

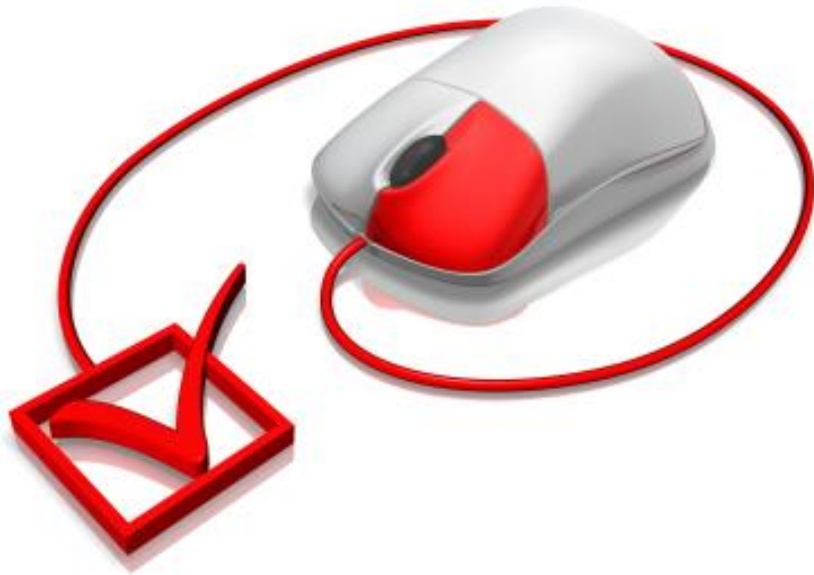
Public Attitudes Towards Ireland's Charity Sector

Commissioned By:



An Rialálaí
Carthanais
Charities
Regulator

About this survey - Research Methodology



- Amarach Research was commissioned by the Charities Regulator to undertake research on the charity sector among the public.
- The survey was placed on the Amarach Panel, with fieldwork carried out from 18th November – 15th December 2022.
- During this time, 2,051 interviews were achieved and a combination of quotas (set on gender, age, social category and region) and weighting was used to ensure the sample is aligned to the national population.

About this Survey - Social Grades

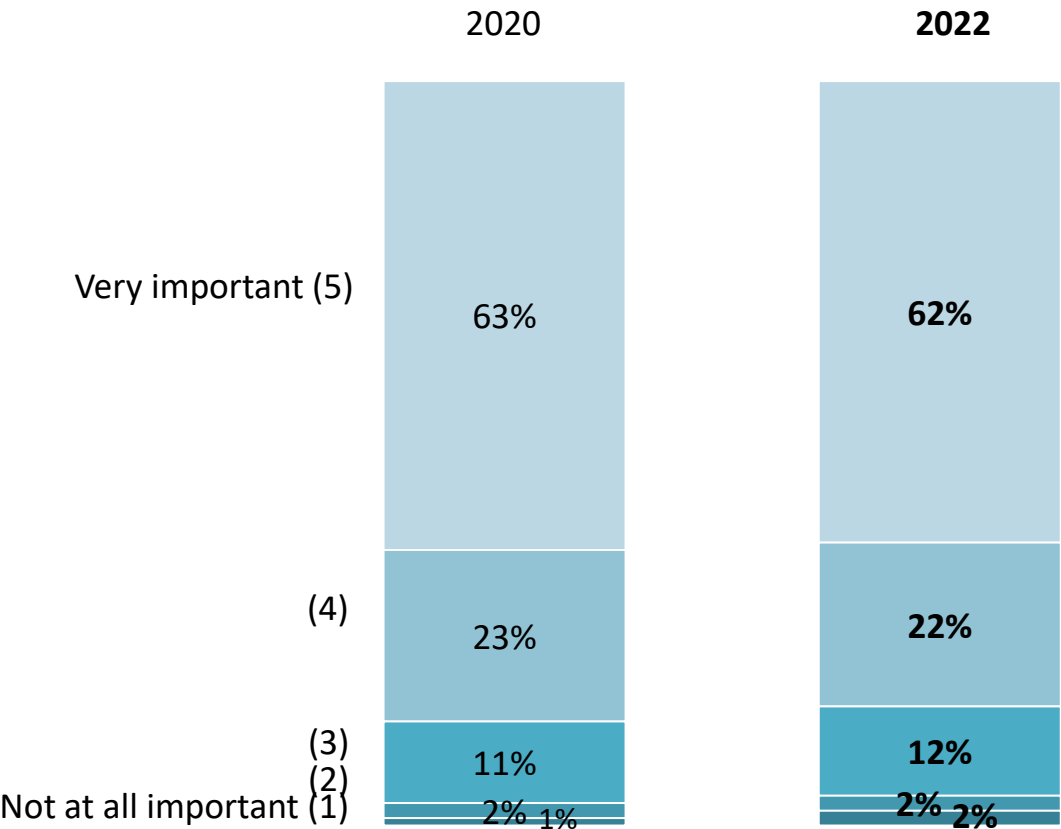
- Social Grade is the 'common currency' social classification (the 'ABC1' system) used by the advertising industry and employed throughout marketing, advertising and market research.
- The classification assigns every household to a grade, usually based upon the occupation and employment status of the Chief Income Earner.
- The classifications are as follows:
 - A: Higher managerial, administrative and professional
 - B: Intermediate managerial, administrative and professional
 - C1: Supervisory, clerical and junior managerial, administrative and professional
 - C2: Skilled manual workers
 - D: Semi-skilled and unskilled manual workers
 - E: State pensioners, casual and lowest grade workers, unemployed with state benefits only
 - F: Farming community



Charity Perceptions

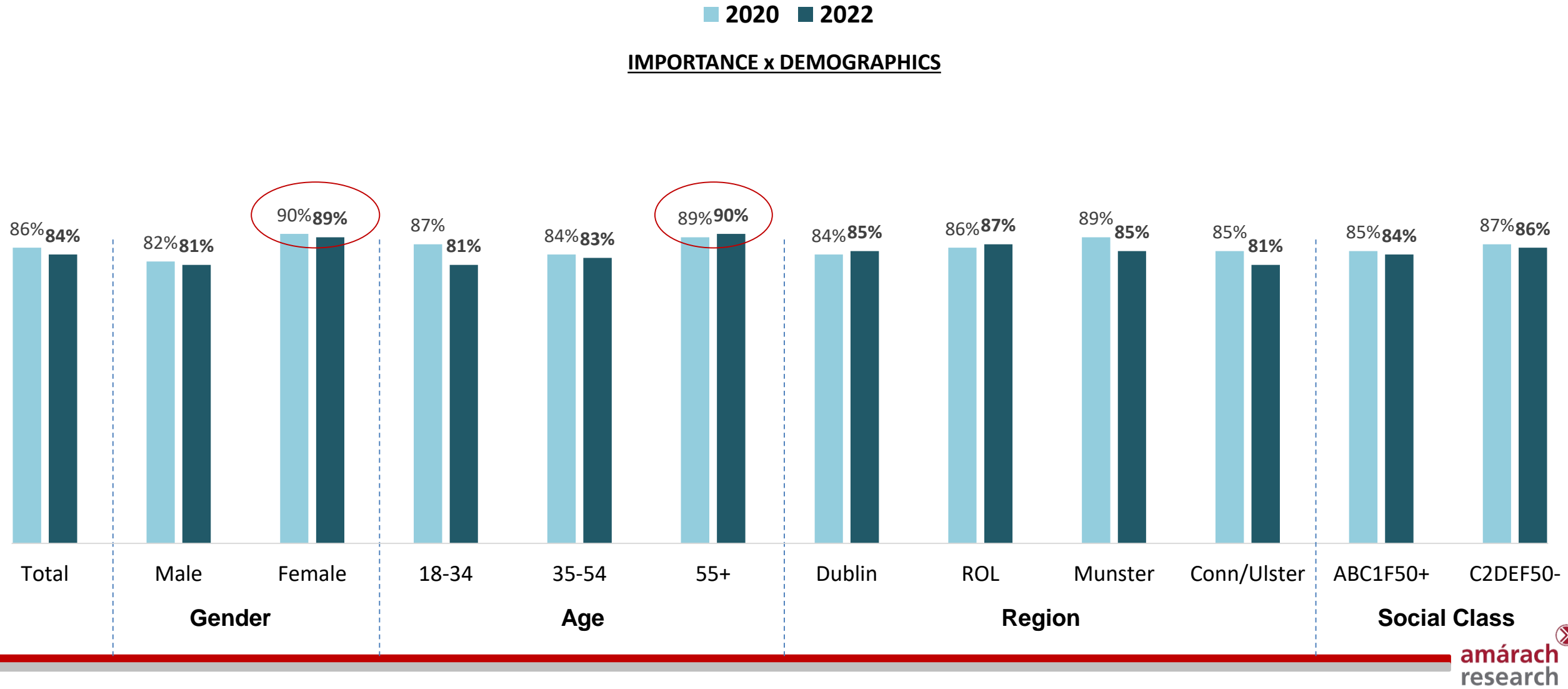
Over 8 in 10 adults continue to believe charities and the work they do are important to Irish society

(Base: All respondents)



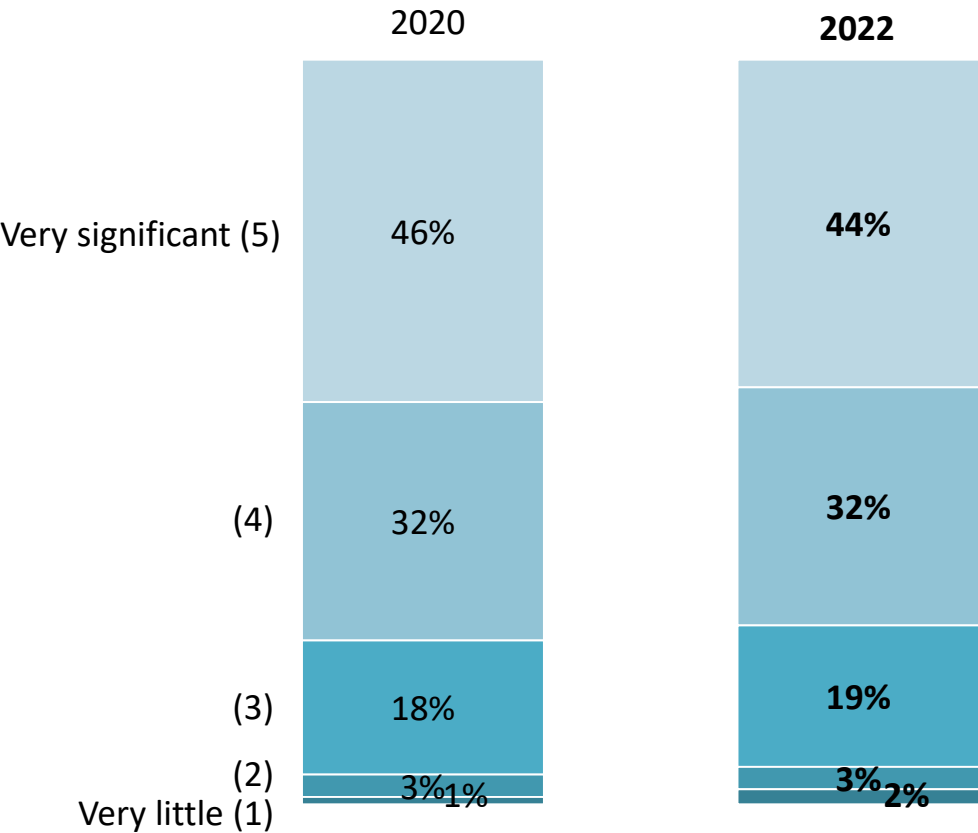
The perceived importance of charities and the work they do is strongest amongst women and the over 55's

(Base: All respondents)



There was no significant change in the proportion of adults who feel charities have an impact in Irish society

(Base: All respondents)

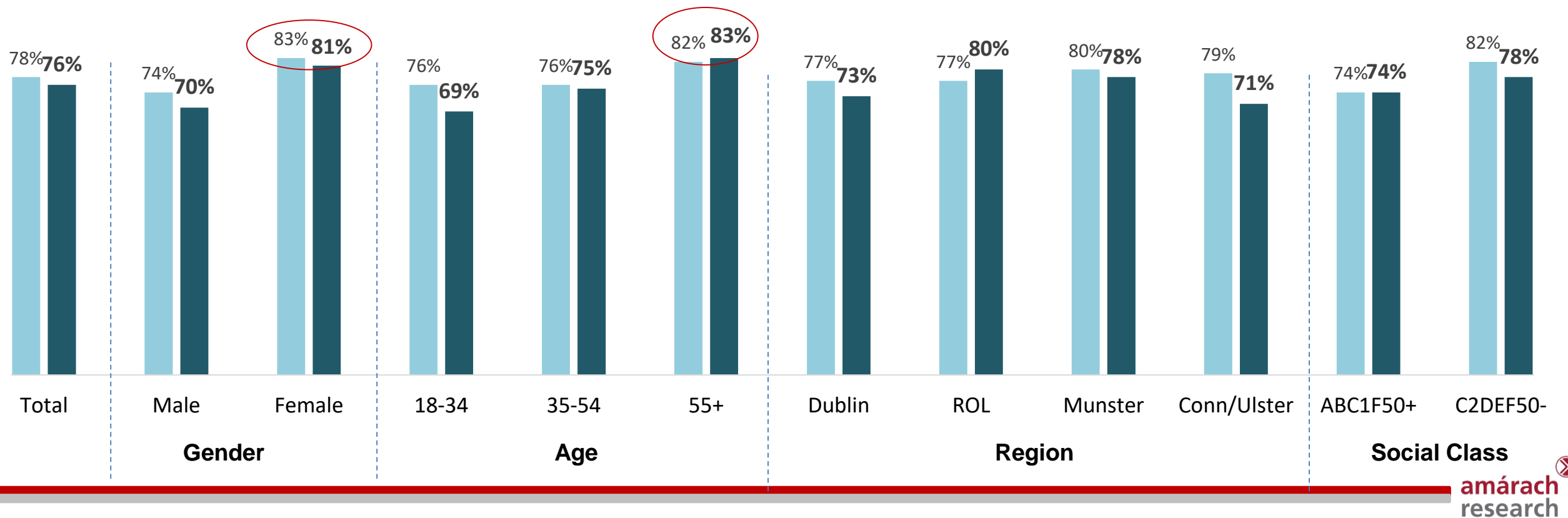


The view that charities have significant impact was highest amongst women and those aged 55+

(Base: All respondents)

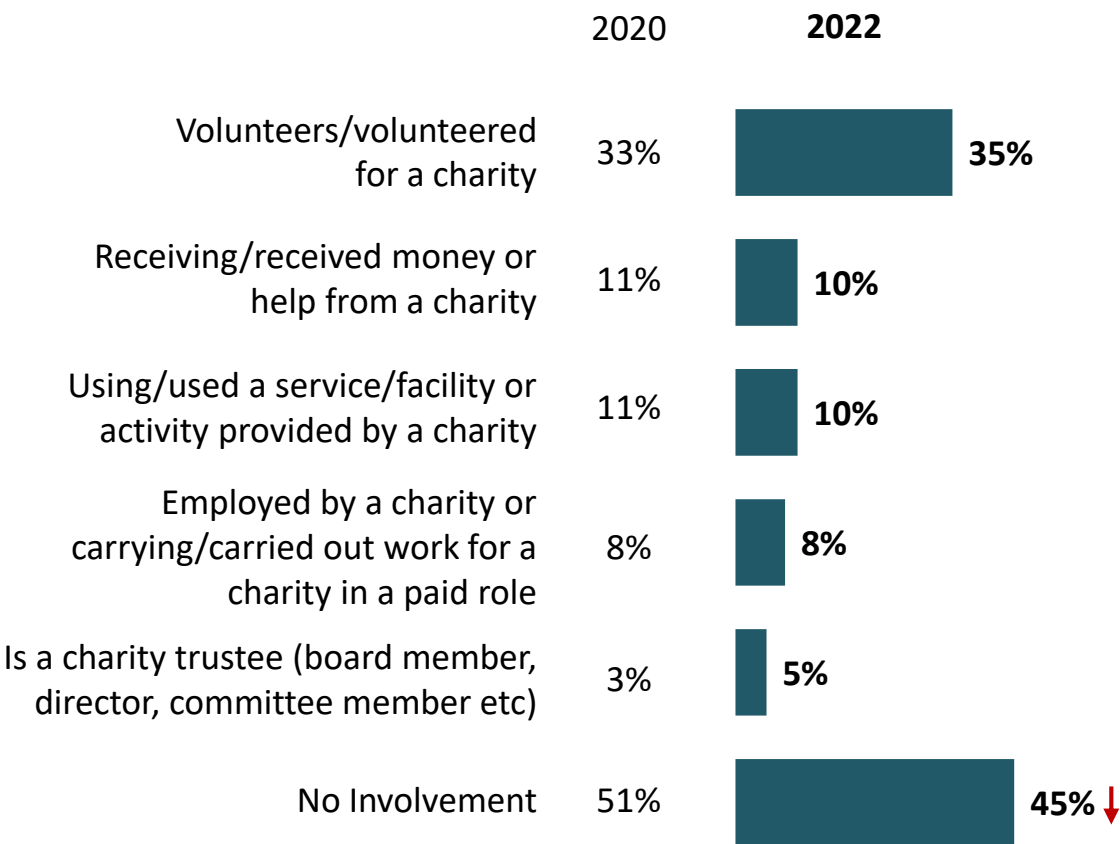
2020 2022

DEMOGRAPHICS FOR SIGNIFICANT IMPACT

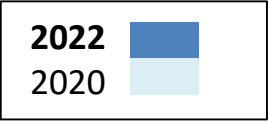


The public's engagement with charities has increased across all demographics and continues to be highest amongst women and 18-34 year olds

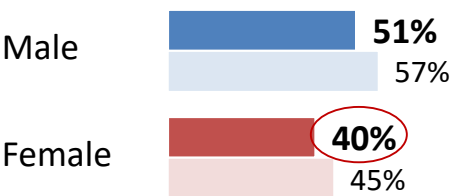
(Base: All respondents)



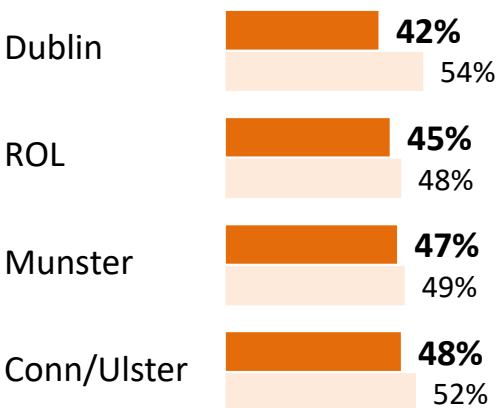
DEMOGRAPHICS FOR NO INVOLVEMENT



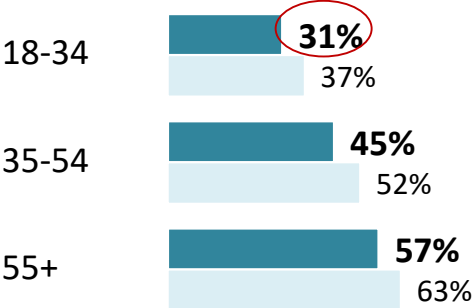
Gender



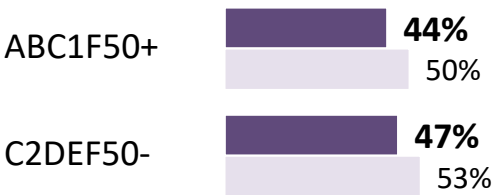
Region



Age

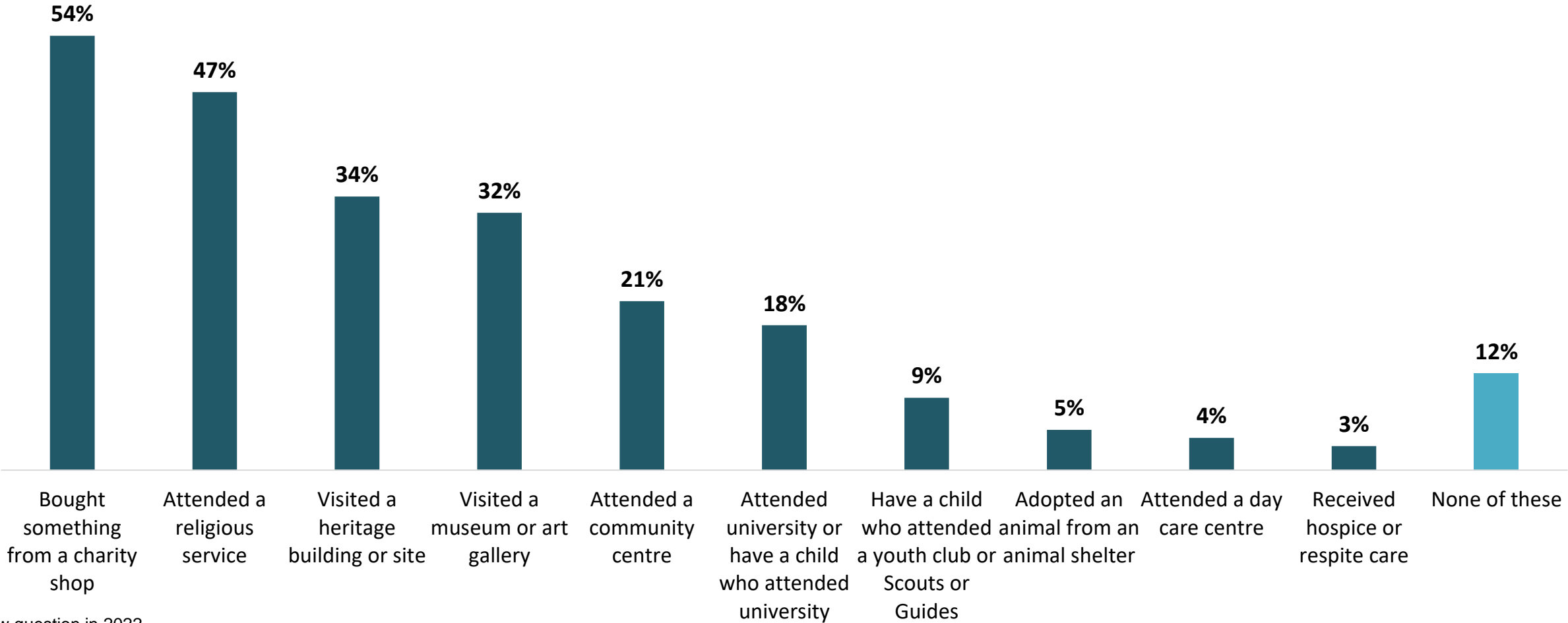


Social category



Although half of adults claim to have no involvement with a charity, 9 in 10 (88%) had potentially engaged with a charity in the 12 months prior to interview, indicating many may not be aware of the breadth of the charity sector in Ireland

(Base: All respondents)

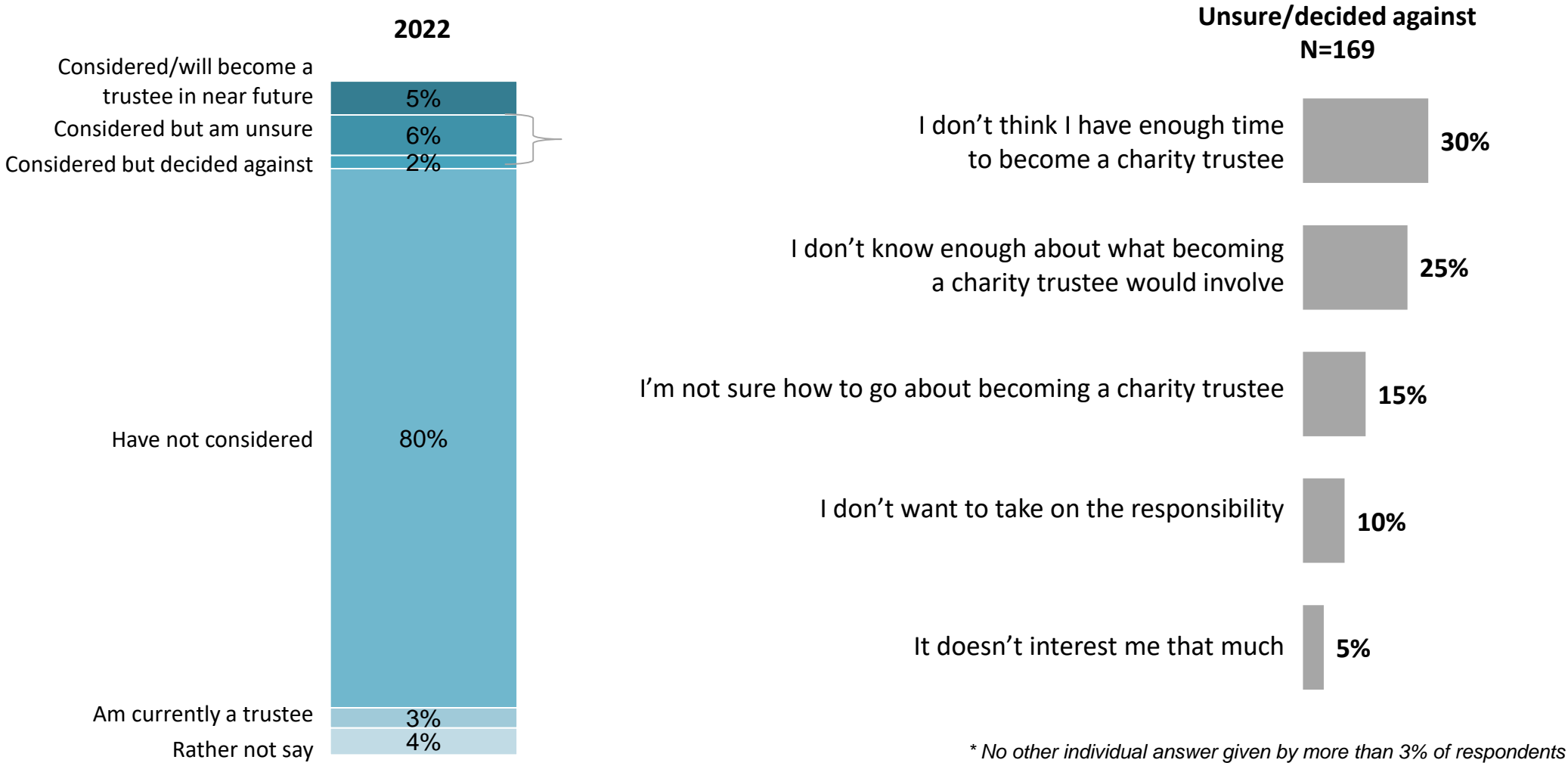


*New question in 2022



8 in 10 adults have not considered becoming a charity trustee. Those who have considered but not done anything about it need more information and reassurance on what is involved, and how to become a trustee

(Base: All respondents)



* No other individual answer given by more than 3% of respondents

*New question in 2022

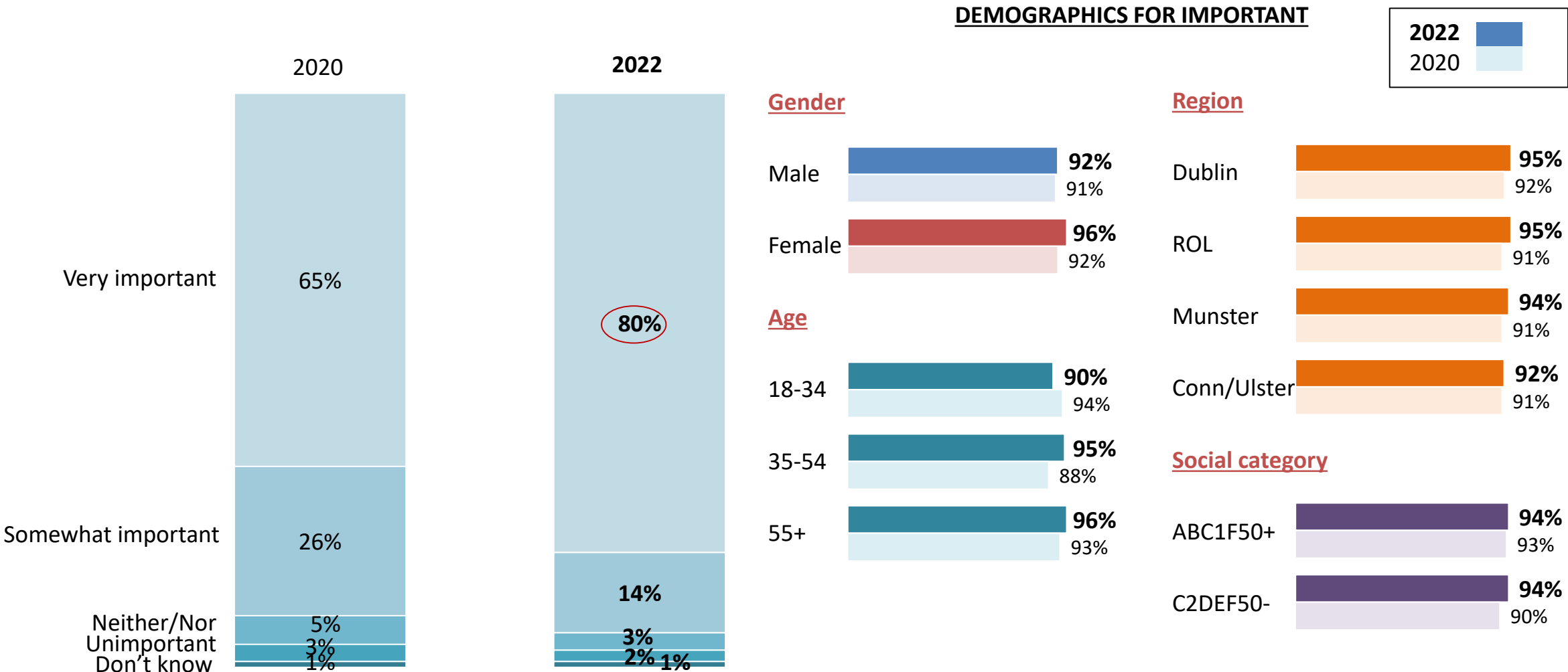
Q7 In the last three years, have you considered becoming a charity trustee?
Q7a Which of the following statements best describes the reason behind your decision?



Deciding on a Charity

The importance of trust and confidence as a factor when deciding whether to donate to a charity has increased significantly

(Base: All respondents)

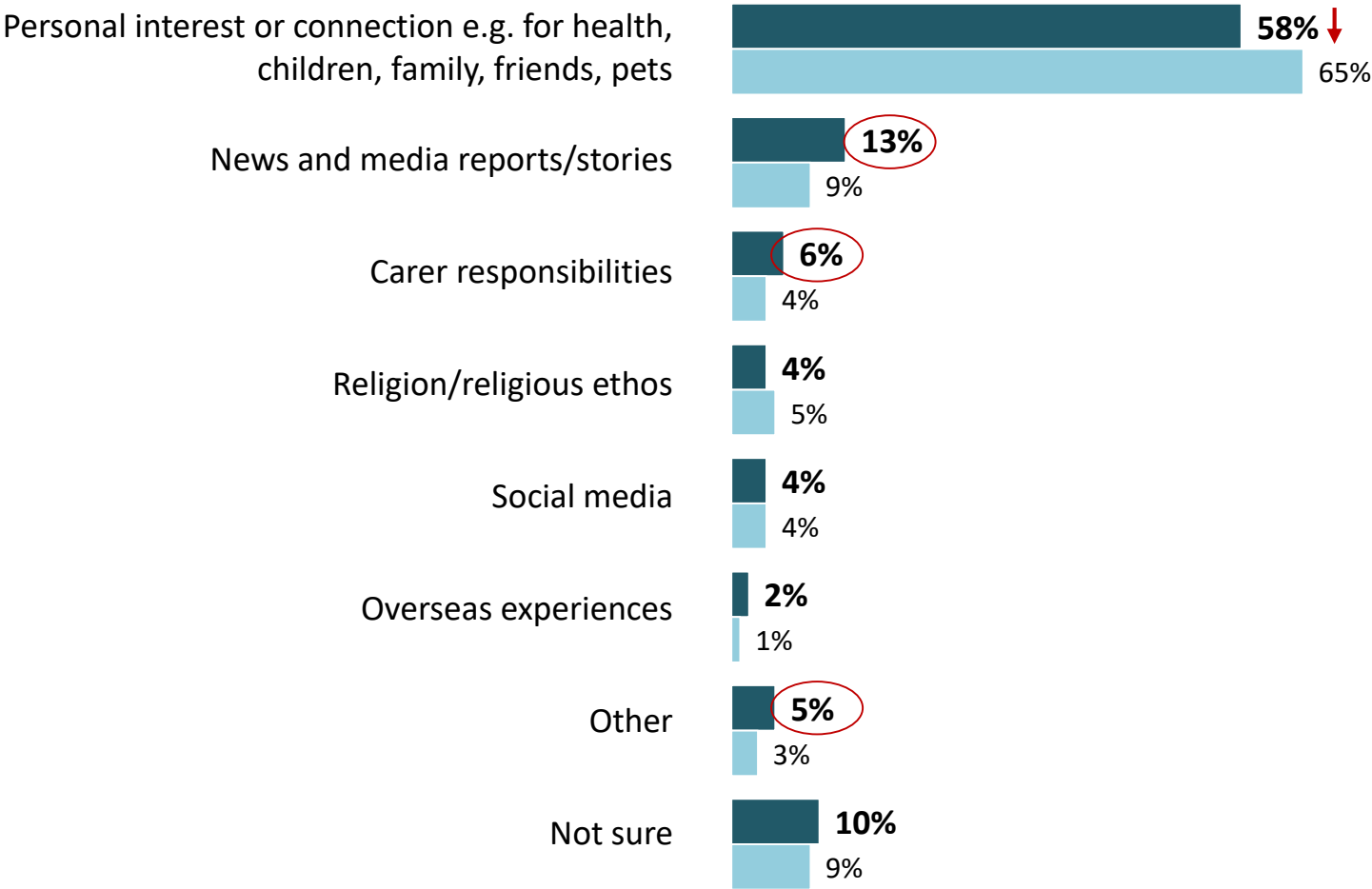


Personal interests or connections continue to be the single greatest influence when deciding to support a charity, though at a lower level than was recorded in 2020

(Base: All respondents)



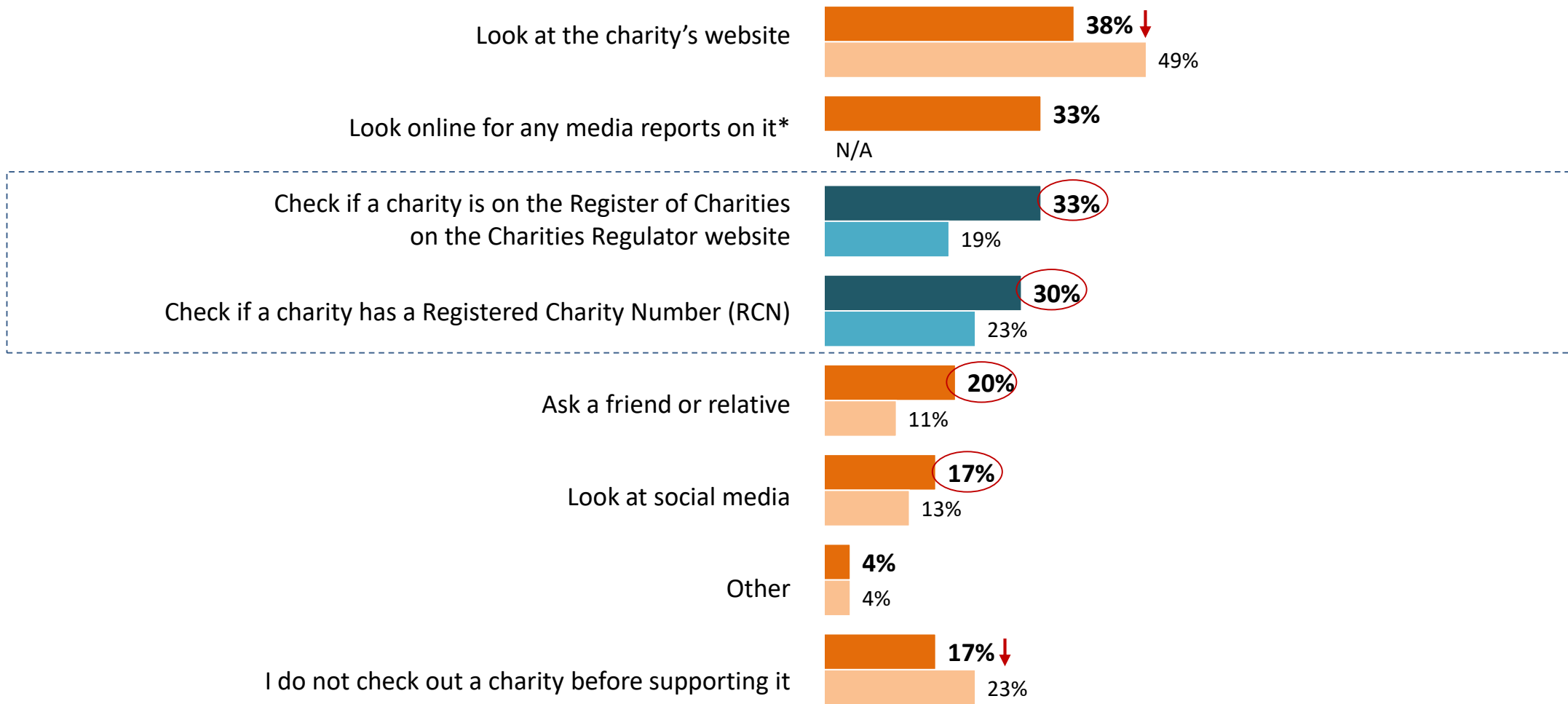
2022
2020



Potential donors were more likely to look into a charity before deciding to support it in 2022 with much greater use of the Register of Charities and checking for a Registered Charity Number (RCN)

(Base: All respondents)

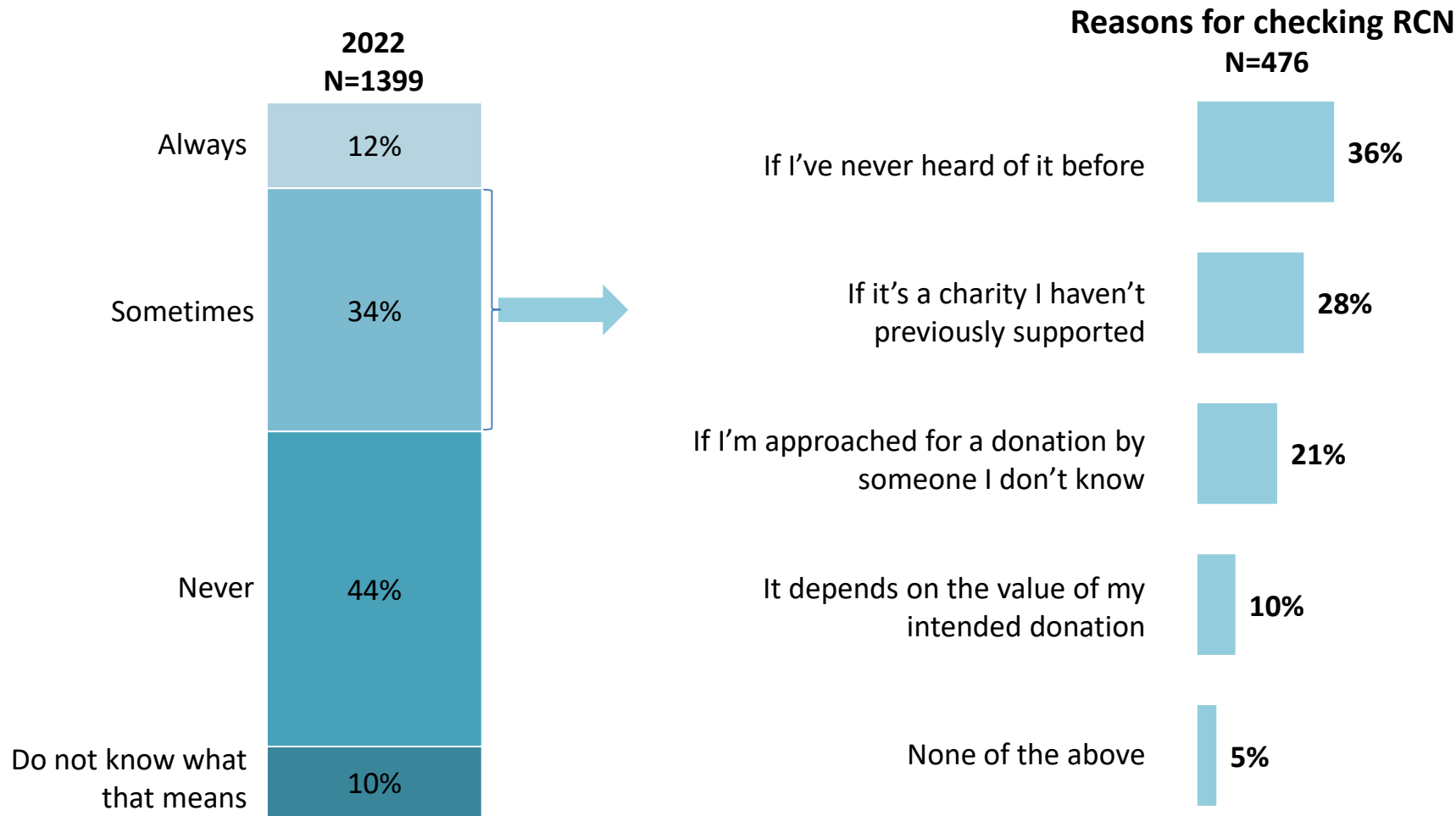
2022
2020



*New response option in 2022

One third claim to sometimes check for a Registered Charity Number (RCN) when prompted and will do so if they are not familiar with the charity in question

(Base: All who do not check for RCN when deciding to support)



*New question in 2022

Q5c. Do you check if a charity has a Registered Charity Number (RCN) before you support it? (please select one)

Q5d. Which of the following reasons best describes why you would sometimes check if a charity has a Registered Charity number (RCN)? (select one)



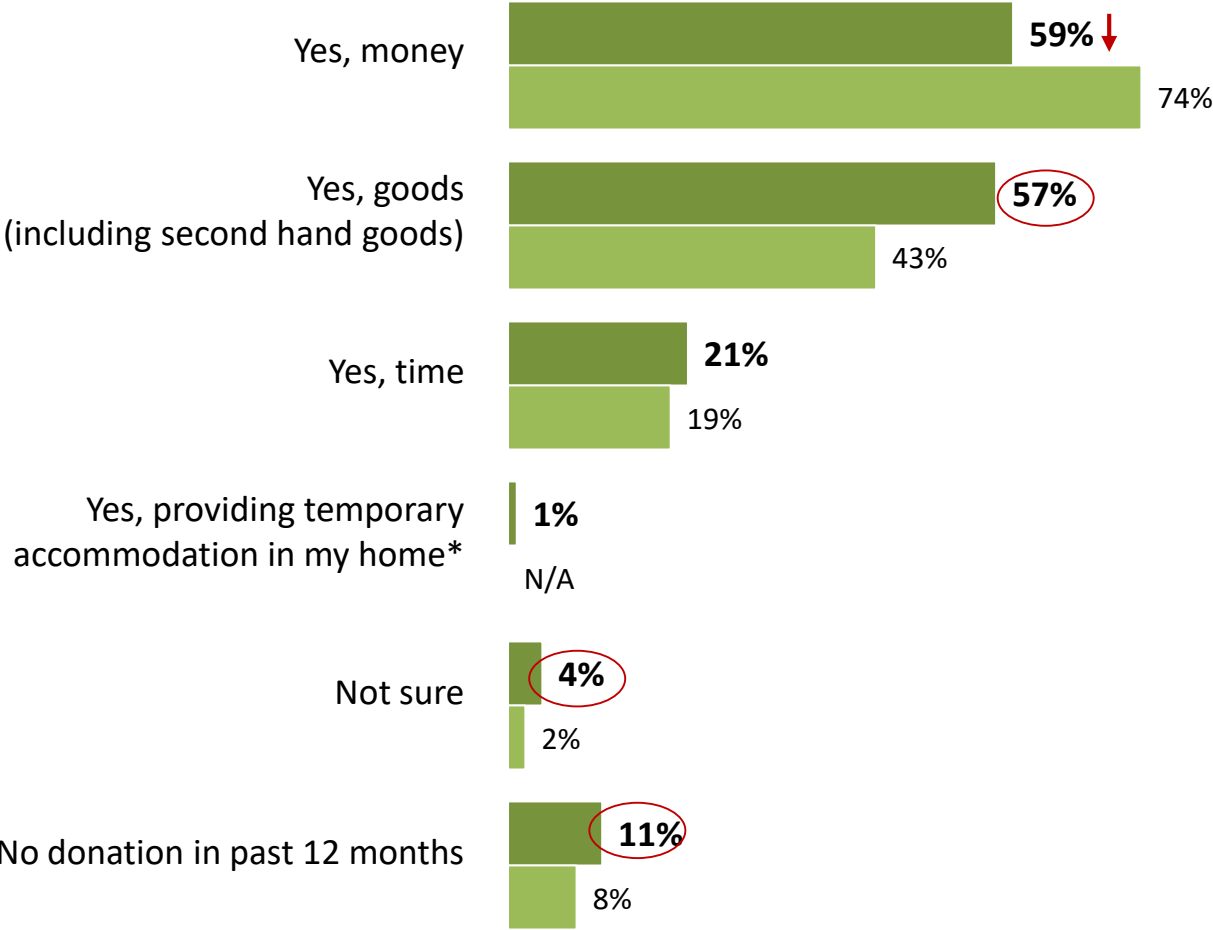
Donations & Support

There is an overall decline in donations and a shift from financial support to goods, which may be a combination of reduced personal finances, a rise in repurposing used items and greater scrutiny of charities

(Base: All respondents)



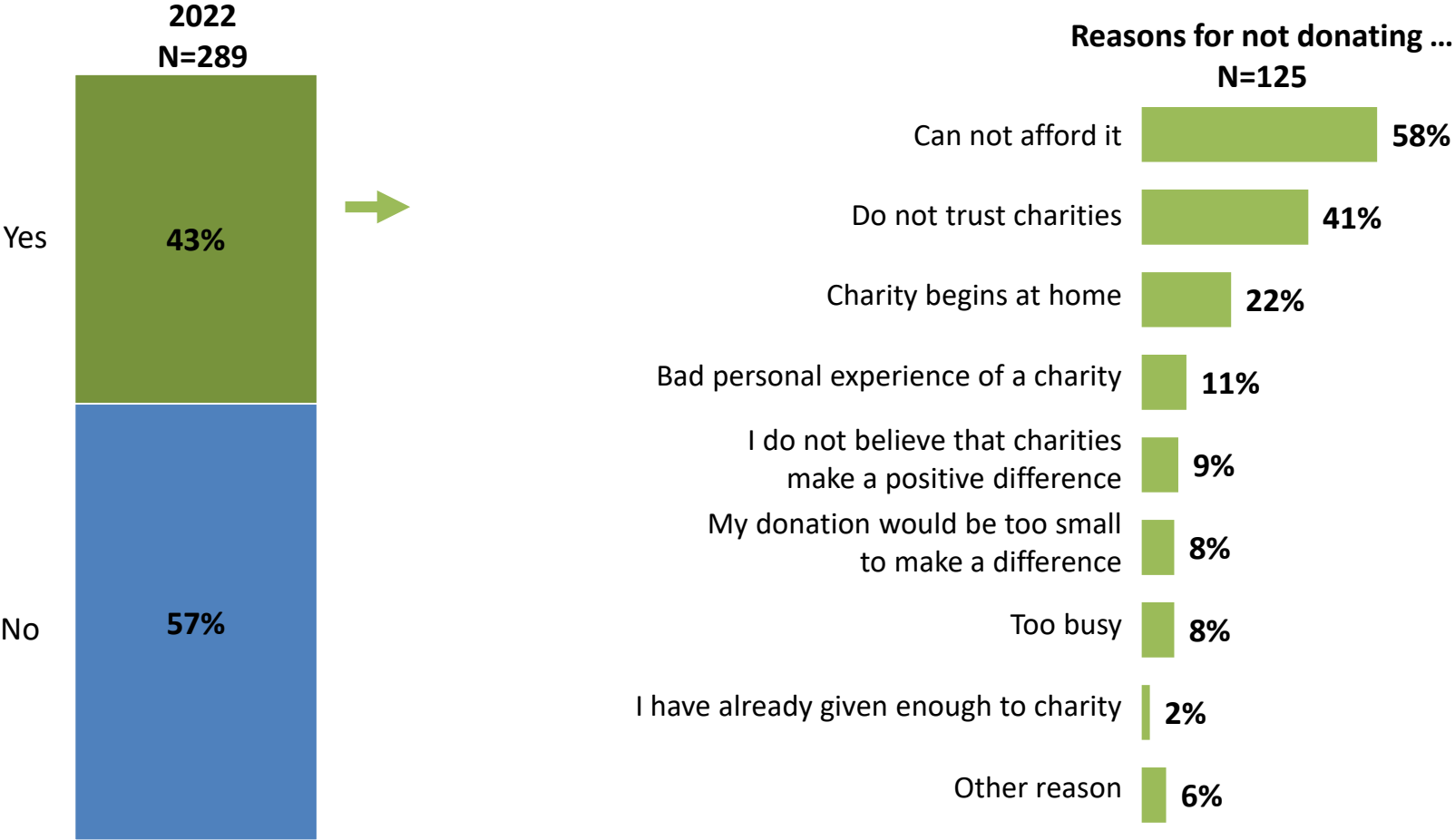
2022
2020



*New response option in 2022

Half of those who did not donate had a particular reason not to do so with the greatest driver being lack of funds. While lack of trust features strongly among this cohort, this equates to just 3% of the total sample

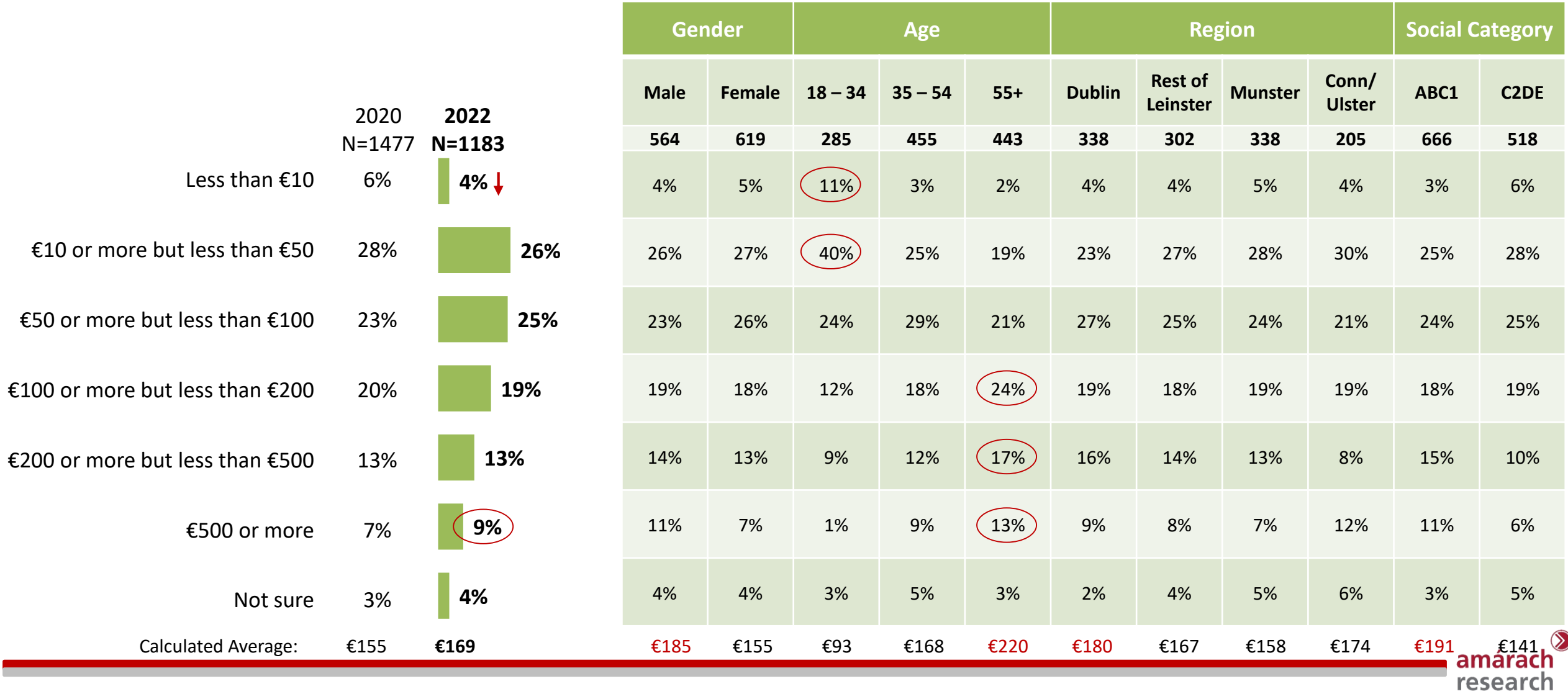
(Base: All who have not made a charity donation in past 12 months)



*New Question in 2022

There is no significant change in the value of donations with the average peaking amongst men, the over 55s, Dublin residents and higher socio economic groups

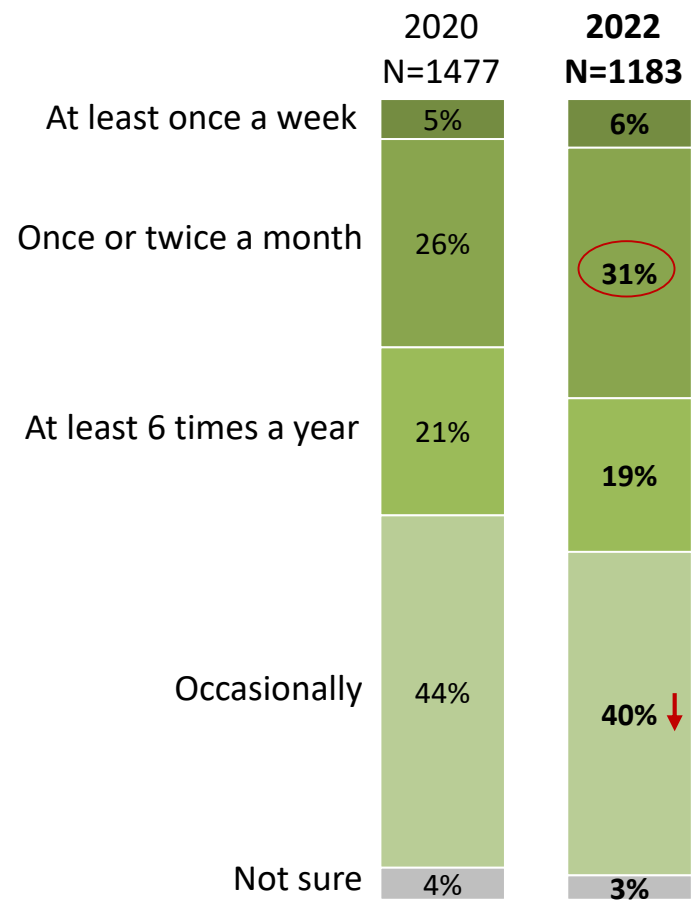
(Base: All who donated **money** in the past 12 months)



The frequency of donating has increased over the past 2 years. Males and those aged 55+ are more likely than average to donate weekly, with 18-34s donating on a more occasional basis



(Base: All who donated **money** in the past 12 months)



Gender		Age			Region				Social Category	
Male	Female	18 – 34	35 – 54	55+	Dublin	Rest of Leinster	Munster	Conn/ Ulster	ABC1 F50+	C2DE F50-
564	619	286	455	443	338	302	338	205	666	518
9%	4%	5%	5%	8%	6%	7%	7%	5%	8%	5%
32%	30%	23%	34%	33%	31%	32%	31%	31%	32%	31%
18%	21%	16%	22%	19%	18%	19%	22%	19%	20%	18%
38%	41%	51%	35%	38%	41%	40%	37%	42%	37%	43%
3%	3%	4%	4%	1%	3%	3%	3%	3%	3%	3%

Raffle/lottery tickets are again the most common way to donate with a significant increase in the use of charity shops. Greater use of direct debit donations aligns with the increased frequency of donating once or twice a month.

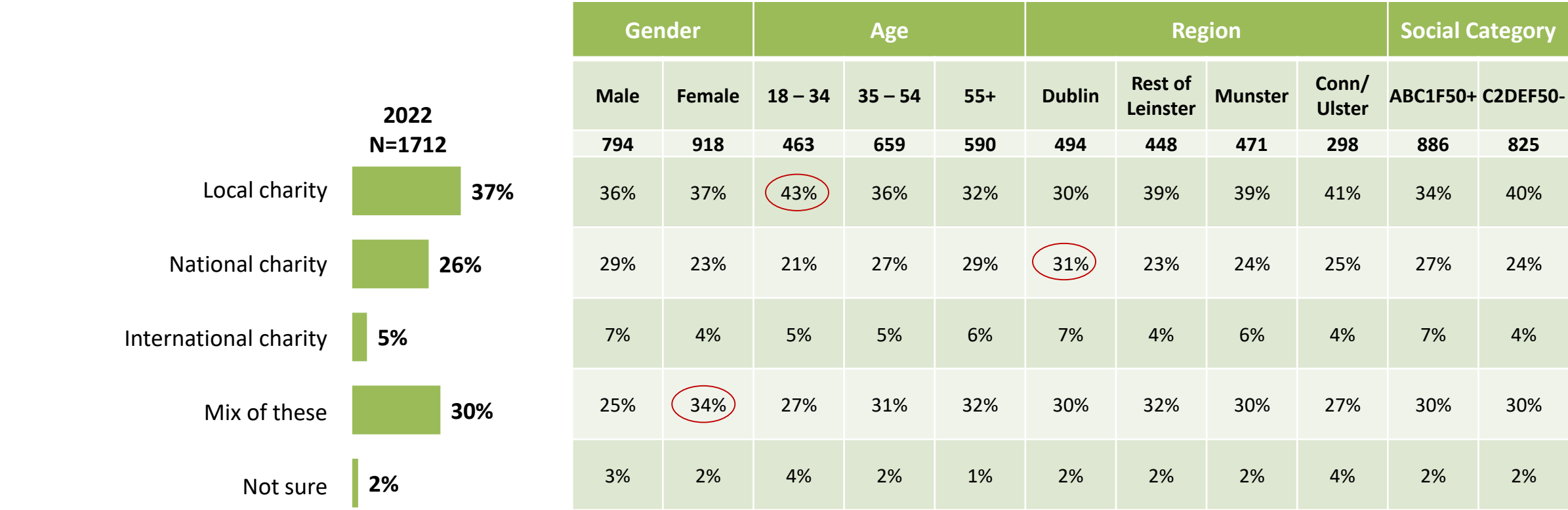
(Base: All who donated money in the past 12 months)

	2020 N=1477	2022 N=1183	Gender		Age			Social Category	
			Male	Female	18 – 34	35 – 54	55+	ABC1F50+	C2DEF50-
Bought a raffle / charity lottery ticket	55%	<div><div></div></div> 53%	564	619	285	455	443	666	518
			47%	58%	39%	58%	56%	53%	52%
Bought goods (including from a charity shop)	37%	<div><div></div></div> 45%							
			41%	49%	42%	45%	48%	45%	45%
Cash collection or a street or door to door fundraiser*	N/A	<div><div></div></div> 45%							
			44%	45%	41%	44%	48%	45%	44%
Sponsored someone in a fundraising event	41%	<div><div></div></div> 36% ↓							
			34%	39%	28%	42%	36%	36%	37%
Online fundraising platform (e.g. GoFundMe)*	N/A	<div><div></div></div> 32%							
			22%	41%	38%	42%	19%	36%	28%
Direct debit or standing order	22%	<div><div></div></div> 26%							
			28%	24%	16%	27%	32%	28%	24%
Text donation	36%	<div><div></div></div> 26% ↓							
			23%	29%	21%	33%	23%	29%	23%
Attended / participated in a fundraising event	19%	<div><div></div></div> 24%							
			18%	29%	26%	26%	19%	24%	24%
On the charity’s website or app*	N/A	<div><div></div></div> 23%							
			21%	25%	28%	20%	23%	23%	23%
Credit/debit card or cheque*	N/A	<div><div></div></div> 21%							
			20%	22%	18%	19%	26%	21%	22%
Via social media	26%	<div><div></div></div> 19% ↓							
			13%	24%	22%	24%	12%	19%	19%
Membership fee or subscription	8%	<div><div></div></div> 7%							
			7%	7%	7%	7%	6%	7%	6%
Regular payroll deduction	4%	<div><div></div></div> 3%							
			4%	2%	3%	3%	4%	4%	3%
Other*	N/A	<div><div></div></div> 3%							
			3%	3%	3%	2%	4%	3%	3%

*New response option in 2022

6 in 10 (63%) donate to local or national charities only, with 3 in 10 donating to a mix of charity types

(Base: All who donated to charity in past 12 months)



*Question change in 2022

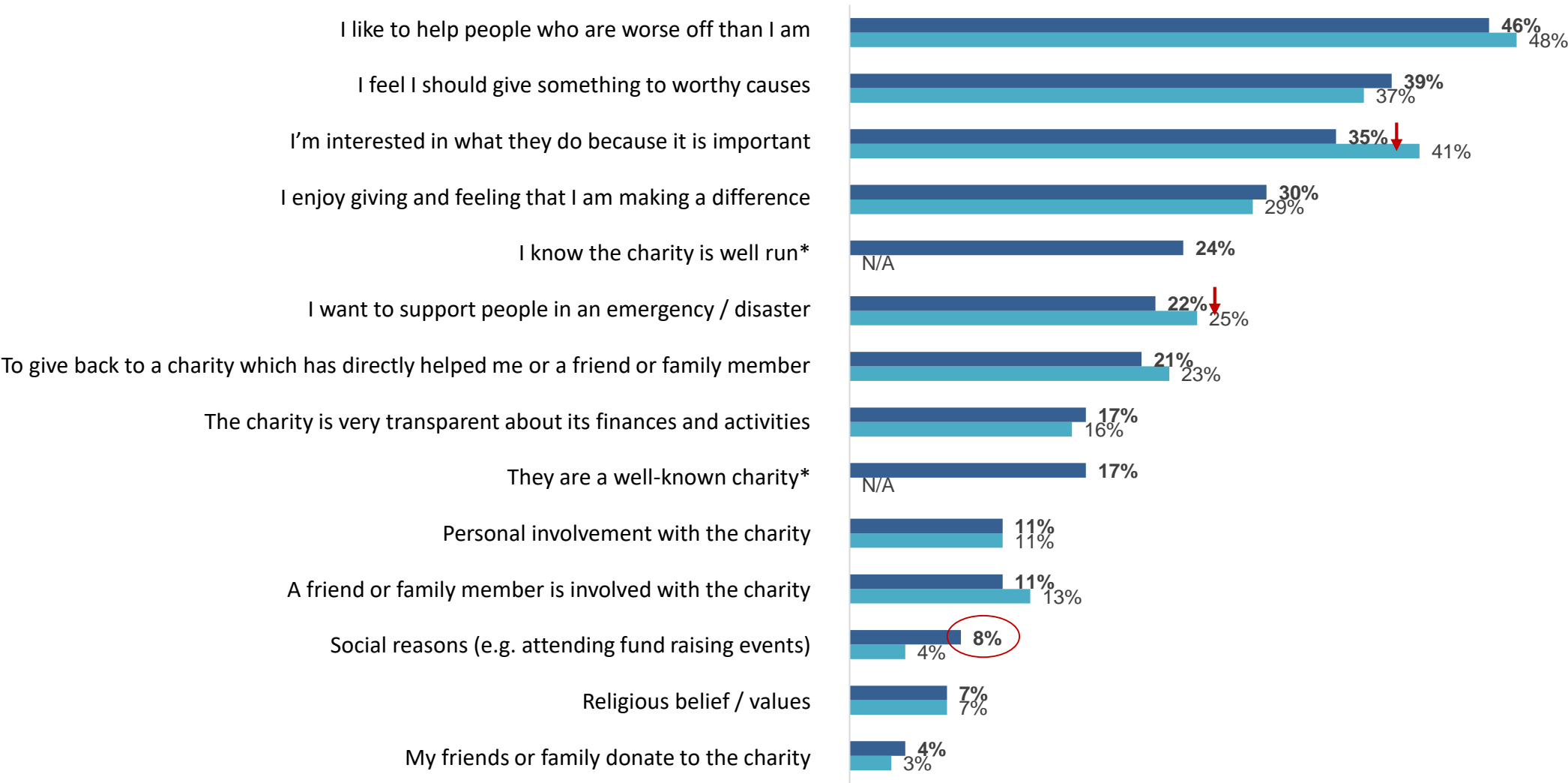
The prevalence of supporting local/national charities may reflect the main reasons for supporting specific charities: to help those worse off, belief in the cause and a desire to support worthwhile causes

(Base: All who donated to charity in past 12 months)



An Rialálaí
Carthanas
Charities
Regulator

2022 N=1712
2020 N=1792



*New response option in 2022

And while mentions have fluctuated, there is no change to the 3 types of charity supported most widely (health, homeless/refuge services, community organisations)

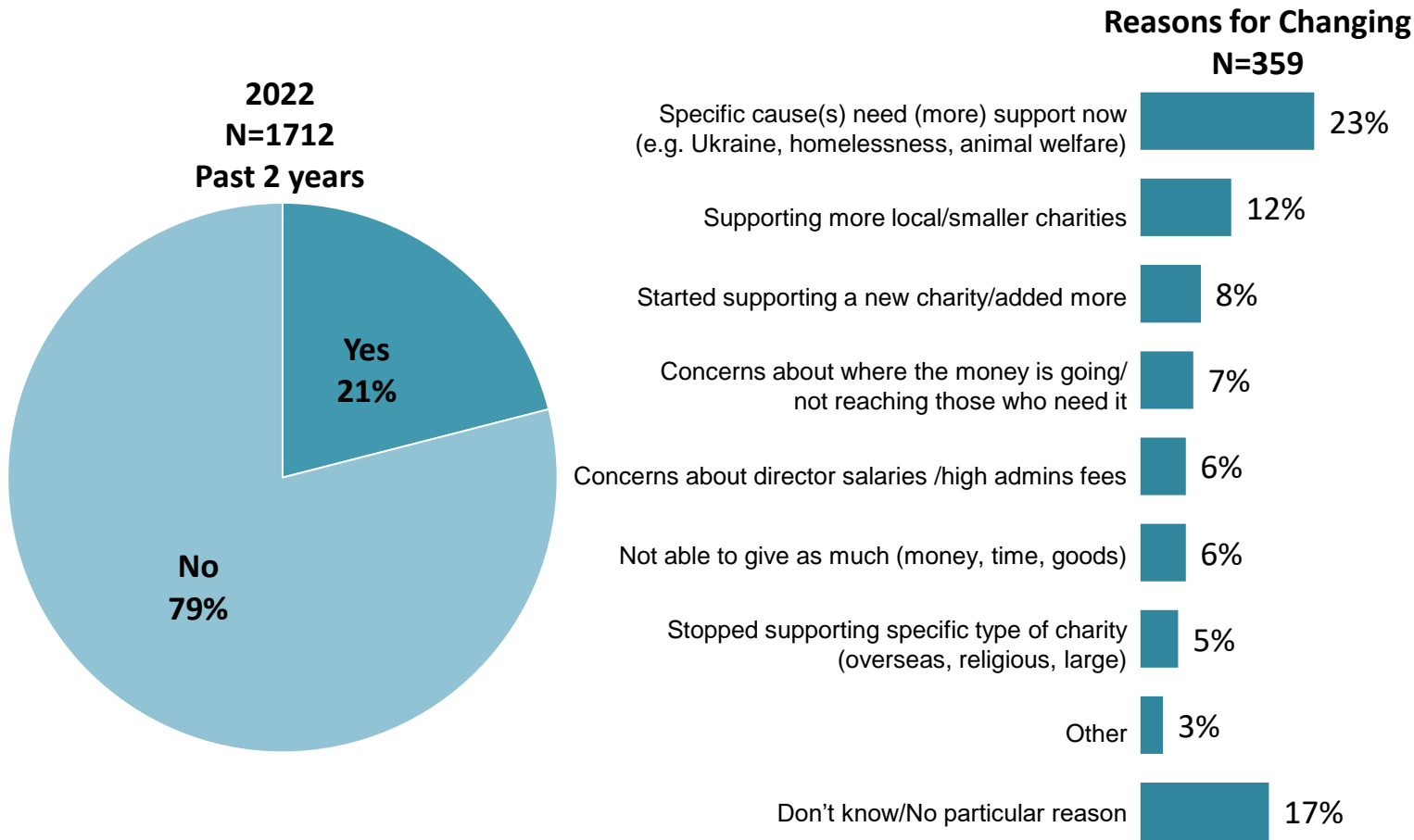
(Base: All who donated to charity in past 12 months)

	2020 N=1792	2022 N=1712	Gender		Age			Region				Social Category	
			Male	Female	18 – 34	35 – 54	55+	Dublin	Rest of Leinster	Munster	Conn/ Ulster	ABC1F50+	C2DEF50-
			794	918	463	659	590	494	448	471	298	886	825
Medical or health related	46%	<div><div></div></div> 44%	38%	48%	41%	48%	41%	46%	42%	43%	43%	46%	42%
Homeless or refuge services	56%	<div><div></div></div> 43% ↓	42%	44%	41%	42%	45%	50%	43%	43%	31%	46%	40%
Local community organisations	43%	<div><div></div></div> 41%	38%	44%	34%	43%	45%	35%	45%	44%	39%	40%	42%
Children or youth	37%	<div><div></div></div> 29% ↓	26%	32%	31%	37%	19%	28%	34%	29%	24%	35%	23%
Animal rescue or welfare	36%	<div><div></div></div> 29% ↓	22%	35%	31%	34%	23%	28%	31%	31%	26%	28%	31%
Physical or intellectual disabilities	28%	<div><div></div></div> 25% ↓	23%	27%	24%	27%	24%	24%	27%	26%	24%	25%	25%
Overseas aid / disaster or war relief	21%	<div><div></div></div> 25%	28%	23%	17%	23%	35%	25%	26%	27%	22%	27%	24%
Schools, colleges or other education	20%	<div><div></div></div> 20%	17%	23%	22%	26%	13%	19%	23%	19%	20%	21%	19%
Religious organisations	15%	<div><div></div></div> 15%	19%	12%	8%	12%	25%	12%	19%	14%	17%	16%	15%
Senior citizens	17%	<div><div></div></div> 14% ↓	15%	14%	9%	15%	18%	12%	16%	16%	13%	14%	15%
Immigrant or refugee services*	N/A	<div><div></div></div> 14%	12%	16%	16%	13%	13%	13%	17%	14%	11%	16%	12%
Environment and conservation	9%	<div><div></div></div> 9%	10%	9%	13%	7%	9%	10%	10%	8%	10%	11%	8%
Arts, culture or heritage	6%	<div><div></div></div> 8%	9%	7%	10%	9%	5%	10%	8%	8%	6%	9%	7%
Not sure / can't remember	2%	<div><div></div></div> 3%	3%	3%	4%	3%	2%	3%	3%	1%	6%	3%	3%

*New response option in 2022

1 in 5 have changed the type of charity they support in the 2 years prior to interview in response to emerging needs such as Ukraine and homelessness

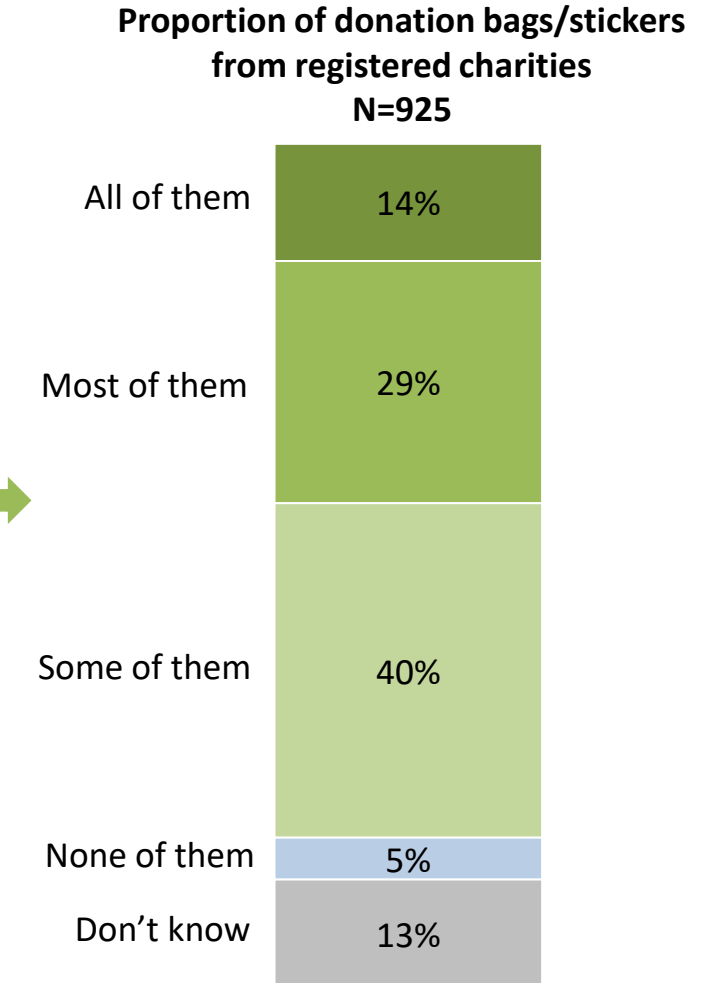
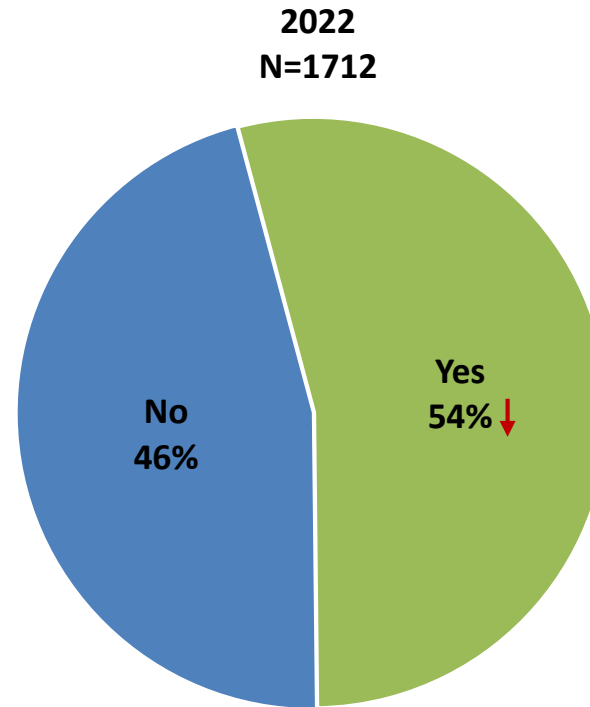
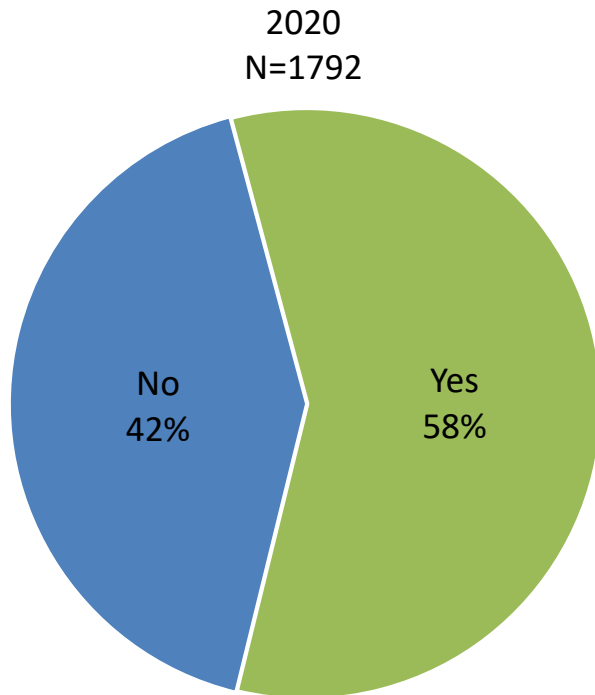
(Base: All who donated to charity in past 12 months)



* No other individual answer given by more than 5% of respondents

There has been a decline in bag/sticker donations since 2020 and almost half (45%) who have donated this way are aware that only some/none of the bags/stickers received are from registered charities

(Base: All who donated to charity in past 12 months)



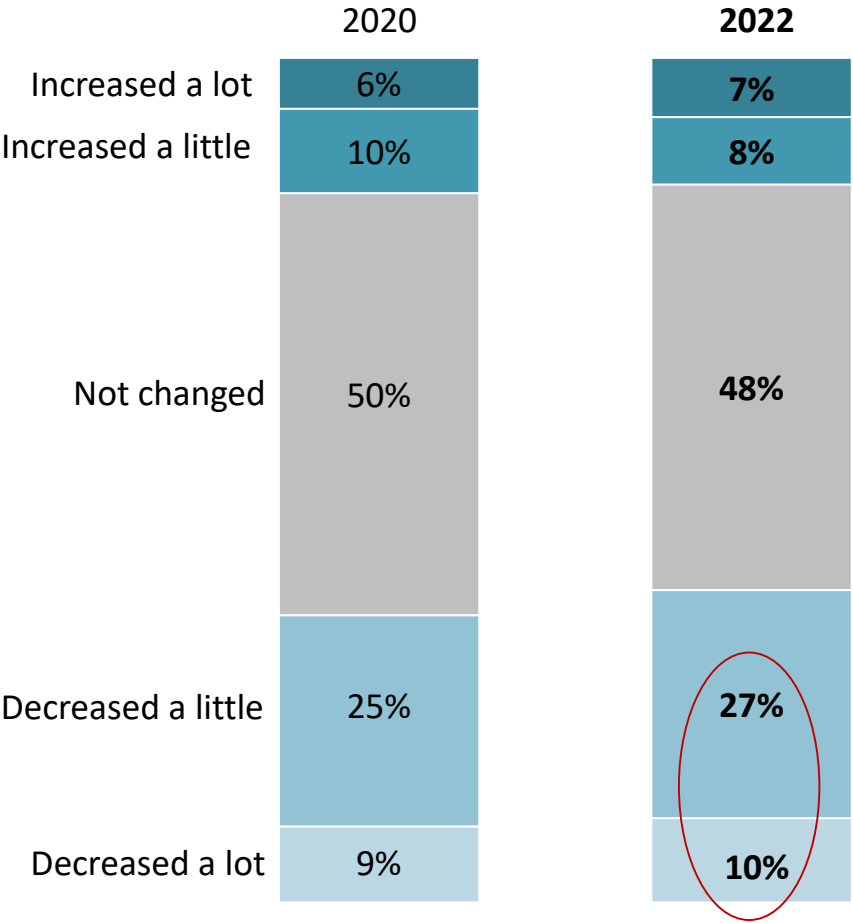
Trust & Confidence



Although the importance of trust as a factor when deciding to donate has increased, overall public trust in charities has dipped slightly over the past 2 years

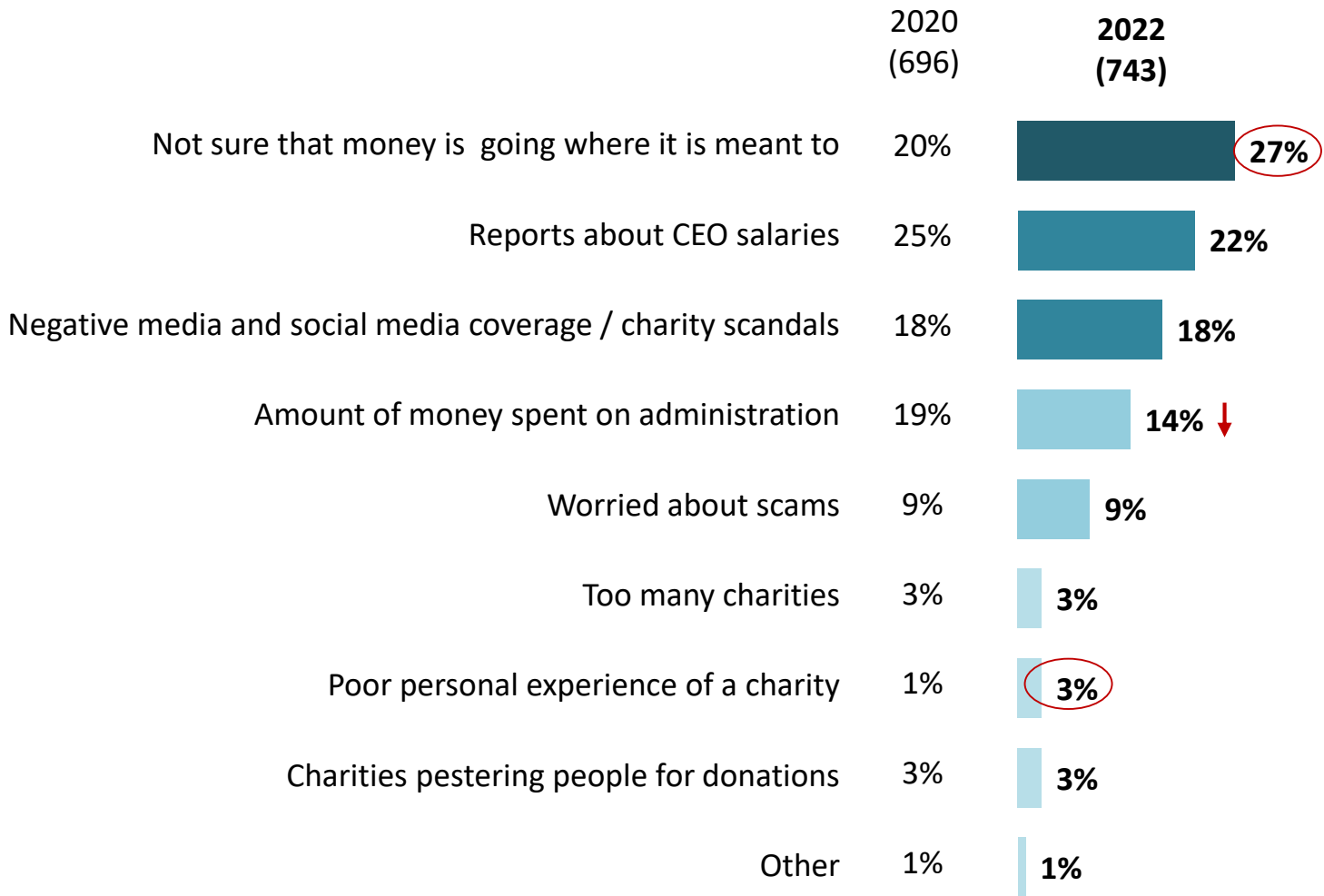


(Base: All respondents)



The main reason for this decline is a perceived lack of transparency in where the money goes, with other reasons mentioned at lower or similar levels to 2020

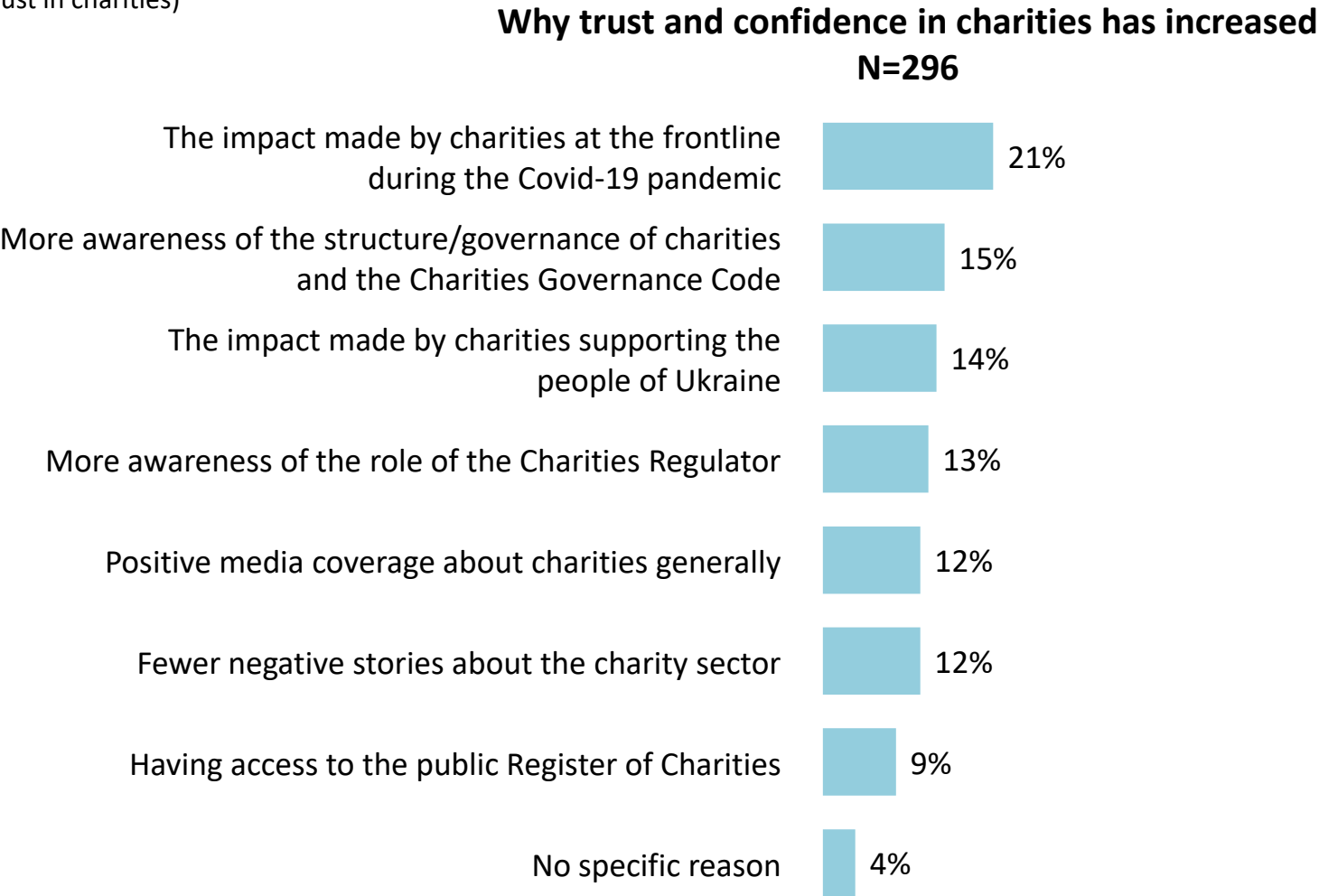
(Base: All with decreased trust in charities)



Those with increased confidence in the charity sector attribute this to a range of factors – mainly the activities of frontline charities during recent crises with awareness of charity governance (15%) and the Regulator also featuring (13%)



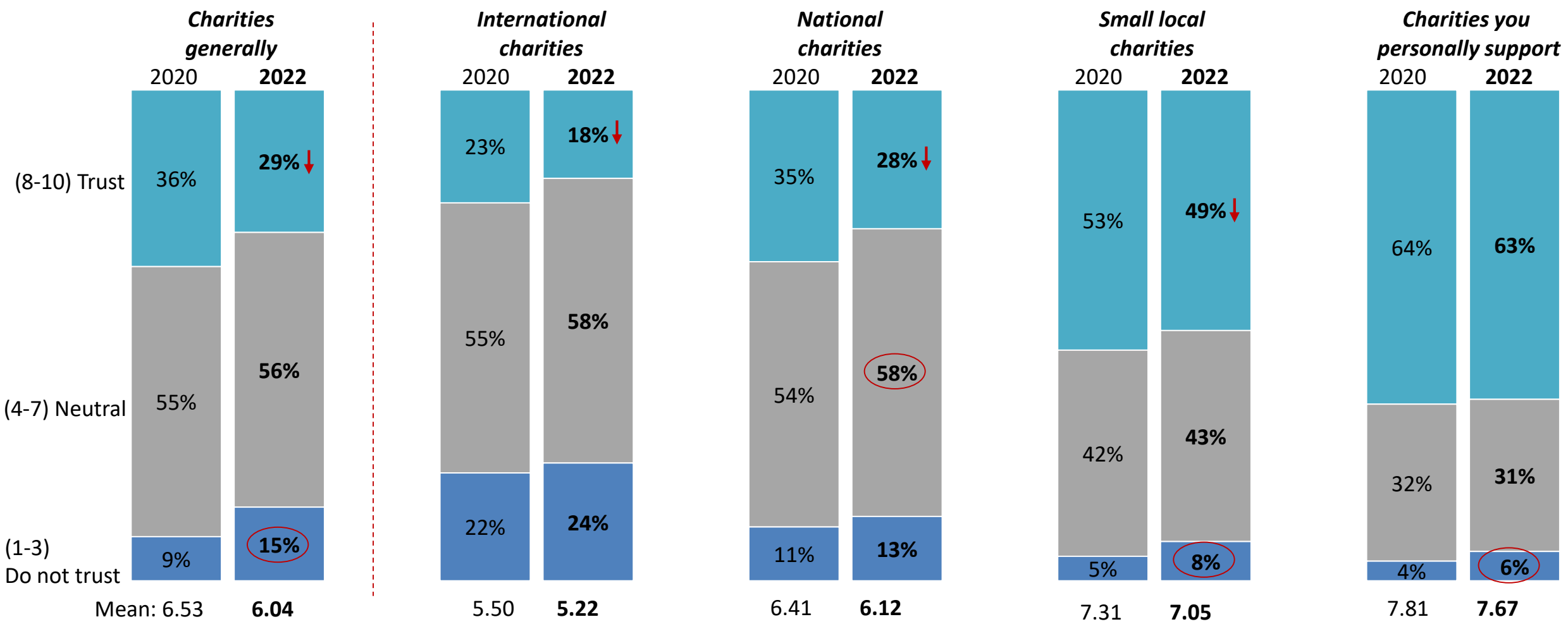
(Base: All with increased trust in charities)



*New Question in 2022

But declining trust is more acute for some charity types, with the exception of charities personally supported which has remained stable.

(Base: All respondents)

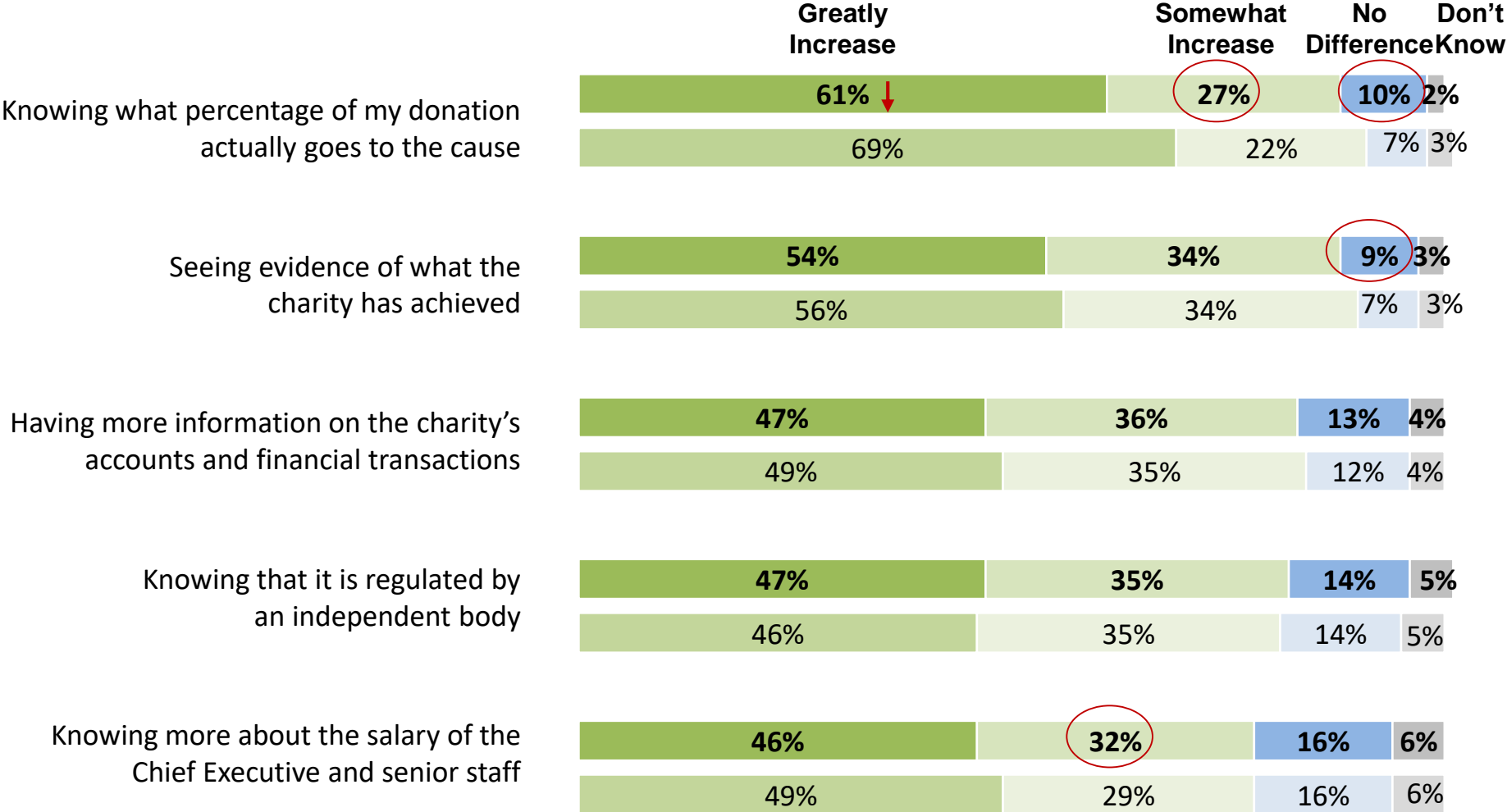


Q8 Thinking about charities overall, on a scale of 1 to 10 how much trust and confidence do you have in the following type of charities?
(please rate on a scale of 1 to 10, 1- I Do not trust them at all, to 10 - I trust them completely)

Greater transparency of donation use and evidence of what charities have achieved (both 88%) are the leading ways to increase trust and confidence


(Base: All respondents)


2022
2020

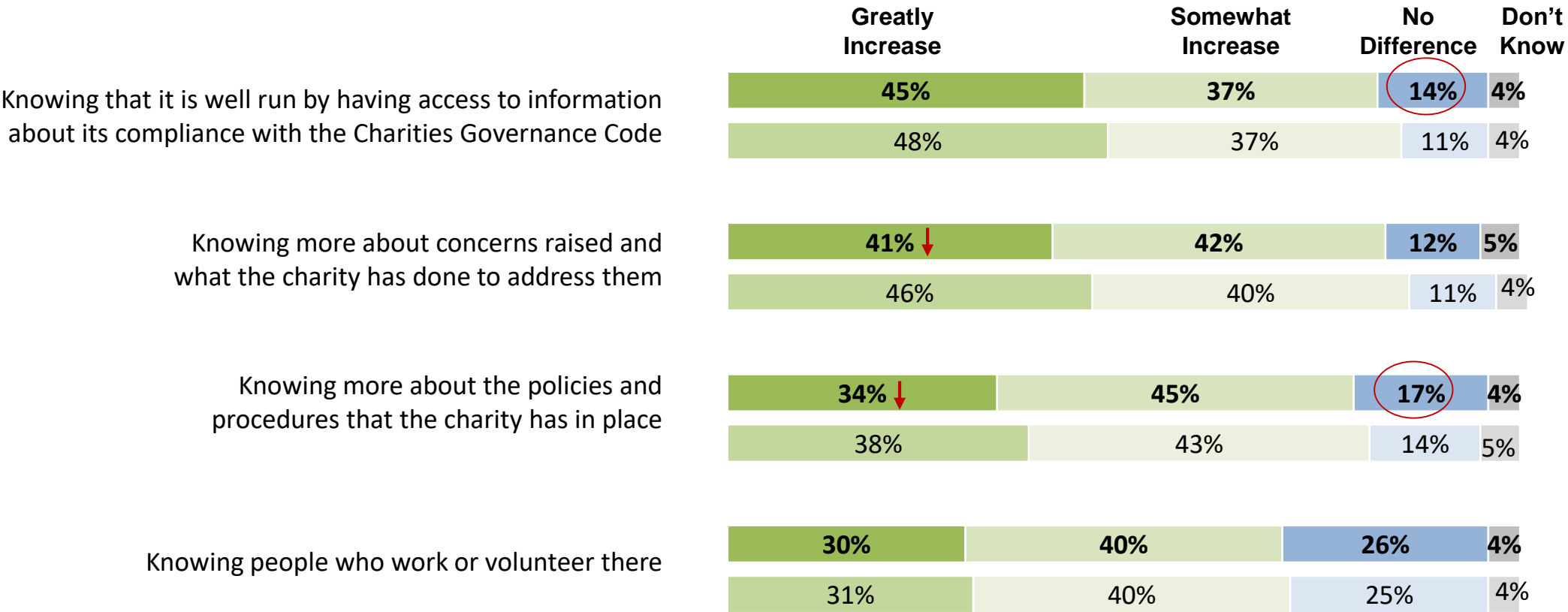


The prioritisation of what would increase trust/confidence in a charity is unchanged though there are some shifts in the extent to which measures are likely to have an impact

(Base: All respondents)

2022 

2020 



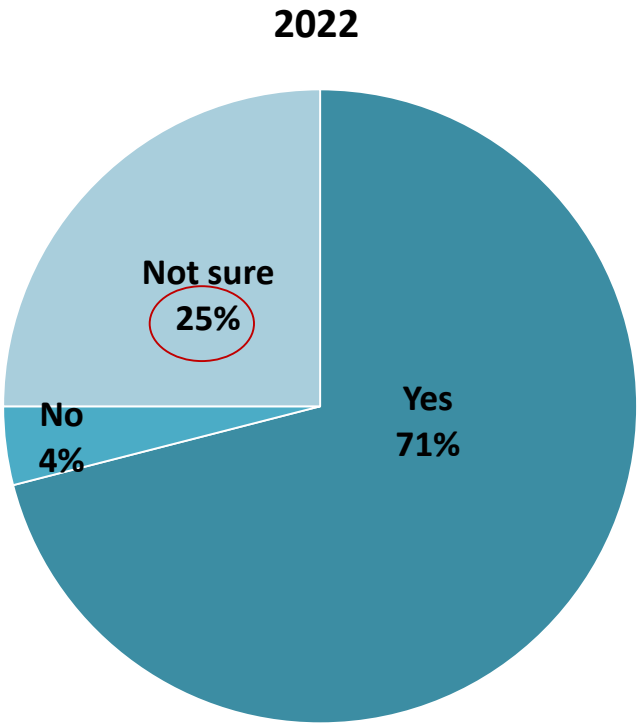
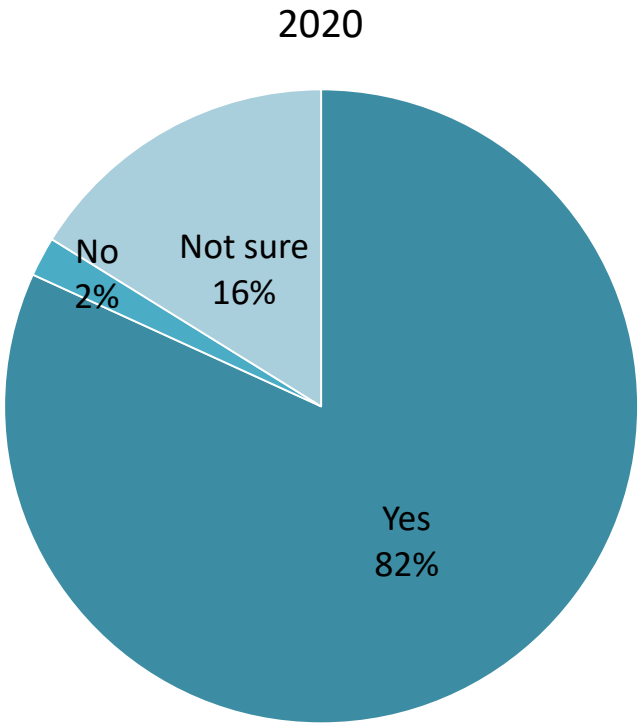


COMPLIANCE

Regulation of Charities

There is greater uncertainty among the public in 2022 as to whether charities are regulated

(Base: All respondents)

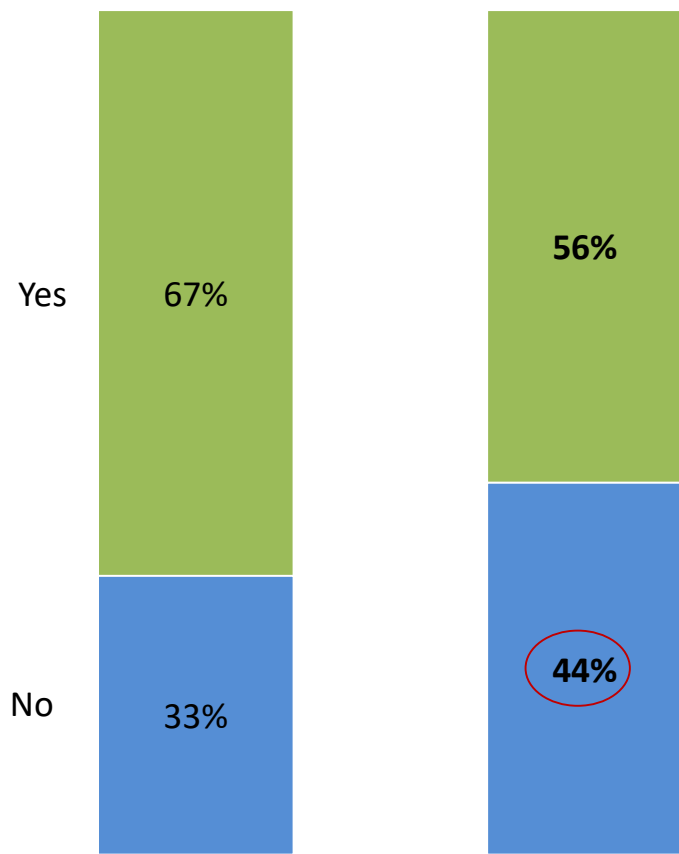


In addition to decreased awareness of charity regulation, fewer people are aware that regulation applies to registered charities only. However, 7 in 10 know it is an offence to present as a charity if unregistered

(Base: All respondents)

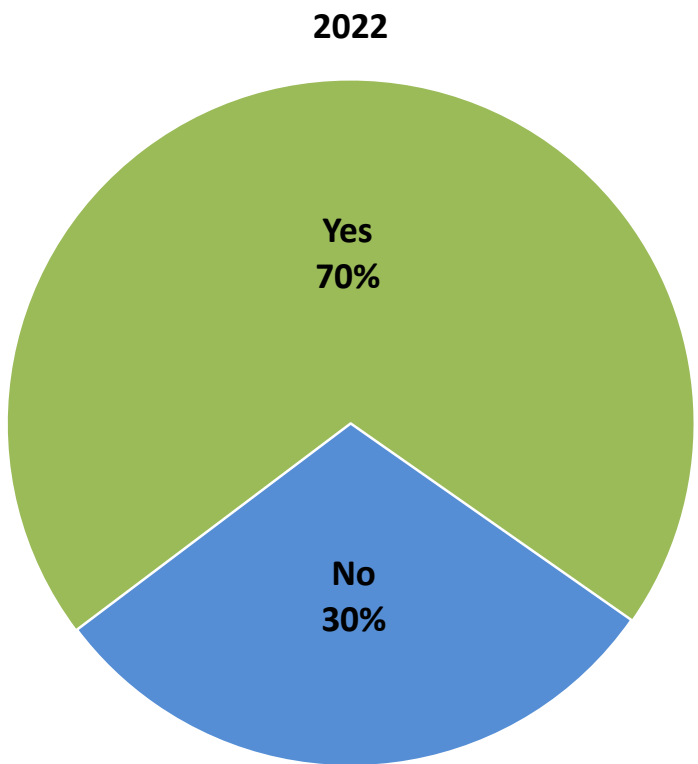
Aware only registered charities regulated

Year	Yes	No
2020	67%	33%
2022	56%	44%



Aware it is an offence for an unregistered individual/organisation to represent as a charity

Year	Yes	No
2022	70%	30%



*New Question in 2022

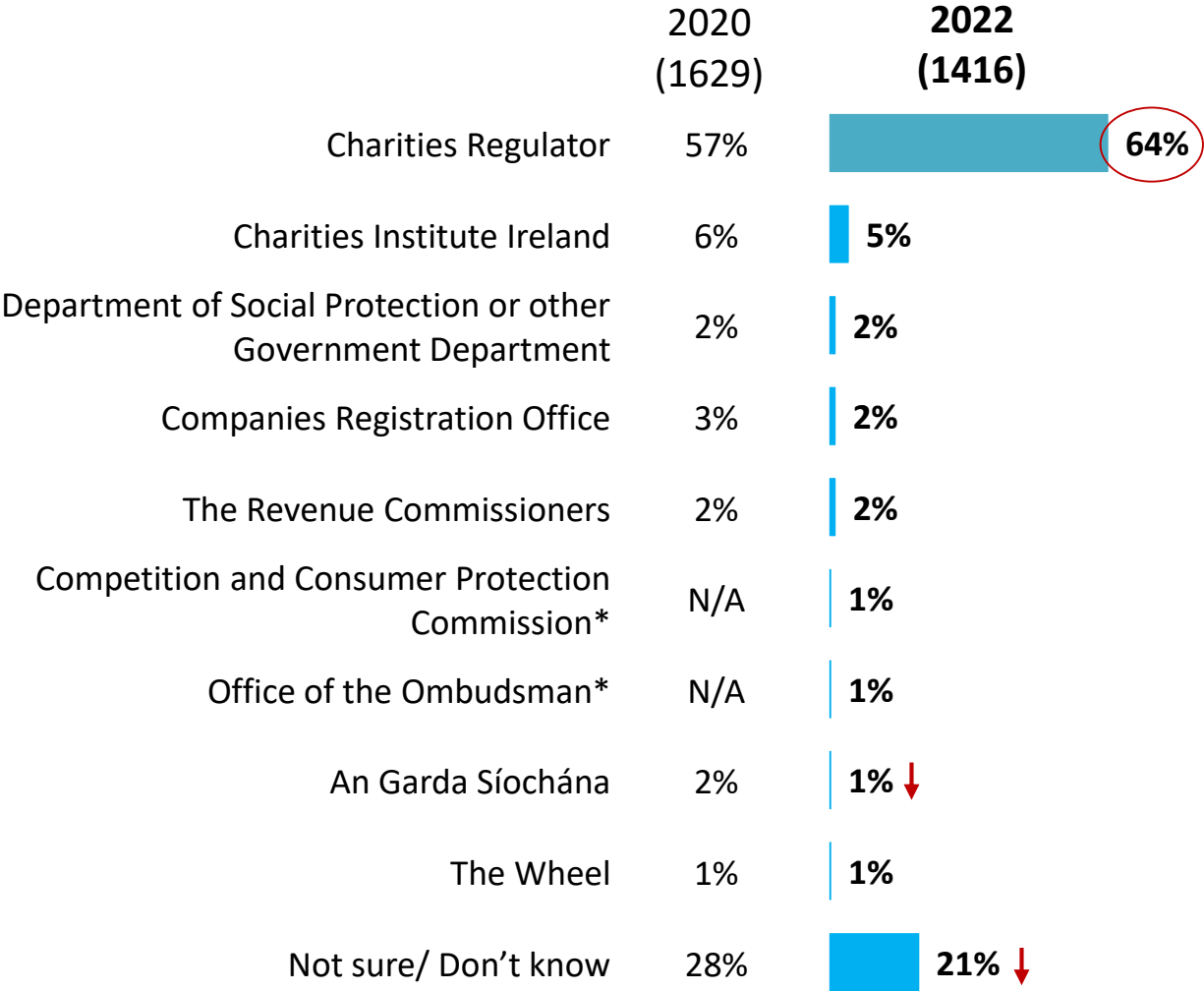
Q12. Are you aware that only registered charities are regulated?

Q12a. Are you aware that it is an offence for an individual or organisation to represent themselves as a charity if they are not registered?

The Charities Regulator continues to be most widely identified with responsibility for regulating charities in Ireland, and awareness is highest amongst the over 55's (76%)



(Base: All aware charities in Ireland are regulated)



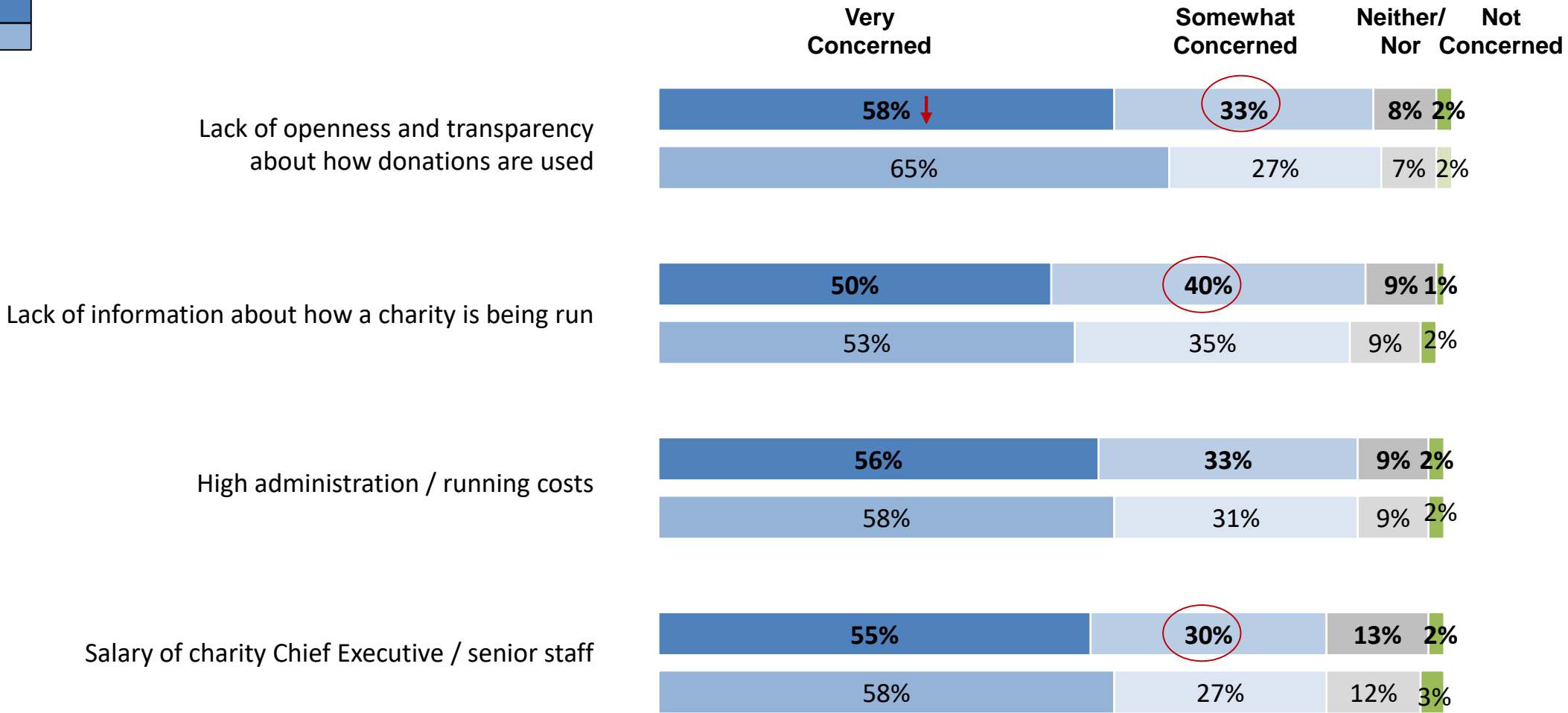
*New response option in 2022

Lack of transparency/information and high running costs/senior staff salaries continue to be of greatest concern to the public

(Base: All respondents)

2022

2020

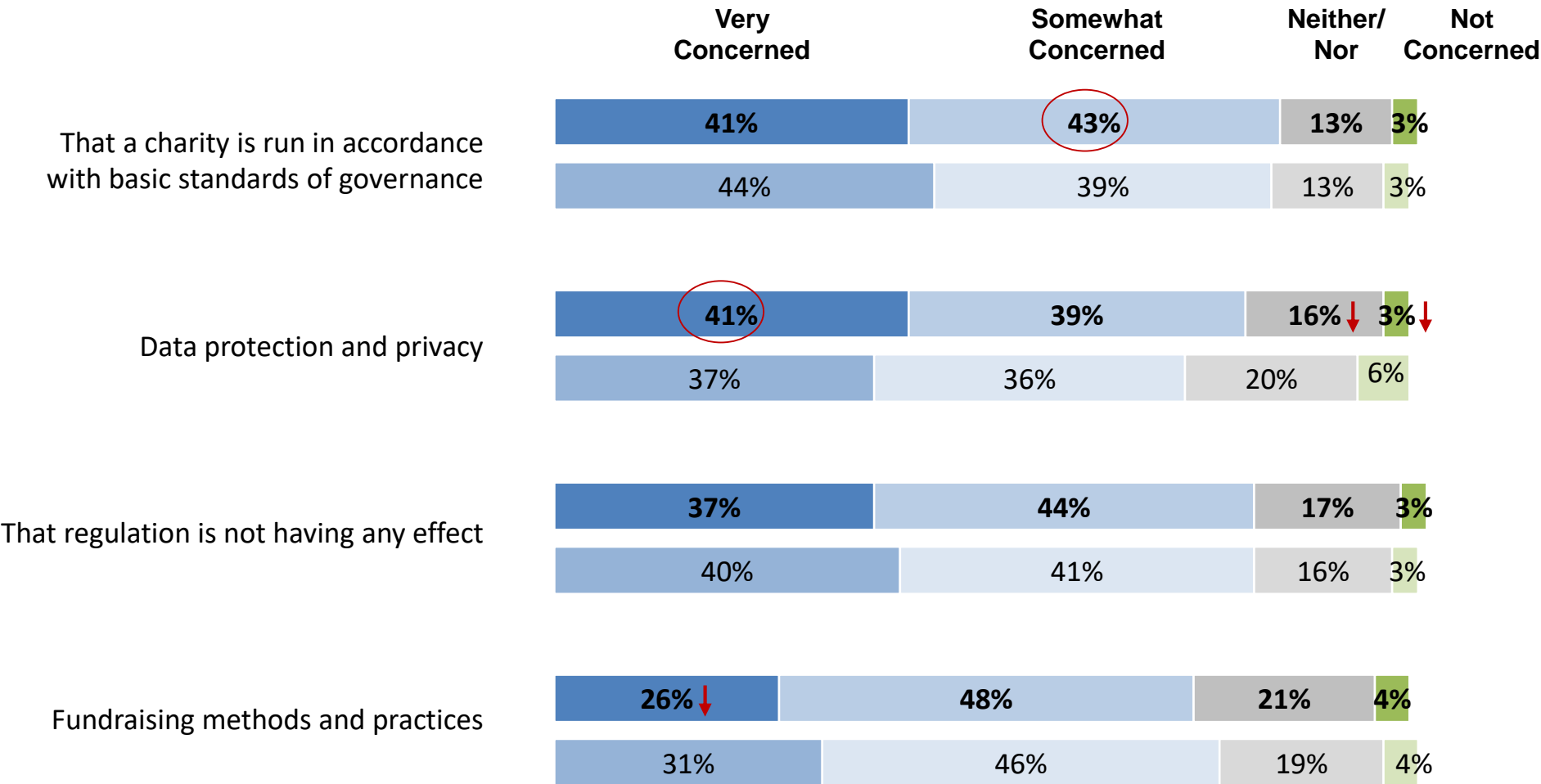


There is increased concern for data protection and while concern for fundraising methods/practices is lower in 2022, it remains a concern for three quarters of respondents

(Base: All respondents)

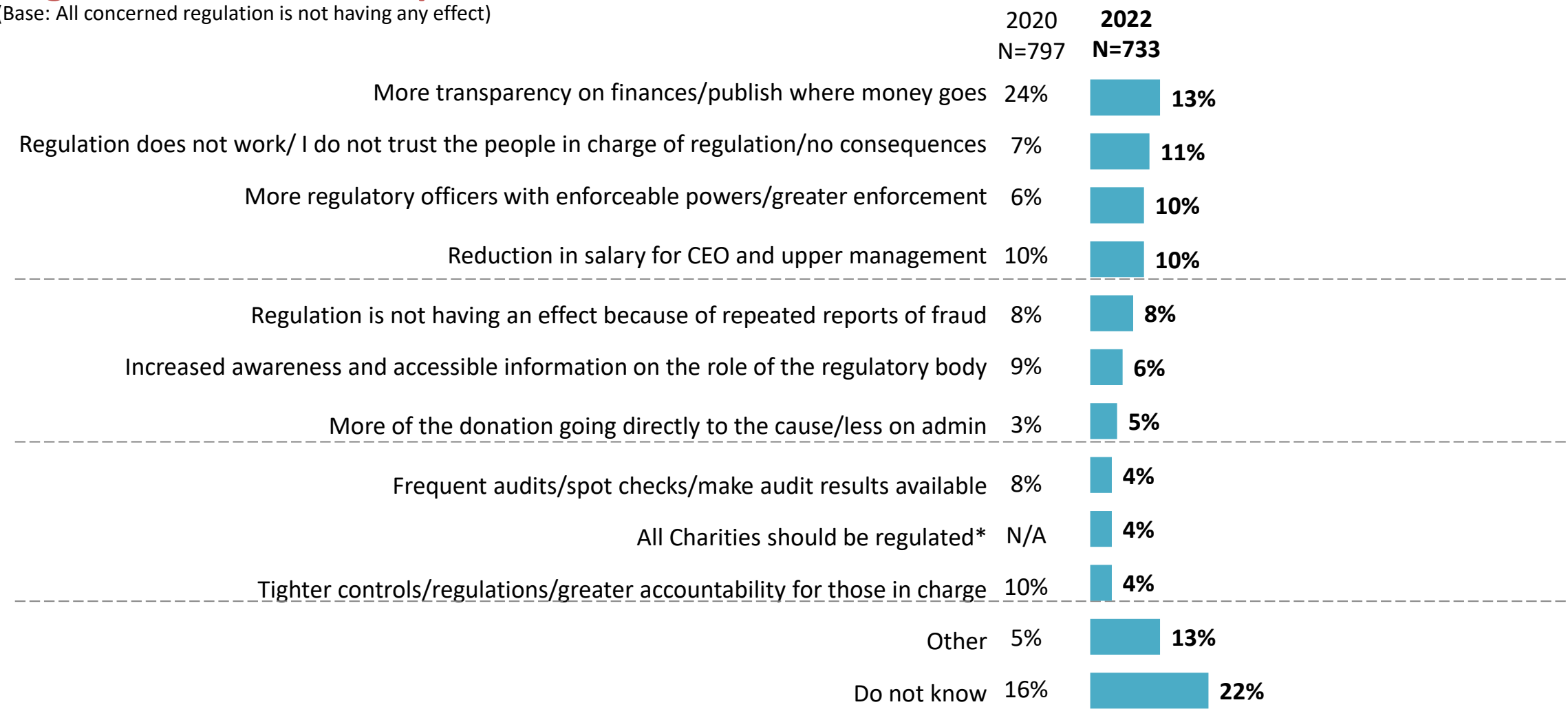


2022
2020



The top suggestion for improving regulation for those concerned about its effectiveness is greater transparency, though 1 in 5 are unsure if/how regulation could be improved

(Base: All concerned regulation is not having any effect)

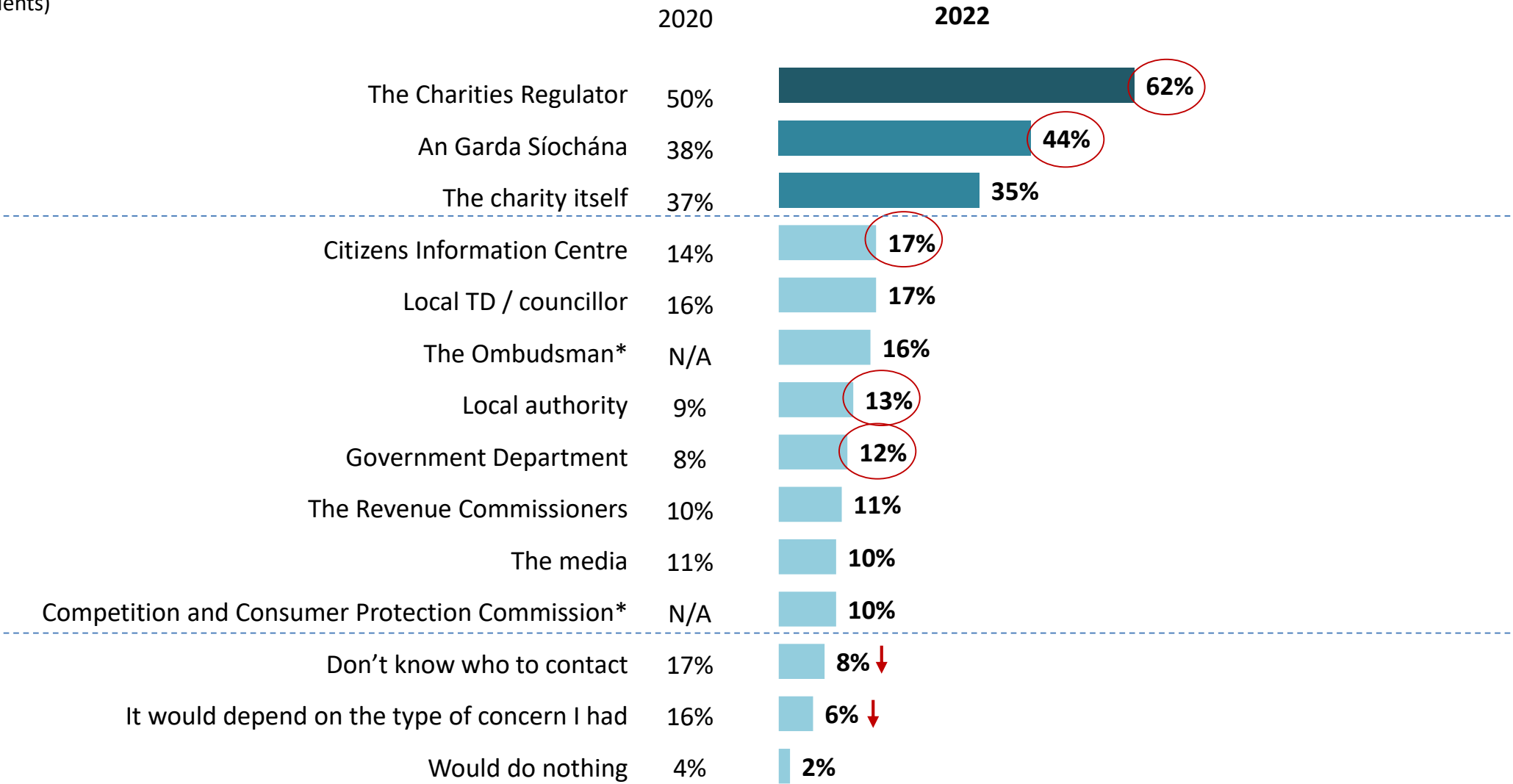


*Responses 3% or lower in 2022 not shown

*New response in 2022

There is increased mentions of contacting someone in the case of a charity concern, with the Charities Regulator remaining the first port of call

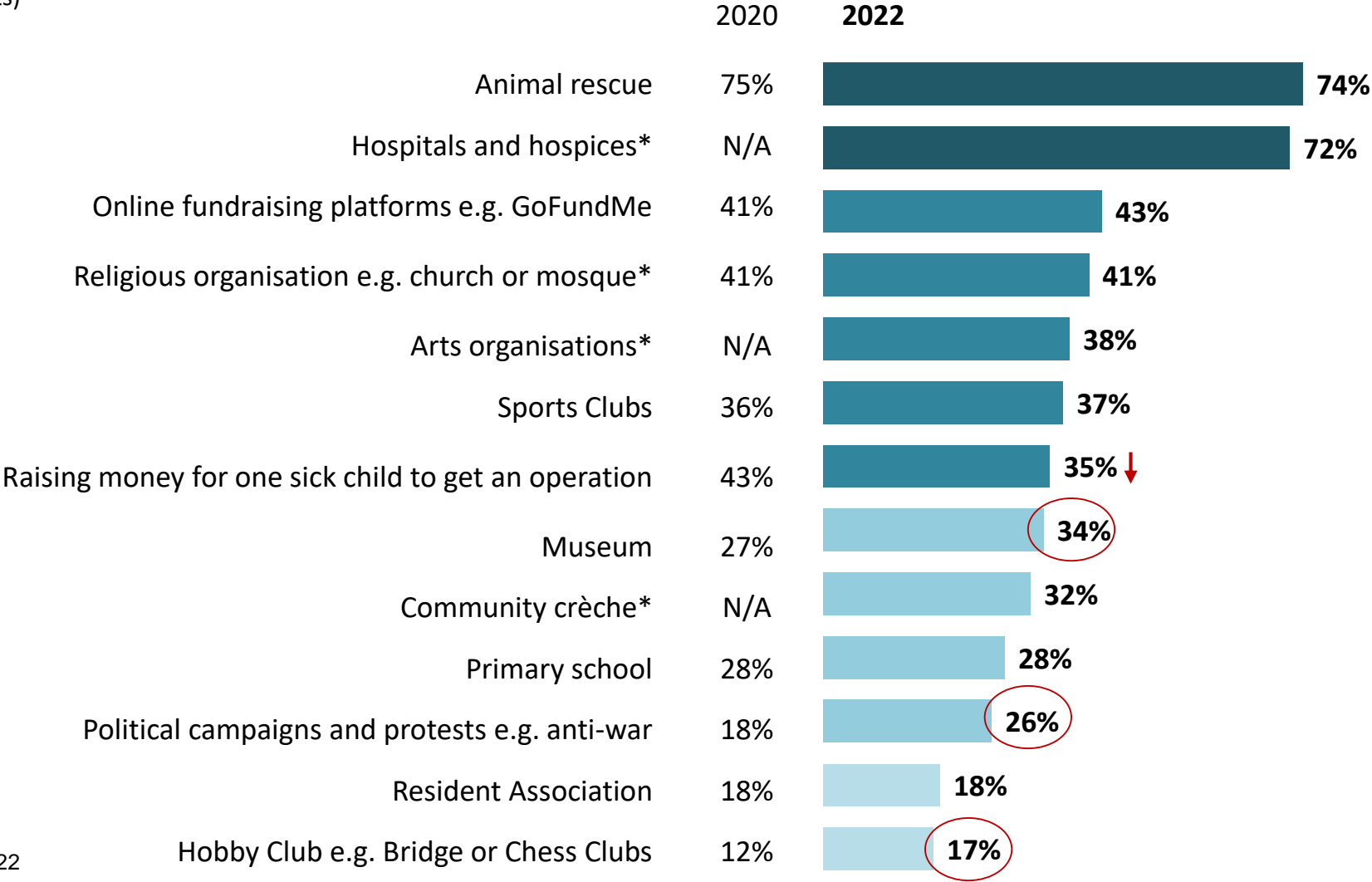
(Base: All respondents)



*New response option in 2022

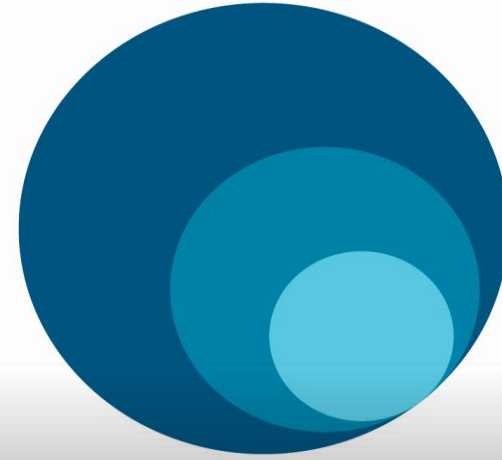
Public understanding of what is considered to be a charity shows scope for improvement with many mistakenly classifying online fundraising platforms and hobby clubs as charitable activities regulated by charity law

(Base: All respondents)



* New/changed in 2022





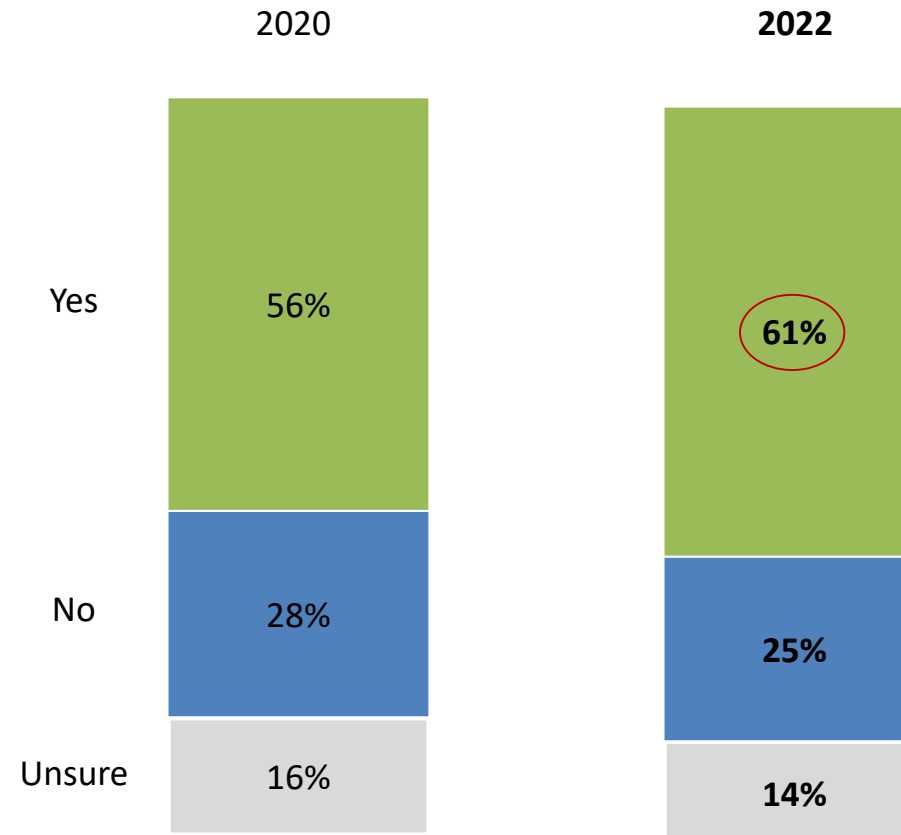
**An Rialálaí
Carthanas**

**Charities
Regulator**

Awareness of and Opinions on the Charities Regulator

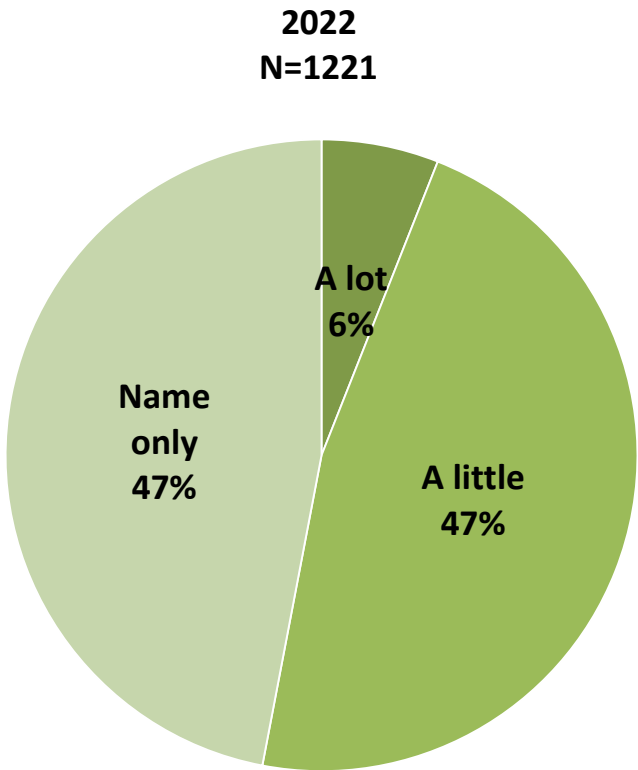
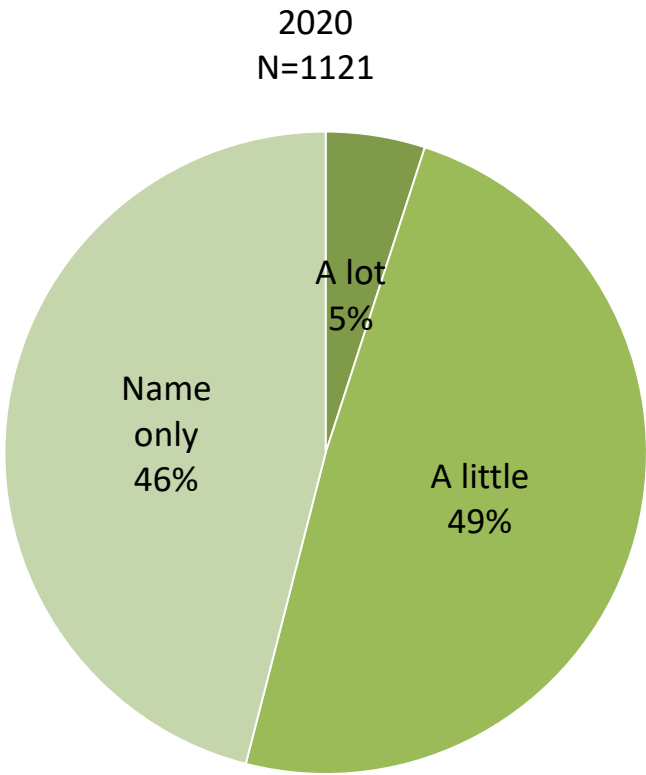
Awareness of the Charities Regulator increased considerably in 2022

(Base: All respondents)



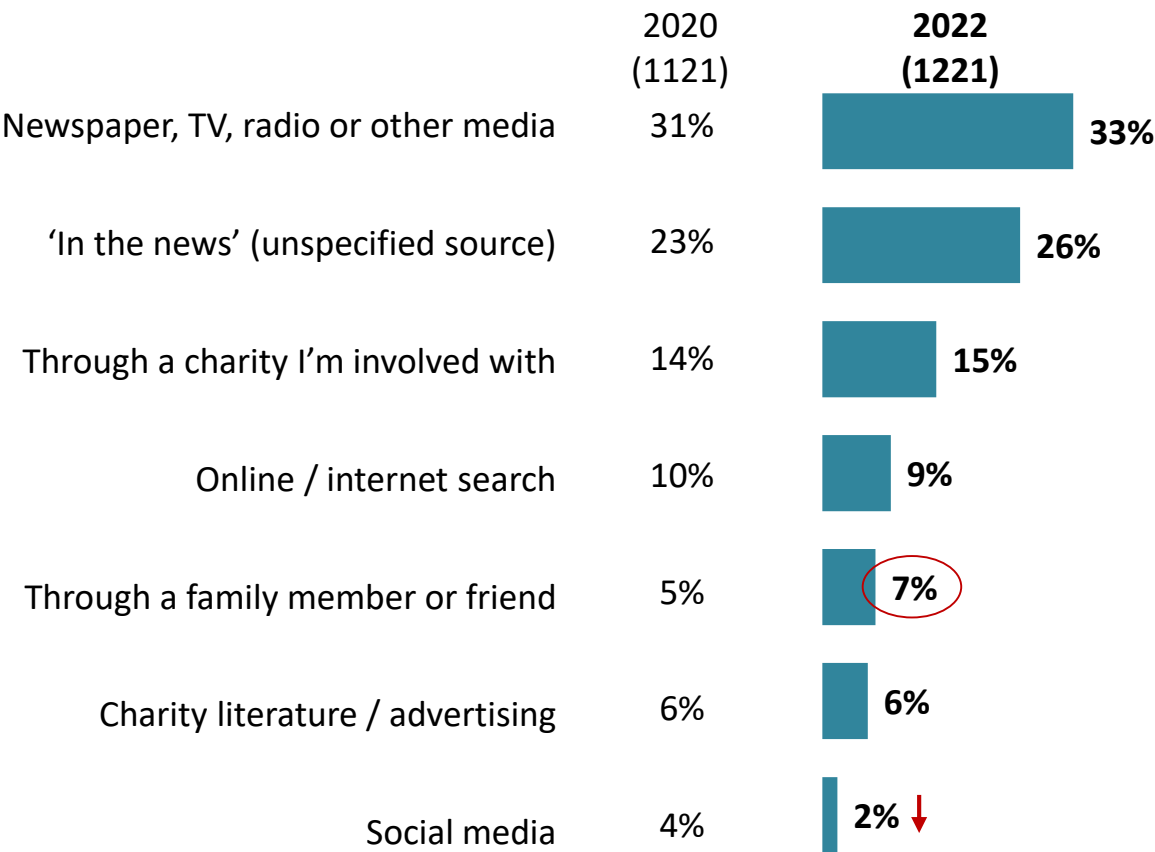
But there are no significant changes to the levels of familiarity with the Charities Regulator

(Base: All aware of the Charity Regulator)



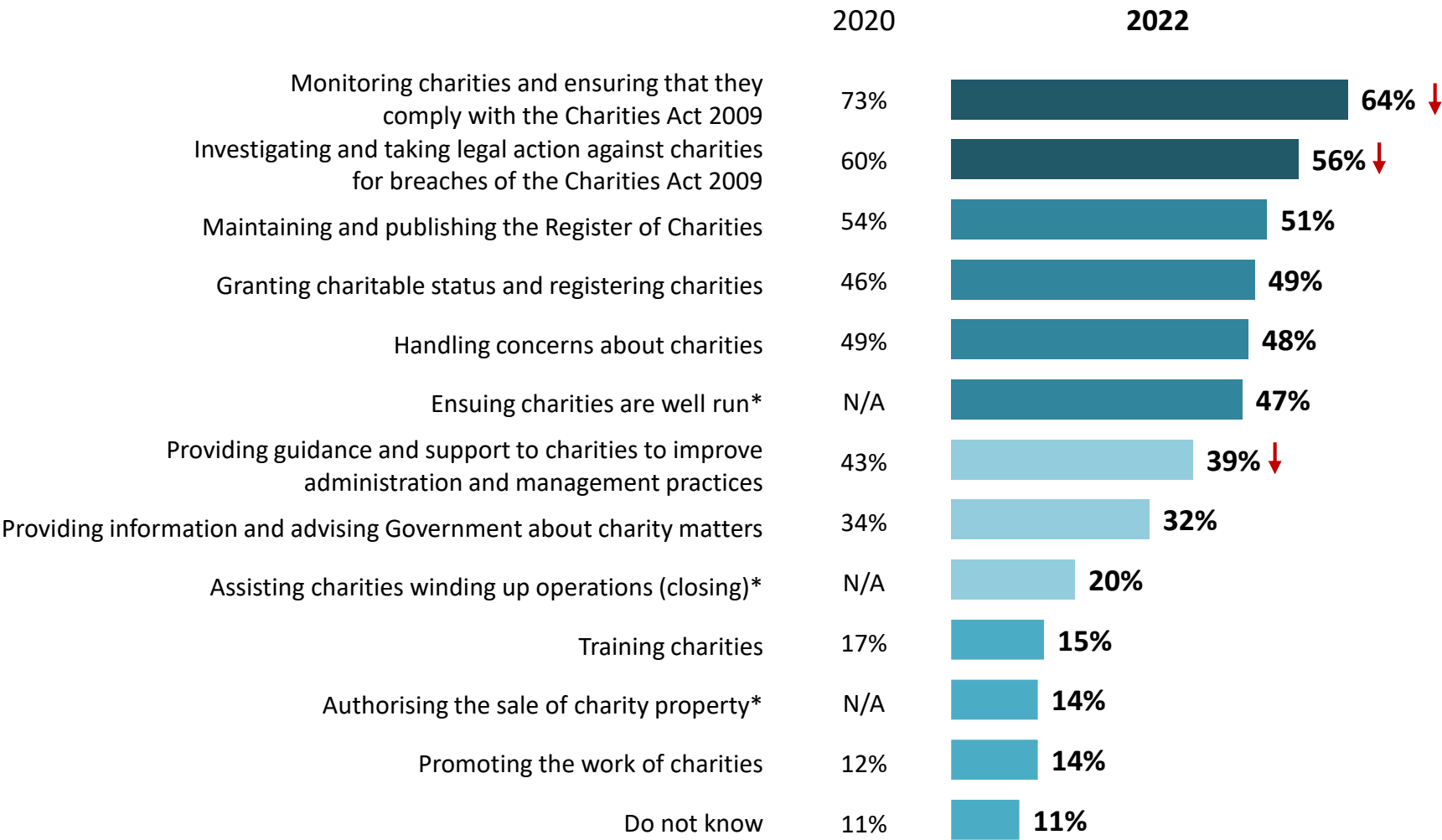
There are no significant changes in terms of the main sources of awareness of the Charities Regulator, which is lead by traditional media

(Base: All heard of Charities Regulator)



There is widespread understanding of the role of the Regulator which centres on monitoring and compliance

(Base: All respondents)

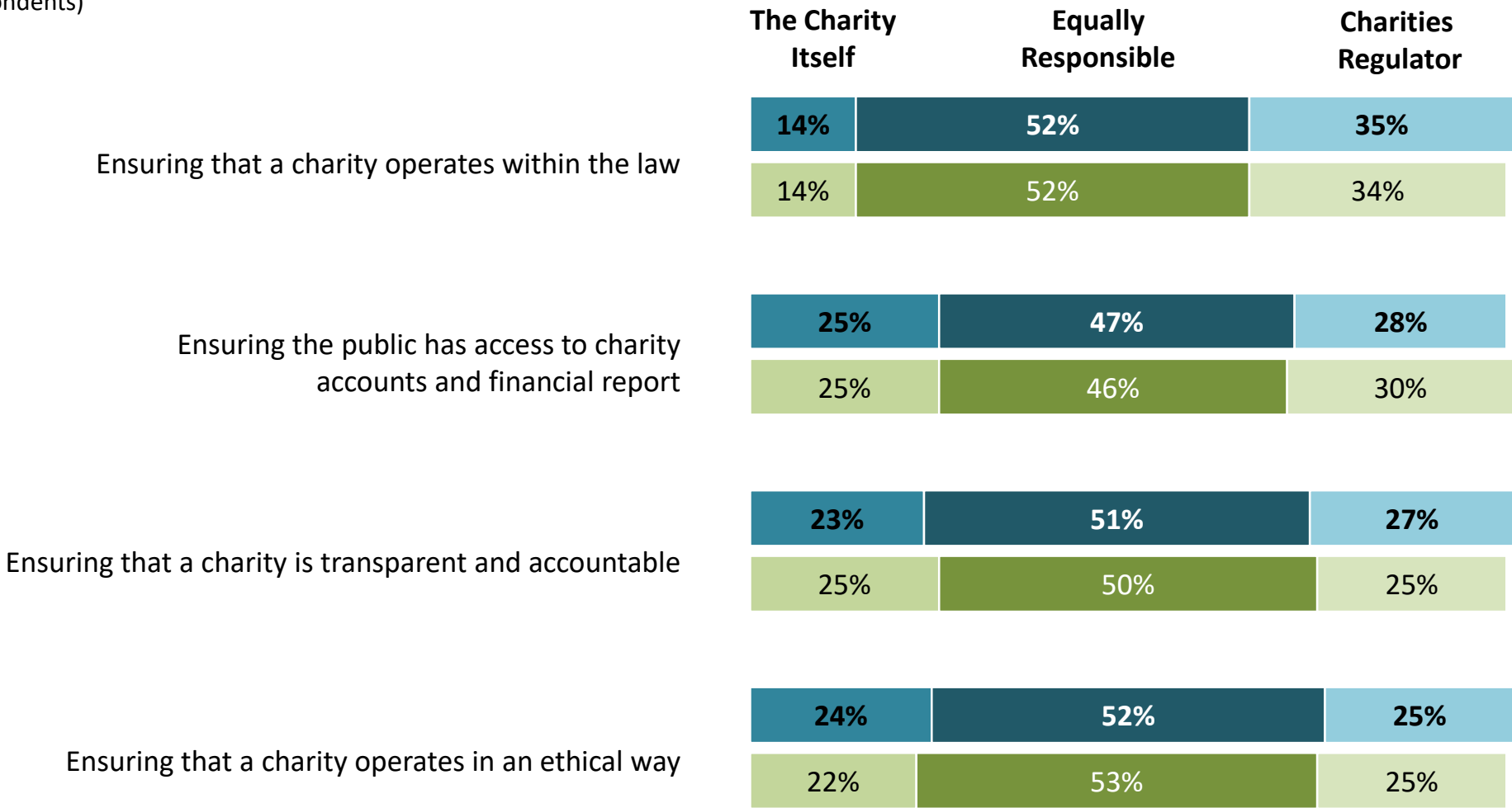


* New response option in 2022

Roughly half of adults believe in shared responsibility between the charity and the Regulator for most of the aspects evaluated ...

(Base: All respondents)

2022
2020

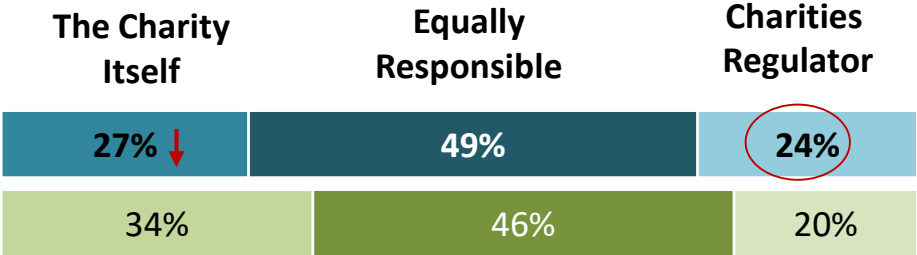


But 1 in 4 believe charities themselves have a role to play in increasing transparency and improving public trust and confidence

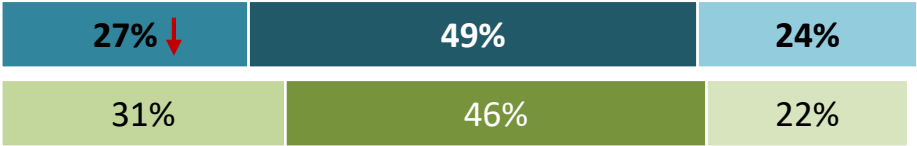
(Base: All respondents)

2022
2020

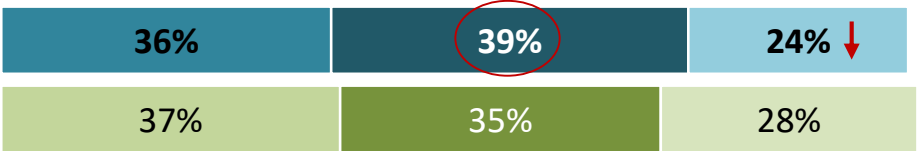
Ensuring that the public has access to information about how a charity is providing a benefit to the public



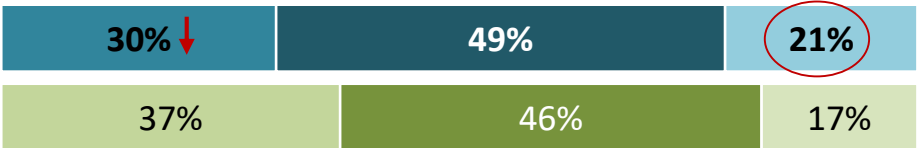
Improving public trust in the charity sector



Publishing a list of the current charity trustees

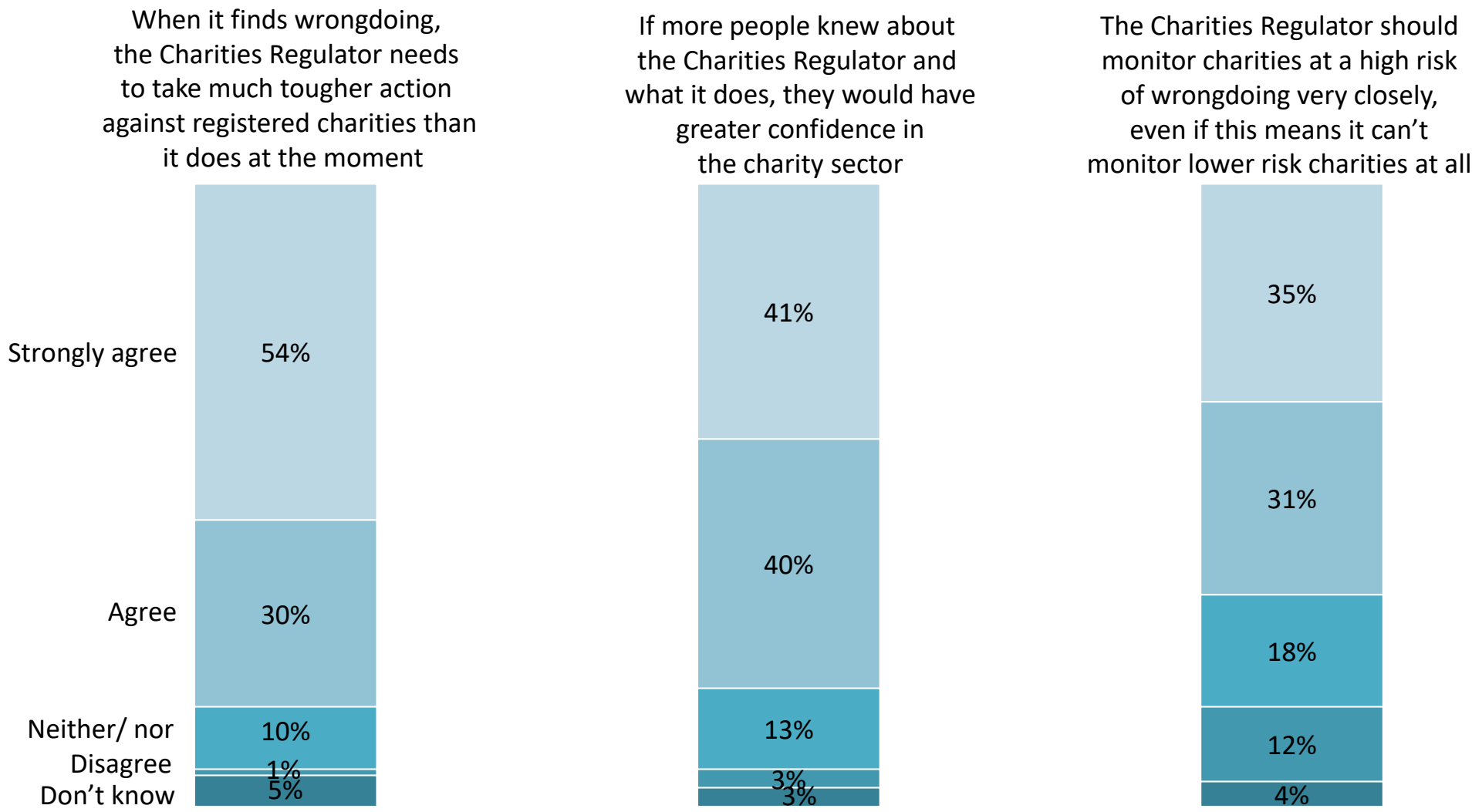


Ensuring that a charity is well run



There is considerable support for tougher action from the Regulator, raising awareness of its role and the prioritisation of charity monitoring

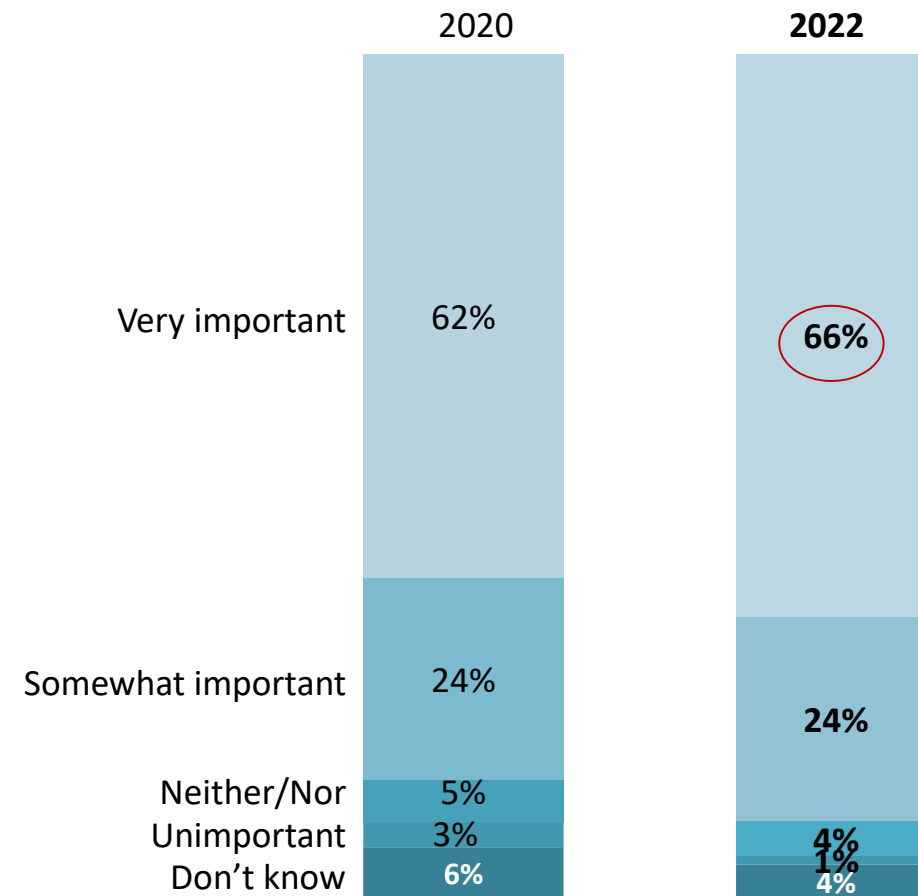
(Base: All respondents)



*New Question in 2022

The role of the Charities Regulator has become increasingly important, up from 86% to 90% echoing the increase in awareness (+5% pts)

(Base: All respondents)

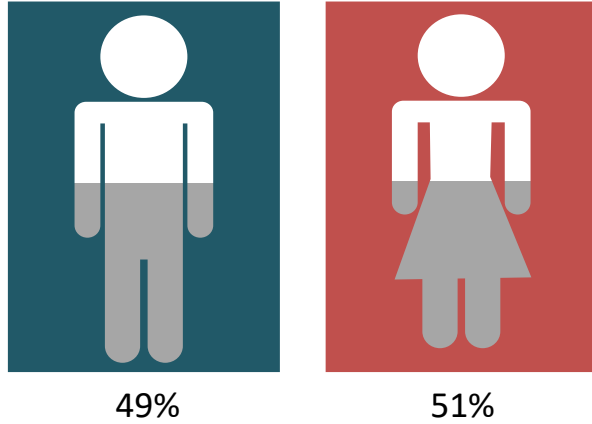




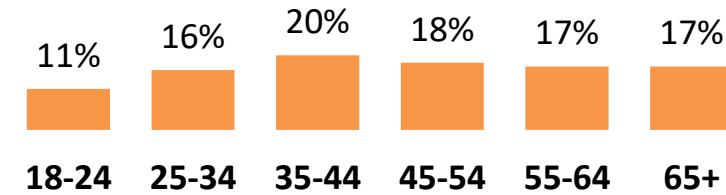
Sample Profile I – Key Demographics

(Base: All respondents)

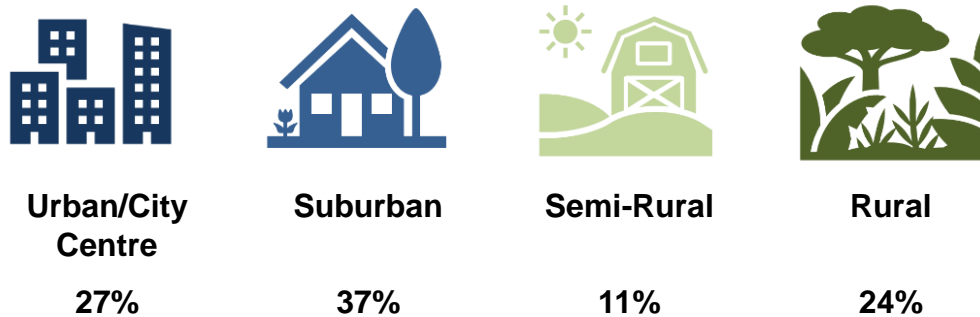
Gender



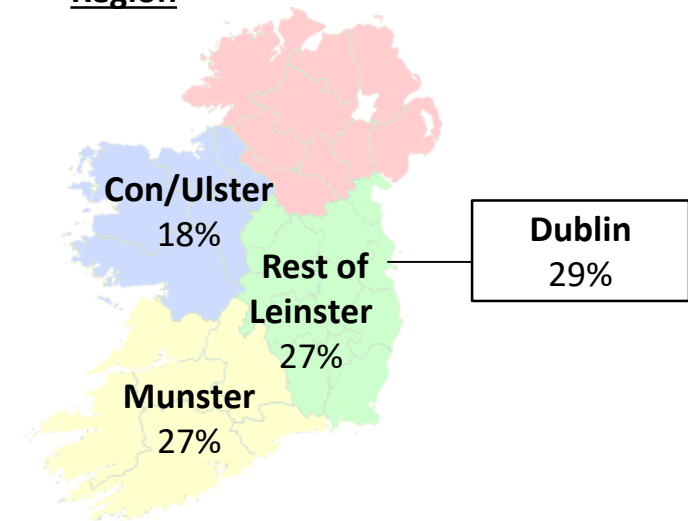
Age



Area



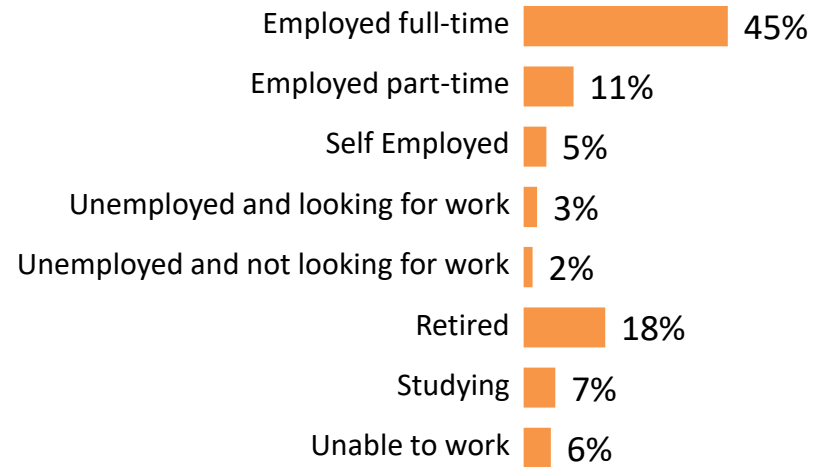
Region



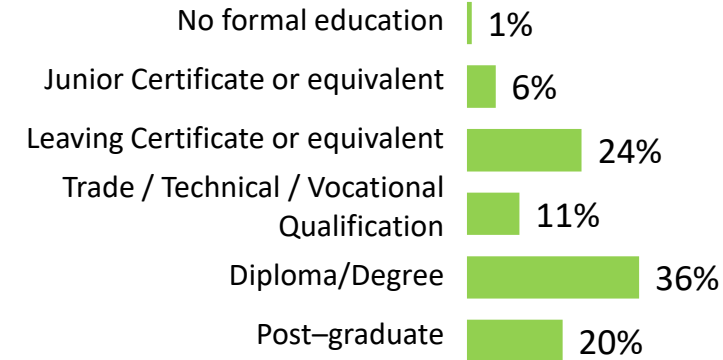
Sample Profile II – Education & Employment

(Base: All respondents)

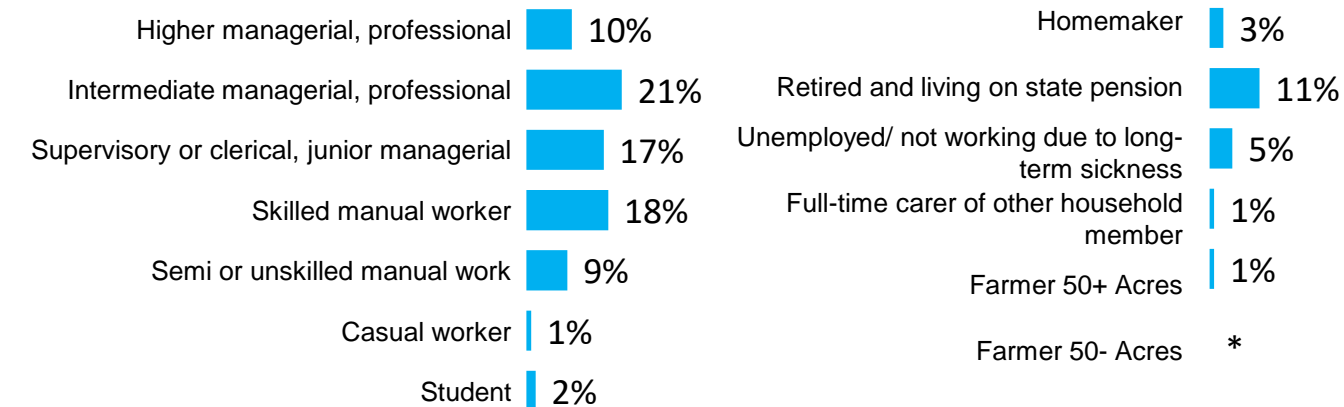
Employment status



Education



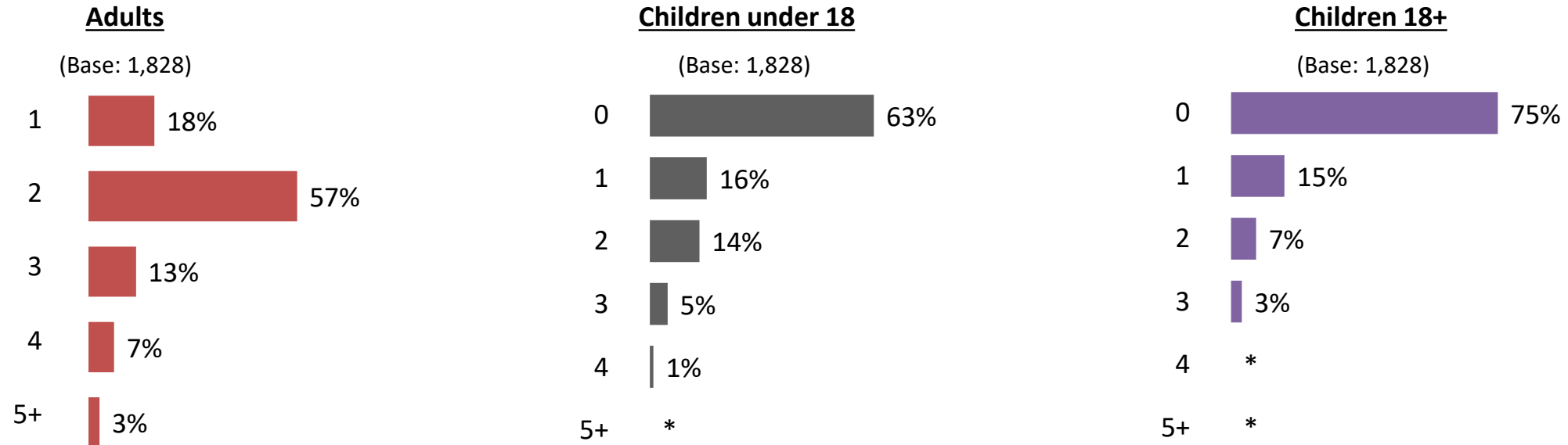
Occupational group of chief earner



Social category



Sample Profile III – Household Composition





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