

Trust & Giving in the Covid Era

National Research Study

November 2020



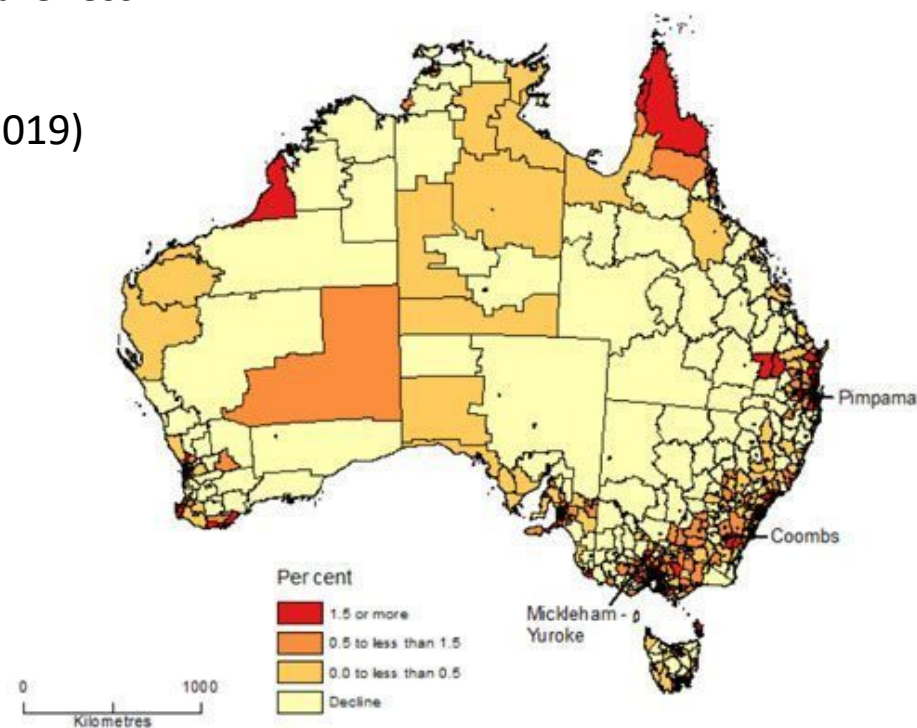
Research History

Historical trends and Drivers of Trust

- 2013 -2017 - Australian studies including with donors v public
Including: Trust, Admin and Cost ratios, NDIS awareness
- 2017 - Comparisons with UK & Ireland (IFC2018)
- 2018 - International comparison across 9 markets (IFC2019)

2020

- **January - Australian Bushfire Giving survey**
(national sample n1100)
- **September - Covid Impact on Charities and Giving**
2 nationally representative surveys 11th-23rd September
(Sample sizes 1049 + 1188)



Today

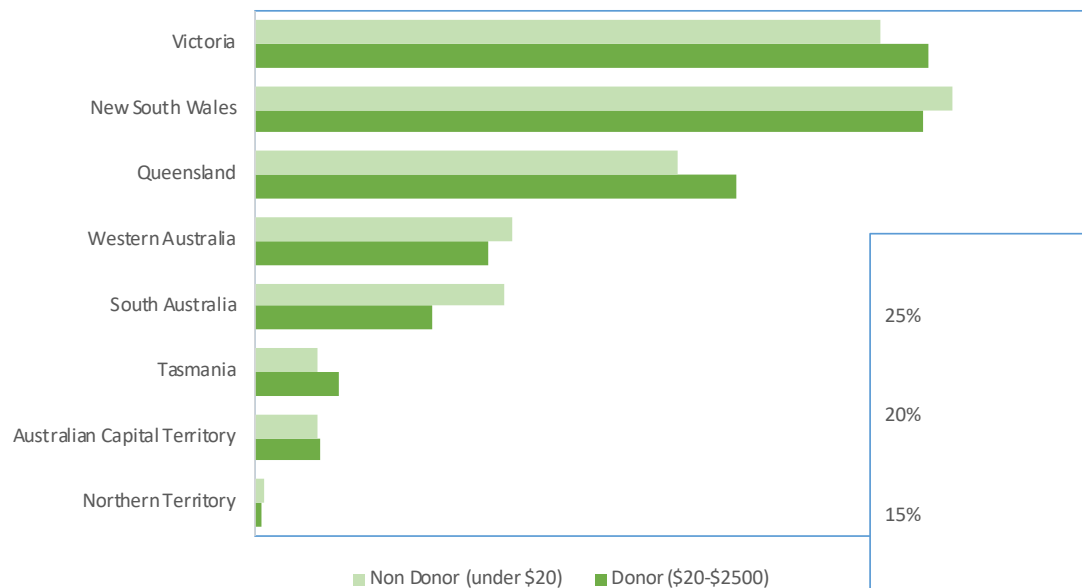


- Personal Experience of Covid
- Individual Expectations moving forward
- Perceptions of Charities during Covid
- Impact on Trust as an outcome
- Bushfires influence?
- The 'Belief' segments

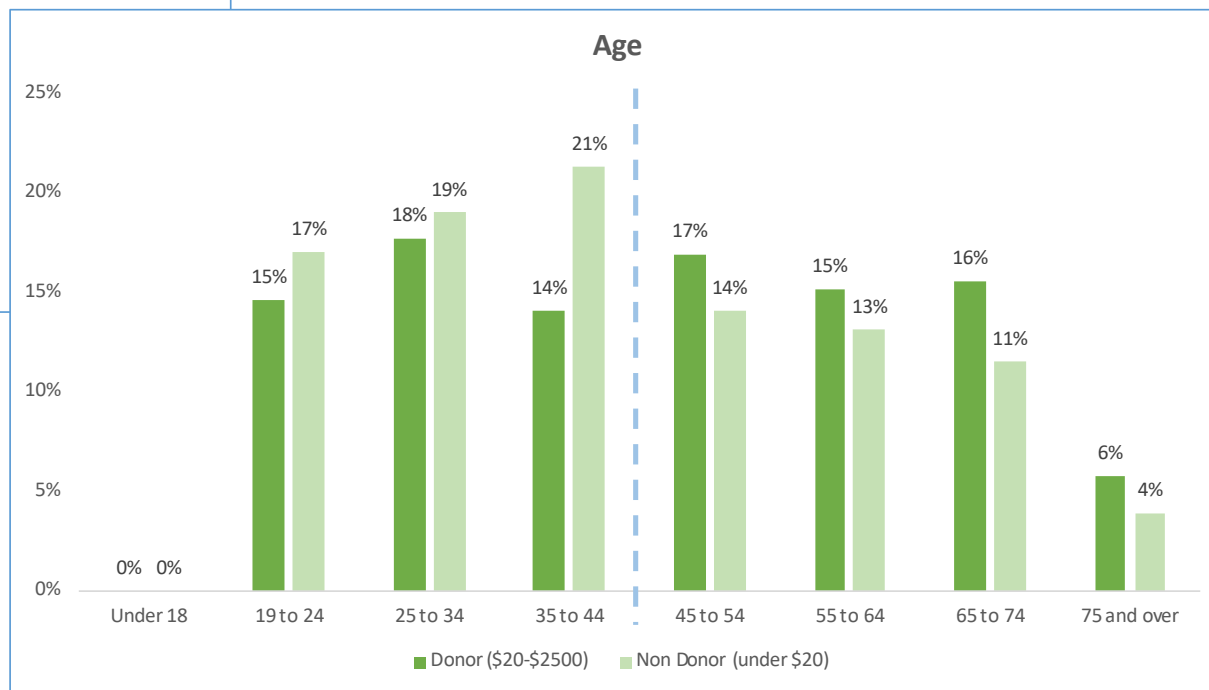
Copy of presentation will be available from FIA Research Hub after webinar

Demographics - State and age v donors

State



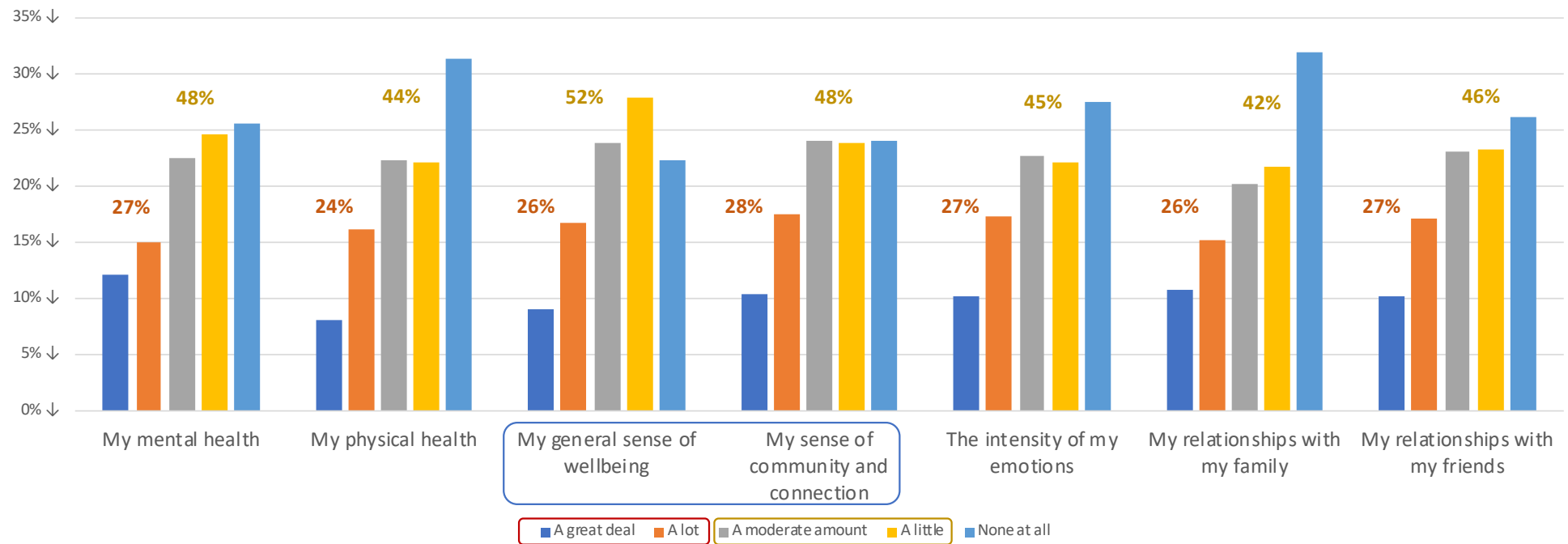
Age



Experience

Impact of Covid on individuals

Overall how much would you say that Covid has had a negative impact on

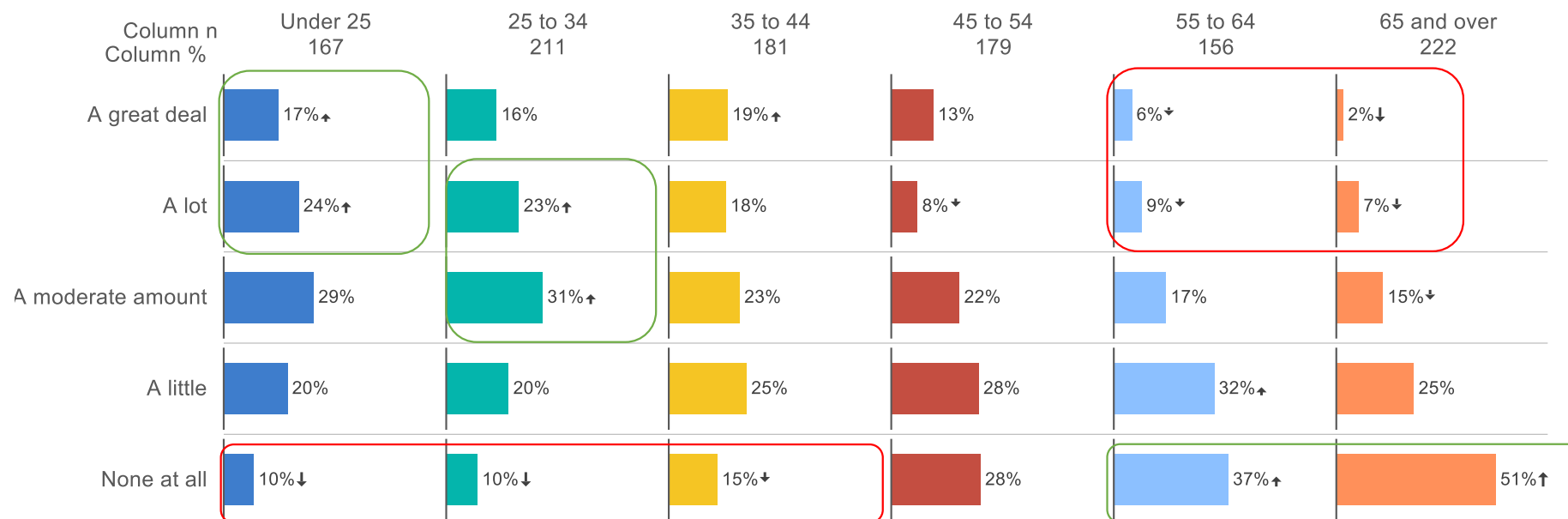


base n = 1110-1116 Multiple comparison correction: False Discovery Rate (FDR) ($p = 0.05$)

Older = my mental health less affected

Overall how much would you say that Covid has had a negative impact on: **My mental health?**

Age

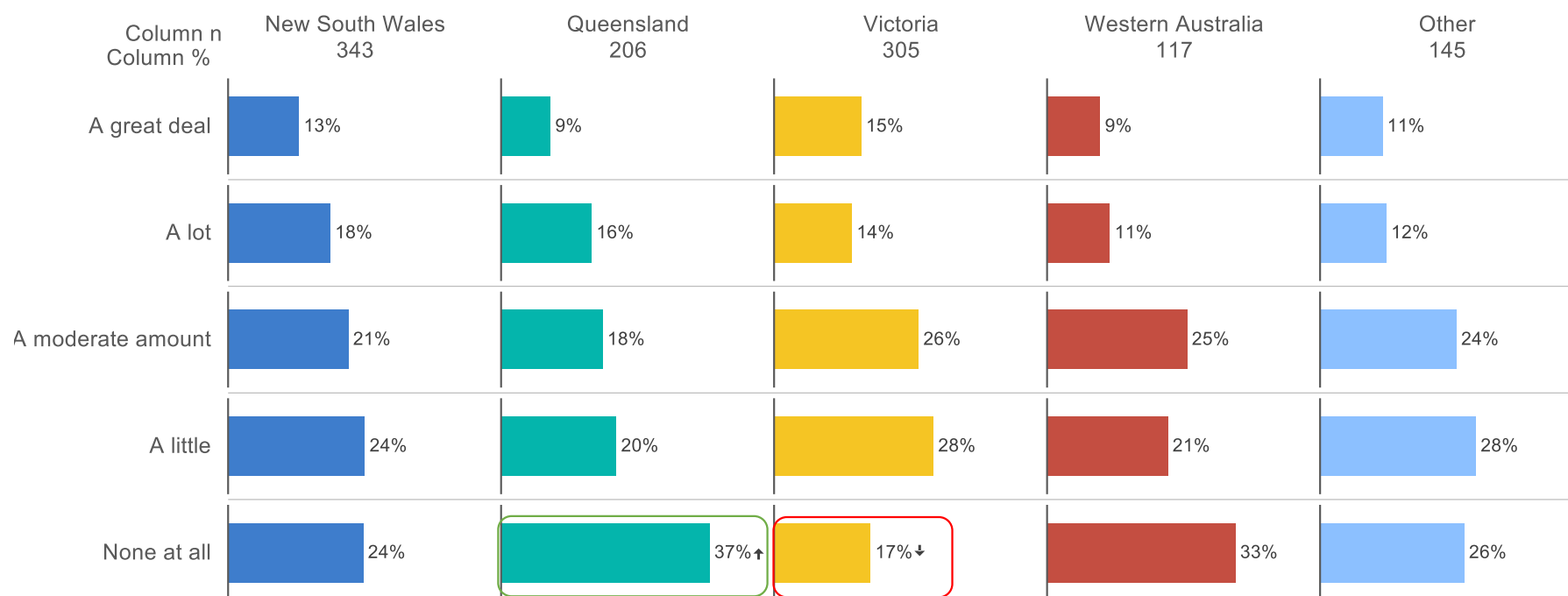


base n = 1116 Multiple comparison correction: False Discovery Rate (FDR) ($p = 0.05$)

Impact of lockdown at extremes

Overall how much would you say that Covid has had a negative impact on: **My mental health?**

State

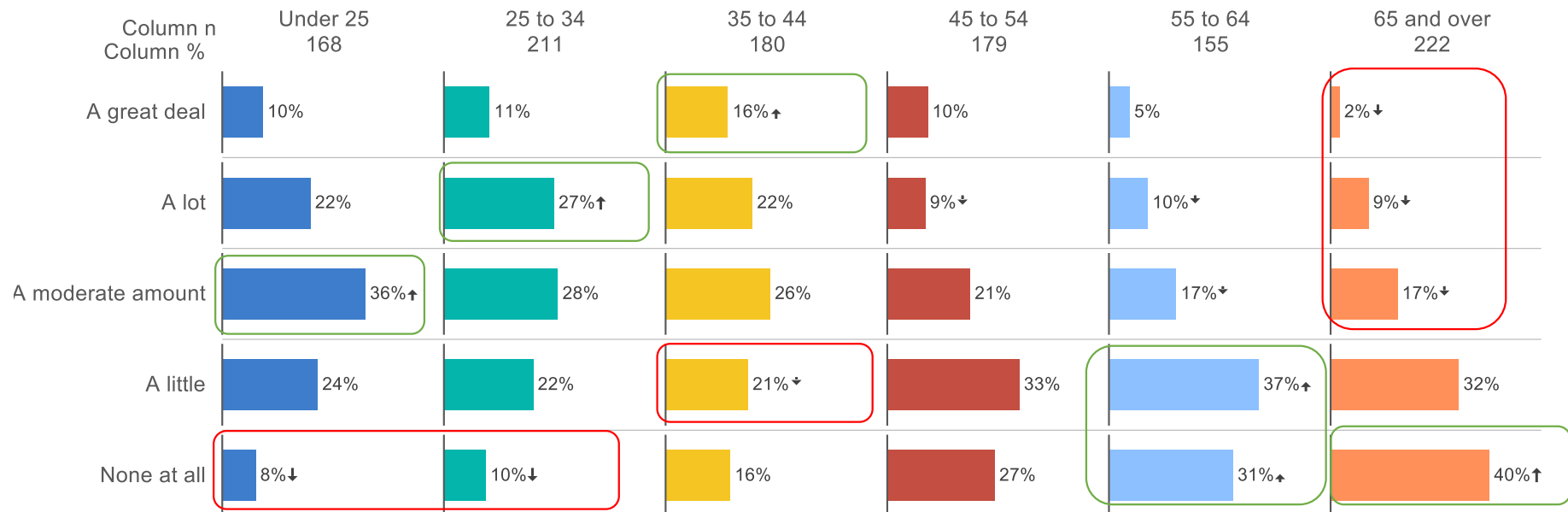


base n = 1116 Multiple comparison correction: False Discovery Rate (FDR) ($p = 0.05$)

Wellbeing worst in middle?

Overall how much would you say that Covid has had a negative impact on: **My general sense of wellbeing?**

Age

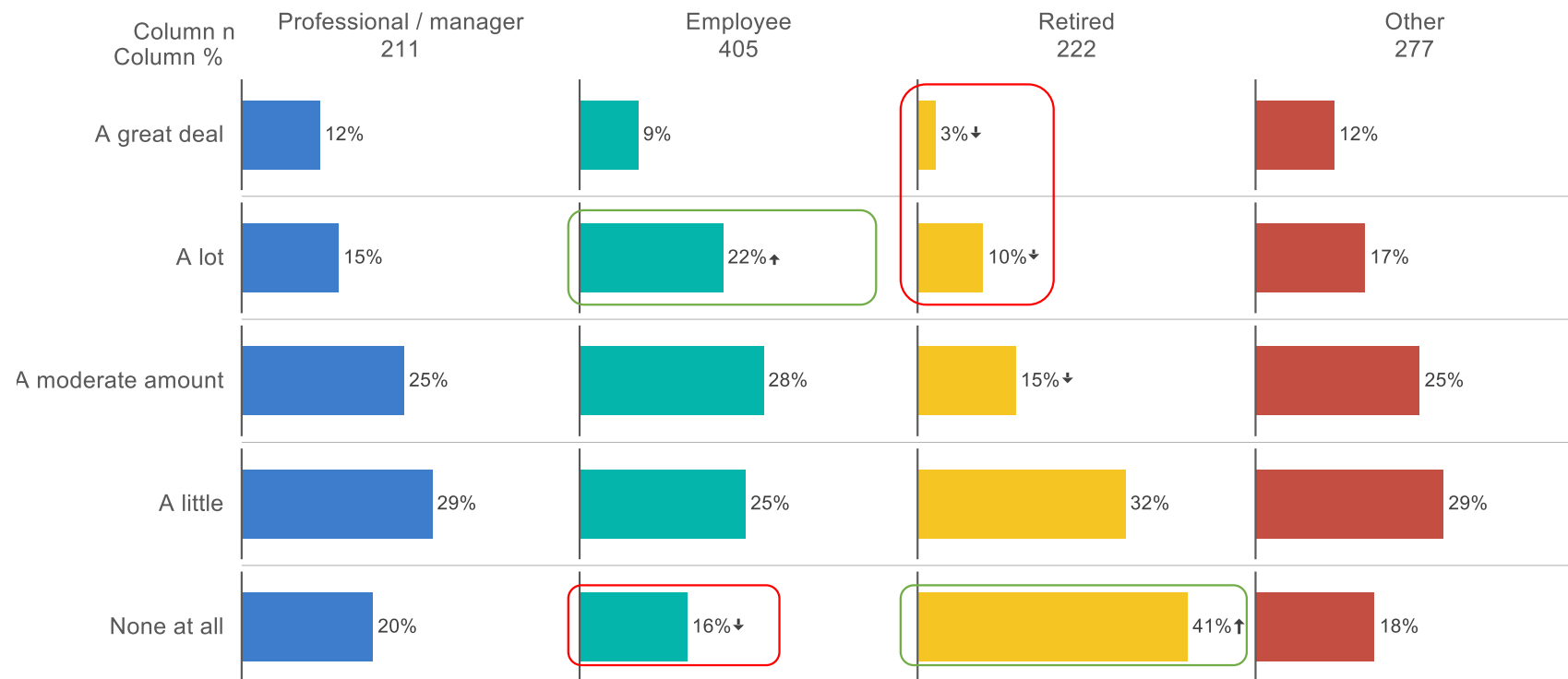


base n = 1115 Multiple comparison correction: False Discovery Rate (FDR) ($p = 0.05$)

Wellbeing pressure greatest on employees

Overall how much would you say that Covid has had a negative impact on: **My general sense of wellbeing?**

Occupation

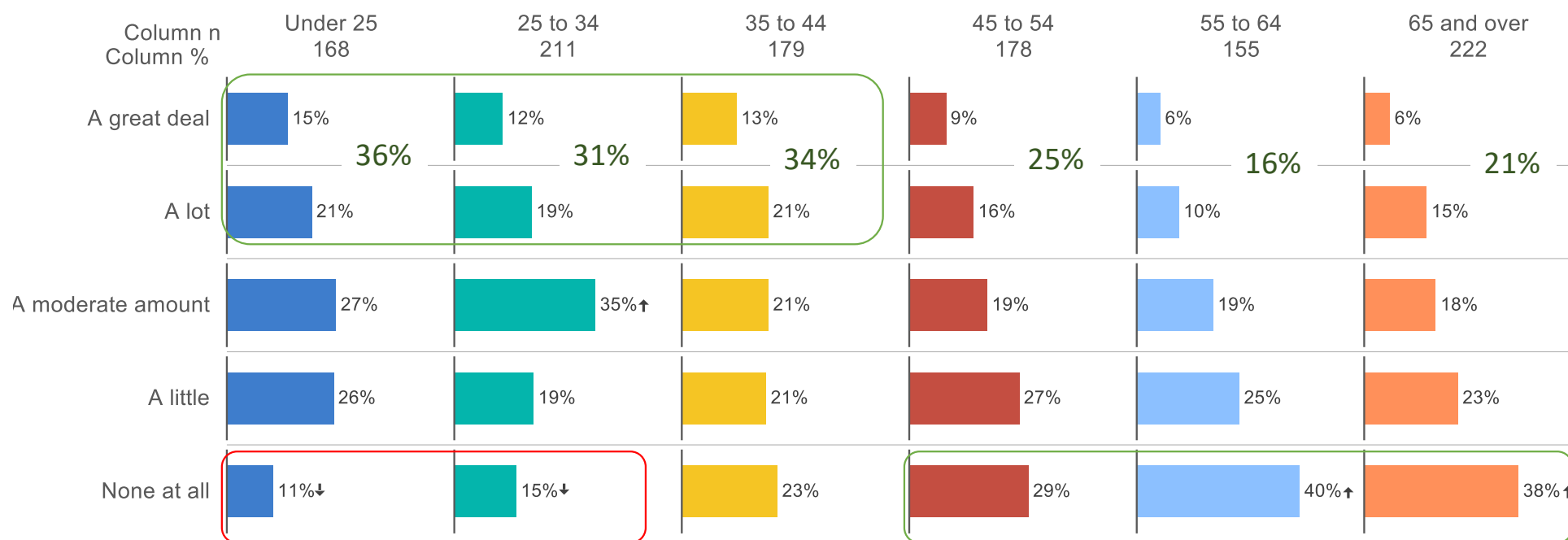


base n = 1115 Multiple comparison correction: False Discovery Rate (FDR) ($p = 0.05$)

Again tough for 25-44?

Overall how much would you say that Covid has had a negative impact on: **My relationships with my friends ?**

Age

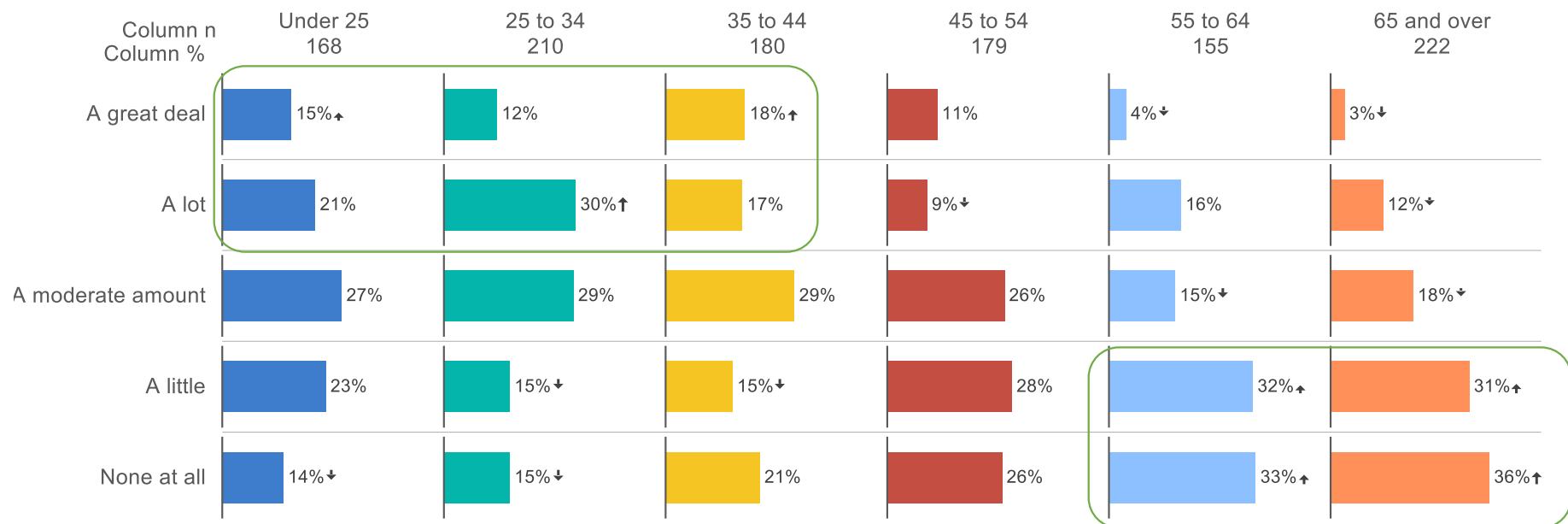


base n = 1113 Multiple comparison correction: False Discovery Rate (FDR) ($p = 0.05$)

Connection to Community similar pattern?

Overall how much would you say that Covid has had a negative impact on: **My sense of community and connection ?**

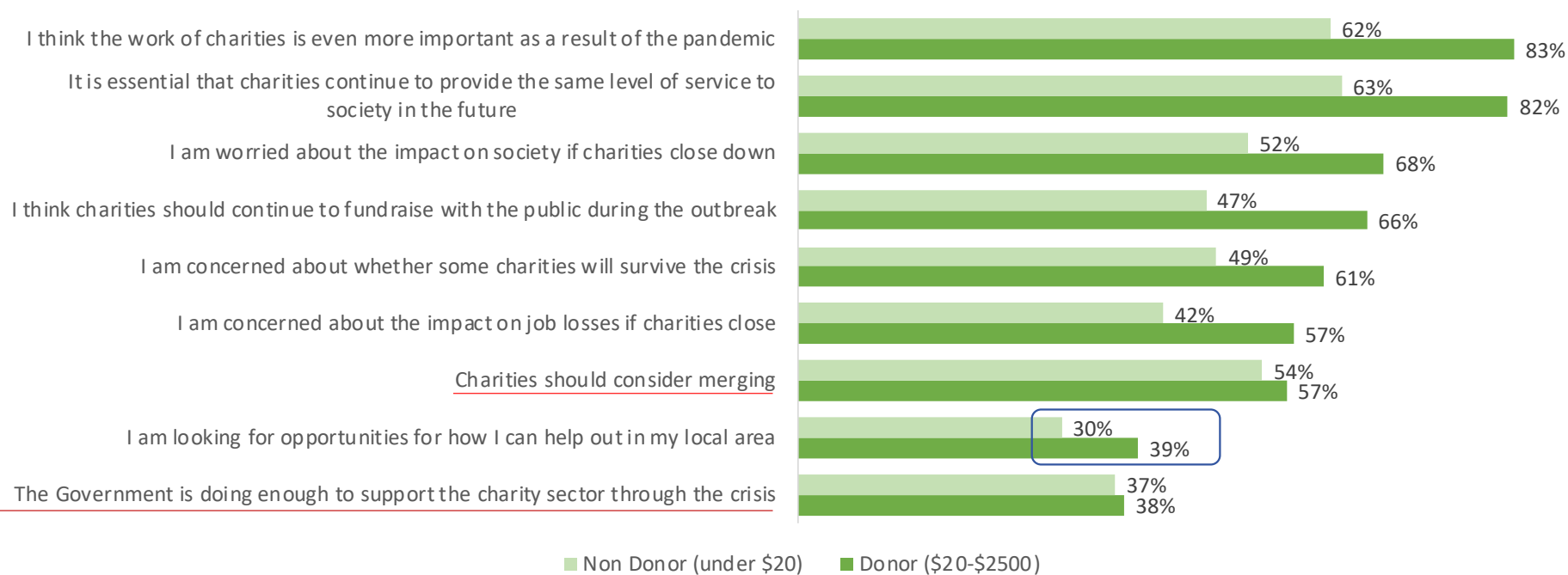
Age



base n = 1114 Multiple comparison correction: False Discovery Rate (FDR) ($p = 0.05$)

Impact of COVID on charities

Q9.1 - Thinking about charities and the pandemic, would you agree or disagree with the following statements:
Strongly Agree + Agree



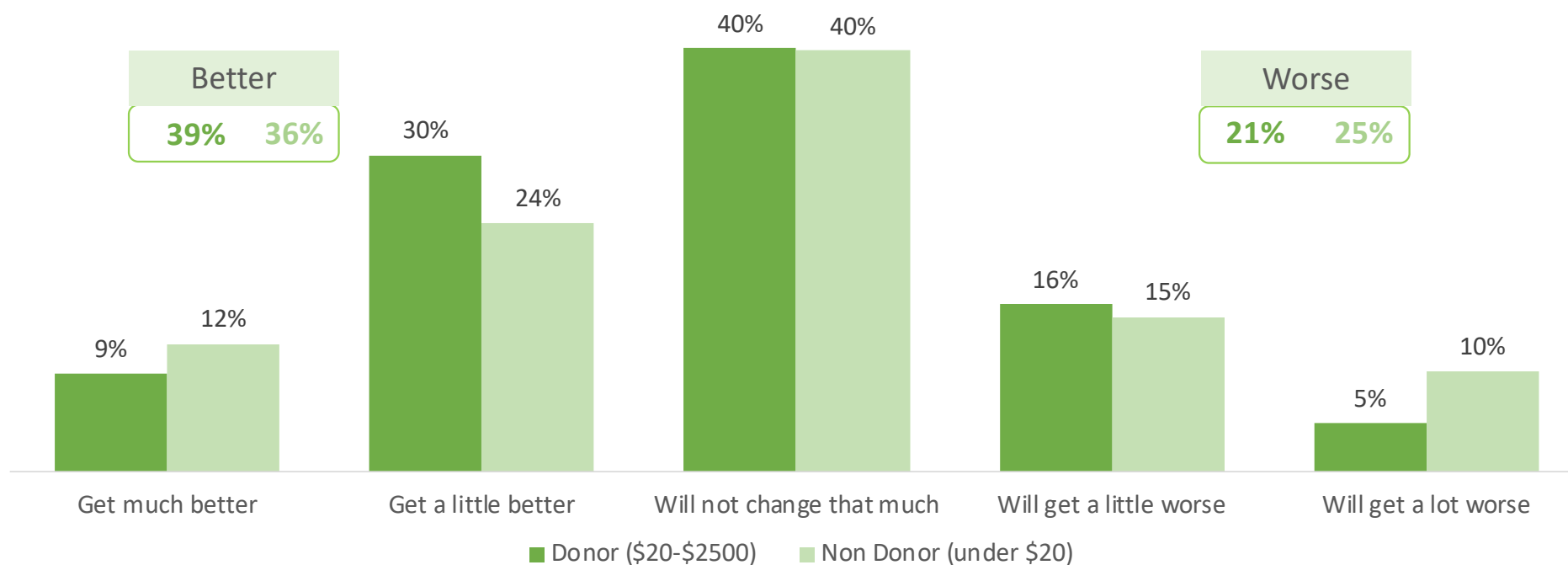
Donors had far higher levels of concern about the impact of COVID on charities with strong support for their role, impact and survival.

base n = 1049 Multiple comparison correction: False Discovery Rate (FDR) ($p = 0.05$)

Expectations

Financial Expectations

How do you think your financial situation may change in the next 12 months?

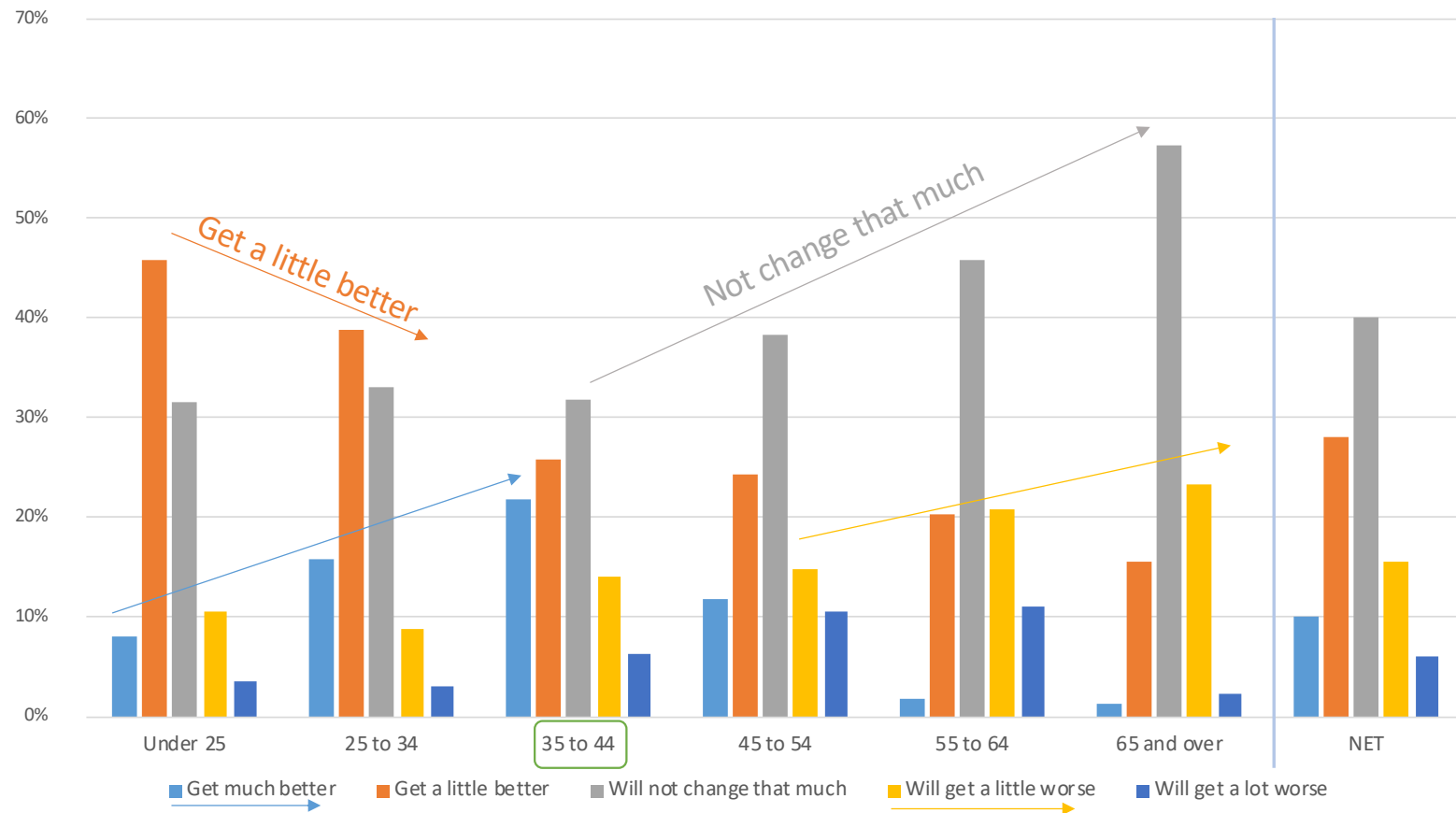


Donors are very slightly more likely to think things will get a little better. Overall 39% of donors think things will get better compared to 36% of non donors.

base n = 1049 Multiple comparison correction: False Discovery Rate (FDR) ($p = 0.05$)

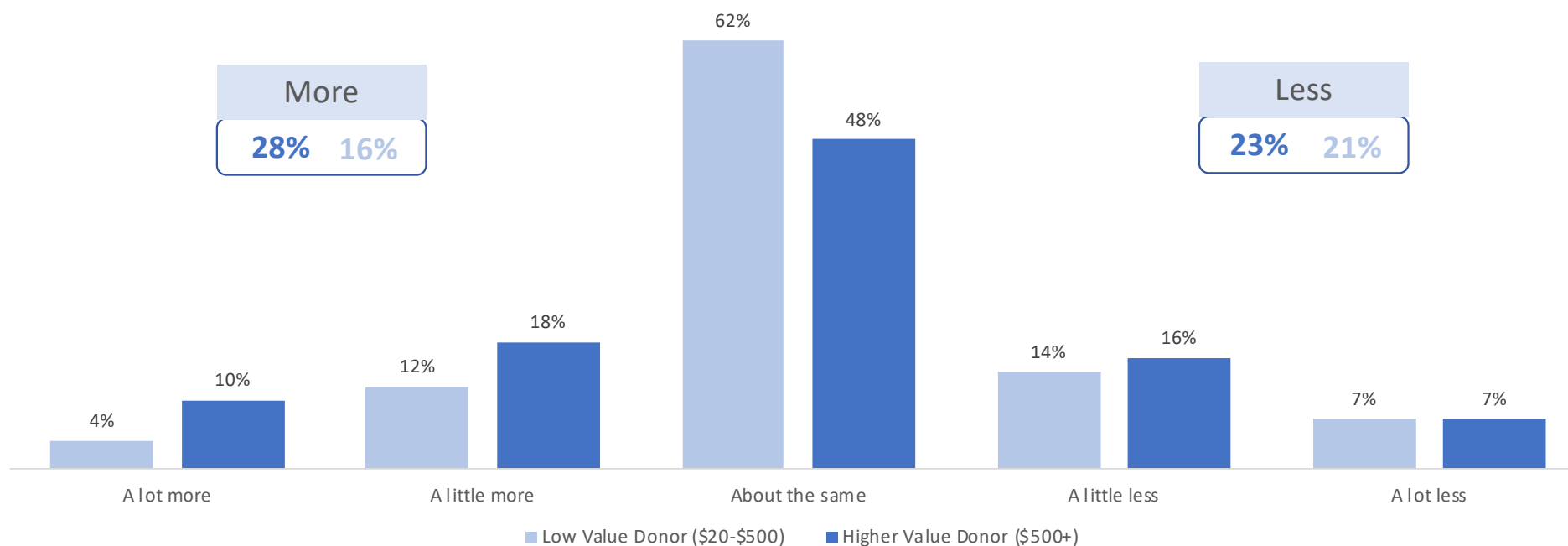
The three Lifestages?

How do you think your financial situation may change in the next 12 months? by Age



Giving Intentions - higher value more ambivalent?

Q8.4 - Thinking about your charitable giving in the next year. Do you expect to give more or less money than the year before?

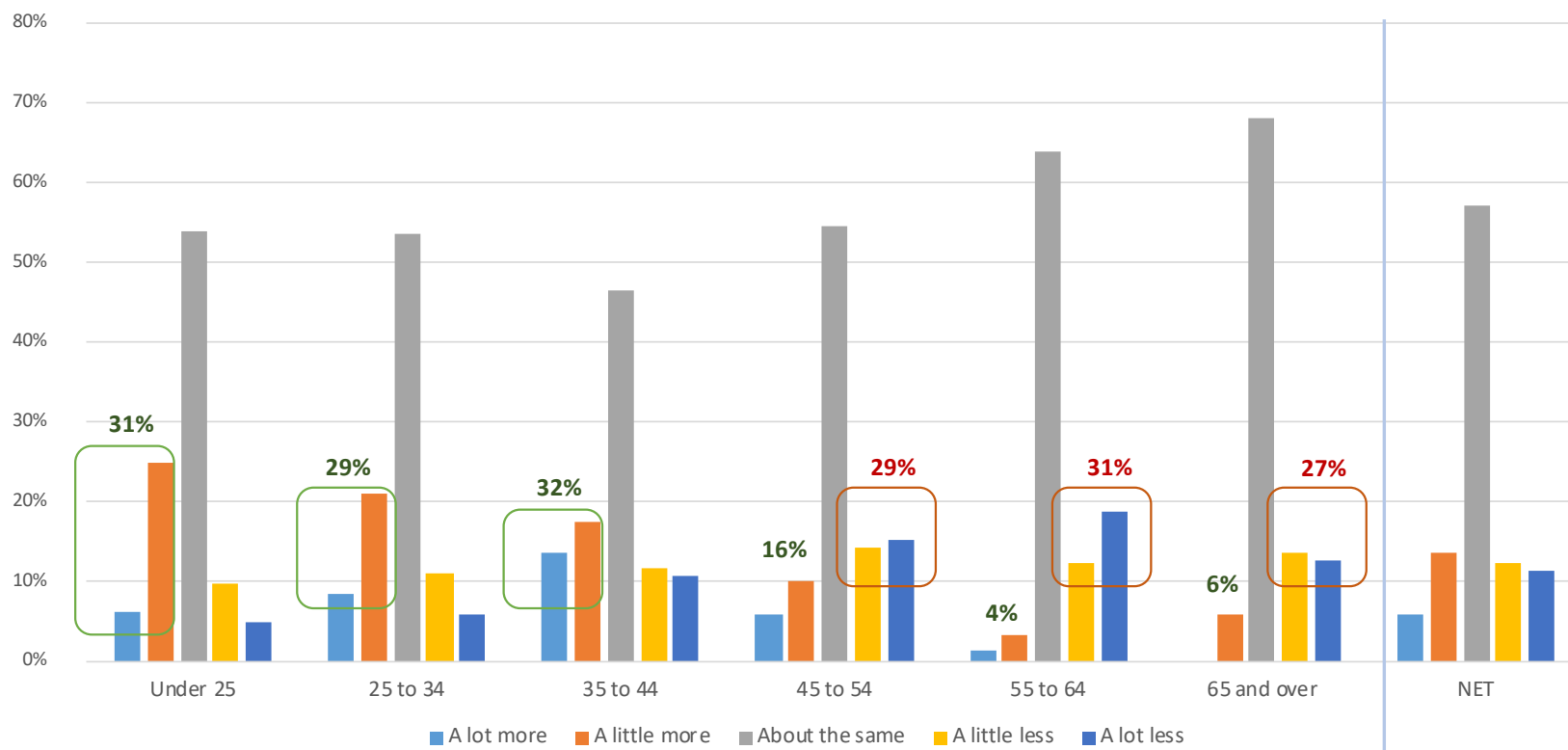


Encouragingly higher value donors are more likely to give more (28%) than give less (23%) and lower value are more likely to stay the same. However overall people are more likely to say they will give less

base n = 1049 Multiple comparison correction: False Discovery Rate (FDR) ($p = 0.05$)

Most giving will remain same but 'older' cutting back?

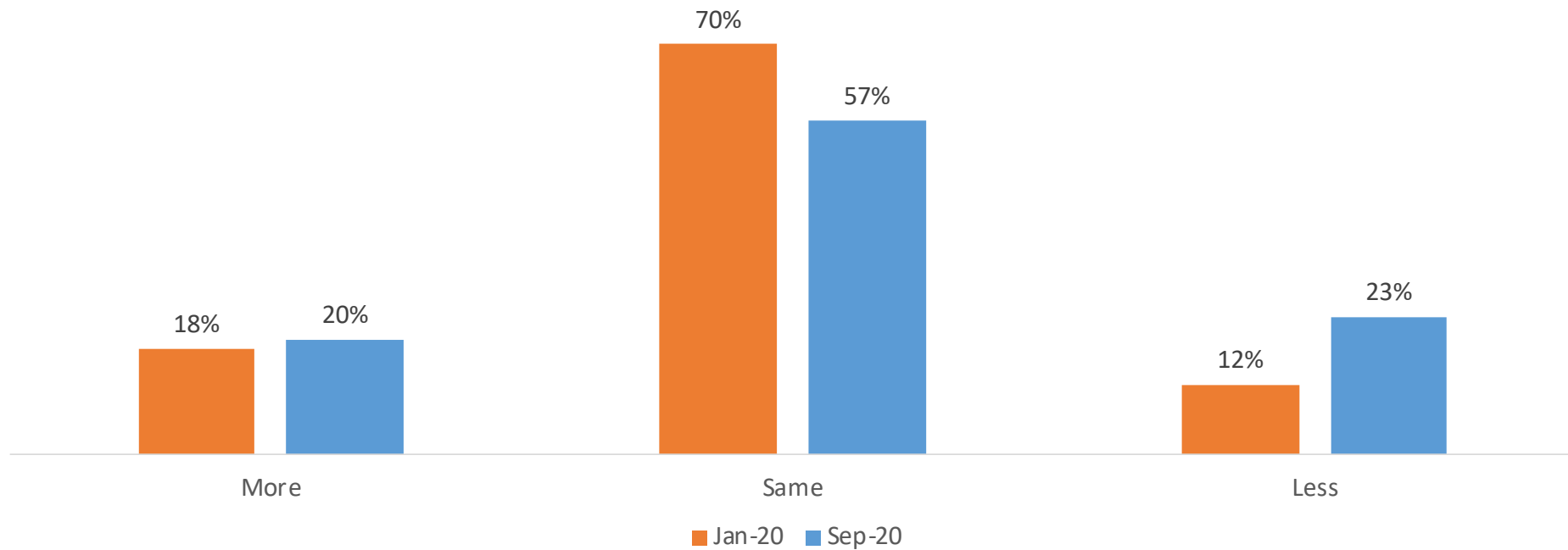
Thinking about your charitable giving in the next year. Do you expect to give more or less money than the year before? by Age



base n = 1049 Multiple comparison correction: False Discovery Rate (FDR) ($p = 0.05$)

Giving Intentions Jan v Sept 2020

Changes during 2020



Although worded slightly differently we see a shift from remaining the same to giving less.

Framing Trust

No Global Crisis in Trust (NGO's)

Examining trust in NGO's - 31 countries over nine consecutive years from the Edelman Trust Barometer

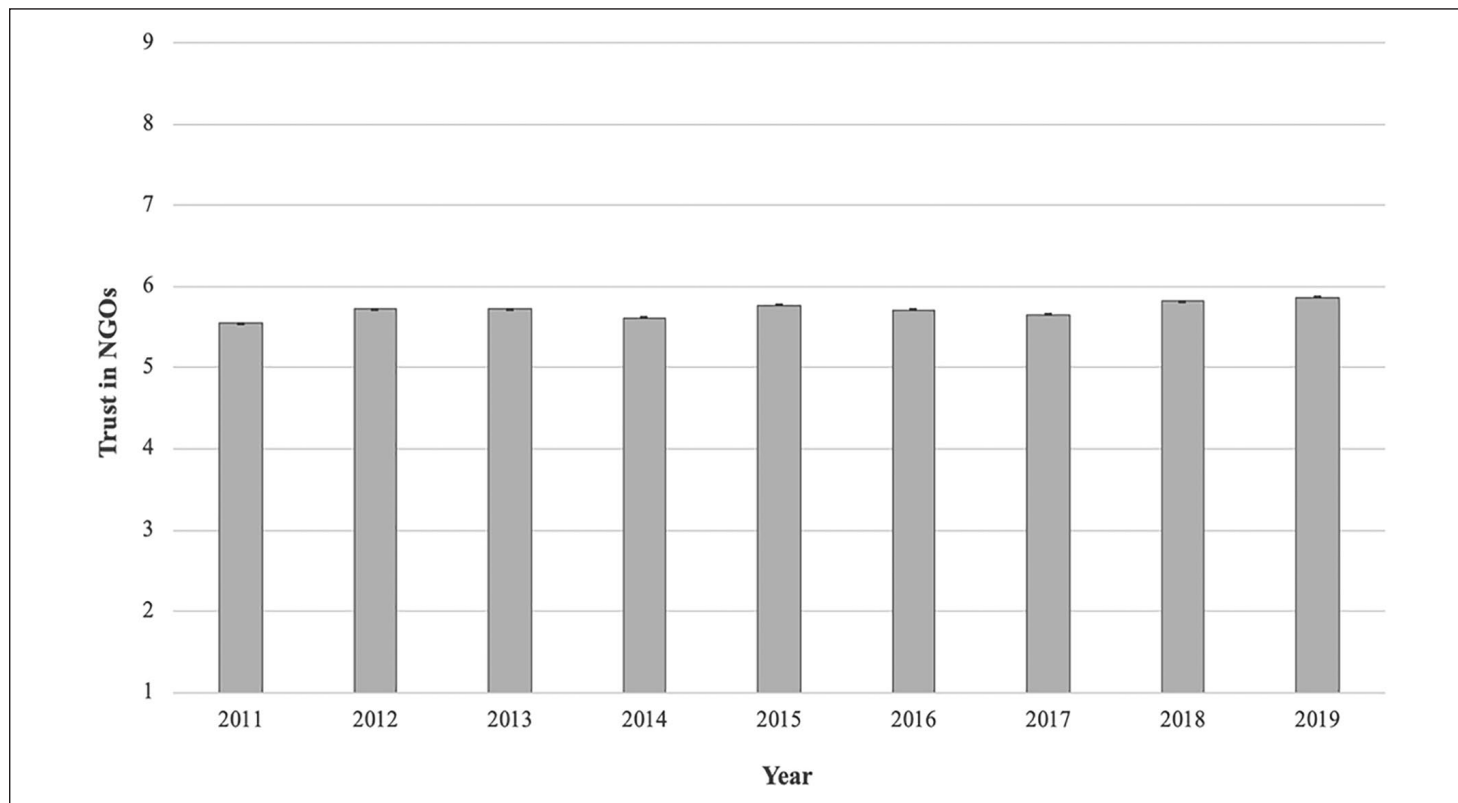


Figure 1. Overall Level of Trust in NGOs Averaged Across 31 Nations.

Trust in charities in Australia quite high by international standards



■ Charities



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

Base: 6,600 adults 16+, 8 countries | Source: nfpSynergy survey September 2018

For Australians Charities play a vital role and are ethical and honest



■ Charities are ethical and honest ■ Charities play a vital role in society

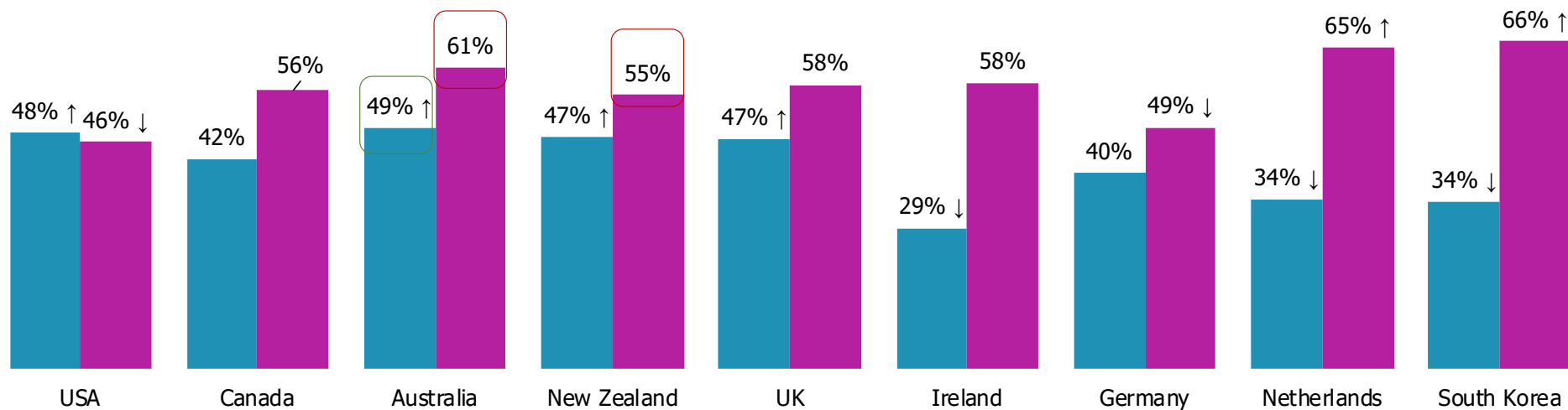


"How much do you agree or disagree with each of the statements below about charities?"

Base: 6,600 adults 16+, 8 countries | Source: nfpSynergy survey September 2018

But: Are there too many 'charities'?

■ Charities are well run ■ There are too many charities



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

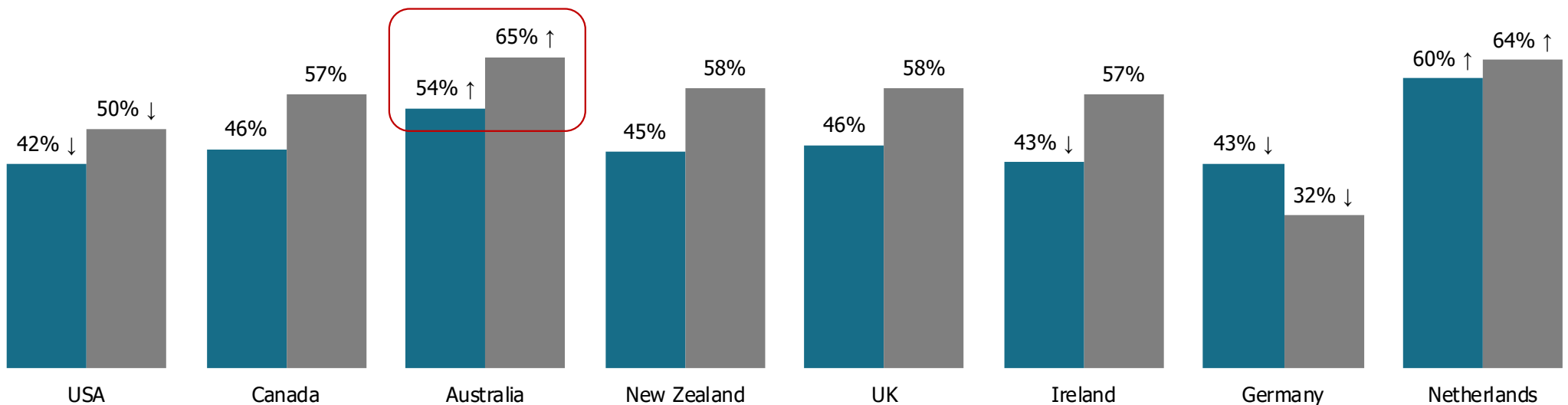
Base: 6,600 adults 16+, 8 countries | Source: nfpSynergy survey September 2018

Australians 'overwhelmed' by charity fundraising

Also 2nd most likely to agree that Fundraising makes me 'feel uncomfortable'

■ Charity fundraising is intrusive

■ I feel overwhelmed by the number of requests



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

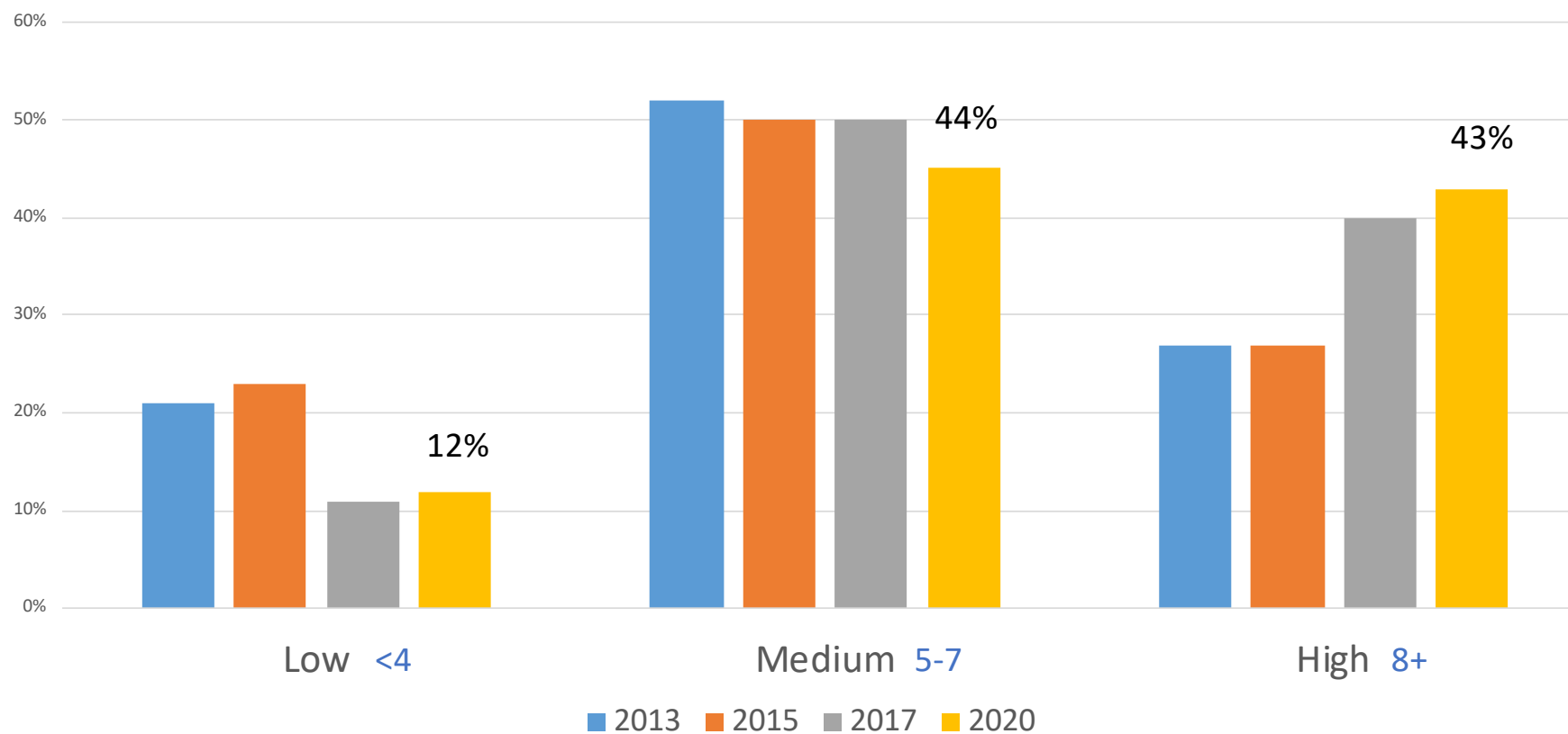
Base: 5,900 adults 16+, 8 countries | Source: nfpSynergy survey September 2018

Trust overall - 2020

Overall Trust scores 2013 - 2020

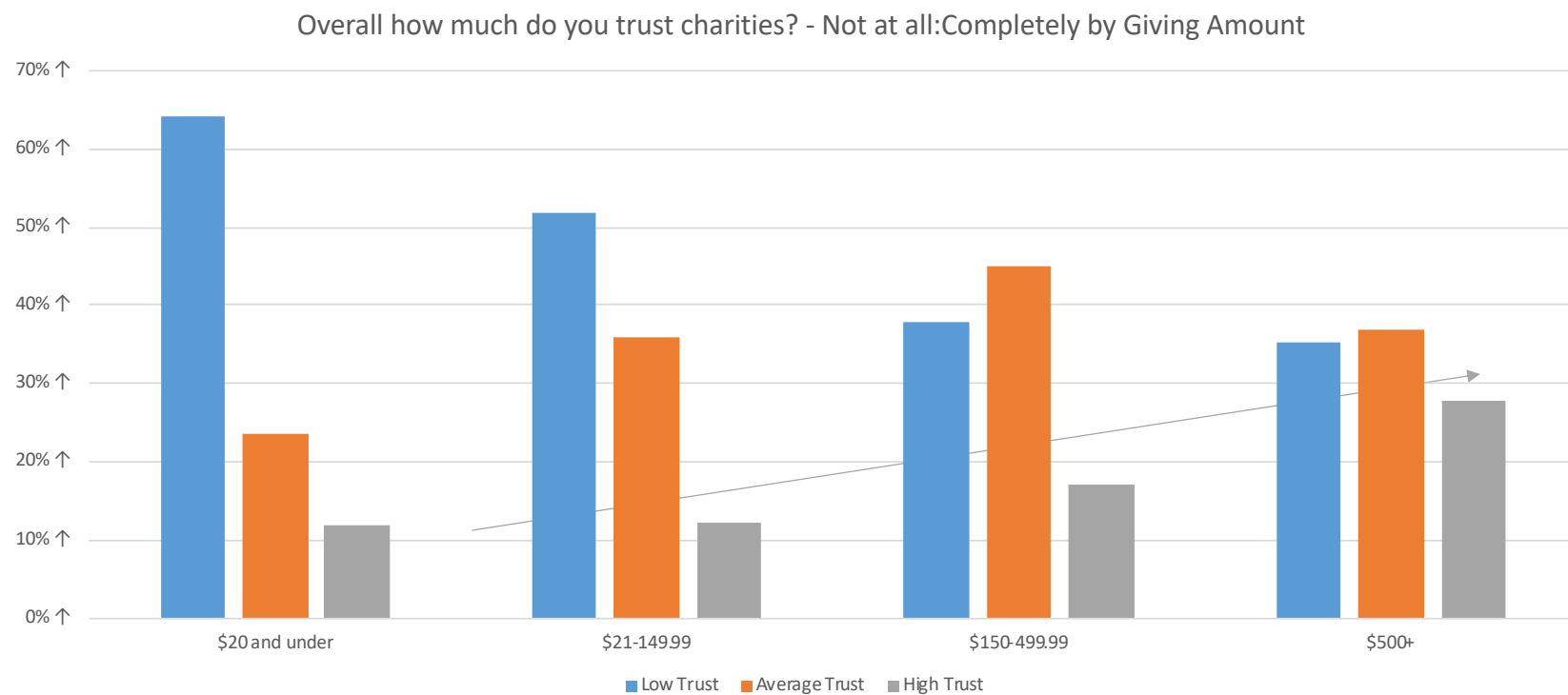
Overall how much do you trust charities (on a 1-10 scale from Not at all - Completely)?

Absolute Public Trust



2020 base n = 1276

More Trust = More \$

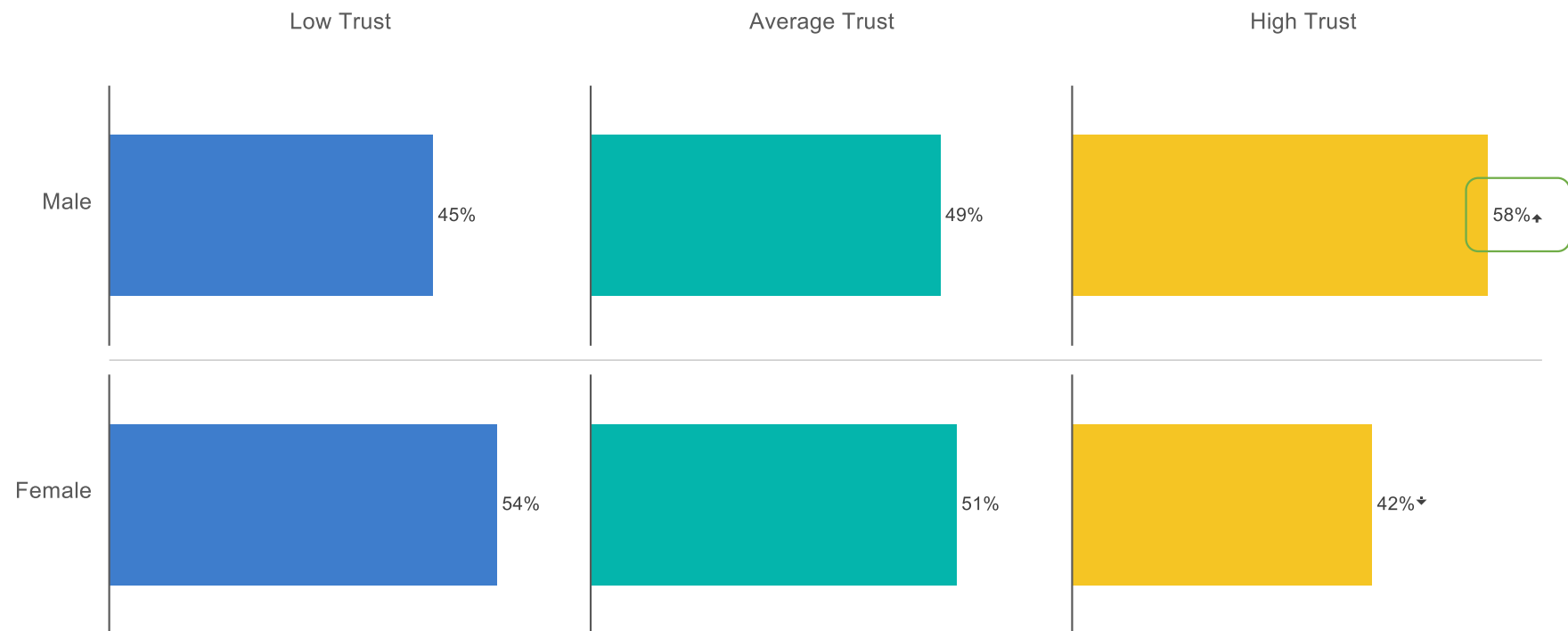


base n = 1049 Multiple comparison correction: False Discovery Rate (FDR) ($p = 0.05$)

Men more likely to be in the higher trust group

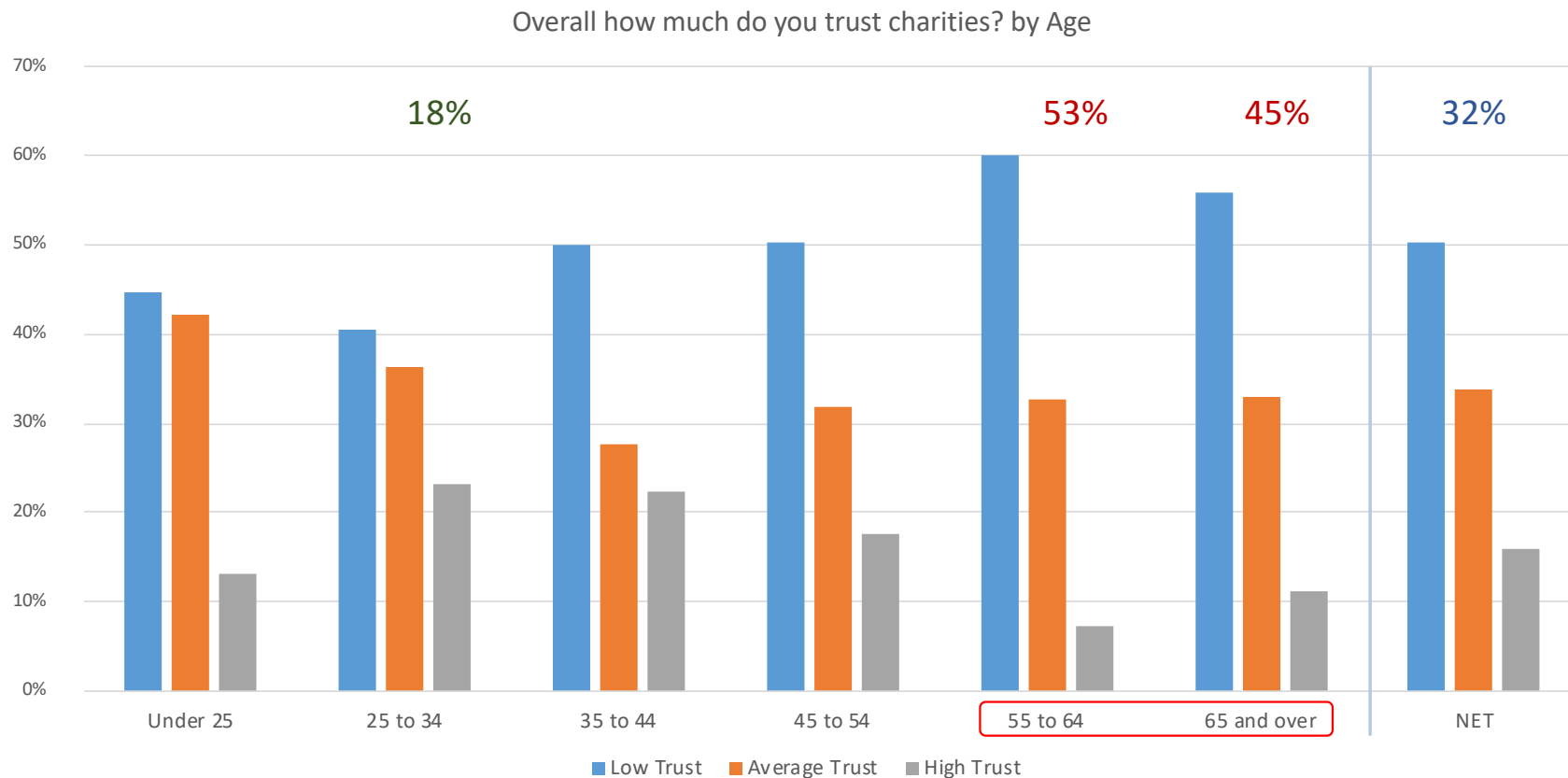


Are you:



base n = 1049 Multiple comparison correction: False Discovery Rate (FDR) ($p = 0.05$)

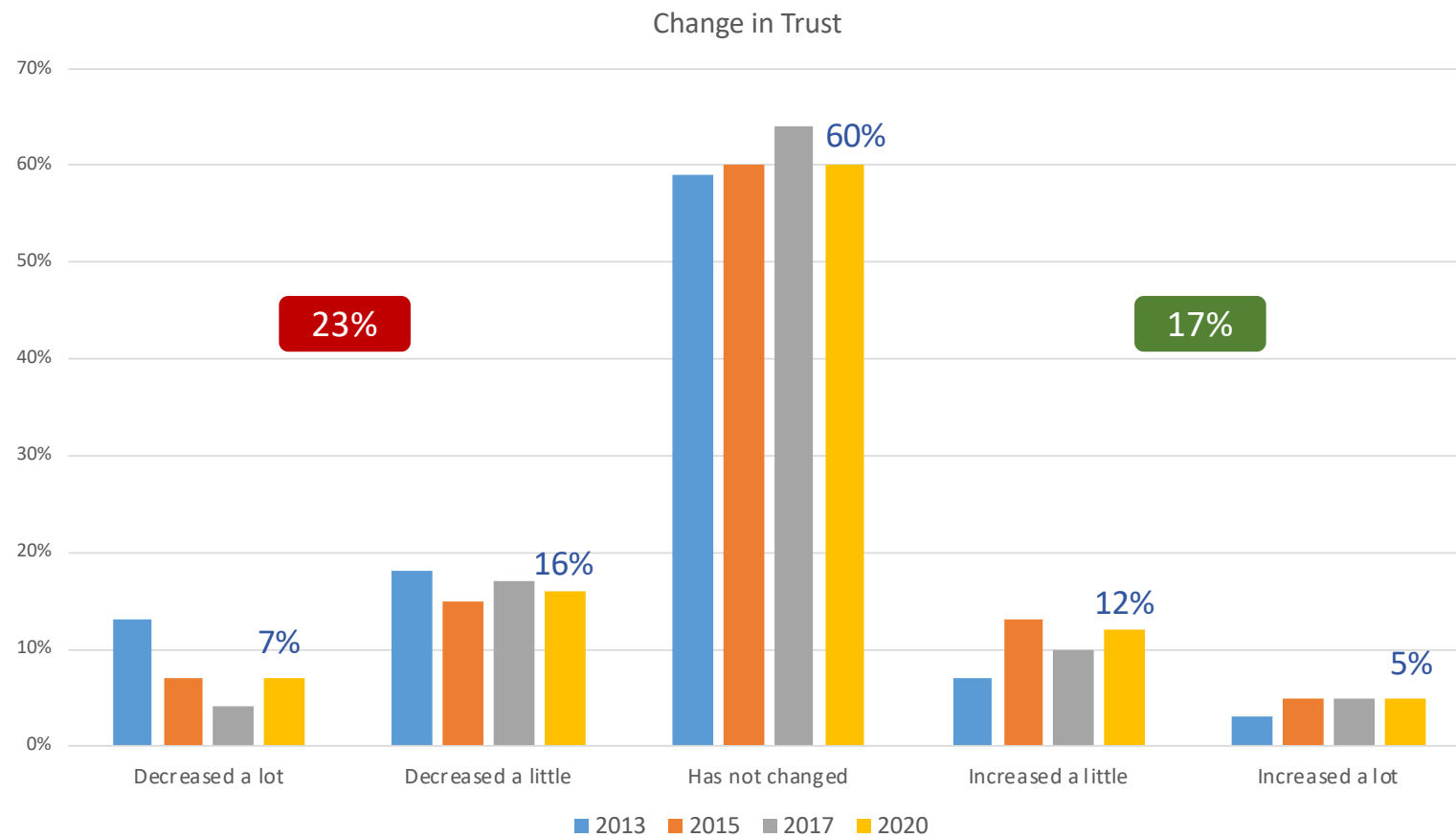
Gen X & Boomers = the biggest trust 'gap'



base n = 1049 Multiple comparison correction: False Discovery Rate (FDR) ($p = 0.05$)

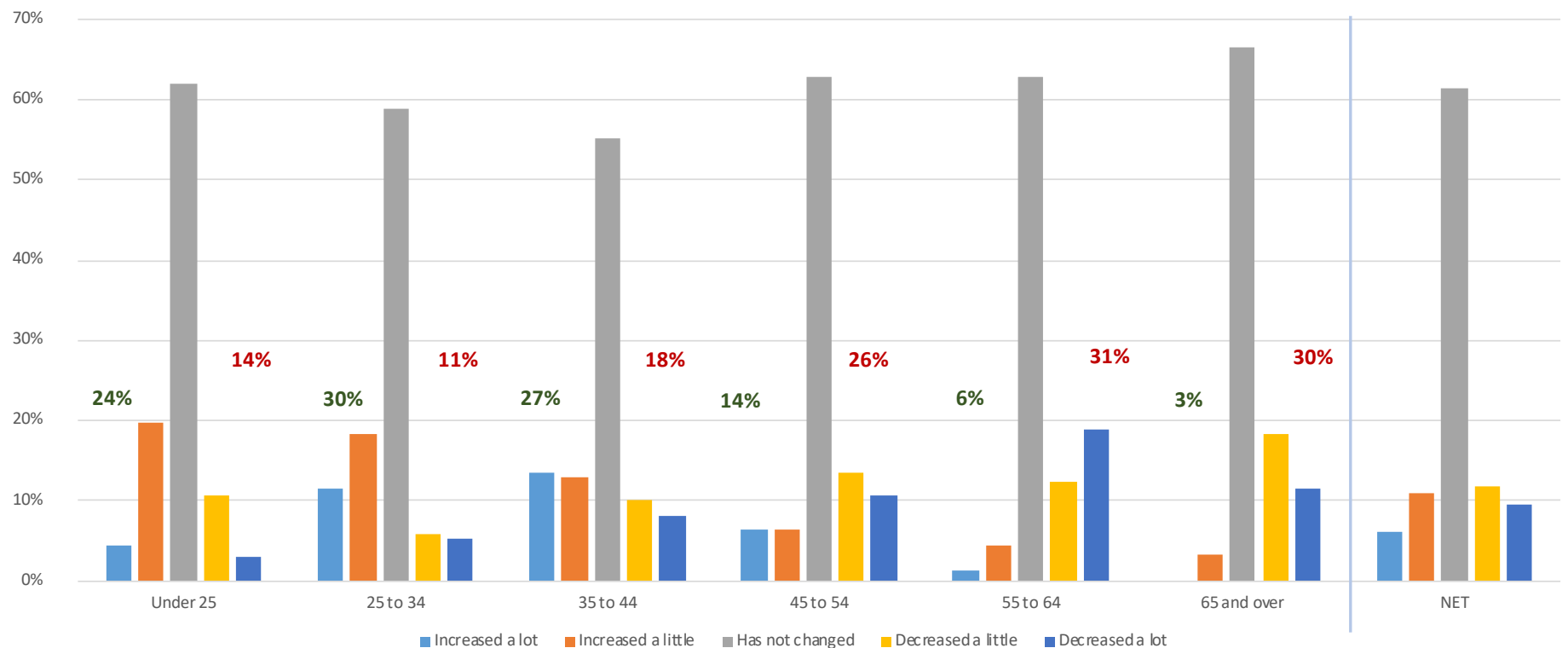
Change in Trust - last three years

Has your trust in charities changed over the past 3 years?



Change in trust also Gen X & Boomers

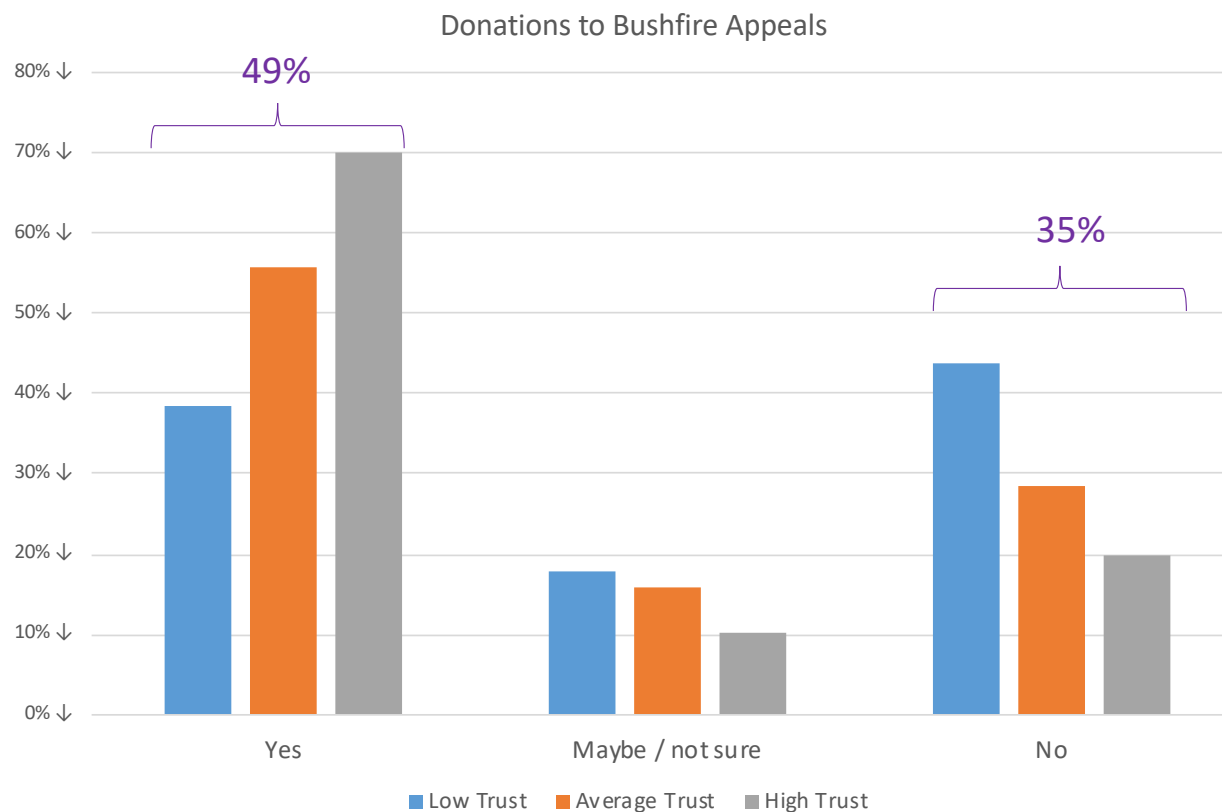
Has your trust in charities changed over the past 3 years? by Age



Bushfire Impact

Bushfire Giving v Trust

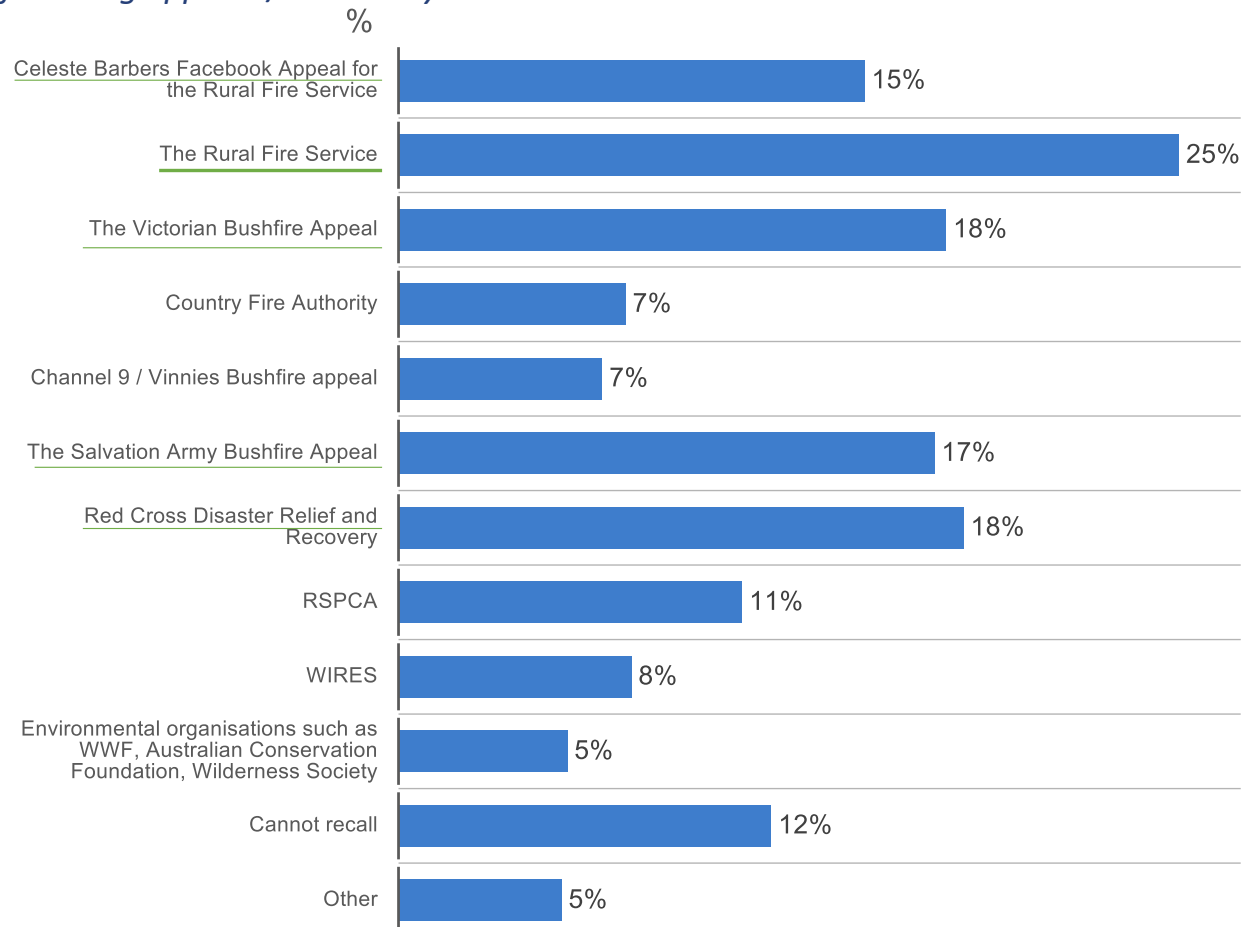
Thinking back to the summer bushfire emergency did you make a donation to an appeal or charity fundraising for the bushfires?



Can you recall which of the following appeals / charities you donated the most to?



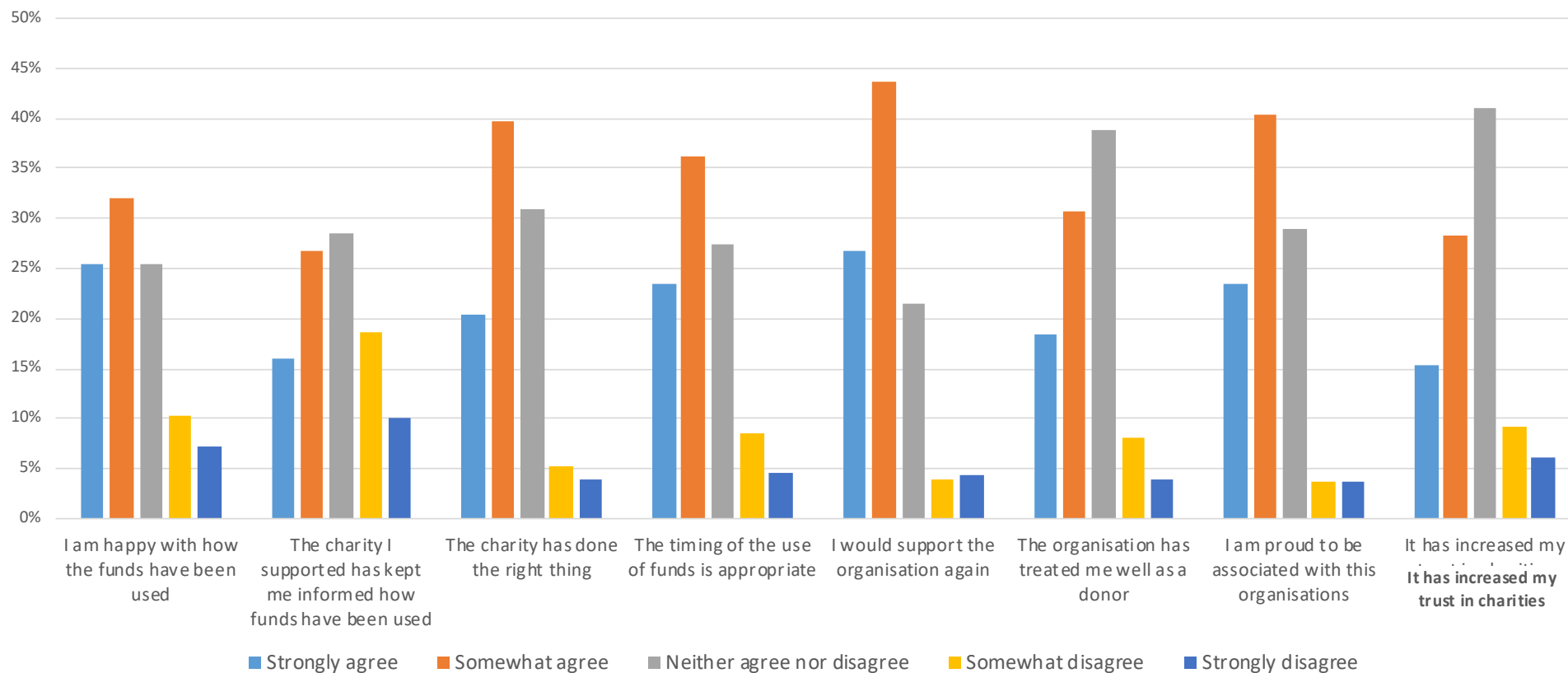
Can you recall which of the following appeals / charities you donated the most to?



base n = 532

How has giving to the Bushfire influenced trust?

Bushfire Donors NOW

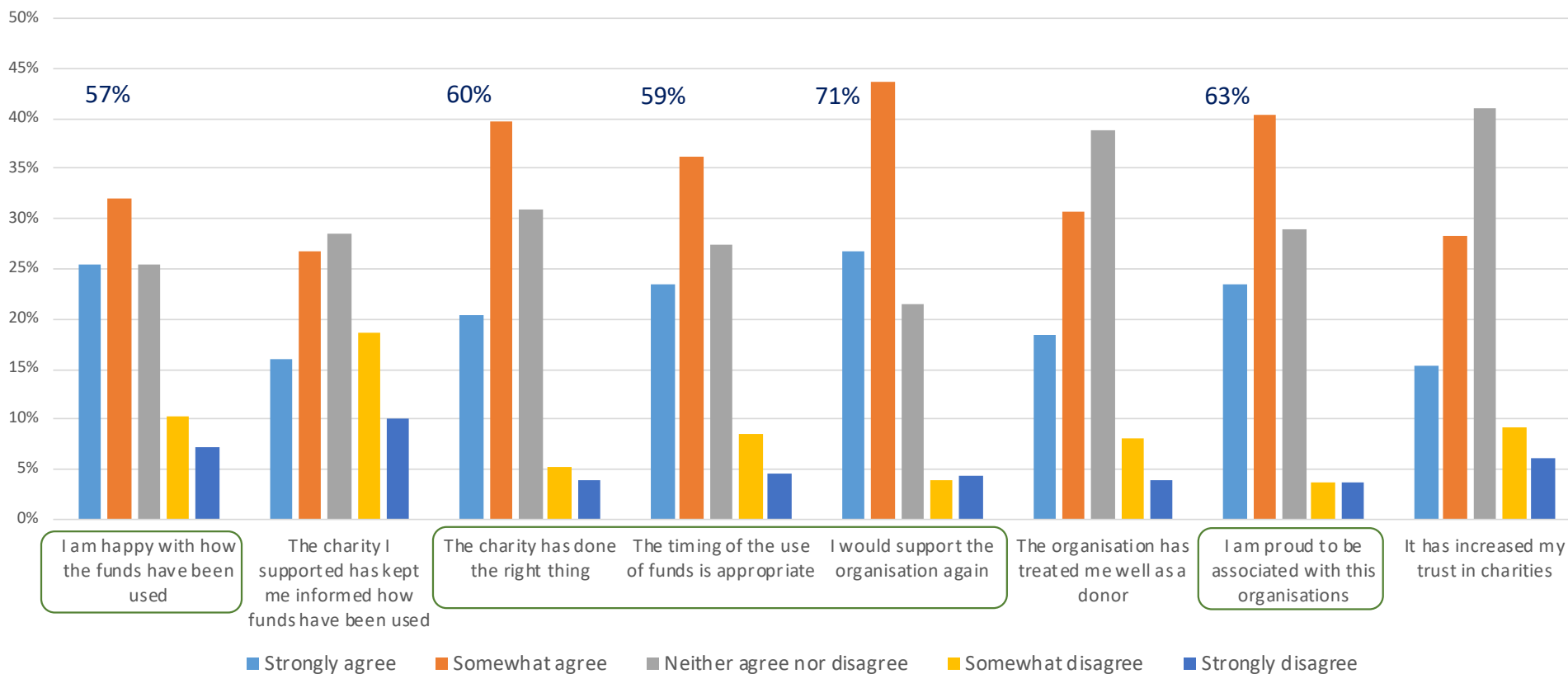


Thinking back to your support for the the summer bushfire crisis would you agree or disagree with the following statements regarding your donation to the bushfire appeal?

base n = 532

How has giving to the Bushfire influenced trust?

Bushfire Donors NOW

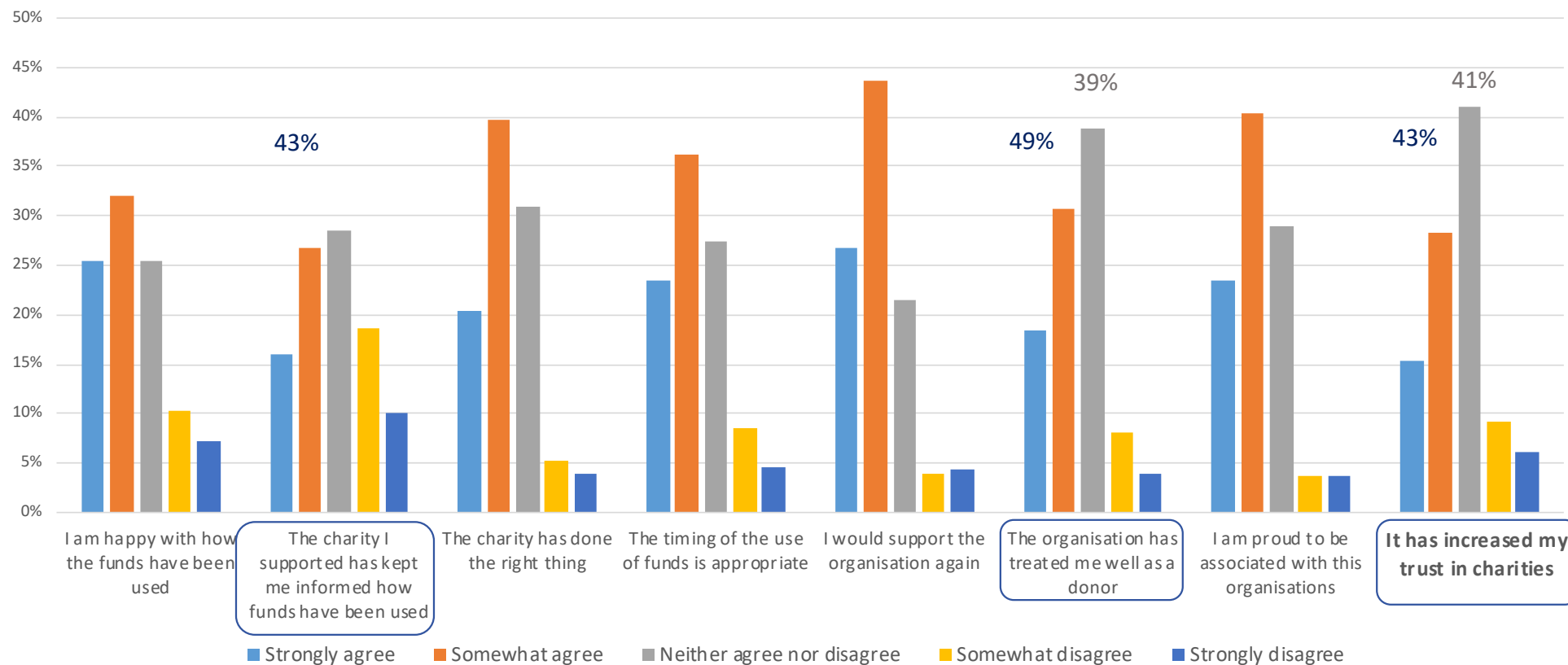


Thinking back to your support for the the summer bushfire crisis would you agree or disagree with the following statements regarding your donation to the bushfire appeal?

base n = 532

How has giving to the Bushfire influenced trust?

Bushfire Donors NOW

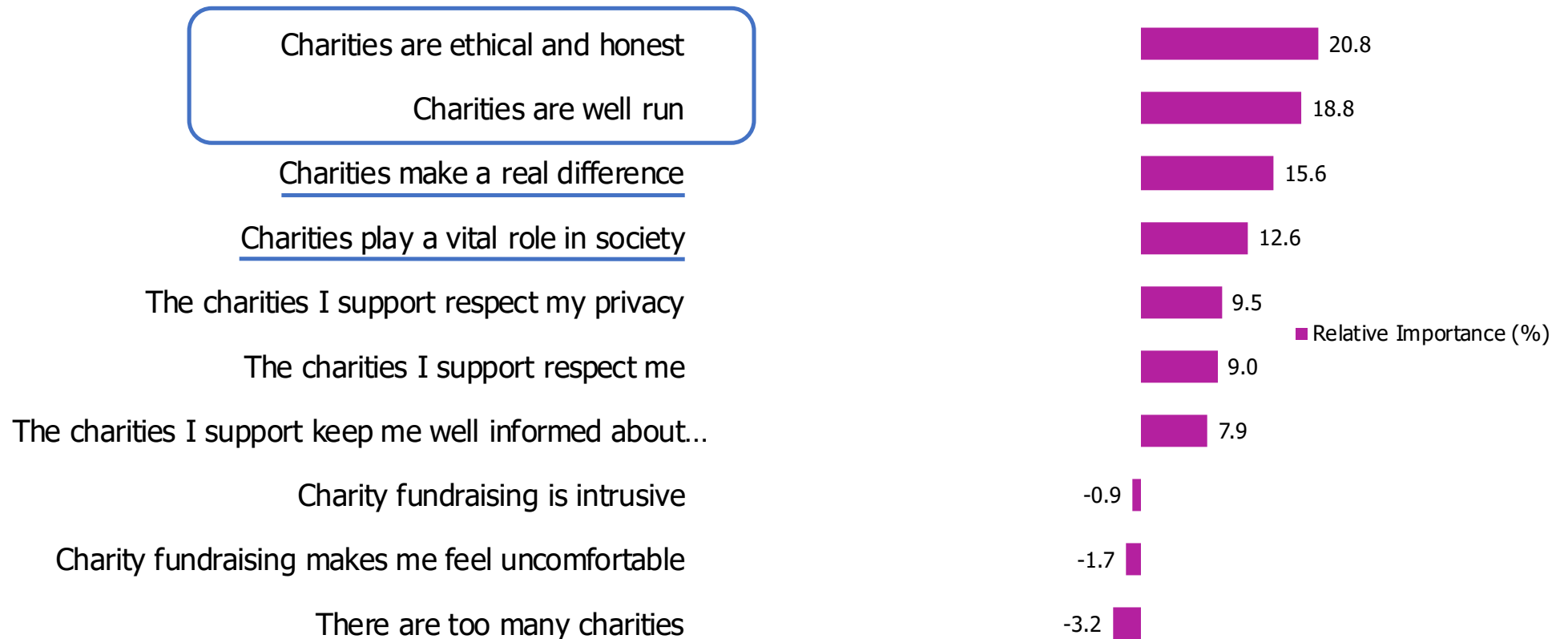


Thinking back to your support for the the summer bushfire crisis would you agree or disagree with the following statements regarding your donation to the bushfire appeal?

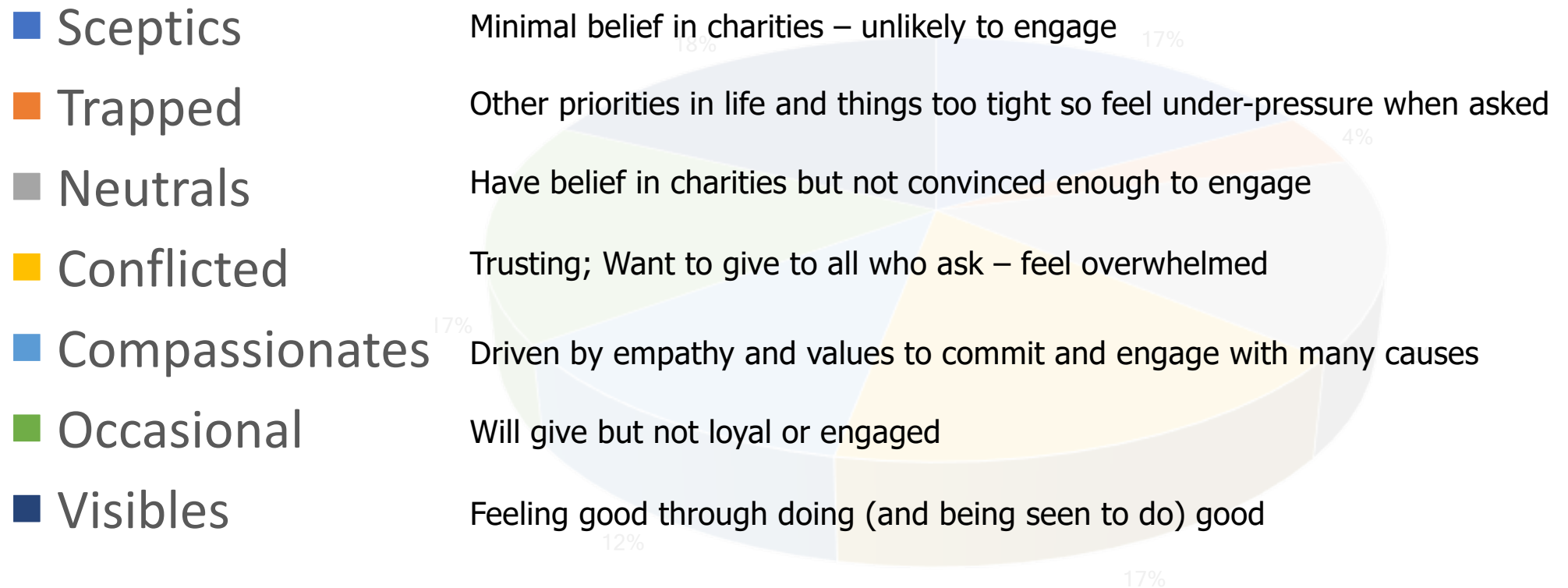
base n = 532

Belief segments

Being ethical and well run = biggest driver of trust in charities

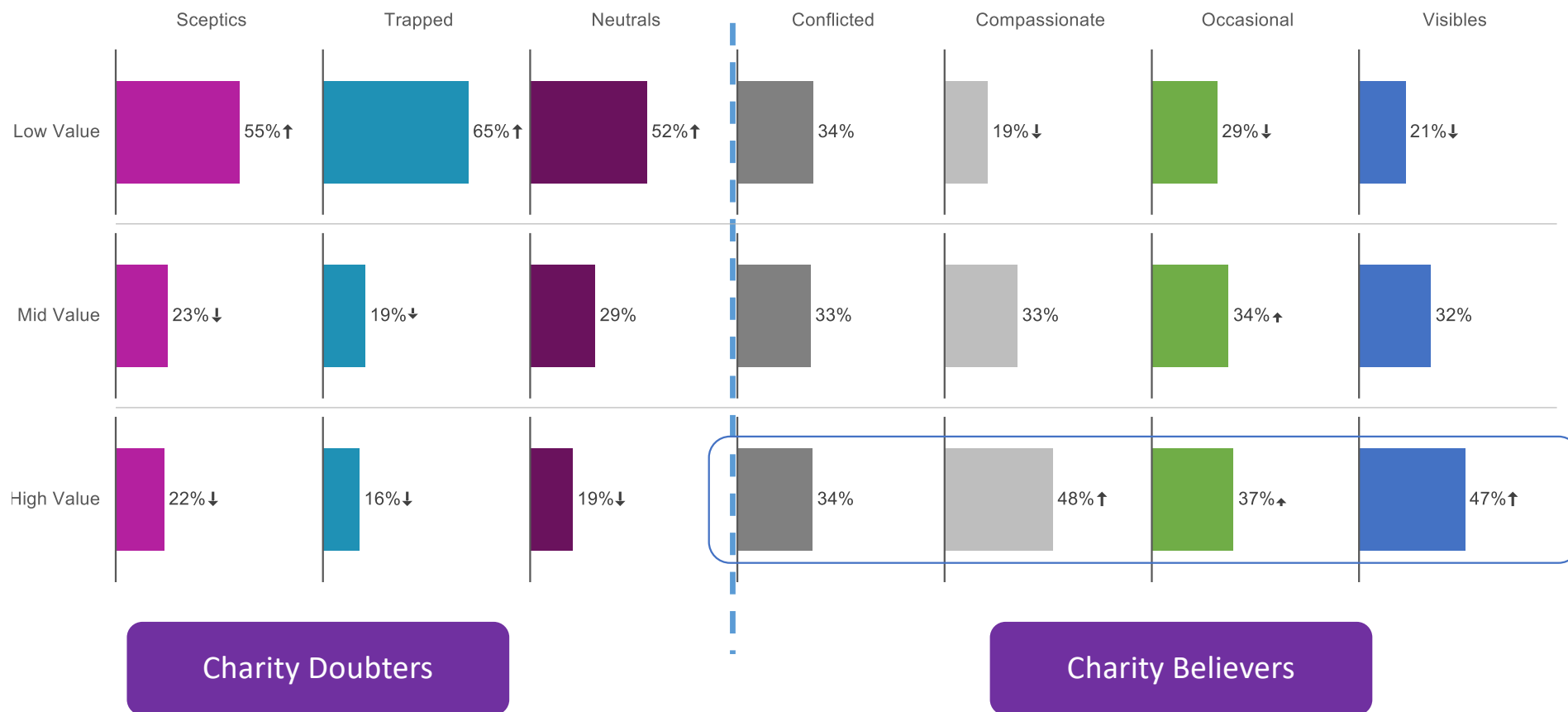


Segmenting the public by 'Belief' in charities



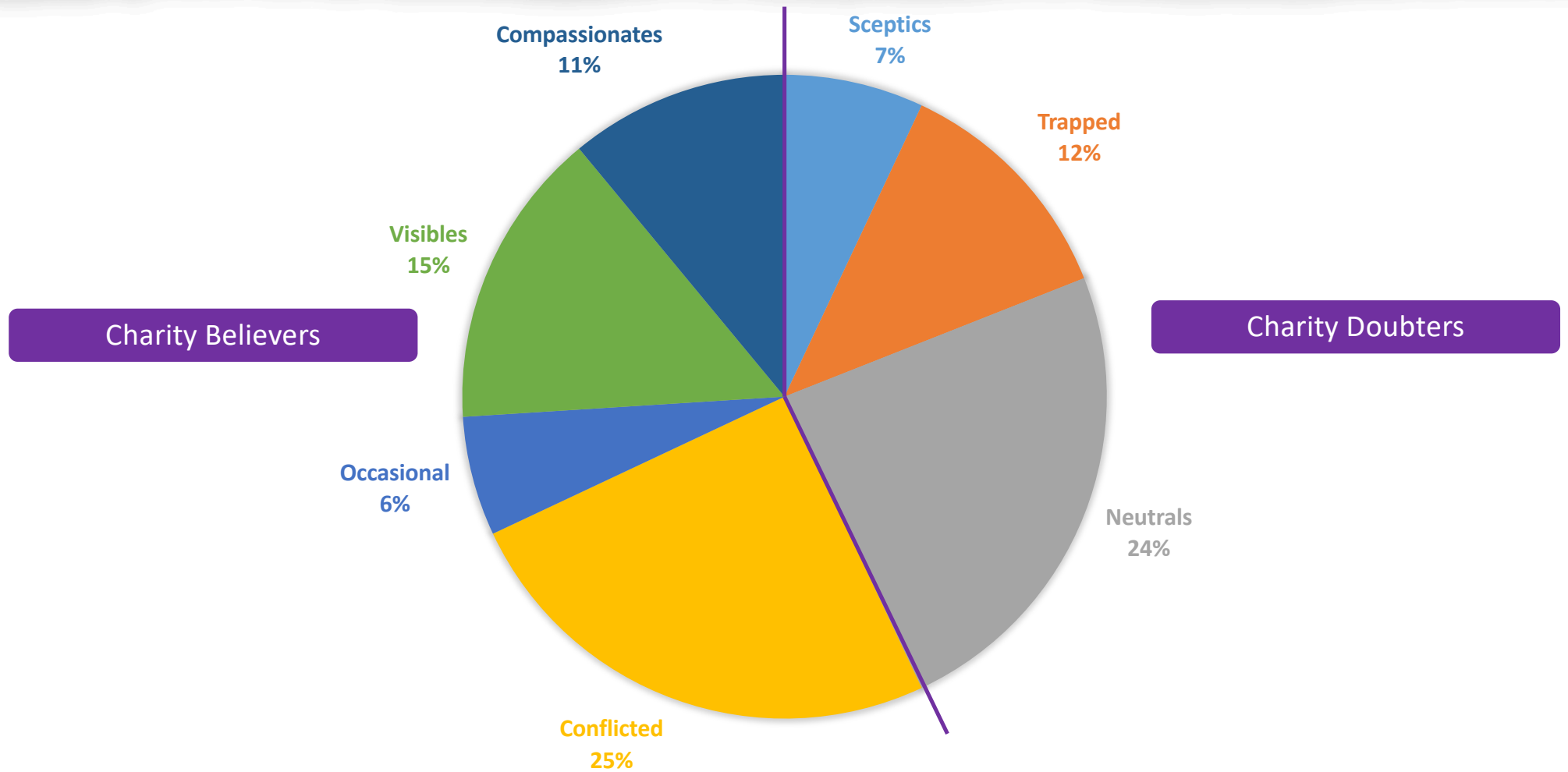
Base: 6,600 adults 16+, 8 countries | Source: nfpSynergy survey September 2018

Believers give more



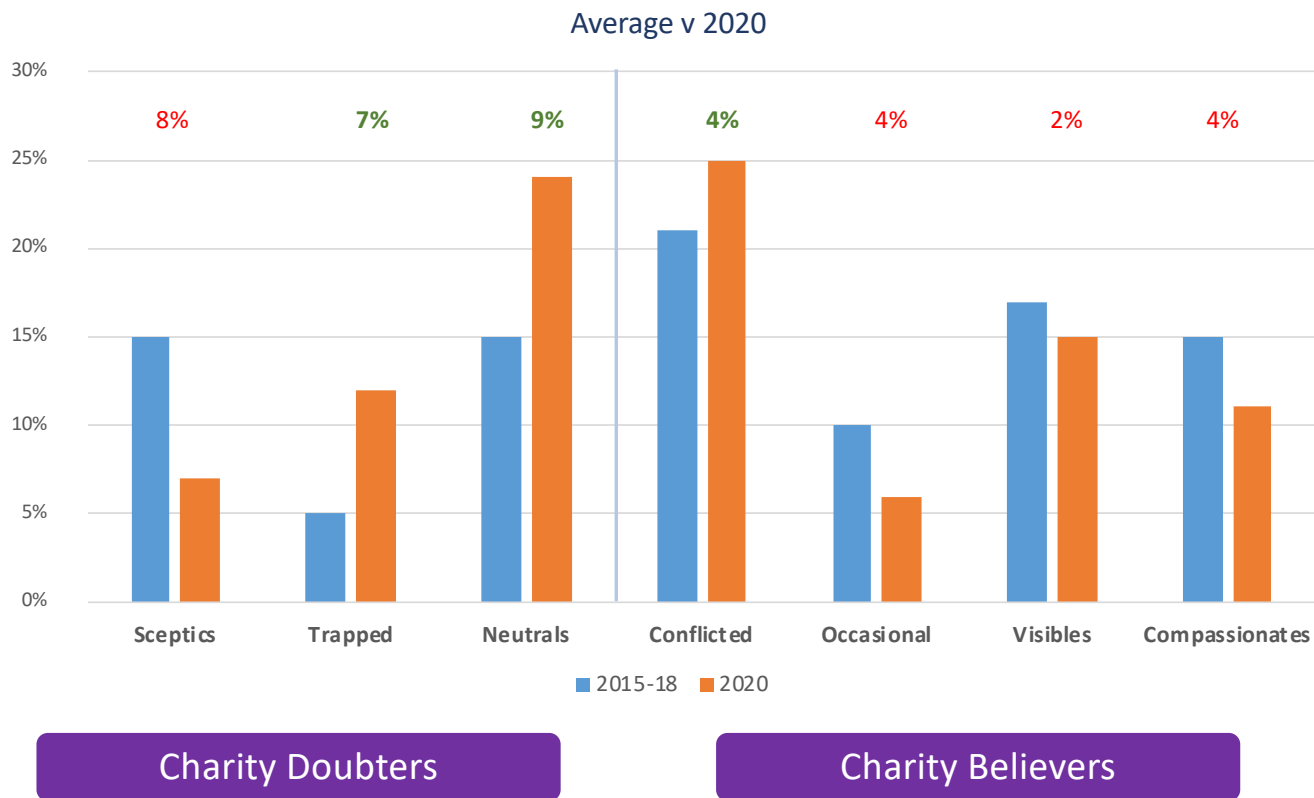
Base: 5,900 adults 16+, 8 countries | Source: nfpSynergy survey September 2018

Belief Segments 2020



base n = 1049 Multiple comparison correction: False Discovery Rate (FDR) ($p = 0.05$)

Decreasing belief = the social and financial context or what?



2020 base n = 1049 Multiple comparison correction: False Discovery Rate (FDR) (p = 0.05)

2015-2018 base: n = 5476 Multiple comparison correction: False Discovery Rate (FDR) (p = 0.05)

Trust pointers moving ahead



Covid Impacts

- Covid has impacted everyone's lives
- Wellbeing pressures greatest amongst younger to middle aged
- Generally three lifestage groups - clear differences on impacts; under 34, 35-54, 55+
- Younger audiences now believe things will pick up
- Generally people believe their giving will stay the same
- And donors looking to give more

Trust in charities and not-for-profits

- Trust levels still good overall and has stayed pretty consistent
- Trust levels not negatively impacted for Bushfire donors
- However, some worrying trends of negative change with older audiences
- With more Neutrals and Trapped (the non-committed) in the Belief segments

Copy of presentation will be available from FIA Research Hub after webinar

more Awareness
Learning Money
Insight Ideas
Innovation Impact
Strategy Value
Effectiveness

