

Fundraising Around the World

The common threads and differences in public attitudes to fundraising and charities around the globe

March 2019

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Background

nfpSynergy have been tracking trust and confidence in charities among the public in both the UK and Ireland for over a decade, while More Strategic have tracked trust in charities both among donors and the public in Australia over the last five years. In our conversations together, we had noticed points of similarity and contrast between the three markets and wanted to be able to put these in a more global context. Was the stark decline in trust in Ireland a uniquely Irish phenomenon or had it happened in other markets as well? Were donors in Australia feeling particularly overwhelmed compared to other countries? In addition to this, More Strategic had developed a segmentation of the charity market in Australia – we wanted to see how this played out in other markets.

In order to try and answer some of these questions, we put together a proposal to explore levels of trust in charities and other institutions, as well as donor sentiment more broadly, among the public in a range of markets. Ultimately, with the support of our sponsors in a number of markets (please see full details at the end of the report), as well as our own social investment, we were able to include nine countries in the research project:

- Australia
- Canada
- Germany
- Ireland
- Netherlands
- New Zealand
- South Korea
- UK
- USA

The results, initially presented at the International Fundraising Congress 2018, have shown us some remarkable patterns in engagement with charities and cultures of giving around the world. We are pleased to be able to share these results here and hope in the future to be able to expand the research to an even broader number of countries, and explore those countries already in the study in greater depth.

Summary of Key Findings

- Trust in charities varies significantly between countries and over time. The USA currently has high levels of trust, while the Netherlands and South Korea have much lower levels.
- The example of Ireland; where trust has gone from very high levels to comparatively low - losing over a third of the numbers saying they trust charities across 6 years (from 74% to 48%) - shows however that trust is a volatile thing that cannot be relied on to remain constant.
- The charity landscape also varies greatly by country:
 - The US shows huge levels of enthusiasm for giving, high levels of trust in charities and a strong belief in the importance and impact that charities are having.
 - Canadians are broadly positive about charities, though without the overwhelming enthusiasm of their neighbours in the US.
 - In Australia, while trust in and enthusiasm for charities is high, there is concern about the level of fundraising and the number of charities and charity requests.
 - New Zealand has moderately high levels of trust and the public is less likely to feel overwhelmed by fundraising than Australians.
 - Despite controversies facing charities in recent years, the UK has about average levels of trust and confidence in charities across the group of countries we sampled.
 - In Ireland, charity scandals have caused a collapse in trust and a lack of confidence in how charities are run.
 - The German charity market appears to be underdeveloped, with fewer people seeing charities as vital, but also lower levels of annoyance with fundraising.
 - In the Netherlands on the other hand, there is something of a perfect storm – the role of charities is seen as comparatively unimportant and, at the same time, people still feel there are too many charities and too much fundraising. This results in one of the lowest levels of trust amongst our sample countries.
 - South Koreans have the very lowest levels of trust in charities. Despite many reporting enjoying to give, there is again a strong perception that there are too many charities. Interestingly, the lack of trust is not driven by fundraising, with South Korea having the lowest proportion of respondents feeling that it is intrusive.
- The relative importance of different charity causes varies greatly between countries, with environmental charities standing out as being more prominent in non-Anglophone European Germany and the Netherlands, where trust is in general also lower.
- Women and higher social grades tend to be stronger supporters of charities across all of the countries we surveyed, while men are likely to be significantly more annoyed by fundraising tactics.
- Older people and higher value donors are in a place of dynamic tension, with high enthusiasm for donating and high levels of giving, but often also feeling hugely under pressure and overwhelmed by the requests they receive.
- Religion plays a key role, with regular worshippers more likely to support charities even in more secular European societies. Regular worshippers are also more likely to trust all institutions in society – not just charities.
- People who donate more appear to also be more generally trusting across the whole range of organisations and institutions in the survey set.

- Bringing together the factors that drive trust and confidence in charity, we can see distinct segments that vary in their engagement with and trust in charities. Looking at how these differ across each of the target markets can give insight into what is driving or blocking trust in each.

Methodology

The research was conducted through online surveys of 700 respondents in each of the countries, nationally representative by age, gender and region. The survey was available in German in Germany, Dutch in the Netherlands, Korean in South Korea, English & French in Canada, and English elsewhere. A full set of the questions asked is available on request.

Respondents were sourced through the fieldwork provider CINT and the survey was hosted by nfpSynergy. The Irish sample was slightly different in that it was conducted as part of an existing piece of nfpSynergy research – the Irish Charity Engagement Monitor. Thus, unfortunately, there are a small number of questions where results are not directly comparable owing to slight methodological differences. We are confident that the remaining questions are comparable.

For giving levels we asked people verbatim how much they remembered giving to charity across the previous year. We then were able to look at the comparative levels of self-reported giving across the countries and split the respondents into high, medium and low giving levels to compare similar groups across the countries as equally as possible. We have taken the differences we have seen between countries at face value. However these differences maybe down to differences in political/economic issues in the countries surveyed, or a different cycle of charity activity, or even different cultural interpretations of the questions being asked.

A set of charts and tables are available on request for those interested in finding out more.

Sponsors

This report was made possible in part due to the support of our kind sponsors who supported carrying out the research in Germany (DTV), Canada (AFP Toronto) and Australia (FIA and Donor Republic). We are grateful for their generous support. More Strategic funded the research in New Zealand, and nfpSynergy funded the research in South Korea, the USA, the UK and Ireland.



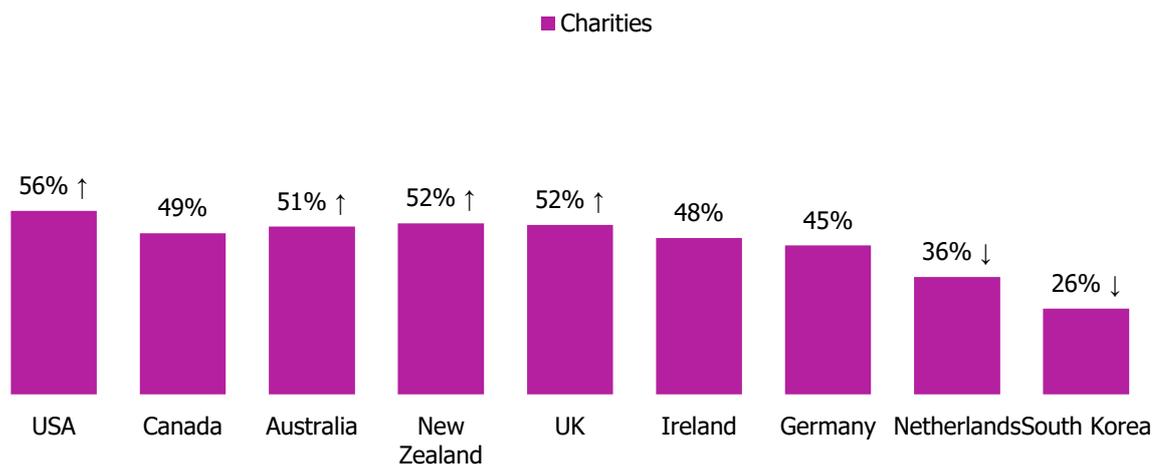
The Professional Body for Australian Fundraising



Trust and Confidence in Charities Across the World

There are huge differences in trust in charities across the world

Figure 1: Trust in charities across different countries



“Please indicate how much trust you have in each of the following bodies” The small up or down arrows indicate a statistically significant difference from the mean. Base: 6,600 adults 16+, 9 countries | Source: nfpSynergy survey September 2018

In most countries in our sample about half of respondents tended to trust charities “a great deal” or “quite a lot”. The striking exceptions were the Netherlands and South Korea – where just 36% and 26% respectively of respondents felt they could trust charities – and the USA, where the figure was unusually high at 56%. While there are a number of factors at play in both cases which are country specific (and which will be explored later in the report), it is interesting to note geographic patterns also. Two of the least trusting countries were both non-Anglophone Northern European countries, suggesting there is a question about the role that charities play in these countries, which retain a stronger role for the state in their social system. Whereas in countries like Ireland, UK, Australia and New Zealand where the last thirty years has seen a withdrawal of the state as the sole provider of social welfare, the function of charities in society is seen to be broader.

It is also useful to look at the ordering of where charities sit among the most or least trusted institutions in a country as in Figure 2 below. Some institutions tend to be highly trusted across all of the countries we surveyed – in most countries the police, armed forces and schools made up the top three most trusted institutions. Others such as political parties tend to be uniformly mistrusted. On the other hand, charities varied more substantially from fourth place in Australia and the UK to eighth in the Netherlands and South Korea. Charities seem to be more vulnerable to changes in public opinion than other institutions.

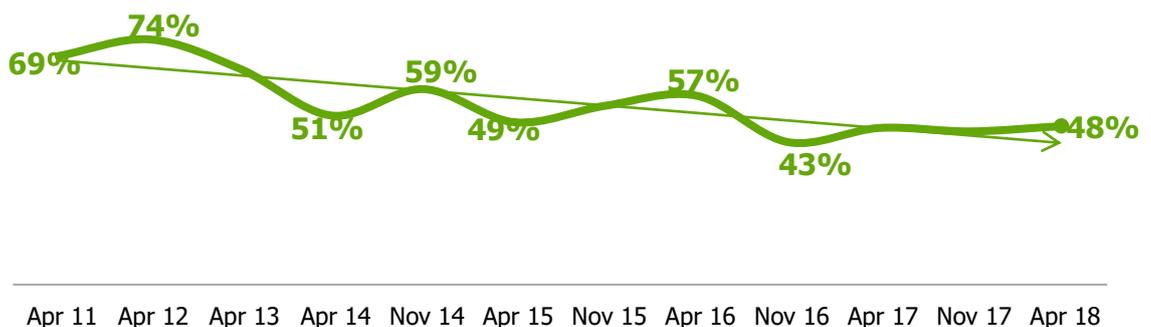
Figure 2: Most and least trusted institutions per country



“Please indicate how much trust you have in each of the following bodies” **Top 10 for each country**
 Base: 6,600 adults 16+, 9 countries | Source: nfpSynergy survey September 2018

This is not just a difference that we see between countries, but also one that we see over time within countries as well. Trust in charities in the UK has been highly volatile over the period we have been tracking it, in contrast to high-trust institutions such as the armed forces or low-trust ones such as political parties. However, the place where we have seen the most dramatic shifts in trust has been Ireland. In April of 2012 74% of respondents in our survey said they trusted charities in Ireland. If this had been replicated in this research, Ireland would have been an enormously positive outlier, with far higher levels of trust than even the USA. So what happened to cause this decline shown in Figure 3 below?

Figure 3: Trust in charity sector in Ireland



“To what extent do you trust each of the following institutions?” **Ranked by ‘Up to a point + A great deal’.** Base: 1,000 adults 16+, Republic of Ireland | Source: Irish Charity Engagement Monitor, Apr 18.

The Irish charity sector has been struck by a series of controversies in recent years, particularly in the period from 2013-2016. Several high-profile cases, including situations where state-paid salaries were being “topped up” by charitable donations and one high profile case of serious mismanagement at a suicide prevention charity, caused an extremely negative atmosphere towards charities in Ireland. This triggered a long-term decline in public trust from a high of nearly three quarters of the public trusting charities to the current situation of just under half. There have also been knock-on effects to charitable income, with many Irish charities completely unconnected to the controversies reporting substantial drops in income over this time period. One respondent in an nfpSynergy focus group said that he had only once taken action as a result of seeing something on the news – to cancel two direct debits to unrelated charities after seeing one of these controversies. While in 2012, 74% of respondents in our research reported having given to charity in Ireland in the last three months, this had declined to just 61% in our most recent survey.

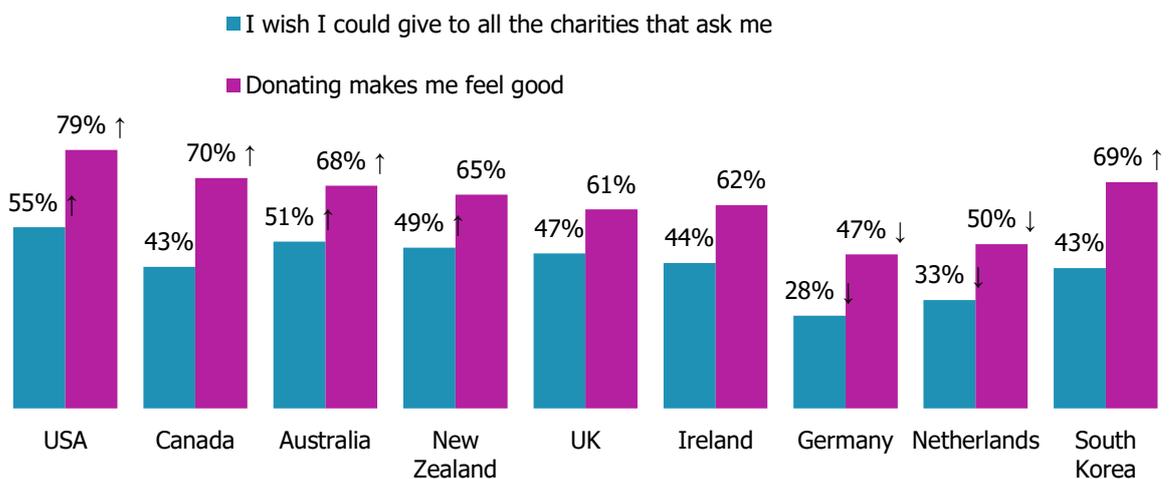
The lesson for individual charities is simple – trust in your organisations is not a given and is dependent not just on how the public sees your charity, but how it sees the sector more broadly. It is volatile and highly subject to change. You may well come under scrutiny through no direct fault of your own but through the actions of completely unrelated organisations. Having a strategy in place ahead of time for when negative media attention is drawn to the charity sector in your country could make the difference in the long run.

What drives trust in charities also varies by country

In carrying out this research we wanted not just to look at how trust varies between different countries, but also dig into the why. What are the factors that drive trust or mistrust in charities in each of these countries? For this reason, we also tested some attitudinal statements about charities and fundraising in each of the countries to explore how cultures of giving varied and to what extent they linked with levels of trust.

The first point to note, from Figure 4 below, is that how good donors feel about giving tends to track well with trust in charities. An overwhelming majority of those from the United States (79%) reported that donating made them feel good, compared to around half in Germany (47%) and the Netherlands (50%). South Korea appear to be an outlier where a high percentage enjoy giving, but with low trust levels as shown in Figure 1. The public in the US are obviously highly enthusiastic about giving and charities there are having success in making donors feel good about their gift.

Figure 4: Public attitudes to giving requests and those that enjoy giving, by country

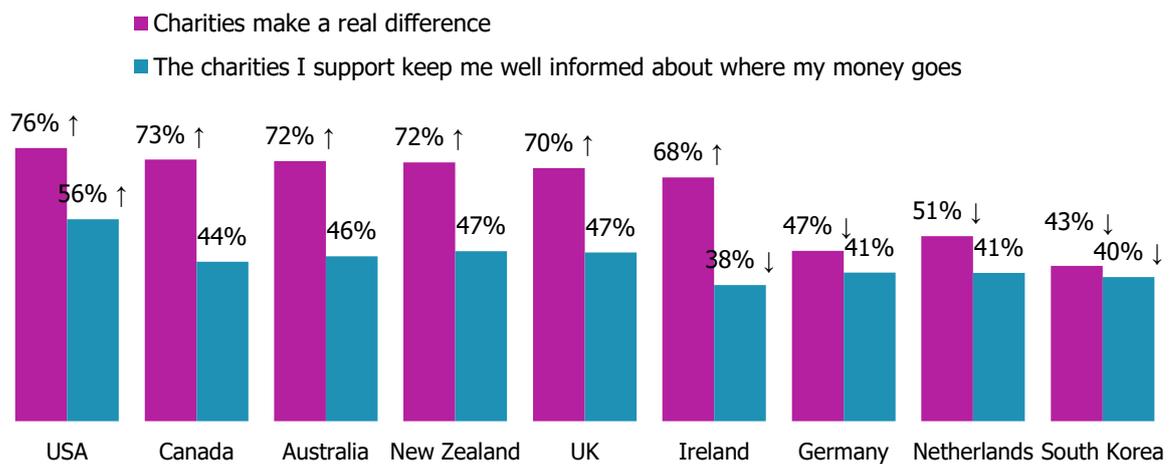


“How much do you agree or disagree with each of the statements below about charities?”

Base: 6,600 adults 16+, 9 countries | Source: nfpSynergy survey September 2018

A clue as to why this might be comes when we look at how donors feel about impact, as in Figure 5 below. A significantly higher proportion of those from the US are likely to say that they feel charities respect them and keep them informed about where their money goes when compared to other countries. This would imply that charities around the world can learn from the example of American charities in their treatment of donors and in their communication of their impact.

Figure 5: Public who believe that charities make a difference and that they are transparent

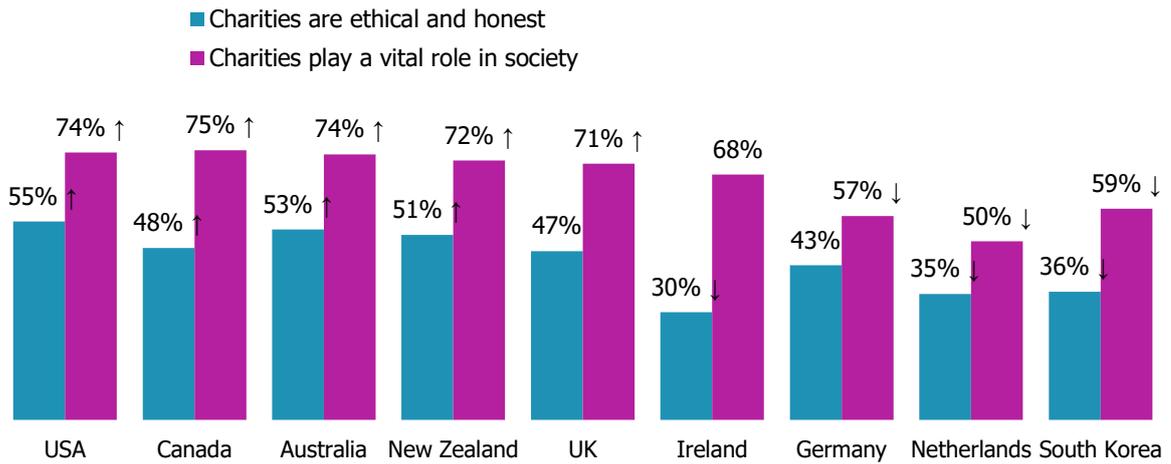


“How much do you agree or disagree with each of the statements below about charities?”

Base: 6,600 adults 16+, 9 countries | Source: nfpSynergy survey September 2018

However, it is not just about how charities inform and treat their supporters. At a much more basic level there is also the role that charities are perceived to play in a given society. When asked about this, as in Figure 6 below, we can see that South Korea, Germany and the Netherlands stand out substantially from the other countries in our sample. While in most countries around 70% or more agree that charities play a vital role in society, in Germany this figure is just 57% and it is as low as 50% in Netherlands. This suggests that in a society where charities are seen to have less of a role in how society functions (perhaps owing to higher levels of state action) people feel more ambivalent and less trusting.

Figure 6: Public who believe that charities are ethical and play a vital role

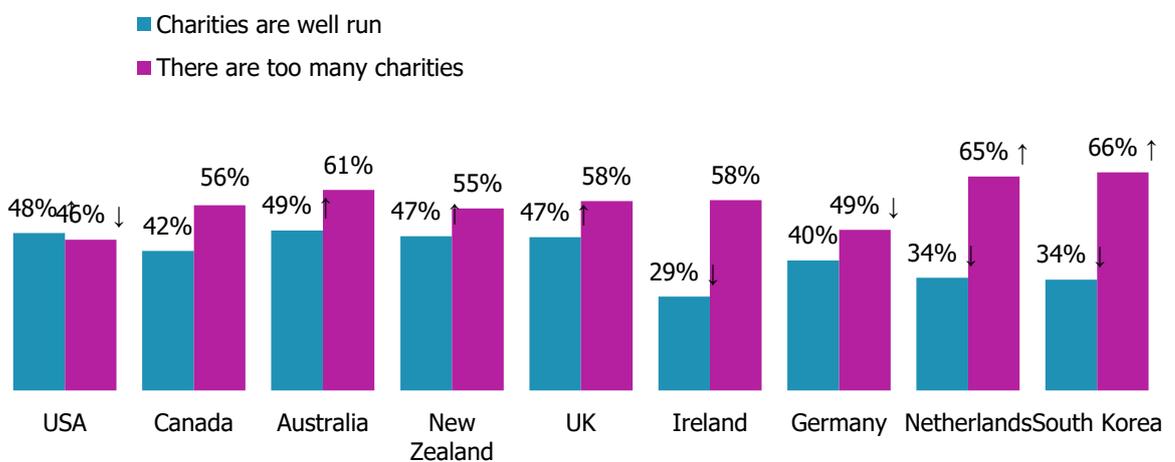


“How much do you agree or disagree with each of the statements below about charities?”

Base: 6,600 adults 16+, 9 countries | Source: nfpSynergy survey September 2018

Figure 6 also shows the impact that controversies can have on trust. As we have already seen, Ireland has had a striking drop in trust in recent years and this is very much reflected in the levels of confidence that Irish people have in how charities themselves are run. Just 30% of respondents in Ireland believe that charities are ethical and honest, compared to over 50% in the USA, Australia and New Zealand. This is reflected again in Figure 7 below where we can see that just 29% of our Irish respondents believe that charities are well run, compared to an average of 44% across all the countries in our sample.

Figure 7: Those who believe charities are well run and those who think there are too many charities



“How much do you agree or disagree with each of the statements below about charities?”

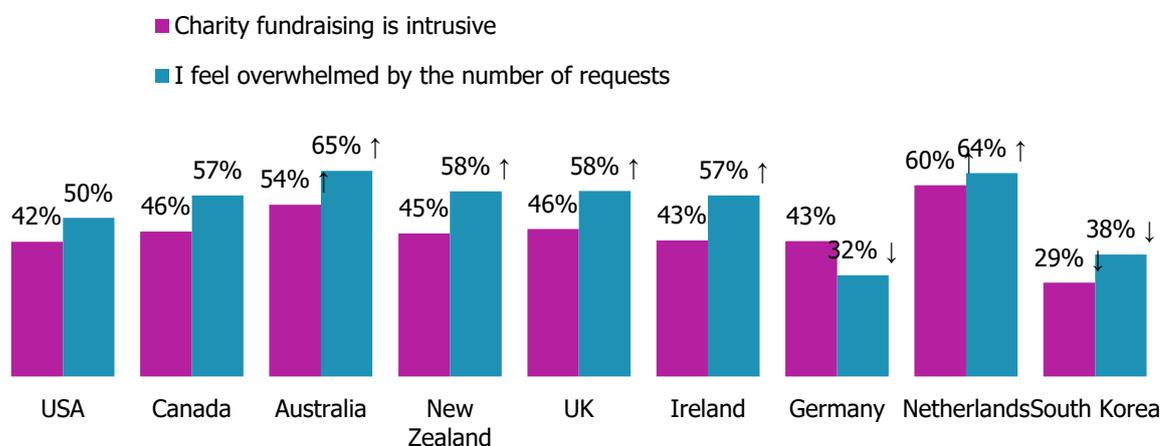
Base: 6,600 adults 16+, 9 countries | Source: nfpSynergy survey September 2018

Here we can also see another potential reason for low levels of trust in charities in the Netherlands and South Korea, with nearly two thirds of Dutch people saying that there are too many charities – a striking difference from its Northern European neighbour Germany where just under half of respondents agreed with the same statement.

We can see a dangerous dynamic at play in the Netherlands and South Korea, where people are simultaneously likely to feel that charities are not that important while also believing there are too many of them. This potentially hostile combination is in contrast to Germany, where while people are not especially likely to believe in the importance of charities, they are also not too bothered about the number of charities in operation, suggesting a more neutral or ambivalent attitude.

Beyond attitudes towards charities generally, we also wanted to explore how attitudes to fundraising differed by country. The results, partially shown below in Figure 8, generally resonate with these countries' overall views towards charities. In the Netherlands for example, we can see that nearly two thirds feel overwhelmed by the number of requests they receive from charities, echoing the feeling in that country that there are too many charities. On the other hand, in Germany, less than one third feel the same way, reflecting a more neutral outlook towards charities.

Figure 8: Those who find fundraising aggressive, and those feeling overwhelmed by volume of requests



"How much do you agree or disagree with each of the statements below about charities?"

Base: 6,600 adults 16+, 9 countries | Source: nfpSynergy survey September 2018

Australia provides an interesting outlier. High proportions believe that fundraising is intrusive (54%) and that they feel overwhelmed (65%). Anecdotally this is consistent with More Strategic's experience from previous surveys of fundraising tactics in Australia, while in strictly statistical terms it is also true that for many charities, using different channels, fundraising is becoming harder and harder with acquisition and retention down, and attrition levels going up. Interestingly, trust levels in charities are still comparatively high in Australia compared to the Netherlands, despite both countries believing that there are too many charities and that fundraising is too intrusive. The crucial difference may be that charities are simply perceived to be more socially important in Australia, with 74% agreeing that they play a vital role compared to just 50% in Netherlands.

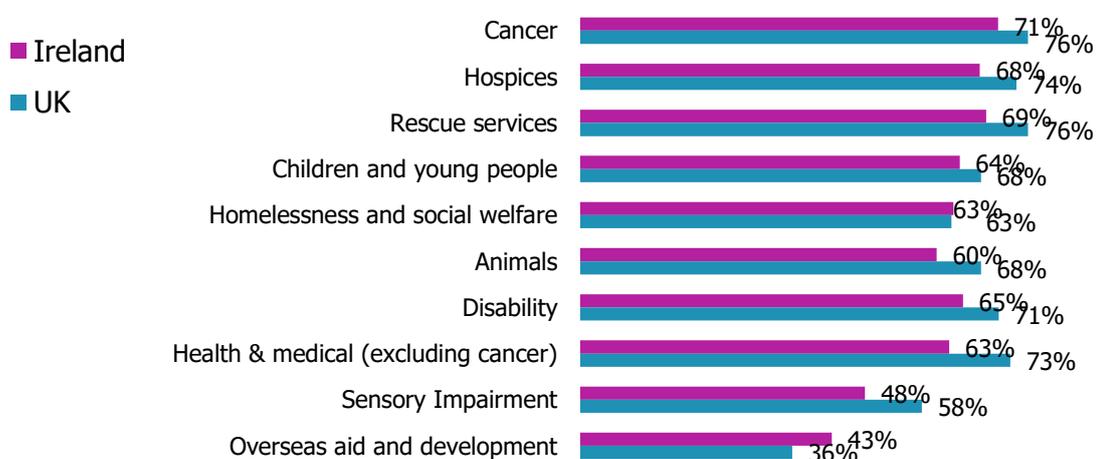
Trust may partly be a function of necessity – where charities are seen as a vital element of society, their role may be seen to be have more social ‘endorsement’ and the public therefore, more inclined to trust them. So, whilst Australian’s have an overall high level of trust in charities generally, believe in the value of the role charities play, enjoy donating and would like to give to all the charities who ask; they are similar to the Netherland’s public level of agreement when it comes to; agreeing that fundraising is intrusive, that there are too many charities and they feel overwhelmed. This appears to be a dichotomy in attitudes specific to Australia in this set of countries.

Thus, we can see a much more complicated underlying picture than overall trust figures would suggest. In Ireland there has been a sharp decline from a position of warmth. In Germany, there are simply lower levels of positive consideration for charities all round – less contact with fundraising, less belief in the importance of charities and less trust. In the Netherlands, there is a level of suspicion of charities that are seen to be too prevalent without people seeing the importance of their role. In Australia, a higher agreement that there are ‘too many charities’ along with perceptions that fundraising tactics are ‘intrusive’ means charities could potentially be risking public positivity and eventually undermining trust - despite the fact levels of trust are presently quite high relatively. We hope that all of these different contexts can provide useful learnings for charities wherever they are based around the world.

Charitable cause also plays a role

Up until now we have talked about charities in the abstract or as one monolithic group. Of course, this is not how people tend to interact with charities in reality – while some may feel sceptical about charities in general, they might feel warmer towards their favourite charities or towards charities working in a specific area. We know that in the UK and Ireland trust in organisations working in different fields varies hugely, as we can see in Figure 9 below. In general, overseas charities are significantly less trusted than those working in other fields. Other research from nfpSynergy suggests that campaigning organisations are also less trusted than more service delivery oriented organisations.

Figure 9: Trust in different areas of the charity sector

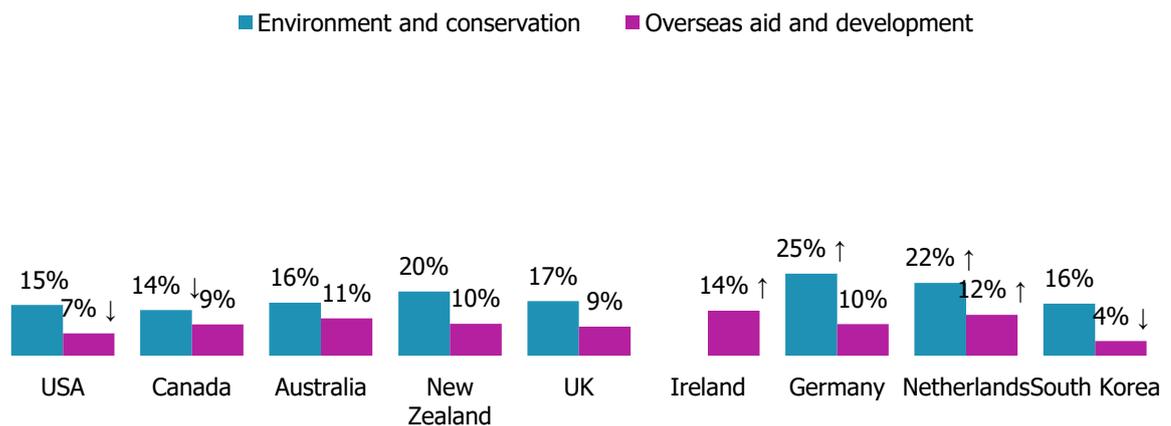


“Below is a list of different charity sectors. Please indicate, by ticking in the appropriate column, how much trust you have in charities working in each of the sectors.”

Base: 1,000 adults 16+, Republic of Ireland | Source: Irish Charity Engagement Monitor, Apr 18, nfpSynergy

For this reason, we thought it would be interesting to explore how favourite cause varied between countries. Would those countries with a greater preponderance of overseas or campaigning style organisations also have lower trust in charities overall? There was some evidence to suggest this might be true, with environmental charities being significantly more prominent in Germany and the Netherlands, as in Figure 10 below, both countries where overall trust is lower as seen in Figure 1.

Figure 10: Those selecting environment and overseas charities as working in their favourite causes



“When you think about your favourite charities, which category do they fall into?”

Base: 6,600 adults 16+, 9 countries | Source: nfpSynergy survey September 2018

Interestingly though, there was a substantial level of similarity between countries overall. Cancer tended to be the most popular cause in most countries (with the exception of the USA and especially South Korea and Germany), while Children/young people was often the second most popular cause for favourite charities, with animals also tending to be high on the list. The full list of favourite causes is replicated below in Figure 11. This is an area that we would be keen to explore more of in order to understand how the landscape of the most popular charities varies in other countries around the world. It’s also interesting to note that in a country like South Korea, where overseas development charities are amongst the largest and best known, as a cause it is not that popular. Equally interesting is how Armed Forces are very popular in the USA and the UK, but not Canada, NZ or Australia, despite the shared military history in many of the twentieth century’s major armed conflicts.

Figure 11: Favourite causes per country

	USA	Canada	Australia	New Zealand	UK	Germany	Netherlands	South Korea
Cancer	29%	42%	40%	40%	46%	17%	51%	6%
Children and young people	38%	41%	35%	39%	32%	30%	27%	44%
Animals	34%	29%	32%	35%	35%	30%	31%	15%
Health and medical (excluding cancer)	21%	33%	23%	26%	25%	12%	33%	11%
Homelessness and social welfare	28%	24%	29%	23%	19%	17%	9%	16%
Environment and conservation	15%	14%	16%	20%	17%	25%	22%	16%
Rescue services	18%	12%	17%	28%	17%	19%	11%	9%
Disability	20%	13%	19%	23%	17%	13%	14%	19%
Hospices	8%	6%	6%	22%	25%	13%	6%	4%
Older people	16%	10%	11%	13%	15%	11%	15%	19%
Armed Forces / Veterans	23%	8%	10%	8%	21%	3%	3%	6%
Religious	21%	12%	11%	13%	6%	6%	8%	13%
Overseas aid and development	7%	9%	11%	10%	9%	10%	12%	4%
Dementia	6%	7%	9%	10%	15%	7%	13%	8%
Refugee and Asylum seeker organisations	6%	4%	9%	7%	5%	8%	9%	9%
Sensory Impairment	3%	2%	5%	6%	6%	4%	5%	3%
Indigenous people's issues	6%	4%	7%	4%	2%	3%	2%	2%

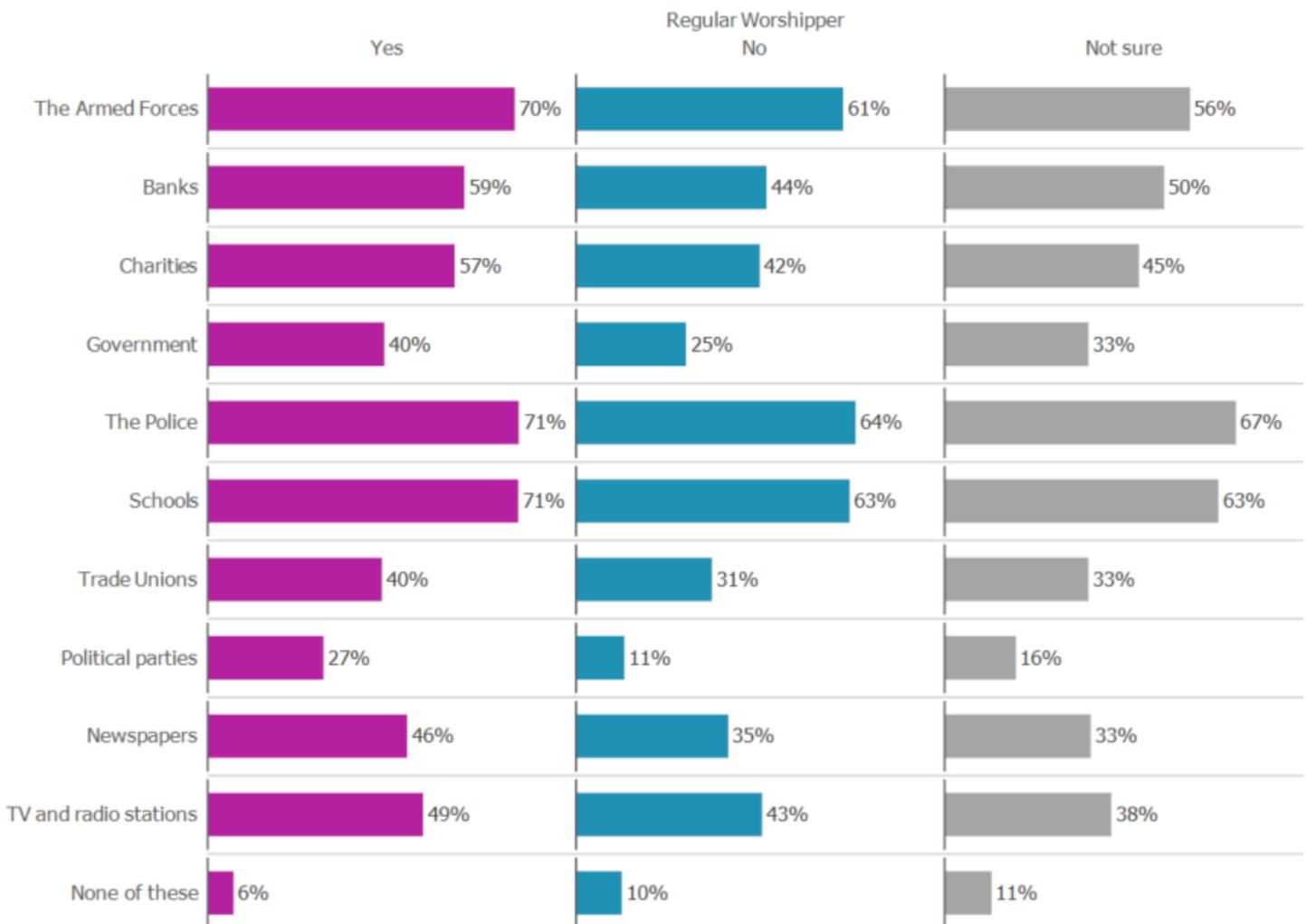
"When you think about your favourite charities, which category do they fall into?"

Base: 6,600 adults 16+, 9 countries | Source: nfpSynergy survey September 2018

Donors and worshippers are more trusting

Of course, just as charities are not homogenous, neither are the public in any of these countries. Different sub-groups of the population have different relationships to charities and giving, and indeed we were able to notice that there were some differences that held out across the board, regardless of country. For example, regular worshippers (those who regularly attend a religious service of any kind) tended to be more trusting not just of charities, but of every single institution that we asked people about (see Figure 12 below).

Figure 12: Trust per institution for Regular and non-regular worshippers



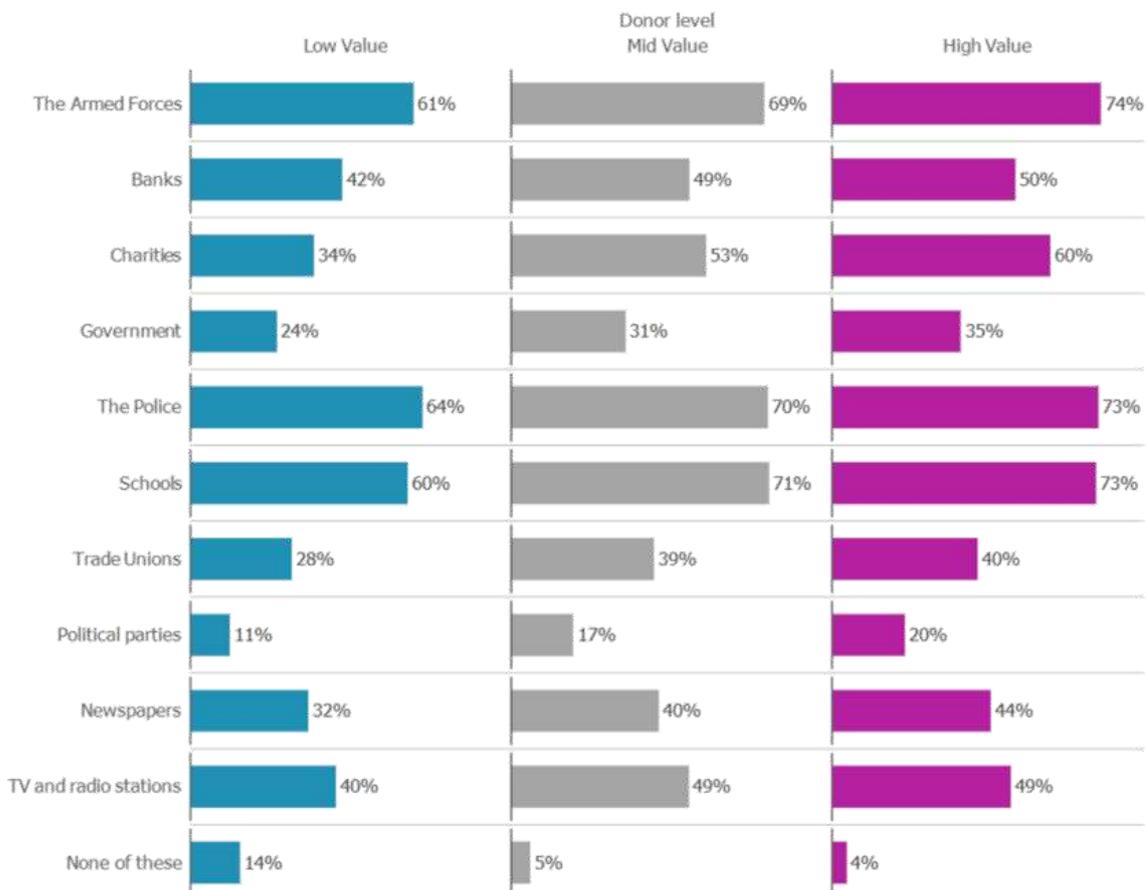
“Please indicate how much trust you have in each of the following bodies”

Base: 6,600 adults; Regular Worshipping “Yes” 1,788, “No” 4,512, “Not sure” 346, 16+, 9 countries | Source: nfpSynergy survey September 2018

This is an important insight into the minds of charity supporters – not only are they more likely to be religious than the population as a whole, across every country that we surveyed, but they are just more trusting of institutions more generally.

People who support charities also appear to be by nature more trusting and perhaps likely to feel a higher level of belonging and involvement in society when compared to those who are not as strong in their support of charities. This can also be seen in Figure 13 below where we look at trust in different institutions broken out by self-reported donation value. In the context of the growing wave of populism internationally, this result is instructive – those who are supporting charities are more likely to feel part of the “in group” in society and feel that society works and is working for them.

Figure 13: Trust per institution by self-reported donation value



“Please indicate how much trust you have in each of the following bodies”

Base: 6,600 adults 16+, 9 countries | Source: nfpSynergy survey September 2018

There were also substantial gender differences across the board, with men more likely than women to say that fundraising made them feel uncomfortable or was intrusive, and less likely to say that donating made them feel good or that charities played a vital role in society. Similarly, higher social grades (those working in more senior managerial or white-collar jobs) tended to place more emphasis on the role that charities play in society and were not especially more likely to be put off by fundraising.

Perhaps the demographic category with the most interesting dynamic was age. Older people were (as most charities would expect) more likely to be recent donors (to have given in the last three months) and also to be higher value donors. However, in general they were less enthusiastic about charities than younger people. On average, 55% of 16-24-year olds in our samples trusted charities compared to just 44% of over 65s. 54% of 16-24 year olds felt that charities were ethical and honest compared to just 35% of over 65s.

Perhaps some of the explanation for this can be seen in the tension older people feel around fundraising. Although they are more likely to say that they feel overwhelmed by the number of requests they receive, they are also more likely to say that they wish they could give to all the charities that ask them. This suggests that there is a strong dynamic tension at play – older people and high value donors do feel good about donating and wish they could do it more, but are currently feeling under too much pressure from charities to do so.

Segmenting the public by trust

Ultimately then we wanted to bring together all of the factors that drive trust and confidence in charities and use them to build attitudinal segments to see how these compared across countries. In doing so, we started by looking at what factors were most important in driving whether respondents felt they trusted charities or not. We did so by using a type of regression analysis known as relative importance analysis. This allowed us not just to identify whether something was relevant or not in determining trust levels, but also how important it was compared to other factors. The results are shown in Figure 14 below¹. Interestingly, the most important factors we can see are whether a respondent sees charities in general as ethical, honest and well run. By contrast, charities making a real difference or playing a vital role in society are of secondary importance. This underlines the importance of hygiene factors around transparency and government in driving overall levels of trust – if you want to be trusted it is not enough to show the importance of the work you are doing (though this is significant), you also need to convince people you are well run and honest.

Figure 14: Most important factors driving trust



“Please indicate how much trust you have in each of the following bodies”

Base: 6,600 adults 16+, 9 countries | Source: nfpSynergy survey September 2018

This may well go some way to explaining why trust in charities in Ireland has fallen so dramatically compared with the UK. In Ireland the most high profile public scandals have been around un-ethical and dishonest behaviour whilst in the UK the criticisms have been more focussed on fundraising practice and charity governance.

¹ The numbers themselves are relative importance expressed in percentages – based on our driver analysis a high positive number means that factor is strongly and positively associated with trust, while a high negative number means the factor is strongly and negatively associated with trust

Having understood this, we were then able to look at different segments defined by their trust in charities and the factors that drive confidence, using a model originally designed by More Strategic using Australian public and donor data. Broadly speaking the model divides the public into Charity Doubters (Sceptics, Trapped and Neutrals) and Charity Believers (Conflicted, Compassionate, Occasional and Visibles).

Using this model, originally linked to transactional donor behaviour data, we know that these trust-driven segments differ strongly in their donation values, with more trusting Believer segments giving significantly higher on average than Doubter segments.

The Seven segments split out as follows:

Charity Doubters:

1 - Sceptics - Have minimal belief in the value of charities and the importance of their role in society. Although they will still support charities they are unlikely to engage deeply or be committed donors.

2 - Trapped - This segment has other priorities in life and feel too under pressure financially to give. This segment is younger and is over-committed to family, career and lifestyle. They do see the value in charities and trust them, so they do want to give but feel they can't at this time.

3 - Neutrals - Is probably the most interesting group within the Doubters. They have belief in charities and are likely to agree they play a positive role, but they do not seem to be convinced enough to engage. They are an audience that charities don't seem to be reaching at present through existing channels and activities.

Charity Believers:

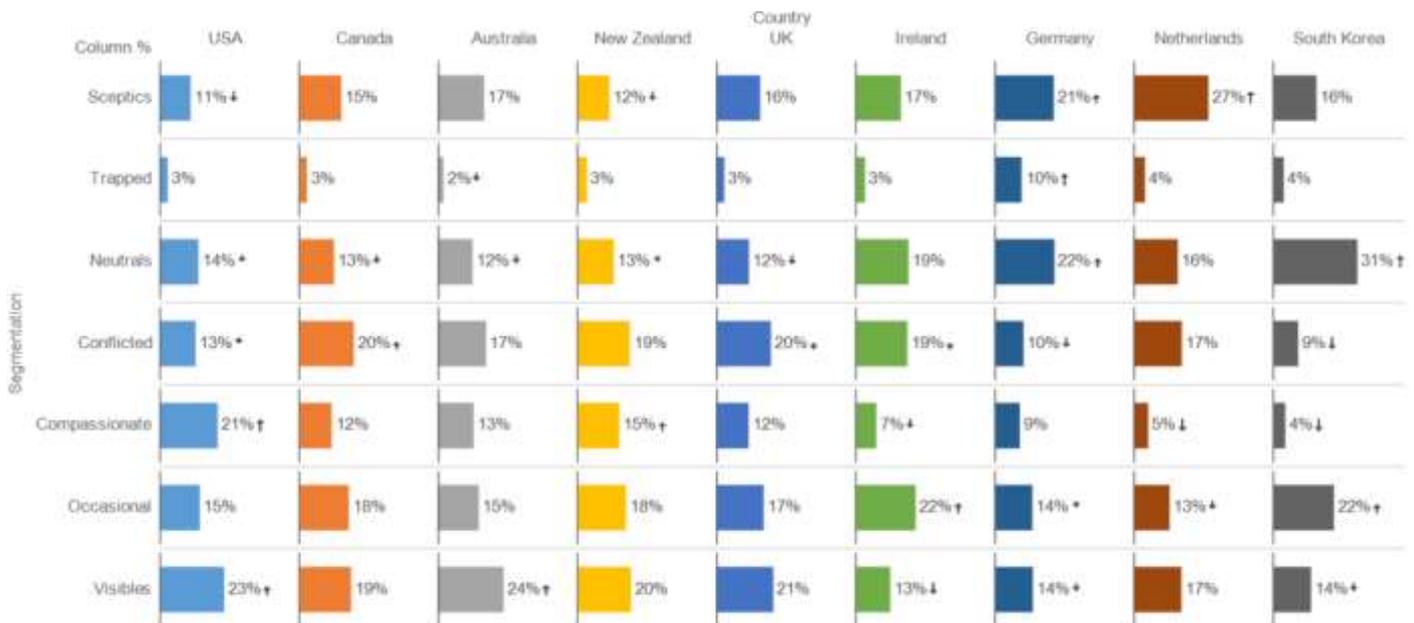
4 - Conflicted - This is the older trusting donor group; They want to give to all who ask and therefore have a tendency to feel overwhelmed as a group - being asked by multiple charities in certain markets as the 'traditional supporters'.

5 - Compassionates - Driven by empathy and values to commit and engage with many causes, they are more likely to support causes across the board; particularly animals, children and poverty alleviation. In Australia the second most valuable segment by individual and overall value of giving.

6 - Occasional - These are the uncommitted charity supporters. They give generously but are not necessarily loyal or engaged.

7 - Visibles - Overall a very positive group. High levels of Trust and lower levels of resistance to fundraising. They feel good through giving and being 'seen to give'. They are high profile supporters and contain event participants and others who share the knowledge of their generosity.

As we can see below in Figure 15, segment membership differs significantly by country. The USA, with its high levels of trust and enthusiasm for charities has the highest proportion of believer segments of any country, particularly over-indexing for Compassionates and Visibles. Australia also has a larger group of Visibles and New Zealand a larger group of Compassionates. Both Germany and Ireland have high proportions of neutrals – but likely for different reasons. Where Germans are likely to have always felt neutral about charities, tending to have less contact than those in other countries, and seeing the role of charities as less important, Irish people are probably more likely to have moved in recent years towards being neutral, having previously been believers. Similarly Ireland has higher levels of Occasionals possibly suggesting that people have withdrawn from more committed relationships. The Netherlands has the highest proportion of sceptics, reflecting low levels of trust and a degree of negativity towards charities.

Figure 15: Segment membership by country

Base: 6,600 adults 16+, 9 countries | Source: nfpSynergy survey September 2018

Eight ways to use this data

At the national level

- Persuade people that charities are well run, and ethical and honest. They appear to be precursors of trust and in turn engaging with charities and giving.
- Persuade people that charities play a vital role in society and make a difference. It's no good being trusted if nobody thinks charities do anything useful.
- Understand how people view fundraising and the number of charities. If it is seen as intrusive and charities as too numerous, that needs to be addressed with clear communications (but this is not enough alone to boost the reputation and income of charities).
- Analyse the attitudes of a population by the different segments and their attitudes. A country with high levels of neutrals and occasionals will need a different set of communications from charities to one with high levels of compassionate and visibles.

At the charity level

- Ask the same questions we ask of the general public in each of these countries of your own supporters to see how they differ or are similar to the norms (contact us for the questions).
- Use our future surveys to measure the awareness of your own charity in the different countries where you work – a service we hope to introduce in 2019.

- Know how popular your cause is – if a cause isn't naturally popular in a country then the messages about how well run, how ethical, how much difference the charity makes, and how vital its work is become even more important.
- Know who your audiences are – this data shows how there are strong demographics differences (and similarities) between countries. So use this information to help target in your country.

What next?

We hope you have found this year's findings useful and enlightening. We are always looking to explore new areas and would be particularly interested in adding new countries to the research in order to make this a more truly global study. We are grateful to our sponsors for their assistance in reaching our current nine countries – if you are interested in sponsoring any other country for inclusion in any future research, please do get in touch with either Cian (cian.murphy@nfpsynergy.net) or Gavin (gavin@morestrategic.com.au) and let us know!

About nfpSynergy

nfpSynergy is a research consultancy that aims to provide the ideas, the insights and the information to help non-profits thrive.

We have over a decade of experience working exclusively with charities, helping them develop evidence-based strategies and get the best for their beneficiaries. The organisations we work with represent all sizes and areas of the sector and we have worked with four in five of the top 50 fundraising charities in the UK.

We run cost effective, syndicated tracking surveys of stakeholder attitudes towards charities and non-profit organisations. The audiences we reach include the general public, young people, journalists, politicians and health professionals. We also work with charities on bespoke projects, providing quantitative, qualitative and desk research services.

In addition, we work to benefit the wider sector by creating and distributing regular free reports, presentations and research on the issues that charities face.

About More Strategic

As strategic marketing consultants over the last decade More Strategic has built a wealth of understanding around why people engage with not-for-profit organisations as customers, donors, volunteers and campaigners.

During that time, we have conducted over 80 quantitative and qualitative research projects ranging from light touch qualitative insights and feedback to detailed segmentation modelling for a range of clients. We have also worked in numerous not-for-profit sectors with clients around advocacy, campaigning and even customer engagement. In addition we have conducted our own cross-sector research into Trust and Confidence, why donors stop, peer-to-peer fundraising drivers and the National Disability Insurance Scheme.

Through our work, we have developed a broad understanding of what motivates engagement with causes and campaigns; What drives trust and confidence in charities and why people are loyal to their favourite charities. We use our research insights and data analysis to inform our work helping not-for-profits have greater support and therefore greater impact.

Please do contact Cian Murphy or Gavin Coopey with any queries or questions or expressions of unmitigated delight or horror on cian.murphy@nfpsynergy.net or gavin@morestrategic.com.au



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