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

- Victoria
- New South Wales
- Queensland
- Western Australia
- South Australia
- Tasmania
- Australian Capital Territory
- Northern Territory

Age

- Under 18
- 19 to 24
- 25 to 34
- 35 to 44
- 45 to 54
- 55 to 64
- 65 to 74
- 75 and over

Non Donor (under $20) vs Donor ($20-$2500)
Experience
Impact of Covid on individuals

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

- My mental health
- My physical health
- My general sense of wellbeing
- My sense of community and connection
- The intensity of my emotions
- My relationships with my family
- My relationships with my friends

*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?*

<table>
<thead>
<tr>
<th>Impact Level</th>
<th>Under 25 167</th>
<th>25 to 34 211</th>
<th>35 to 44 181</th>
<th>45 to 54 179</th>
<th>55 to 64 156</th>
<th>65 and over 222</th>
</tr>
</thead>
<tbody>
<tr>
<td>A great deal</td>
<td>17%†</td>
<td>16%</td>
<td>19%†</td>
<td>13%</td>
<td>6%†</td>
<td>2%↓</td>
</tr>
<tr>
<td>A lot</td>
<td>24%†</td>
<td>23%†</td>
<td>18%</td>
<td>8%†</td>
<td>9%†</td>
<td>7%↓</td>
</tr>
<tr>
<td>A moderate amount</td>
<td>29%</td>
<td>31%†</td>
<td>23%</td>
<td>22%</td>
<td>17%</td>
<td>15%†</td>
</tr>
<tr>
<td>A little</td>
<td>20%</td>
<td>20%</td>
<td>25%</td>
<td>28%</td>
<td>32%†</td>
<td>25%</td>
</tr>
<tr>
<td>None at all</td>
<td>10%↓</td>
<td>10%↓</td>
<td>15%†</td>
<td>28%</td>
<td>37%†</td>
<td>51%†</td>
</tr>
</tbody>
</table>

*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?**

<table>
<thead>
<tr>
<th>Impact Level</th>
<th>New South Wales</th>
<th>Queensland</th>
<th>Victoria</th>
<th>Western Australia</th>
<th>Other</th>
</tr>
</thead>
<tbody>
<tr>
<td>A great deal</td>
<td>13%</td>
<td>9%</td>
<td>15%</td>
<td>9%</td>
<td>11%</td>
</tr>
<tr>
<td>A lot</td>
<td>18%</td>
<td>16%</td>
<td>14%</td>
<td>11%</td>
<td>12%</td>
</tr>
<tr>
<td>A moderate amount</td>
<td>21%</td>
<td>18%</td>
<td>26%</td>
<td>25%</td>
<td>24%</td>
</tr>
<tr>
<td>A little</td>
<td>24%</td>
<td>20%</td>
<td>28%</td>
<td>21%</td>
<td>28%</td>
</tr>
<tr>
<td>None at all</td>
<td>24%</td>
<td>37%</td>
<td>17%</td>
<td>33%</td>
<td>26%</td>
</tr>
</tbody>
</table>

*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?*

<table>
<thead>
<tr>
<th>Column n</th>
<th>Under 25 168</th>
<th>25 to 34 211</th>
<th>35 to 44 180</th>
<th>45 to 54 179</th>
<th>55 to 64 155</th>
<th>65 and over 222</th>
</tr>
</thead>
<tbody>
<tr>
<td>A great deal</td>
<td>10%</td>
<td>11%</td>
<td>16%†</td>
<td>10%</td>
<td>5%</td>
<td>2%†</td>
</tr>
<tr>
<td>A lot</td>
<td>22%</td>
<td>27%†</td>
<td>22%</td>
<td>9%‡</td>
<td>10%‡</td>
<td>9%‡</td>
</tr>
<tr>
<td>A moderate amount</td>
<td>36%‡</td>
<td>28%</td>
<td>26%</td>
<td>21%</td>
<td>17%‡</td>
<td>17%‡</td>
</tr>
<tr>
<td>A little</td>
<td>24%</td>
<td>22%</td>
<td>21%*</td>
<td>33%</td>
<td>37%‡</td>
<td>32%</td>
</tr>
<tr>
<td>None at all</td>
<td>8%‡</td>
<td>10%‡</td>
<td>16%</td>
<td>27%</td>
<td>31%+</td>
<td>40%†</td>
</tr>
</tbody>
</table>

*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?**

<table>
<thead>
<tr>
<th>Column %</th>
<th>Professional / manager 211</th>
<th>Employee 405</th>
<th>Retired 222</th>
<th>Other 277</th>
</tr>
</thead>
<tbody>
<tr>
<td>A great deal</td>
<td>12%</td>
<td>9%</td>
<td>3%</td>
<td>12%</td>
</tr>
<tr>
<td>A lot</td>
<td>15%</td>
<td>22%†</td>
<td>10%†</td>
<td>17%</td>
</tr>
<tr>
<td>A moderate amount</td>
<td>25%</td>
<td>28%</td>
<td>15%†</td>
<td>25%</td>
</tr>
<tr>
<td>A little</td>
<td>29%</td>
<td>25%</td>
<td>32%</td>
<td>29%</td>
</tr>
<tr>
<td>None at all</td>
<td>20%</td>
<td>16%†</td>
<td>41%†</td>
<td>18%</td>
</tr>
</tbody>
</table>

**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?

<table>
<thead>
<tr>
<th>Age</th>
<th>Under 25</th>
<th>25 to 34</th>
<th>35 to 44</th>
<th>45 to 54</th>
<th>55 to 64</th>
<th>65 and over</th>
</tr>
</thead>
<tbody>
<tr>
<td>A great deal</td>
<td>15%</td>
<td>12%</td>
<td>13%</td>
<td>9%</td>
<td>6%</td>
<td>6%</td>
</tr>
<tr>
<td>A lot</td>
<td>21%</td>
<td>19%</td>
<td>21%</td>
<td>16%</td>
<td>10%</td>
<td>15%</td>
</tr>
<tr>
<td>A moderate amount</td>
<td>27%</td>
<td>35%†</td>
<td>21%</td>
<td>19%</td>
<td>19%</td>
<td>18%</td>
</tr>
<tr>
<td>A little</td>
<td>26%</td>
<td>19%</td>
<td>21%</td>
<td>27%</td>
<td>25%</td>
<td>23%</td>
</tr>
<tr>
<td>None at all</td>
<td>11%‡</td>
<td>15%‡</td>
<td>23%</td>
<td>29%</td>
<td>40%†</td>
<td>38%†</td>
</tr>
</tbody>
</table>

_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?*

<table>
<thead>
<tr>
<th></th>
<th>Under 25 (168)</th>
<th>25 to 34 (210)</th>
<th>35 to 44 (180)</th>
<th>45 to 54 (179)</th>
<th>55 to 64 (155)</th>
<th>65 and over (222)</th>
</tr>
</thead>
<tbody>
<tr>
<td>A great deal</td>
<td>15%*</td>
<td>12%</td>
<td>18%†</td>
<td>11%</td>
<td>4%†</td>
<td>3%†</td>
</tr>
<tr>
<td>A lot</td>
<td>21%</td>
<td>30%†</td>
<td>17%</td>
<td>9%†</td>
<td>16%</td>
<td>12%†</td>
</tr>
<tr>
<td>A moderate amount</td>
<td>27%</td>
<td>29%</td>
<td>29%</td>
<td>26%</td>
<td>15%†</td>
<td>18%†</td>
</tr>
<tr>
<td>A little</td>
<td>23%</td>
<td>15%†</td>
<td>15%†</td>
<td>28%</td>
<td>32%†</td>
<td>31%†</td>
</tr>
<tr>
<td>None at all</td>
<td>14%†</td>
<td>15%†</td>
<td>21%</td>
<td>26%</td>
<td>33%†</td>
<td>36%†</td>
</tr>
</tbody>
</table>

*base n = 1114 Multiple comparison correction: False Discovery Rate (FDR) (p = 0.05)*
Impact of COVID on charities

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

- Better
  - Donor ($20-$2500): 39%
  - Non Donor (under $20): 36%

- Get a little better
  - Donor ($20-$2500): 30%
  - Non Donor (under $20): 24%

- Will not change that much
  - Donor ($20-$2500): 40%
  - Non Donor (under $20): 40%

- Will get a little worse
  - Donor ($20-$2500): 16%
  - Non Donor (under $20): 15%

- Will get a lot worse
  - Donor ($20-$2500): 5%
  - Non Donor (under $20): 10%

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

- Get much better
- Get a little better
- Will not change that much
- Will get a little worse
- Will get a lot worse

The three Lifestages?
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

- Under 25: 31% A lot more, 29% A little more, 32% About the same, 16% A little less, 4% A lot less
- 25 to 34: 29% A lot more, 29% A little more, 32% About the same, 16% A little less, 4% A lot less
- 35 to 44: 31% A lot more, 29% A little more, 32% About the same, 16% A little less, 4% A lot less
- 45 to 54: 31% A lot more, 29% A little more, 32% About the same, 16% A little less, 4% A lot less
- 55 to 64: 31% A lot more, 29% A little more, 32% About the same, 16% A little less, 4% A lot less
- 65 and over: 27% A lot more, 29% A little more, 32% About the same, 16% A little less, 6% A lot less
- NET: 31% A lot more, 29% A little more, 32% About the same, 16% A little less, 4% A lot less

base n = 1049 Multiple comparison correction: False Discovery Rate (FDR) (p = 0.05)
Giving Intentions Jan v Sept 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.

No Global Crisis of Trust: A Longitudinal and Multinational Examination of Public Trust in Nonprofits. CM Chapman, MJ Hornsey, and N Gillespie 2020 - Nonprofit and Voluntary Sector Quarterly
Trust in charities in Australia quite high by international standards

“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

“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’?

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

Absolute Public Trust

<table>
<thead>
<tr>
<th></th>
<th>2013</th>
<th>2015</th>
<th>2017</th>
<th>2020</th>
</tr>
</thead>
<tbody>
<tr>
<td>Low</td>
<td>&lt;4</td>
<td></td>
<td>12%</td>
<td></td>
</tr>
<tr>
<td>Medium</td>
<td>5-7</td>
<td></td>
<td>44%</td>
<td></td>
</tr>
<tr>
<td>High</td>
<td>8+</td>
<td></td>
<td>43%</td>
<td></td>
</tr>
</tbody>
</table>

2020 base n = 1276
Overall how much do you trust charities? - Not at all: Completely by Giving Amount

- **Low Trust**
- **Average Trust**
- **High Trust**

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

*More Trust = More $*
Men more likely to be in the higher trust group

Are you:

<table>
<thead>
<tr>
<th></th>
<th>Low Trust</th>
<th>Average Trust</th>
<th>High Trust</th>
</tr>
</thead>
<tbody>
<tr>
<td>Male</td>
<td>45%</td>
<td>49%</td>
<td>58%</td>
</tr>
<tr>
<td>Female</td>
<td>54%</td>
<td>51%</td>
<td>42%</td>
</tr>
</tbody>
</table>

base n = 1049 Multiple comparison correction: False Discovery Rate (FDR) (p = 0.05)
Gen X & Boomers = the biggest trust ‘gap’

Overall how much do you trust charities? by Age

- Under 25: 18%
- 25 to 34: 53%
- 35 to 44: 45%
- 45 to 54: 32%
- 55 to 64: 65 and over:
- 65 and over: 32%
- NET:

*base n = 1049 Multiple comparison correction: False Discovery Rate (FDR) (p = 0.05)*
Has your trust in charities changed over the past 3 years?

**Change in Trust - last three years**

- **Has not changed**: 60%
- **Increased a little**: 12%
- **Increased a lot**: 17%
- **Decreased a little**: 16%
- **Decreased a lot**: 23%

*2020 base n = 1276*
Has your trust in charities changed over the past 3 years? by Age

- Under 25: 24% Increased a lot, 30% Increased a little, 11% Has not changed, 18% Decreased a little, 14% Decreased a lot
- 25 to 34: 14% Increased a lot, 30% Increased a little, 27% Has not changed, 14% Decreased a little, 6% Decreased a lot
- 35 to 44: 11% Increased a lot, 27% Increased a little, 18% Has not changed, 26% Decreased a little, 6% Decreased a lot
- 45 to 54: 18% Increased a lot, 14% Increased a little, 26% Has not changed, 6% Decreased a little, 31% Decreased a lot
- 55 to 64: 26% Increased a lot, 3% Increased a little, 3% Has not changed, 14% Decreased a little, 6% Decreased a lot
- 65 and over: 24% Increased a lot, 11% Increased a little, 18% Has not changed, 3% Decreased a little, 30% Decreased a lot

2020 base n = 1276
Bushfire Impact
Thinking back to the summer bushfire emergency did you make a donation to an appeal or charity fundraising for the bushfires?

Donations to Bushfire Appeals

- **Yes**: 49%
- **Maybe / not sure**: 35%
- **No**: 12%

2020 base n = 1276
Can you recall which of the following appeals / charities you donated the most to?

- Celeste Barbers Facebook Appeal for the Rural Fire Service: 15%
- The Rural Fire Service: 25%
- The Victorian Bushfire Appeal: 18%
- Country Fire Authority: 7%
- Channel 9 / Vinnies Bushfire appeal: 7%
- The Salvation Army Bushfire Appeal: 17%
- Red Cross Disaster Relief and Recovery: 18%
- RSPCA: 11%
- WIRES: 8%
- Environmental organisations such as WWF, Australian Conservation Foundation, Wilderness Society: 5%
- Cannot recall: 12%
- Other: 5%

_base n = 532_
How has giving to the Bushfire influenced trust?

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

- I am happy with how the funds have been used
- The charity I supported has kept me informed how funds have been used
- The charity has done the right thing
- The timing of the use of funds is appropriate
- I would support the organisation again
- The organisation has treated me well as a donor
- I am proud to be associated with this organisation
- It has increased my trust in charities

*base n = 532*
How has giving to the Bushfire influenced trust?

Thinking back to your support for 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?

Thinking back to your support for 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

- Charities are ethical and honest: 20.8%
- Charities are well run: 18.8%
- Charities make a real difference: 15.6%
- Charities play a vital role in society: 12.6%
- The charities I support respect my privacy: 9.5%
- The charities I support respect me: 9.0%
- The charities I support keep me well informed about: 7.9%
- Charity fundraising is intrusive: -0.9%
- Charity fundraising makes me feel uncomfortable: -1.7%
- There are too many charities: -3.2%

Base: 6,600 adults 16+, 8 countries | Source: nfpSynergy survey September 2018
Segmenting the public by ‘Belief’ in charities

- **Sceptics**: Minimal belief in charities – unlikely to engage
- **Trapped**: Other priorities in life and things too tight so feel under-pressure when asked
- **Neutrals**: Have belief in charities but not convinced enough to engage
- **Conflicted**: Trusting; Want to give to all who ask – feel overwhelmed
- **Compassionates**: Driven by empathy and values to commit and engage with many causes
- **Occasional**: Will give but not loyal or engaged
- **Visibles**: Feeling good through doing (and being seen to do) good

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

<table>
<thead>
<tr>
<th>Category</th>
<th>Sceptics</th>
<th>Trapped</th>
<th>Neutrals</th>
<th>Conflicted</th>
<th>Compassionate</th>
<th>Occasional</th>
<th>Visibles</th>
</tr>
</thead>
<tbody>
<tr>
<td>Low Value</td>
<td>55%↑</td>
<td>65%↑</td>
<td>52%↑</td>
<td>34%</td>
<td>19%↓</td>
<td>29%↓</td>
<td>21%↓</td>
</tr>
<tr>
<td>Mid Value</td>
<td>23%↓</td>
<td>19%↓</td>
<td>29%</td>
<td>33%</td>
<td>33%</td>
<td>34%↑</td>
<td>32%</td>
</tr>
<tr>
<td>High Value</td>
<td>22%↓</td>
<td>16%↓</td>
<td>19%↓</td>
<td>34%</td>
<td>48%↑</td>
<td>37%↑</td>
<td>47%↑</td>
</tr>
</tbody>
</table>

**Charity Doubters**

**Charity Believers**

*Base: 5,900 adults 16+, 8 countries | Source: nfpSynergy survey September 2018*
Belief Segments 2020

Charity Believers
- Visibles: 15%
- Occasional: 6%
- Conflicted: 25%
- Compassionates: 11%

Charity Doubters
- Neutrals: 24%
- Trapped: 12%
- Sceptics: 7%

base n = 1049 Multiple comparison correction: False Discovery Rate (FDR) (p = 0.05)
Decreasing belief = the social and financial context or what?

Average v 2020

<table>
<thead>
<tr>
<th>Category</th>
<th>2015-18</th>
<th>2020</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sceptics</td>
<td>8%</td>
<td>7%</td>
</tr>
<tr>
<td>Trapped</td>
<td>9%</td>
<td>4%</td>
</tr>
<tr>
<td>Neutrals</td>
<td>4%</td>
<td>4%</td>
</tr>
<tr>
<td>Conflicted</td>
<td>2%</td>
<td>2%</td>
</tr>
<tr>
<td>Occasional</td>
<td>4%</td>
<td>4%</td>
</tr>
<tr>
<td>Visibles</td>
<td>8%</td>
<td>2%</td>
</tr>
<tr>
<td>Compassionates</td>
<td>7%</td>
<td>4%</td>
</tr>
</tbody>
</table>

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