions is entirely voluntary and you may withdraw your consent at any time.

The answers that you provide will be used only for market research analysis purposes. For more information on how your information will be processed and protected, please review Opinium's privacy policy [here](#).

Do you consent to the collection of information on the following topics?

ROWS

1. Ethnicity
2. Health
3. Political views
4. Religion

COLUMNS

1. Yes, I consent
2. No, I do not consent

D11.ASK ALL OPTING IN

SINGLE

Do you think of yourself as a member of any particular ethnic group? If you feel uncomfortable answering this question, please feel free to select ‘prefer not to say’

White

1. English / Welsh / Scottish / Northern Irish / British
2. Irish
3. Gypsy or Irish Traveller
4. Roma
5. Any other White background

Mixed / Multiple ethnic groups

1. White and Black Caribbean
2. White and Black African
3. White and Asian
4. Any other Mixed / Multiple ethnic background

Asian / Asian British

1. Indian
2. Pakistani
3. Bangladeshi
4. Chinese
5. Any other Asian background

Black / African / Caribbean / Black British

1. African
2. Caribbean
3. Any other Black/African/Caribbean background

Other ethnic group

1. Arab
2. Any other ethnic group
3. Don't think of myself as any of these
4. Prefer not to say

D12.ASK ALL OPTING IN**SINGLE**

Do you regard yourself as belonging to any particular religion?

1. Yes
2. No
3. Prefer not to say

D13.ASK ALL ANSWERING YES AT D12**SINGLE**

Which of the following religions do you belong to?

1. Christian (including Church of England, Catholic, Protestant and all other Christian denominations)
2. Buddhist
3. Hindu
4. Jewish
5. Muslim
6. Sikh
7. Any other religion
8. Prefer not to say

D14.ASK ALL OPTING IN SINGLE

Do you have any physical or mental health conditions or illnesses lasting or expected to last 12 months or more? This could be a physical impairment, learning difficulty, health condition, illness, or disability.

1. Yes
2. No
3. Prefer not to say

D15.ASK ALL WHO SAID YES AT D14 SINGLE

Does your health problem, illness or disability limit your day-to-day activities in any way?

1. Yes, a lot
2. Yes, a little
3. No
4. Prefer not to say

D16.ASK ALL MULTI

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

1. Yes - volunteer
2. Yes - paid employee
3. Yes - trustee
4. Yes - member of charity's executive or management committee
5. Yes - in some other way
6. None of these [EXCLUSIVE]

1 | Perceptions and experience of charities

Section purpose: General experiences with charities and supporting different charities in different ways

Q1. ASK ALL

MULTI

27. Which of the following organisations do you generally trust to deliver what they promise? Please select all that apply. [ROTATE ANSWERS](#)

1. Health professionals
2. Local government
3. Regulators and watchdogs (such as Ofgem and Citizens Advice)
4. National government
5. Local charities
6. National charities
7. Public bodies (e.g. department for health, etc.)
8. Private business
9. None of these [EXCLUSIVE](#)

Q2. ASK ALL

SINGLE

Thinking now about charity fundraisers, (by fundraisers we mean someone who asks you to donate money or goods to a charity). Overall, how much would you say that you trust charity fundraisers?

1. I trust all charity fundraisers
2. I trust some but not others
3. I don't trust any charity fundraisers

Q3. ASK ALL WHO CODED 2 OR 3 AT Q2

OPEN

Why do you not trust charity fundraisers? Can you tell us about any experiences you've had that have led you to feel this way?

Please write in

Q4. ASK ALL

SINGLE

Which of the following describes your habits when it comes to supporting charities?

By supporting we mean anything from donating money or goods, participating in an event to volunteering to raising awareness through social media.

1. I regularly support one or more charity(s)
2. I sometimes support one or more charity(s)
3. I do not currently support a charity but would consider doing so
4. I do not currently support a charity and would not consider doing so

Q5. ASK ALL

MULTI

In which of the following ways have you supported charities? Please select all that apply. **ROTATE ANSWERS**

1. Financial donations [BLOCK]
2. Goods donations (e.g. giving physical goods to a charity shop or food bank)
3. Volunteered (e.g. direct volunteering with the cause) [BLOCK]
4. Taken part in a sponsored event (physical or virtual)
5. Taken part in / hosted a fundraiser (e.g. a coffee morning, jumble sale)
6. Sponsored someone taking part in an event / fundraiser [BLOCK]
7. Followed specific charities on social media [BLOCK]
8. Lent your voice online (e.g. sharing on social media, writing emails, signing a petition)
9. Lent your voice offline (e.g. raising awareness in person, attending a demonstration)
10. Bought a product that donates money to a charity [BLOCK]
11. Bought a product directly from a charity
12. Left a gift in my will [BLOCK]
13. By playing the National Lottery [BLOCK]
14. Lotteries (not including the National Lottery), raffles or prize draws
15. Attended a free charity event (e.g. a panel discussion) [BLOCK]
16. Bought a ticket for a charity event (e.g. a gala, concert)
17. Other (please specify) [FIX]
18. None of the above [EXCLUSIVE]

Q6. ASK ALL WHO HAVE DONATED Q5= 1

MULTI

Thinking about the charities you have donated financially to in the past 12 months, how frequently do you typically donate? Please select all that apply

1. Regular donations (e.g. monthly Direct Debit/standing order payments)
2. One-off or occasional donations (e.g. collection tin, round up at checkout, tapping on a contactless card machine)

Q7. ASK ALL

SINGLE

And thinking overall, how would you rate your experience(s) supporting charities over the last 12 months?

1. Very positive
2. Somewhat positive
3. Equally positive and negative
4. Somewhat negative
5. Very negative
6. N/A have not experienced charitable fundraising

Q8. ASK ALL WHO DO OR WOULD SUPPORT (DO NOT SHOW TO Q4=4 (WOULD NOT CONSIDER))

SINGLE GRID

Do you support or would you consider supporting the following types of charity?

Please think about all kinds of support, from one off or regular donations to volunteering to raising awareness through social media.

ROWS

1. Animal Welfare
2. Children or young people
3. Medical research / hospitals / hospices
4. Homelessness, housing and refuge shelters
5. Overseas aid and disaster relief / international development
6. Environmental (including climate change and conservation)
7. Religious organisations
8. Physical health / disability
9. Mental health / disability
10. Elderly people
11. Armed forces or military veterans

COLUMNS

1. Would not consider supporting
2. I have not supported this type of charity but I would consider it
3. I have supported this type of charity once or twice
4. I support this type of charity occasionally
5. I support this type of charity regularly

Q9. ASK ALL

MULTI

Do you do any of the following before supporting a charity? Please select all that apply. **ROTATE ANSWERS**

1. Look at the charity's website
2. Look for news stories about the charity
3. Check the charity is formally registered for example with the Charity Commission or the Fundraising Regulator
4. Do some research to understand the cause
5. Read the charity's annual report
6. Look at the charity's financial accounts
7. Other (please specify) **FIX AT BOTTOM**
8. None of the above **[EXCLUSIVE] FIX AT BOTTOM**

2 | General experience of charitable fundraising

Section purpose: this section goes into specific experience with different forms of charitable fundraising and gathers insights on the impact, resulting actions, motivations and barriers.

Q10. ASK ALL SINGLE GRID

Please think about the following ways in which charities can raise funds and get support from the public. How comfortable are you with these methods of charitable fundraising? Please consider how you would feel if you experienced any of these forms of fundraising. ROTATE ROWS

ROWS

1. Public Fundraising

Charity representatives approach you in public to ask you to make a one-off or continuing donation. This could be on the street, in shops, or in other public spaces (such as a shopping centre).

2. Door-to-door Fundraising

Charity representatives knock on your door to ask you to give money to support a charity.

3. Charity Bags

Bags posted through your door for you to fill with unwanted clothing or other items which are then collected at a later date so the items can be sold to raise money for charity.

4. Online Fundraising

Methods charities use to let you donate online; through platforms like Just Giving, or on the charity's own website.

5. Sponsorship of Individuals

Donating to someone who will complete a challenge e.g. running a marathon, with the money going to a chosen charity/charities. This could be online or with a paper form.

6. Convenience Giving

Donating small amounts to a charity by tapping a contactless card machine; rounding up the cost of a bill in a restaurant or shop; or sending a text message to donate automatically e.g. "GIVE10" do donate £10.

7. Fundraising Marketing

Adverts by charities asking you to donate, on TV, the radio, in print, on social media or as mailings through your letterbox.

8. Lotteries, Raffles and Prize Draws

A form of fundraising where you pay for entry and can win a prize or money. This could range from a small prize you win as part of a raffle, to a big prize like a house which you win in a prize draw. (this does not include the National Lottery)

9. Personal Cause Fundraising

This is not charitable fundraising but someone raising money for themselves or a friend/family member/pet e.g. to pay for an operation or to help them in times of difficulty, using online platforms like GoFundMe.

COLUMNS

1. Very comfortable
2. Fairly comfortable
3. Not very comfortable
4. Not at all comfortable
5. Don't know

Q11. ASK ALL WHO ARE NOT COMFORTABLE WITH THAT FORM OF FUNDRAISING Q10
= 3 OR 4

OPEN

And why do you say you are not comfortable with this way of fundraising?

PULL THROUGH ROWS NOT COMFORTABLE WITH. OPEN FOR EACH ONE

Please write in.

Q12. ASK ALL

MULTI

Which of the following types of charitable fundraising do you remember seeing or experiencing (whether you took any action as a result or not) over the last 12 months?

Please select all that apply. ROTATE ANSWERS

1. Public Fundraising

Charity representatives approach you in public to ask you to make a one-off or continuing donation. This could be on the street, in shops, or in other public spaces (such as a shopping centre).

2. Door-to-door Fundraising

Charity representatives knock on your door to ask you to give money to support a charity.

3. Charity Bags

Bags posted through your door for you to fill with unwanted clothing or other items which are then collected at a later date so the items can be sold to raise money for charity.

4. Online Fundraising

Methods charities use to let you donate online; through platforms like Just Giving, or on the charity's own website.

5. Sponsorship of Individuals

Donating to someone who will complete a challenge e.g. running a marathon, with the money going to a chosen charity/charities. This could be online or with a paper form.

6. Convenience Giving

Donating small amounts to a charity by tapping a contactless card machine; rounding up the cost of a bill in a restaurant or shop; or sending a text message to donate automatically e.g. "GIVE10" do donate £10.

7. Fundraising Marketing

Adverts by charities asking you to donate, on TV, the radio, in print, on social media or as mailings through your letterbox.

8. Lotteries, Raffles and Prize Draws

A form of fundraising where you pay for entry and can win a prize or money. This could range from a small prize you win as part of a raffle, to a big prize like a house which you win in a prize draw. (this does not include the National Lottery)

9. Personal Cause Fundraising

This is not charitable fundraising but someone raising money for themselves or a friend/family member/pet e.g. to pay for an operation or to help them in times of difficulty, using online platforms like GoFundMe.

10. None of the above [EXCLUSIVE]

Q13. ASK ALL WHO HAVE EXPERIENCED CF IN THE LAST 12 MONTHS FROM Q12
SINGLE GRID

And overall, how would you rate the experience that you had? If you have had multiple experiences, please rate the last one.

ROWS
PULL THROUGH FROM Q12

COLUMNS

1. Very positive
 2. Somewhat positive
 3. Neither positive or negative
 4. Somewhat negative
 5. Very negative
 6. Can't remember
- 28.

Q14. ASK ALL WHO HAVE EXPERIENCED CF IN THE LAST 12 MONTHS FROM Q12
OPEN

What would make the biggest difference to improve the experience you had?

PULL THROUGH ROWS EXPERIENCED. OPEN FOR EACH ONE

Please write in.

Q15. ASK ALL WHO INTERACTED
SINGLE GRID

What did you do as a result of experiencing this type of fundraising. Please again think of your last experience of this form of fundraising.

ROWS PULL THROUGH FROM Q12

COLUMNS

1. I donated/ signed up to a direct debit either at the time or after the interaction [don't show to charity bag, lotteries]
2. I returned the charity bag with clothes in [charity bag only]
3. Bought a ticket/ entered the draw [lotteries only]
4. I did more research into the cause/ charity but nothing more
5. Nothing, I took no action at all
6. Other [please write in]
7. Can't remember

Q16. ASK ALL WHO DONATED OR TOOK ACTION Q15=1, 2 OR 3

MULTI

You said that you took some form of action after your experience with this type of fundraising – what were the main reasons that motivated you to take action?

ROWS PULL THROUGH FROM Q12

1. It was a cause I wanted to support/ is close to my heart
2. I have personal experience of the cause
3. The individual who was doing the fundraising seemed credible [Do not show to Q12=4 and 7]
4. It was a local cause
5. I could see how my donation would be used
6. I was provided with useful information to help me decide to take action
7. It's a charity/ cause that I support anyway
8. It was a convenient way for me to support a charity
9. Other (please specify) OE

Q17. ASK ALL WHO TOOK NO ACTION Q15=4-5

MULTI

You said that you took no action after your interaction with this type of fundraising – why was that? Please select all that apply. ROTATE ANSWERS

ROWS PULL THROUGH FROM Q12

1. I was not given sufficient information to make an informed choice
2. I like to have more time to make a decision about supporting a charity
3. I wasn't certain where my donation would actually be going
4. The behaviour of the fundraiser [[Do not show to Q12=4 and 7 9
5.]The content of the material was not suitable [only show to online fundraising and marketing 4 and 7]
6. The caller called too late in the day [only show to door-to-door]

7. I was asked at a time that was not convenient [only show to door-to-door/on street]
8. I did not want to share my personal information
9. I could not afford to
10. It's not a cause I support
11. I already support other charity's / causes in other ways
12. I was in a rush /too busy
13. Other (please specify) [OE](#)

[Q17_BF ASK ALL CODED Q17=3](#)

[OPEN](#)

Please can you provide more detail on the behaviour of the fundraiser

Please write in.

[Q18. ASK ALL WHO EXPERIENCED THAT FORM OF FUNDRAISING AT Q12](#)

[MULTI](#)

Which of the following words would you most associate with your experience? Please select all that apply. [ROTATE LIST](#)

[ROWS PULL THROUGH FROM Q12](#)

[COLUMNS](#)

1. Pressured
2. Relaxed
3. Informative
4. Straightforward
5. Confusing
6. Unethical
7. Rude
8. Ethical
9. Inconvenient
10. Thought-provoking
11. Satisfied
12. Aggressive
13. Disappointment
14. Regrettable
15. Guilt
16. Transparent
17. Honest
18. Friendly
19. Helpful
20. Convenient
21. Polite
22. Illegal
23. Upsetting
24. Other (please specify)

Q19. ASK ALL WHO INTERACTED SINGLE

Did the experience make you more or less likely to engage with this type of charitable fundraising again in the future?

ROWS PULL THROUGH FROM Q12

1. Much more likely
2. More likely
3. Would not impact my decision
4. Less likely
5. Much less likely

Q20. ASK ALL WHO INTERACTED SINGLE

Did the experience make you more or less likely to engage with supporting charities in general again in the future?

ROWS PULL THROUGH FROM Q12

1. Much more likely
2. More likely
3. Would not impact my decision
4. Less likely
5. Much less likely

Q21. ASK ALL MULTI

Charities conduct door-to-door fundraising as it can be an important way to collect funds and tell the public about their cause. It also allows the public the opportunity to ask questions about the cause or charity if they wish. Which of the following would be appropriate times of day for charities to fundraise door-to-door? Please select all that apply.

1. Between 8am and 12pm
2. Between 12pm and 4pm
3. Between 4pm and 6pm
4. Between 6pm and 8pm
5. Between 8pm and 10pm
6. I would be happy if they knocked during daylight hours during winter months.
7. I would be happy if they knocked during daylight hours during summer months.
8. Any of the above times **[EXCLUSIVE]**
9. Never **[EXCLUSIVE]**

3 | Fundraising scenarios

Section purpose: to understand people's expectations for donating dependant on different fundraising situations

The following questions will ask you to consider charitable fundraising scenarios.

ALTERNATE THE ORDER IN WHICH EACH SCENARIO IS SHOWN

Q22. ASK ALL

MULTI RANK

Please rank each item, where 1 is the most important priority if you were being asked to donate in the following situation and 6 is the least important priority for you.

Scenario 1: You are asked to give a casual donation of a small amount (e.g. up to £10), for example by rounding up a bill, giving to a collection tin or tapping a contactless machine

1. That it's convenient
2. Safety (e.g. protection from fraud and illegal activity etc)
3. Transparent i.e. I can clearly see how my donation is being spent
4. Enough time to make a decision (i.e. not being pressured)
5. Enough time to read any relevant information or research the cause or the charity (i.e. being informed)
6. Seeing the credentials of the person or charity doing the fundraising

Q23. ASK ALL

MULTI RANK

Please rank each item, where 1 is the most important priority if you were being asked to donate in the following situation and 6 is the least important priority for you.

Scenario 2: You are asked to commit to ongoing donations (giving to a charity on a regular basis, e.g. through sponsoring a specific project or person; using direct debit; or giving straight from your wages)

1. That it's convenient
2. Safety (e.g. protection from fraud and illegal activity etc)
3. Transparent i.e. I can clearly see how my donation is being spent
4. Enough time to make a decision (i.e. not pressured)
5. Enough time to read any relevant information or research the cause or the charity (i.e. being informed)
6. Seeing the credentials of the person or charity doing the fundraising

4 | Awareness of the Fundraising Regulator

Section purpose: understand awareness and impact of The Fundraising Regulator

Q24. ASK ALL SINGLE

How much, if anything, do you know about the following organisations?

ROWS [ROTATE]

1. Fundraising Regulator
2. Charity Commission

COLUMNS

1. Never heard of them
2. Heard of them but don't know anything about them
3. Know a bit about them
4. Know a lot about them

The Fundraising Regulator is an independent body that regulates fundraising across the charitable sector. They work to ensure the public can trust fundraising, they protect donors from poor fundraising practices, and they support the work of fundraisers. They also ensure consistent fundraising standards across the UK.

Q25. ASK ALL SINGLE

Does the existence of the Fundraising Regulator make you more or less likely to trust regulated charitable fundraisers (as a reminder by fundraisers we mean someone who asks for money for a charity).

1. Much more likely to trust a fundraiser
2. A little more likely to trust a fundraiser
3. It would make no difference to my trust
4. A little less likely to trust a fundraiser
5. Much less likely to trust a fundraiser

Q26. ASK ALL OPEN

What do you think a regulator should do to improve the public's experience of charitable fundraising?

Please write in.

Q27. ASK ALL
MULTI

What else, if anything, would make you trust charity fundraisers more? Please select all that apply. ROTATE ANSWERS

1. Seeing positive stories in the news about Charities
2. Transparency around how my donation was being used
3. Evidence of the difference my donation made
4. Understanding what the charity being regulated actually means
5. Knowing that my personal data (i.e. bank details) will be kept secure
6. Being provided with relevant information about the cause/ charity
7. Knowing that charitable fundraising is regulated
8. Knowing the charity is registered with the Fundraising Regulator.
9. Other (please specify)

Final classification questions

D17.ASK ALL
MULTI MAX 3

Which of the following media channels do you engage with the most?

Please select the top three

1. Physical newspaper
2. Online News websites such as the mailonline
3. Catch up TV e.g. BBC iPlayer or ITV X
4. Streaming services e.g. Netflix and Amazon Prime
5. Radio
6. Podcasts
7. Television
8. Instagram
9. Facebook
10. X (formerly Twitter)
11. Tik Tok
12. Magazines
13. YouTube
14. Blogs
15. None of the above [EXCLUSIVE]

D18.ASK ALL
MULTI

How do you prefer to keep up to date with news and current affairs?

Please select all that apply.

1. I read a physical newspaper
2. I read online news websites/newspapers
3. I look at social media
4. I get immediate notifications on my phone about breaking news
5. I get a daily email from a news website
6. I get my news from friends and family
7. Other (please specify) [\[PIN TO THE BOTTOM\]](#)
8. I don't actively look at news [\[EXCLUSIVE\]](#)

[D19.ASK ALL AGED 22+ AND OPTING IN SINGLE GRID](#)

Now we would like to ask you about previous elections/ In the last general election almost 15 million people who were registered to vote in it chose not to.

Which of the following elections did you vote in?

[ROWS](#)

1. The general election held in December 2019

[COLUMNS](#)

1. Yes – I voted in this election
2. No – I did not vote in this election
3. Not sure / can't remember

[D20.ASK VOTED AND GB SINGLE](#)

And thinking back to the UK general election in December 2019, which, if any, of the following parties did you vote for?

1. Conservative
2. Labour
3. Liberal Democrats
4. Scottish National Party
5. Plaid Cymru
6. Brexit Party
7. Green
8. Some other party
9. Not sure / can't remember

[D21.ASK VOTED AND NI SINGLE](#)

And thinking back to the UK general election in December 2019, which, if any, of the following parties did you vote for?

1. Sinn Fein
2. Democratic Unionist Party (DUP)
3. Alliance
4. Ulster Unionist Party (UUP)
5. Social Democratic and Labour Party (SDLP)
6. Traditional Unionist Voice (TUV)
7. Aontu

8. People Before Profit (PBP)
9. Another party
10. Not sure / can't remember

D22.ASK ALL SINGLE

Have you achieved a qualification at degree level or above? For example, a degree, foundation degree, HND or HNC, NVQ level 4 and above, teaching and nursing.

1. Yes
2. No
3. Don't know

D23.ASK ALL MULTI

And have you achieved any of these other qualifications (or their equivalents)? Please select all that apply.

1. 5 or more GCSEs (A*-C,9-4), O Levels (passes) or CSEs (grade 1)
2. Any other GCSEs, O levels or CSEs (any grades) or Basic Skills course
3. 2 or more A levels, 4 or more AS levels
4. 1 A level, 2-3 AS levels
5. 1 AS level
6. Scottish Higher, Scottish Advanced Higher or further Highers
7. NVQ level 3, BTEC National, OND or ONC, City and Guilds Advanced Craft
8. NVQ level 2, BTEC General, City and Guilds Craft
9. NVQ level 1
10. An apprenticeship
11. Any other qualification, equivalent unknown
12. I haven't achieved any official qualifications [EXCLUSIVE]
13. Don't know [EXCLUSIVE]



About Opinium



OPINIUM is an award winning strategic insight agency built on the belief that in a world of uncertainty and complexity, success depends on the ability to stay on pulse of what people **think, feel** and **do**. Creative and inquisitive, we are passionate about empowering our clients to make the decisions that matter. We work with organisations to define and overcome strategic challenges – helping them to get to grips with the world in which their brands operate. We use the right approach and methodology to deliver robust insights, strategic counsel and targeted recommendations that generate change and positive outcomes.

www.opinium.com | research@opinium.com | 0207 566 3190

