

**An Rialálaí  
Carthanas**

**Charities  
Regulator**

**The Charities Regulatory Authority  
Irish Public Survey**

**An Amárach Report**

**amárach**   
**research**

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# 1 Introduction & Background

## 1.1 Introduction

Amárach Research ([www.amarach.com](http://www.amarach.com)) was commissioned by the Charities Regulator in late 2020 to undertake market research among two of its key stakeholder groups:

- The charitable organisations who are regulated by the Charities Regulator
- The general public

Working with the Charities Regulator we designed and implemented two distinct research programmes. Both research programmes were run simultaneously. Data collection was completed between December 2020 and January 2021.

It is important to highlight the context of the research programme. The COVID-19 pandemic has had a huge impact on Irish society throughout 2020 and continuing into 2021. It has created upheaval and worse across all aspects of Irish society. It has had a particular impact on the charity sector, increasing demand for services, while at the same time making those services far more difficult to deliver. The data collection for the research took place during one of the worst waves of the pandemic – when case numbers and death rates rose to their highest levels.

The research programme has been designed to take account of the pandemic and its impact.

The outcome of each stakeholder group is reported separately. This report presents the outcomes of the research programme conducted among the general public.

## 1.2 Background

The Charities Regulator was established on 16 October 2014 and is responsible for regulating the charities sector. Charities form part of the wider not-for-profit sector therefore not all not-for-profit organisations are charities. Whether or not an organisation is a charity depends on whether it meets certain criteria set out in the Charities Act 2009, often referred to as ‘the charity test’. To be a registered charity in Ireland, an organisation must –

- operate in the Republic of Ireland,
- exist for a charitable purpose(s),
- promote a charitable purpose(s) only,
- carry out all its activities to further the charitable purpose(s),
- exist to benefit the public in Ireland or elsewhere through advancing its charitable purpose,
- not be an ‘excluded body’ e.g. sports organisation, political party.

The charity sector plays a pivotal role in Irish society. It plays this role in many different ways, including:

- As an enabler of charitable purposes which deliver real benefits across Irish society and abroad;
- As one of the largest employment categories in the State – second only to tourism<sup>1</sup>;
- As a channel for societal engagement for those who volunteer and work in the charitable sector;
- As a means of effecting change – through education, advocacy and action;
- As a means of delivering public services, where charities are paid by the State to undertake particular roles, responsibilities and functions. Examples include social housing and health and social care services.

The charity sector has developed far beyond its original role of providing alms for the poor and the number of registered charities continues to increase year on year. At the end of February 2021, there were 11,407 charities on the Register of Charities ranging from very small local volunteer only charities to large national or international organisations employing thousands of people. Its diversity encompasses a range of specialist activities and extends into most aspects of life in Ireland today. Many charities have moved beyond volunteering to the provision of services that require highly trained and specialist staff.

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<sup>1</sup> The Not for Profit Sector including charities, is one of the largest employers in the Irish economy: <https://www.benefacts.ie/insights/reports/2020/>

A key aspect of the sector is that all registered charities regardless of their size, charitable purpose or legal form are overseen by charity trustees. Charity trustees are volunteers who donate their time to oversee the management and administration of a charity. In agreeing to take on this important role, charity trustees accept legal responsibility for the running of the charity. At the end of February 2021, there were 74,650 charity trustees on the Register of Charities.

Charities have also expanded their sources of income. In addition to donations from the public there are numerous other potential income streams available to charities including income derived from providing services on behalf of the State through service agreements, commercial activity, grant aid from the State and wider philanthropic donation and engagement.

The public's attitudes to charities and charitable activities are complex:

- They often perceive them to be simpler and bigger organisations than many actually are;
- They often want them to do more with less;
- They demand higher standards in charity performance and delivery often without understanding the associated cost implications;
- They are impacted by media coverage of any scandals that involve charities.

The results of this survey will assist the Charities Regulator, charities, policy makers and other stakeholder in their work to increase levels of public trust and confidence in a sector that is vital to society at both a national and global level.

### 1.3 The Role of the Charity Regulator

The establishment of the Charities Regulator in 2014 was a key milestone for the sector. The organisation’s Mission, Vision and Values encapsulates its role:

Mission	To regulate the charity sector in the public interest so as to ensure compliance with the law and support best practice in the governance, management and administration of charities.
Vision	A vibrant trusted charity sector that is valued for the public benefit it provides.
Values	Independence; Fairness; Engagement; Transparency and Proportionality.

Source: [www.charitiesregulator.ie](http://www.charitiesregulator.ie)

Under the Charities Act 2009, the Charities Regulator’s functions are to:

- increase public trust and confidence in the management and administration of charitable trusts and charitable organisations;
- promote compliance by charity trustees with their duties in the control and management of charitable trusts and charitable organisations;
- promote the effective use of the property of charitable trusts or charitable organisations;
- ensure the accountability of charitable organisations to donors and beneficiaries of charitable gifts, and the public;
- promote understanding of the requirement that charitable purposes confer a public benefit;
- establish and maintain a register of charitable organisations;
- ensure and monitor compliance by charitable organisations with the Charities Act;
- carry out investigations in accordance with the Charities Act;
- encourage and facilitate the better administration and management of charitable organisations by the provision of information or advice, including in particular by way of issuing (or, as it considers appropriate, approving) guidelines, codes of conduct, and model constitutional documents;
- carry on such activities or publish such information (including statistical information) concerning charitable organisations and charitable trusts as it considers appropriate;
- provide information (including statistical information) or advice, or make proposals, to the Minister on matters relating to the functions of the Charities Regulator.

The launch of a new regulatory regime for the charity sector should not be seen in isolation. Society is demanding strengthened regulatory regimes in every walk of life: in business, in healthcare, in government and in the private sector.

Strengthening public trust and confidence in charities is a key strategic priority of the Charities Regulator and it works with a number of stakeholders to support the achievement of objectives related to this priority. The Charities Regulator's stakeholders include the public, charity trustees, beneficiaries, funders, donors, staff and volunteers, Government departments, Revenue Commissioners, other State agencies, Charity Representative Groups, media and professional bodies.

#### 1.4 Why Research the Public?

Understanding the attitude of the public to the charity sector is fundamental to the survival and success of the sector in terms of strengthening public trust and confidence. Perhaps more than most other organisational or business sectors the public has a view on charities. They believe that they know and understand them. This derives from the key role that the public plays in the charity sector in enabling and supporting individual organisations, providing them with the imprimatur to continue with their work.

While the charity sector is changing rapidly for a variety of reasons, there is an absolute need to gain an overview of the public perception of the sector. While some organisations such as The Charities Institute of Ireland or The Wheel have done this (and Amárach has carried out much of the research programme), having an overview of the sector including public perceptions and expectations is important for the Charities Regulator in terms of informing the focus of its work. It is critical to carrying out its regulatory functions that the Charities Regulator understands how the public perceives the sector and its regulation and the basis for those perceptions.

Carrying out research at regular intervals and through the use of smaller one-off surveys is one way to gain this insight. The benefits of such insight will be to test the effectiveness and understanding of the drivers for change in the sector and the role of the Charities Regulator. This research can also inform the Charities Regulator and its stakeholders as to what the public does not understand about the sector so that they can create or contribute to education and awareness campaigns to address specific knowledge deficits.

## **2 About Amárach Research**

Amárach Research is an Irish market research and data specialist consultant. Amárach carries out social, behavioural and policy related research. Established since 1989, Amárach specialises in providing high-quality full service and societal research, consulting and analysis.

Amárach was the first Irish research organisation to receive ISO accreditation, the international quality standard for market, opinion and social research ISO 20252. Quality standards reflect those set out in the ISO 9001 and ISO 20252 protocols.

### 3 Executive Summary

There have been a variety of different research projects undertaken on Irish attitudes to the charity sector over the past decade. They include work undertaken by the Charities Regulator, the Charities Institute Ireland, Philanthropy Ireland and The Wheel.

In March 2020 Philanthropy Ireland and The Charities Aid Foundation (CAF) published CAF Ireland Giving 2020 – An Overview of Charitable Giving in Ireland<sup>2</sup> This report was based on a nationally representative survey of 1,000 adults undertaken in September 2019.

The CAF research provided some key findings for individual giving in Ireland. These results set the scene usefully for this new study for the Charities Regulator, undertaken by Amárach Research ([www.amarach.com](http://www.amarach.com)).

Among the highlights of the CAF report were:

- In the year prior to the data collection, nine in ten (90%) people in Ireland participated in at least one charitable or social action and more than seven in ten (72%) had done so in the previous four weeks.
- Nearly a quarter of people (23%) had volunteered in the last year.
- More than half (54%) of people agreed (either strongly or tend to) that most charities are trustworthy.

Almost three quarters (75%) of people thought that charities have had a positive impact on their own local community (73%) and on the Republic of Ireland as a whole (75%). Just under seven in ten (69%) think that charities have had a positive impact internationally.

Since the CAF report, Charities Institute Ireland commissioned Amárach Research<sup>3</sup> to check in with the Irish public in July 2020, mid COVID-19 pandemic.

Aligned with the CAF 2019 findings, 72% said they had engaged with charities during the pandemic, primarily through digital means. The majority were unconcerned about donating via online and mobile platforms. There was also evidence that the pandemic had either no impact or a positive impact in that giving had increased since the March 2020 lockdown.

Now, in 2021 this report provides the findings of a new survey of the general public in Ireland which was carried out on behalf of the Charities Regulator as an online survey between 18<sup>th</sup> December 2020 and 11<sup>th</sup> January 2021.

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<sup>2</sup> <https://www.cafonline.org/docs/default-source/about-us-publications/caf-ireland-giving-report-2020.pdf>

<sup>3</sup> Amárach Research Omnibus for Charities Institute Ireland, July 2020

### **Survey Format:**

A self-completion questionnaire of 33 questions was designed in collaboration with the Charities Regulator. The survey was placed with the Amárach Research National Panel and an external panel that has been developed by our partners, DataXcel.

Quotas were set on gender, age, social category and region to achieve a sample of n = 2001 adults, aligned with the national population.

### **Key Findings:**

#### **The role of charities and public understanding of the sector**

The importance of charities and the work they do in Irish society is clear. 86% of respondents believed charities and the work they do to be either important, 23%, or very important, 63%. Further, 78% rated the impact of charities in Irish society as either significant, 32%, or very significant 46%.

This sentiment is echoed in other studies, including the Amárach 2019 research for Charities Institute Ireland<sup>4</sup> where 70% believed the role the charities sector plays in Irish society to be important or very important and 91% said the impact on Irish society would be negative or very negative if Irish charities ceased to exist as a consequence of the absence of volunteers or fundraising.

This new survey asked whether respondents thought there is a difference between a good cause and a registered charity. Over one quarter of the sample did not know or said there is no difference, a concerning statistic given the importance of understanding there is a difference when it comes to engagement and donating.

Those responding that there is a difference between a good cause and a registered charity were asked to state their understanding of the difference, in their own words.

Of the 72% of respondents that answered this question, over half, 51%, described the difference as *'A registered charity is a regulated, legal entity, a good cause is not'*. A variety of other responses were provided, indicating work is required to ensure the public are clear on these differences and the potential consequence of misunderstandings.

#### **Charity regulation**

Eight out of ten, 82%, believe that charities are regulated in Ireland. Those who had made a donation to a charity in the last 12 months were more likely to believe charities are regulated than those who had not made a donation recently.

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<sup>4</sup> Amárach Research for Charities Institute Ireland, May 2019: *How different generations will sustain the charity sector into the future.*

When provided with list of activities and asked to indicate which was a charitable activity regulated by charity law, other than animal rescue, there was a degree of confusion. Although results indicated some types of activities were more widely thought to be regulated than others - for example raising money for a sick child, online platforms like GoFundMe, churches and sports clubs - over one quarter of the sample were unsure for each activity. Again, there appears to be scope to dispel these misconceptions.

Whilst 28% did not know which organisation was responsible for regulating charities, 57% of those who believe charities to be regulated in Ireland named the Charities Regulator as the relevant body from a list of seven potential organisations. In 2019 a public survey carried out on behalf of the Regulator asked a similar question and established 53% of respondents recognised the Charities Regulator, which was an increase on 48% recorded through the same question in 2018. While not directly asked the same question, the 57% result in this current study indicates that awareness of the Regulator is steadily increasing.<sup>5</sup>

Two thirds of respondents were aware that only registered charities are regulated.

Nine out of ten respondents had made a donation to charity in the past 12 months. 82% of those who had donated to a charity had donated money, 49% goods and 21% time.

The most popular ways of donating money to a charity were through:

1. buying a raffle or lottery ticket
2. sponsoring someone
3. through a charity website using a credit/debit card

The importance of local charities is clear. 53% said their most frequent donations are to local charities. Just over one third, 35%, said their most frequent donations are to national charities.

Almost six in ten, 58%, of those who had donated had given clothing or other items using bags or stickers posted through their letterbox.

All respondents were asked whether they would check that the organisation referenced on charity bags and stickers posted through the door was a registered charity before donating. 43% did not check this.

Similarly, 30% said they do not check if a charity has a Registered Charity Number (RCN) before donating, and 12% admitted they did not know what an RCN was. Only one fifth,

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<sup>5</sup> Public Awareness Report January 2020, B&A: Q.1 Which if any of the following 'Regulators' are you aware of doing the work of regulating and looking after Irish consumer interests?

19% of respondents said they always checked whether a charity had an RCN before donating, and 39% sometimes checked.

The importance of a charity's website was highlighted when those who do check out a charity before donating were asked how they did this. 49% looked at the charity's website, rising to 60% among under 35s. Those who had an awareness of regulation, 51%, were more likely to check a charity's website than those without an awareness of regulation, 40%.

Nevertheless, nearly one quarter, 23%, said they do not check out a charity before supporting it. There is a definite need to improve public awareness of regulation, the RCN and the need for members of the public to protect themselves and society more widely by making informed donations through checking the Register of Charities.

### **Types of charities**

The top five types of charities respondents said that they donated to are:

1. Homeless or refuge services, 56%
2. Medical or health related, 46%
3. Local community organisations, 43%
4. Children or youth, 37%
5. Animal rescue or welfare, 36%

The three top reasons for selecting a charity to support are to help people worse off, 48%, belief in the cause, 41%, and a desire to contribute to worthwhile causes, 37%.

29% of respondents said they enjoyed giving, and feeling they were making a difference and 25% focused on supporting emergency situations. 23% cited giving back to a charity which has directly helped them or someone they know, rising to 48% among those who had been a service user/recipient.

88% of respondents said they have not changed the type of charity they support as a result of COVID-19.

Where changes had been made by 12% of the sample, respondents had adjusted their focus towards donating to help those most in need and affected by the pandemic, 29%, and more local charities, 19%. 14% admitted to being more conscious now of vulnerable groups in need.

The importance of charities in society, and the inclination to focus on charities closest to home were emphasised in the Amárach Pandemic Survey July 2020 for Charities Institute Ireland<sup>6</sup> where 67% agreed that Irish charities have been important or very important in

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<sup>6</sup> Amárach Research Omnibus for Charities Institute Ireland, July 2020

supporting our communities during the COVID-19 pandemic. That survey also found Irish charities were significantly more ‘popular’ during the pandemic than overseas charities, with 79% preferring to donate to a charity focused on services in Ireland.

### **Trust and confidence**

Just over one third, 36%, of respondents in this survey rated the trust and confidence they have in charities generally as 8, 9 or 10 out of 10.

Respondents demonstrated the greatest degree of trust and confidence in charities they personally support and in small local charities. International charities were the least likely to receive ratings of 8, 9 or 10.

Over the past two years 16% reported that their trust and confidence in charities had increased. Half said it had not changed, and one third said it had decreased. Those most likely to report an increase were those with some engagement with charities.

Concerns around financial decisions and administration were the top reasons for those who responded that their trust and confidence in charities had decreased. Negative media coverage was also influential among 18%. A second tier of questioning of those respondents revealed concerns around media reports of fraud and not enough money going to the cause.

Consequently, knowing what percentage of donations actually goes to the cause would greatly increase confidence for two thirds of respondents and somewhat increase confidence for over one fifth. Overall, 9 out of 10 respondents would feel increased confidence if this type of transparency was available.

91% rated trust and confidence in a charity when deciding whether to donate to them as ‘Important’ – 65% said ‘very important’ and 26% ‘somewhat important’. Over 50% of those surveyed said they were ‘very concerned’ around a lack of openness and transparency about how donations are used, Chief Executive and senior staff salaries, high administration and running costs and lack of information about how a charity is run.

Openness and transparency was a concern for over 9 out of 10 respondents overall, with 65% very concerned and 27% somewhat concerned.

### **Addressing concerns and improving public perceptions**

Over 8 out of 10 were concerned that the regulation is not having any effect, resulting in one quarter calling for greater transparency on finances.

The survey asked respondents who they would contact if they had a concern about a registered charity. Overall, the Charities Regulator was most widely mentioned, either as the first or subsequent mention among 50% of respondents. Nevertheless, 50% of the

sample did not reference the Charities Regulator, and the range of other organisations cited in response to this question indicated a general lack of awareness and some confusion.

When asked directly 'Have you heard of the Charities Regulator?' 56% of respondents said they had, 16% were unsure and 28% said no.

This clearly demonstrates a need to raise awareness with the public about the presence of the Regulator, how to raise a concern and the types of concerns falling under the remit of the Regulator.

Levels of awareness increased by age group, to 72% awareness among those aged 55+. The B&A Public Awareness Report January 2020 also found awareness of the Charities Regulator was driven by the over 55s in particular, with over 7 in 10 of those aged 55+ mentioning the Charities Regulator in answer to the question "Which if any of the following 'Regulators' are you aware of doing the work of regulating and looking after Irish consumer interests?"

When given three options in this survey to describe how much they knew about the Charities Regulator only 5% claimed they knew 'a lot'. 49% described what they knew as 'a little' and 46% said 'just the name'.

The survey asked all respondents to review a list of activities and responsibilities and to indicate which they thought the Charities Regulator is responsible for. The top two answers related to the Charities Act.

- Nearly three quarters, 73%, selected 'Monitoring charities and ensuring they comply with the Charities Act 2009'.
- 60% selected 'Investigating and taking legal action against charities for breaches of the Charities Act 2009'.

When asked what the Charities Regulator should be responsible for, the top two answers remained the same.

Handling concerns about charities was cited as something the Charities Regulator should be responsible for by 60%. This had been mentioned by 49% within the previous question, what respondents believed the Regulator is responsible for. A number of responsibility statements were provided, and the sample was asked to identify whether the Charities Regulator or the charity itself should be responsible. The option 'equally responsible' was also available. There was a tendency to use 'equally responsible' by around half the sample in the majority of cases, suggesting confusion around these lines of responsibility.

To further clarify the public perception of the role of the Charities Regulator, the survey asked respondents to rank five statements in order of importance to illustrate how the Charities Regulator should operate.

Of close to equal importance were:

- That it maintains and publishes an online Register of Charities operating in Ireland which can be searched for free
- That the Register of Charities includes information on the finances and activities of each registered charity and a list of current charity trustees

All respondents were asked to rate the importance of the role of the Charities Regulator as an independent statutory body responsible for registering and regulating charities operating in Ireland. 62% gave the rating very important. A further 24% said somewhat important, resulting in over 8 out of 10 using one of the two 'important' ratings.

### **Next steps**

The results of this survey demonstrate that there is further scope for the Charities Regulator, individual charities and representative bodies to educate the public about the sector, how it is regulated and what steps individuals can take to increase their knowledge about registered charities.

Consideration may be given to further highlighting best practice for the general public in respect of engaging with charities, making donations and raising concerns. In particular, there is scope for engaging further with the public to encourage donors to protect themselves by ensuring that they are informed about the organisations to which they wish to donate.

Work is also required to improve public perceptions of the charity sector and ensure fair and accurate media coverage. Charities themselves have perhaps the greatest opportunity to address these perceptions by ensuring that the public is informed about key matters such as the requirement for paid staff, the reality of competing with private sector organisations to attract and retain skilled and experienced staff, the significant impact that charities have on the lives of beneficiaries through the work that they do, and the link between a charity's activities and its costs and overall expenditure.

Crucially, the survey results highlight the desire on the part of the public for a greater level of transparency and accountability among charities regarding their finances and activities. The survey also confirms the central role that transparency plays when it comes to levels of public trust and confidence in individual charities and the sector more generally.

The response to the survey, show that the sector is highly valued by the Irish public. Engagement and support remain strong, despite the challenges of the COVID-19 pandemic. With continued support of the Charities Regulator the signs are there that public support will continue, and that increased transparency has the potential to delivery an increase in overall levels of public trust and confidence to the benefit of all.

## 4 Methodology and Sampling

### 4.1 Methodology

This research study sits within a wider project commissioned by the Charities Regulatory Authority (“Charities Regulator”) which includes two stakeholder groups:

- I. This survey of the Irish public
- II. A survey of Irish charities

This report provides the findings of the survey of the Irish public, which was carried out as an online survey between 18<sup>th</sup> December 2020 and 11<sup>th</sup> January 2021.

A self-completion questionnaire of 33 questions was designed in collaboration with the Charities Regulator. Questionnaire available within Appendix I.

Note: Data has been rounded to the nearest 1% within figures and tables.  
As a consequence, graphics may not always total 100% for single code questions.

### 4.2 Sampling:

Online research of the public always works on the basis of sourcing respondents from extensive panels. This overcomes any GDPR issues because potential respondents have opted into the research process.

The survey was placed with the Amárach Research National Panel and a panel that has been developed by DataXcel, our supplementary online data provider. More information can be found in Appendix II.

Quotas were set on gender, age, social category and region to achieve a sample aligned with the national population.

A nationally representative sample of n = 2001 adults was achieved

## 4.2 Sample Profile

The following Figures illustrate the demographic profile of the nationally representative sample of the Irish population, aged 16+:

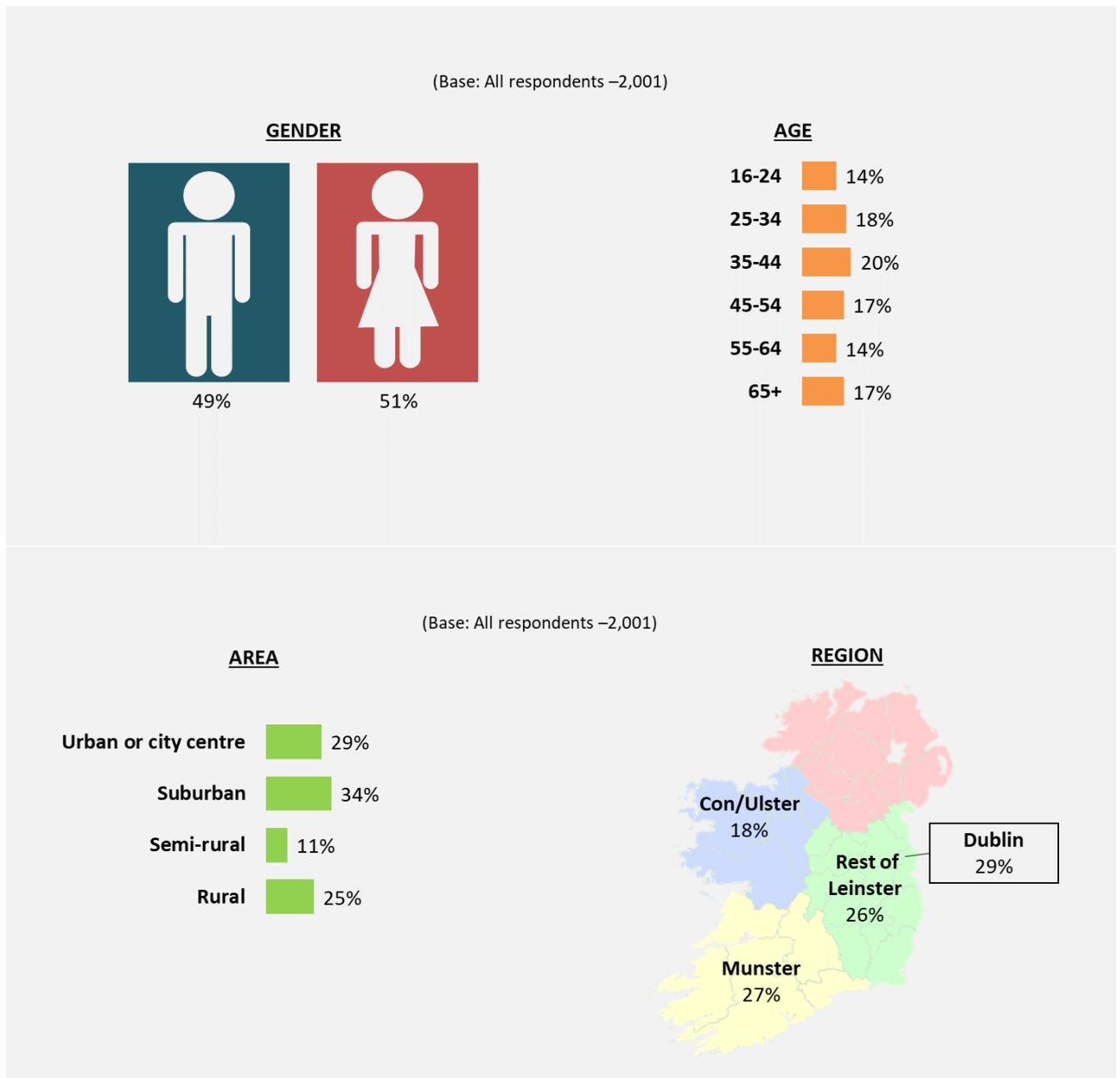


Figure 1- Sample Profile I

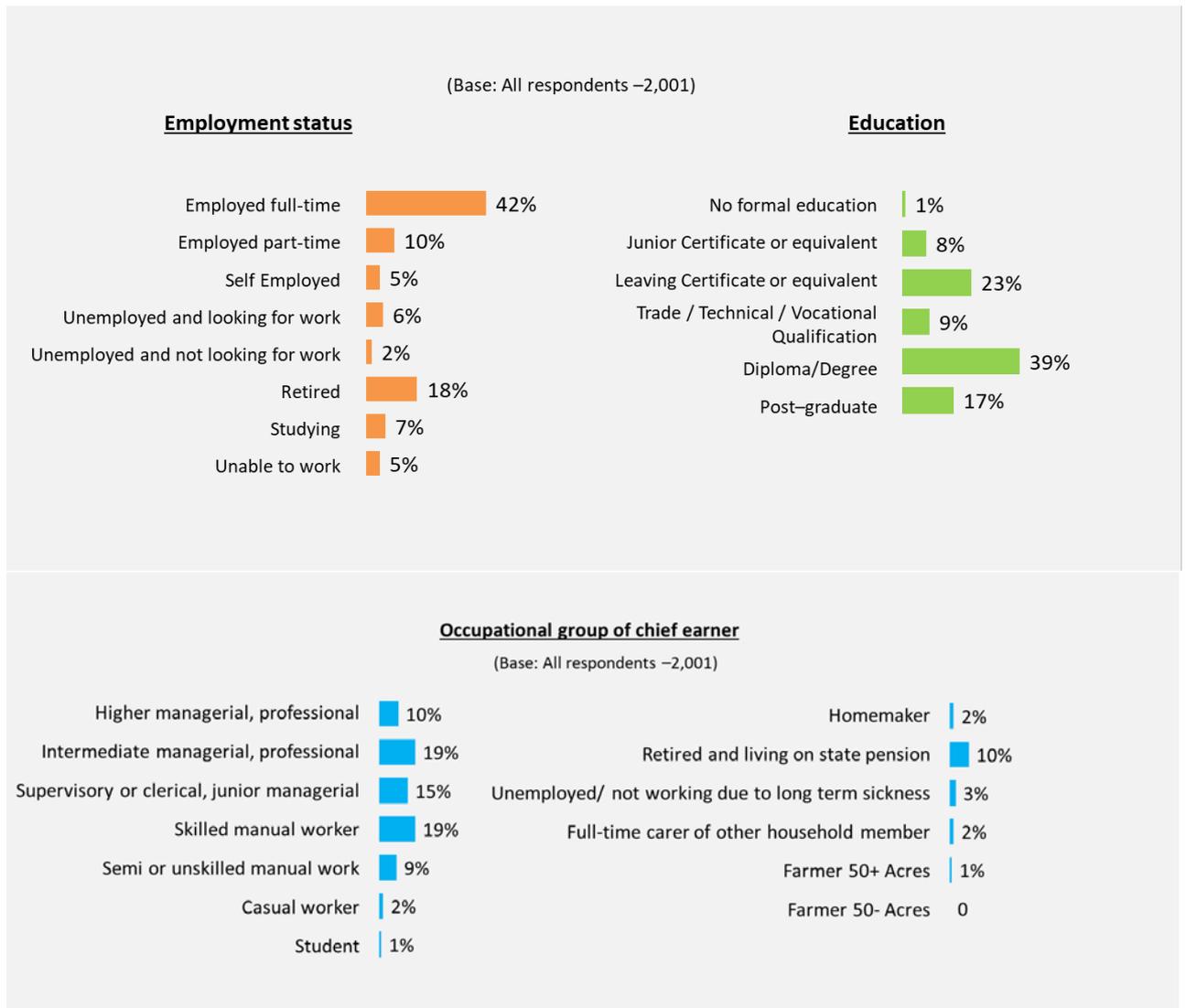
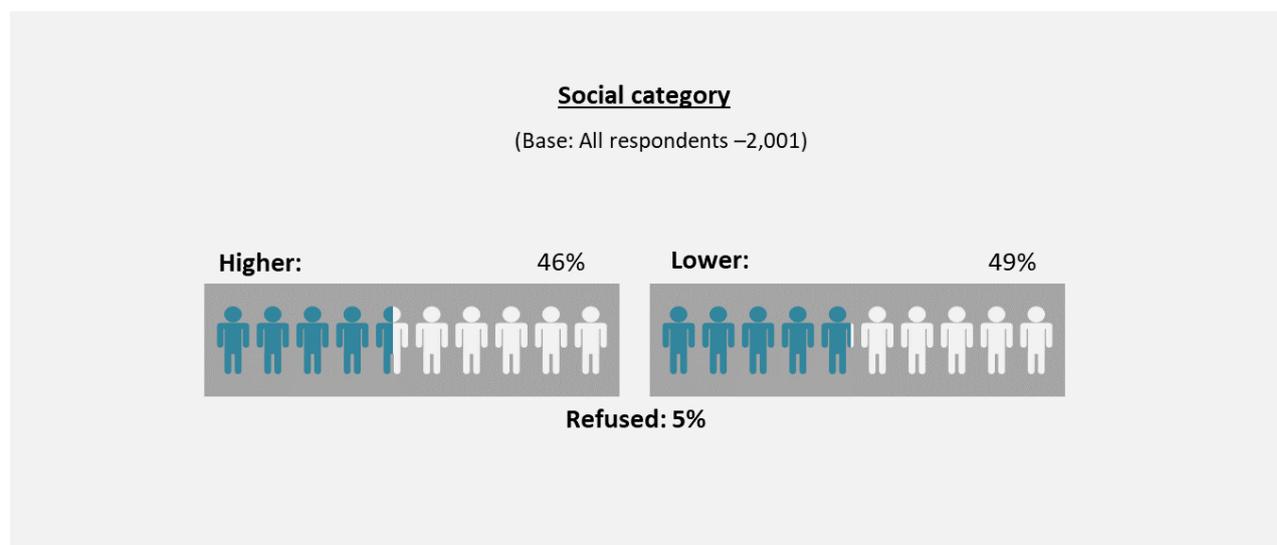


Figure 2– Sample Profile II



- 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

Figure 3– Sample Profile III / Social Category

**Note:** within the report “ABC1” and “C2DE” are respectively referred to as “those from households in the higher social category” and “those from households in the lower social category”.

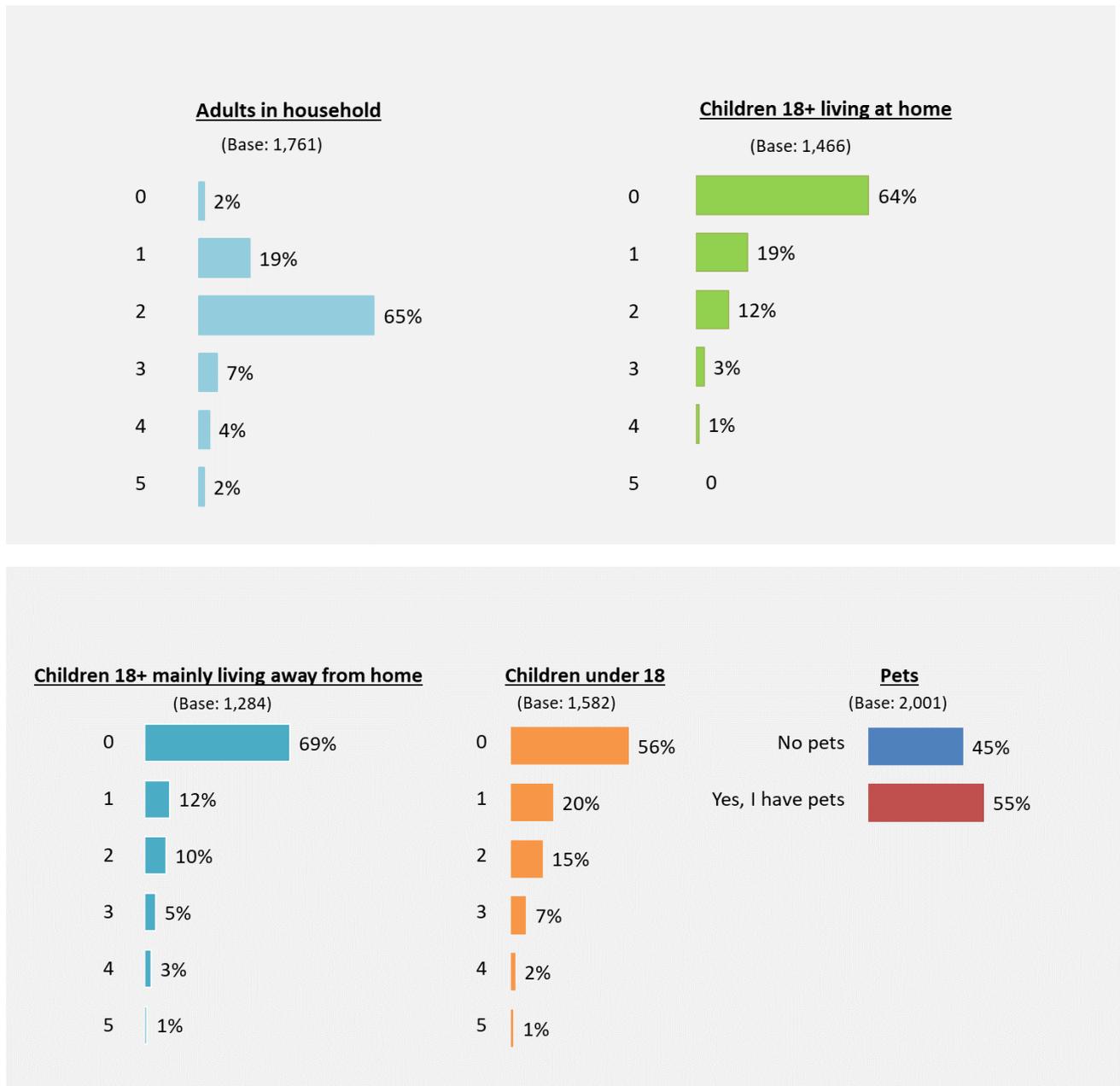


Figure 4– Sample Profile IV

## 5 Findings

### 5.1 Section One: The Charities Sector in Ireland

#### 5.1 The importance and impact of charities in Irish society

The importance of charities and the work they do in Irish society is clear. 86% of respondents believed charities and the work they do to be either important, 23%, or very important, 63%.

Further, 78% rated the impact of charities in Irish society as either significant (32%) or very significant (46%).

More females and more of those from households in the lower social category described charities as important/very important and their impact as significant/very significant.

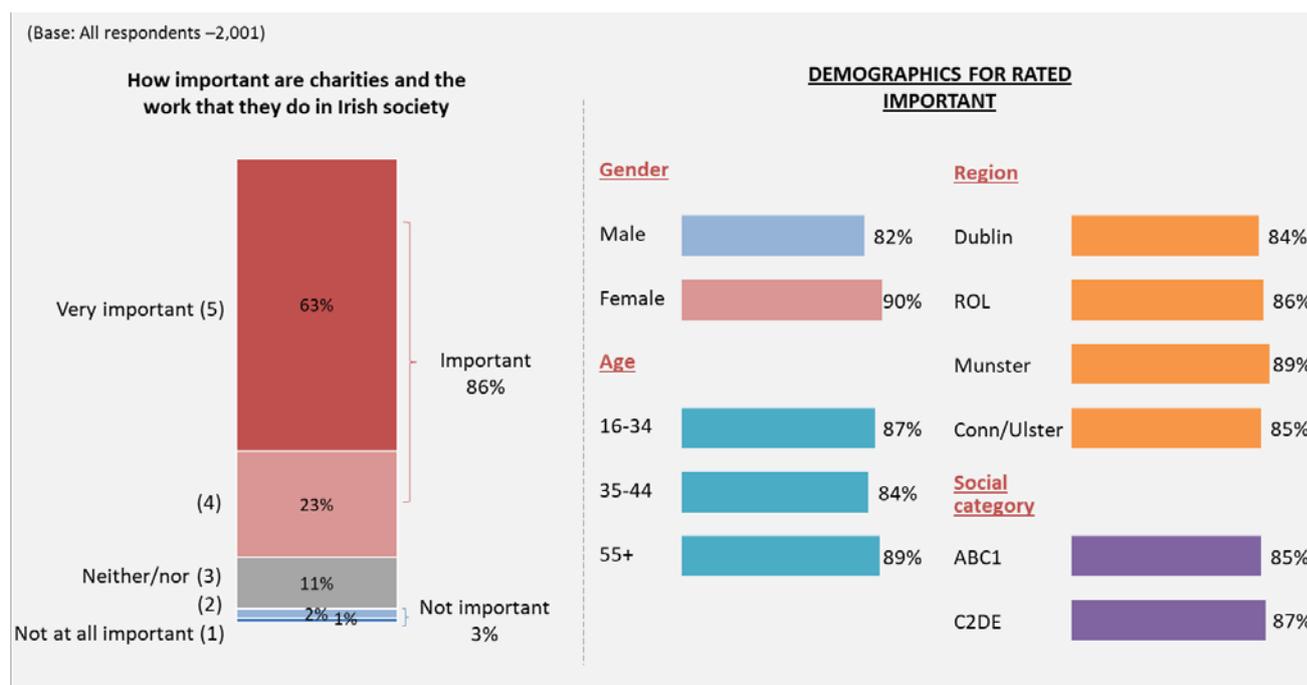


Figure 5– How important are charities and the work that they do in Irish society

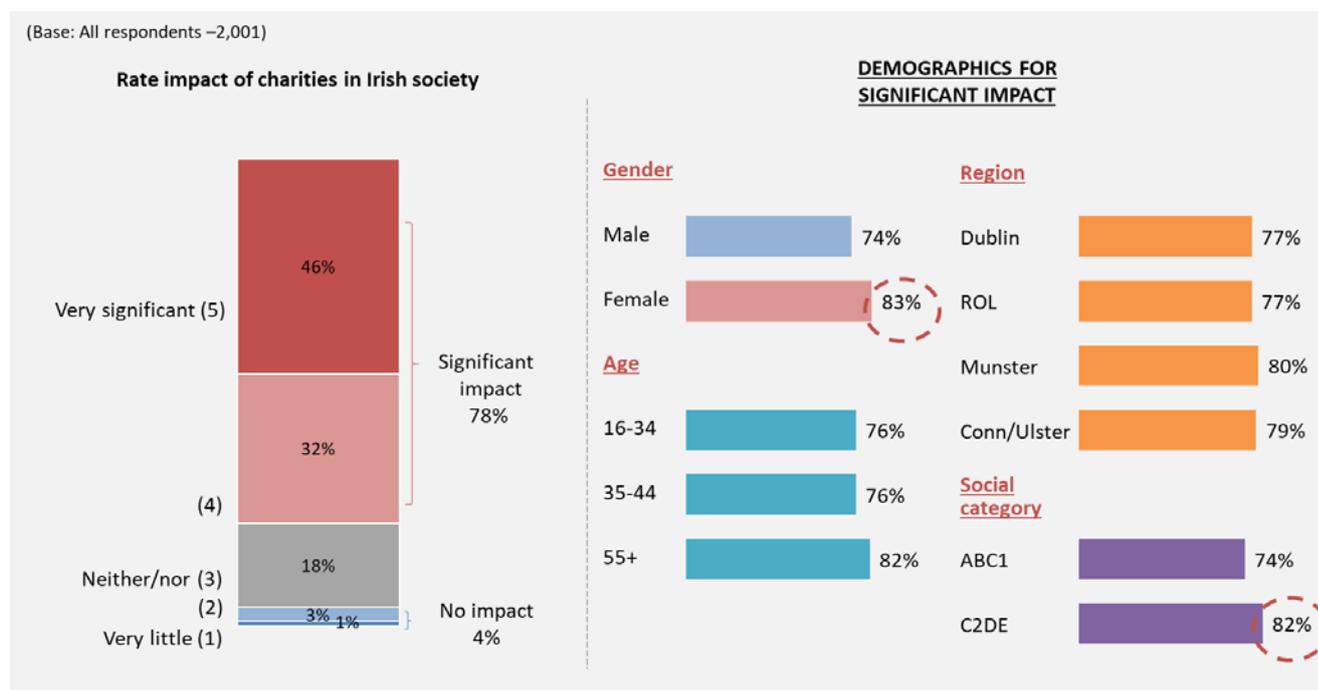


Figure 6– How would you rate the impact of charities in Irish society

A similar demographic pattern was noted in respect of direct involvement in charities. Males were significantly more likely than females to say they or a family member or close friend had no involvement with a charity.

Where charity involvement was evident, volunteering was most prevalent, particularly among those aged 16-34; 44% of the youngest age group had volunteered, compared with under 30% of those aged 35+. 41% of those surveyed who said that they had received money or help or used a service provided by a charity said that they volunteered.

Q2. Do you or any family member or close friend have any of the following involvement with a charity or charities? (Please select all that apply)

	Gender				Age			Charity involvement		
	Total	Male	Female	Other	16-34	35-54	55+	Vol/ Employee/ Trustee	Service user/ Recipient	Not involved
<b>Total (Wtd.)</b>	<b>2001</b>	<b>976</b>	<b>1017</b>	<b>8</b>	<b>636</b>	<b>745</b>	<b>620</b>	<b>793</b>	<b>350</b>	<b>1013</b>
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Received money or help from charity	11%	5%	15%	20%	14%	13%	4%	12%	60%	0
Used a service provided by charity	11%	9%	14%	0	15%	14%	6%	16%	66%	0
Employed by a charity or carried out work for a charity in paid role	8%	5%	10%	0	13%	7%	4%	20%	10%	0
Volunteers for a charity	33%	31%	34%	46%	44%	29%	27%	83%	41%	0
Is a charity trustee	3%	2%	4%	0	4%	1%	4%	8%	5%	0
No involvement	51%	57%	45%	34%	37%	52%	63%	0	0	100%

Table 1 – Involvement with charity

### 5.1 Sector perceptions and regulation

Over one quarter of the sample did not know or said there is no difference between a good cause and a registered charity.

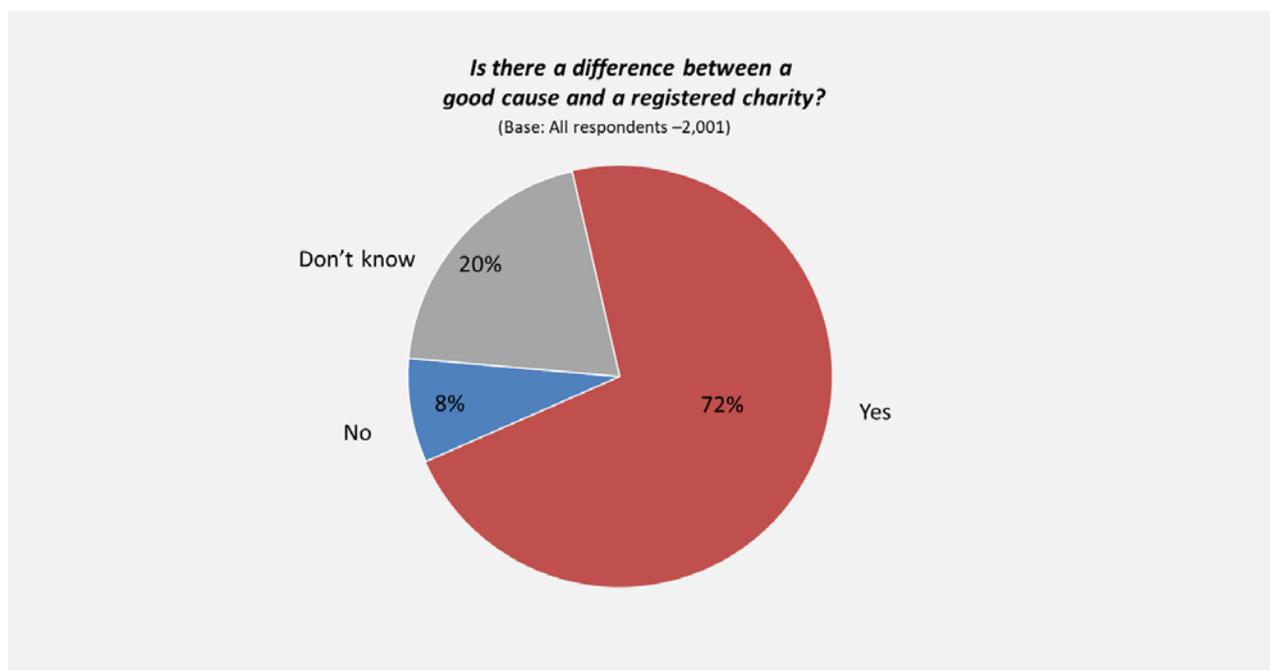


Figure 7 – Is there a difference between a good cause and a registered charity

Those who believed charities are regulated in Ireland, and those who had made a donation to a charity in the last 12 months were more likely to have responded that there is a difference between a good cause and a registered charity.

Q3a. Is there a difference between a good cause and a registered charity?					
	Total	Are charities regulated in Ireland?		Made a donation to charity in the last 12 months	
		Yes	No	Yes	No/ Unsure
Total	2001	1629	372	1792	209
	100%	100%	100%	100%	100%
Yes	72%	75%	57%	73%	60%
No	8%	9%	7%	8%	10%
Do not know	20%	17%	35%	19%	30%

Table 2 – Is there a difference between a good cause and a registered charity

Those responding that there is a difference between a good cause and a registered charity were asked to state their understanding of the difference, in their own words. They were asked to type their explanation into the survey.

These verbatim comments were then reviewed individually. Common themes were grouped into regularly occurring codes.

Of the 72% required to respond to this question, only 8% said they did not know the difference. The majority provided their thoughts. Over half, 51%, described the difference in the same or a very similar way, as ‘A registered charity is a regulated, legal entity, a good cause is not’. This was the most frequently occurring answer.

The next most common response reflected the understanding of 15%: ‘A good cause is a once off endeavour, a charity has ongoing goals and objectives.’

Three further descriptions were provided by 9% each, and all other comments had fewer than 5% providing them.

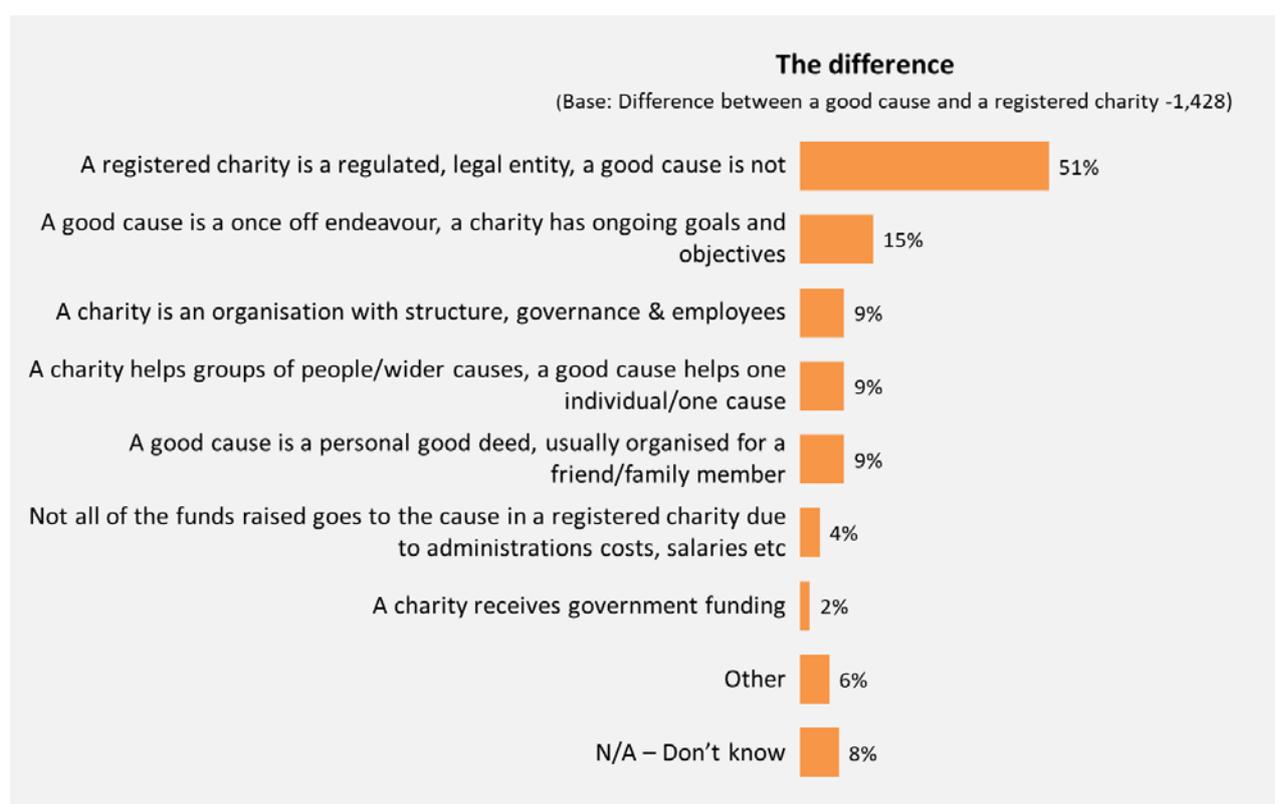


Figure 8 – What is the difference? (between a good cause and a registered charity)

Eight out of ten, 82%, believe that charities are regulated in Ireland.

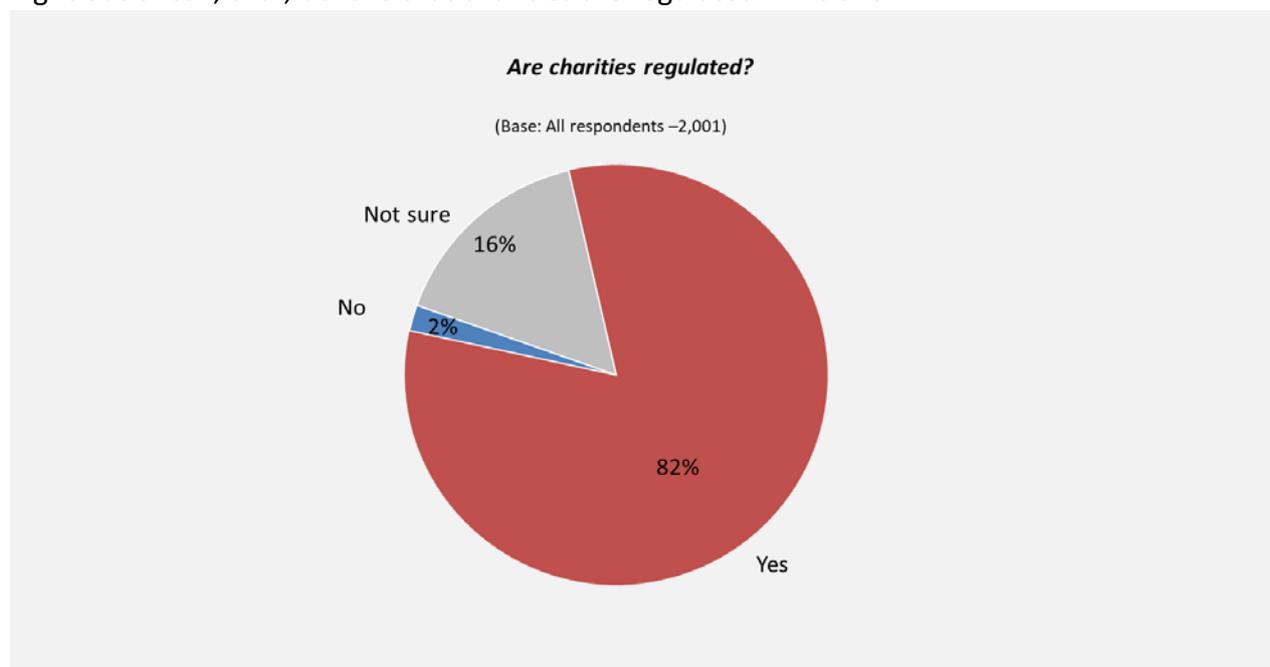


Figure 9 – Are charities regulated in Ireland

Those who had made a donation to a charity in the last 12 months were more likely to believe charities are regulated than those who had not made a donation recently.

Q4. Are charities regulated in Ireland? (please select one)			
	Made a donation to charity in the last 12 months		
	Total	Yes	No/ Unsure
Total	2001	1792	209
	100%	100%	100%
Yes, charities are regulated	81%	83%	68%
No, charities are not regulated	2%	2%	5%
Not sure	16%	15%	27%

Table 3 – Are charities regulated in Ireland?

When provided with list of activities and asked to indicate which was a charitable activity regulated by charity law, other than animal rescue, there was a degree of confusion.

Although results indicated some types of activities were more widely thought to be regulated than others - for example raising money for a sick child, online platforms like GoFundMe, churches and sports clubs - over one quarter of the sample were unsure for each activity.

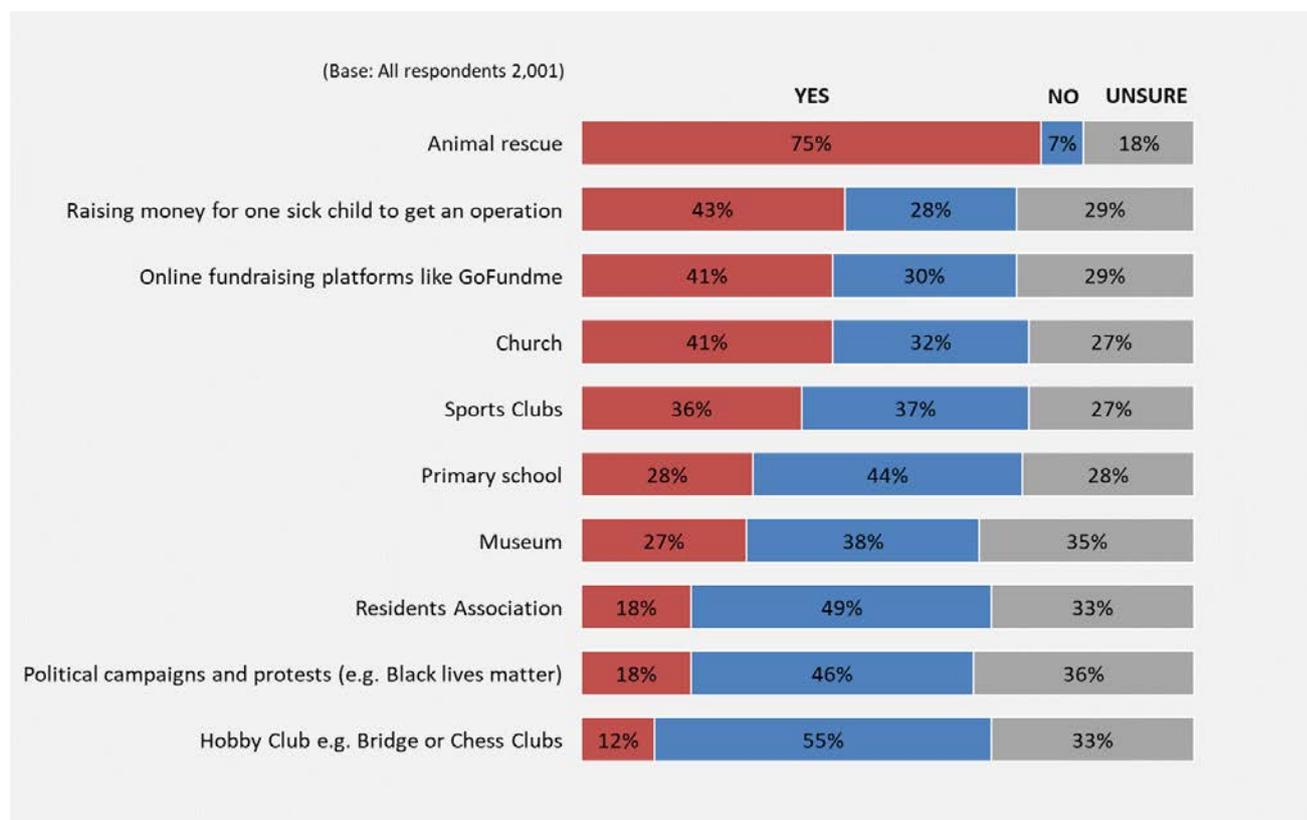


Figure 10 – Which of the following is a charitable activity regulated by charity law...

Further, those who believe charities are regulated in Ireland were consistently more inclined to say ‘yes’, this activity is regulated, for each activity listed.

### 5.1 Initial awareness of the Charities Regulator

57% of those who believe charities to be regulated in Ireland named the Charities Regulator as the organisation responsible, from a list of seven potential organisations. In 2019 a public survey carried out on behalf of the Regulator asked a similar question and established 53% of respondents recognised the Charities Regulator. This was an increase on 48% recorded through the same question in 2018. While not directly asked the same question, the 57% result in this current study indicates that awareness of the Regulator is steadily increasing.<sup>7</sup>

Males were more likely than females, 63% compared to 51%, to name the Charities Regulator. Over 55s were significantly more likely than those in younger age groups: 74% compared to 52% of 35-44s and 45% of under 35s.

<sup>7</sup> Public Awareness Report January 2020, B&A: Q.1 Which if any of the following ‘Regulators’ are you aware of doing the work of regulating and looking after Irish consumer interests?

28% said they did not know which organisation was responsible. A number of other organisations were selected by very small sub samples.

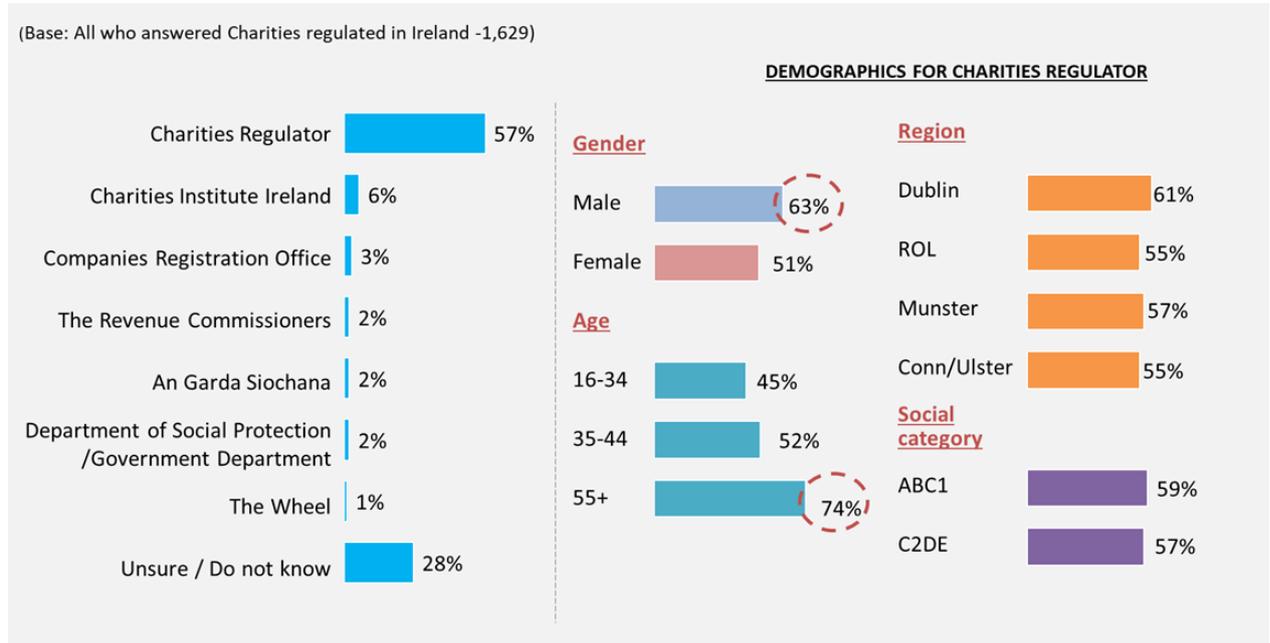


Figure 11 – What is the name of the organisation responsible for regulating charities in Ireland?

### 5.1 Registered charities regulation

Two thirds of respondents were aware that only registered charities are regulated.

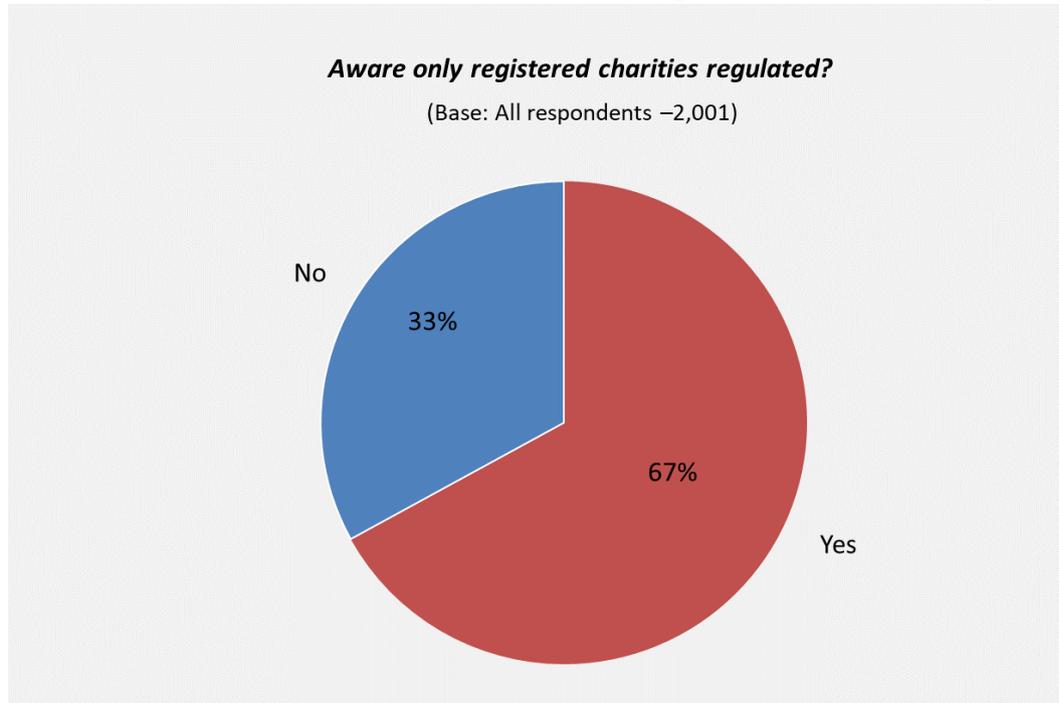


Figure 11- Are you aware that only registered charities are regulated

Those involved in charities as volunteers or trustees, those who believed charities to be regulated and those who had made a donation in the past 12 months were most likely to claim awareness that only registered charities are regulated.

Q4b. Are you aware that only registered charities are regulated?								
	Family member or close friend have involvement with charity				Are charities regulated in Ireland?		Made a donation to charity in the last 12 months	
	Total	Vol/ Employee/ Trustee	Service user / recipient	Not involved	Yes	No	Yes	No/ Unsure
Total	2001	793	350	1013	1629	372	1792	209
	100%	100%	100%	100%	100%	100%	100%	100%
Yes	67%	74%	72%	62%	75%	30%	69%	49%
No	33%	26%	28%	38%	25%	70%	31%	51%

Table 4 – Are you aware that only registered charities are regulated?

## 5.2 Section Two: Donations and Support

Nine out of ten respondents had made a donation to charity in the past 12 months. Donating money was most prevalent – 74% of the population had donated money, 43% goods and 19% time. Those with some involvement in charities were more likely to donate.

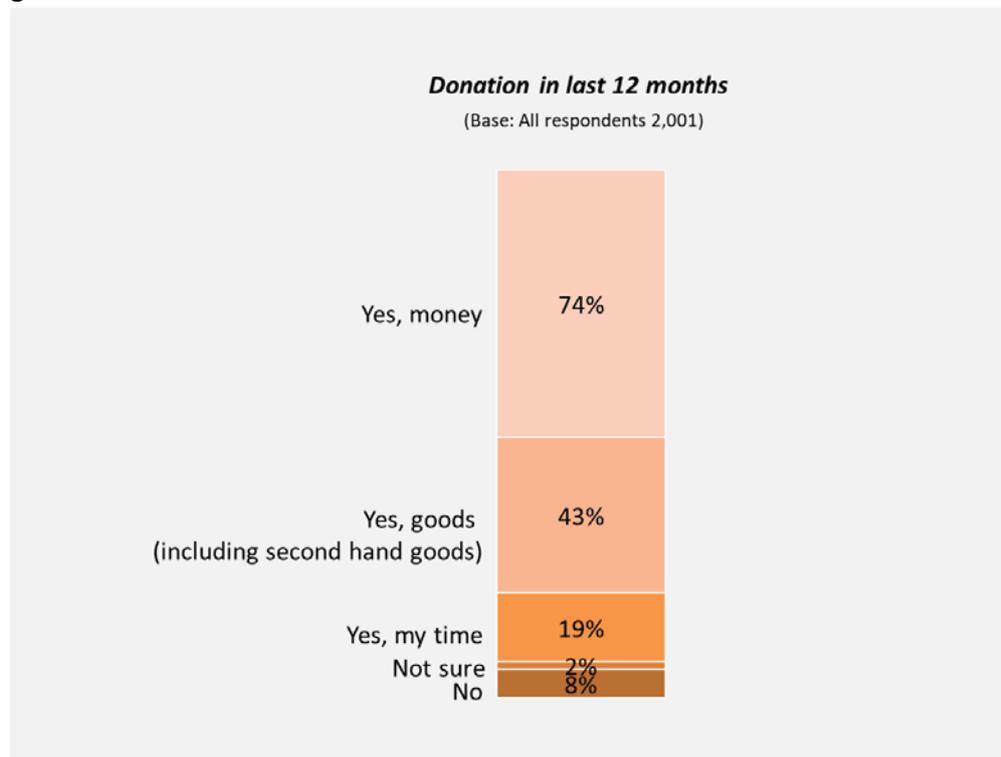


Figure 12- Have you made a donation of money, your time or goods directly to a charity at any time in the last 12 months

Q5. Have you made a donation of money, your time or goods directly to a charity at any time in the last 12 months?

	Family member or close friend have involvement with charity			
	Total	Vol/ Employee/ Trustee	Service user / recipient	Not involved
Total	2001	793	350	1013
	100%	100%	100%	100%
Yes, money	74%	80%	74%	70%
Yes, goods (incl second hand goods)	43%	50%	60%	37%
Yes, my time	19%	38%	21%	6%
Not sure	2%	1%	1%	4%
No	8%	2%	5%	12%

Table 5 – Have you made a donation of money, your time or goods directly to a charity at any time in the last 12 months

This equates to 82% of those who had donated to a charity having donated money, 49% goods and 21% time.

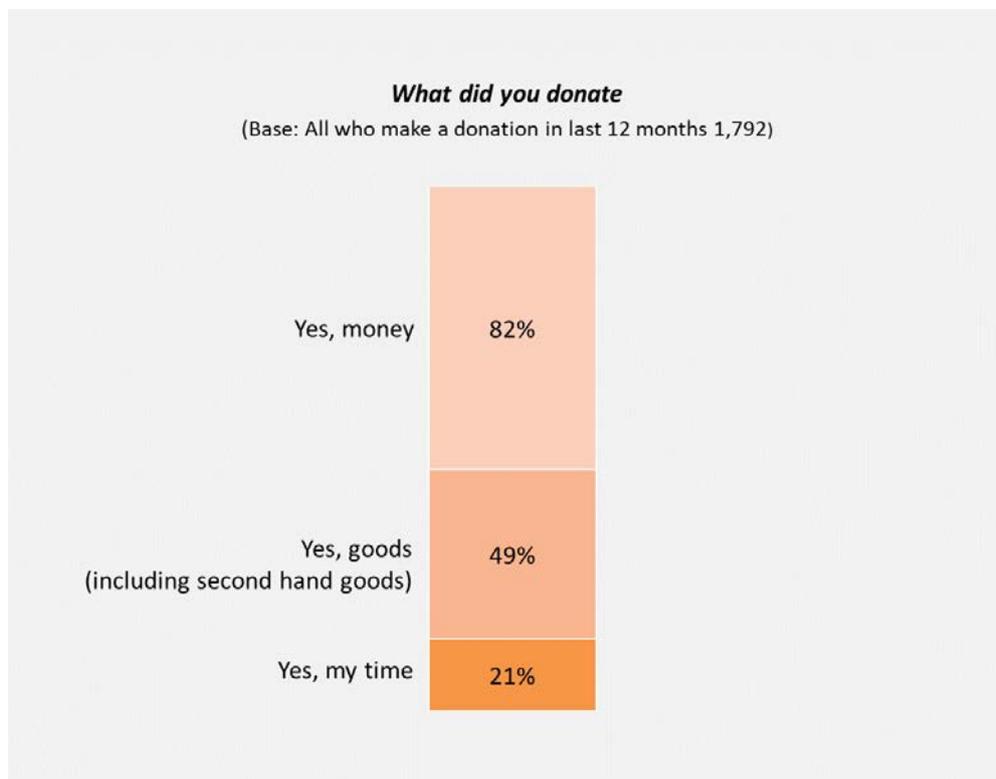


Figure 13- What did you donate

## 5.2 Financial donations

The most common amount to donate, among those who had donated money, was €10-€49, 28%.

Females were more likely than males, under 35s were more likely than 35+, and those from households in the lower social categories were more likely than those from households in the higher social categories to donate this amount.

Overall, males were more likely than females to donate between €200 and €499. Although those from households in the higher social category were more likely than those from households in the lower social category to donate €200 or more, 17% compared to 10%, only one quarter of this higher earning proportion of the population had donated more than €200. Dublin residents are the most likely to be donating at the €200+ level.

When amounts between €10 to less than €100 are reviewed, there is evidence that more in the lower earning cohort are donating, 59% compared with only 44% of those from households in the higher social category. These different social categories are equally likely to donate between €100 to €199.

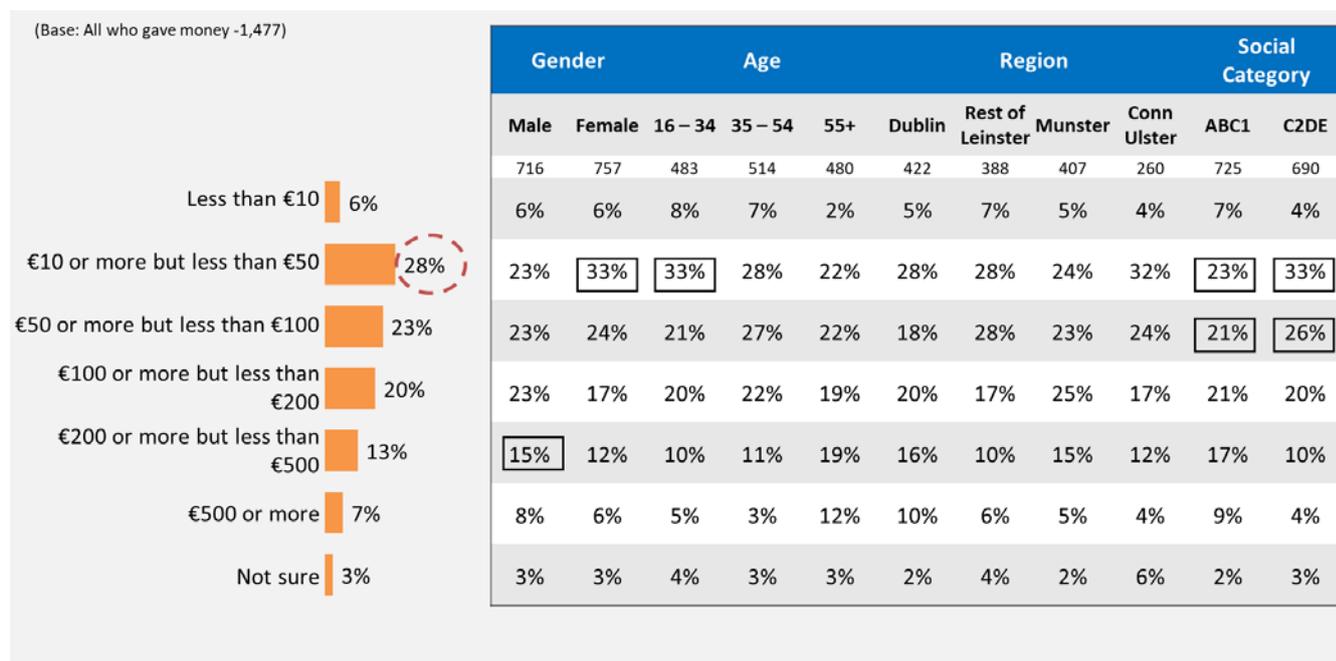


Figure 14 – How much money have you given in the last 12 months

When mean scores calculated from the midpoints of the above bands were reviewed, a pattern of higher giving among those with higher engagement in charities and awareness of regulation was seen.

Demographic differences were also evident, with the higher mean scores among males, people aged 55+, those living in Dublin and surrounding counties and those from households in the higher social category.

Almost one third were donating on a weekly or monthly basis. Over 35s were more likely than under 35s to report this regular pattern of donation. There was little difference by social category.

Under 55s were more inclined to make occasional donations.

Q5a. How much money have you given in the last 12 months (include loose change in cash collections)?										
	Family member or close friend have involvement with charity				Are charities regulated in Ireland		Name of org responsible for regulating charities in Ireland		Heard of the Charities Regulator	
	Total	Vol/ Employee/ Trustee	Service user / recipient	Not involved	Yes	No	Yes	No	Yes	No/ Unsure
Base for stats	1430	619	251	686	1218	211	721	498	874	555
Mean score €	€154.53	€169.53	€133.15	€147.35	€163.29	€103.96	€189.61	€125.20	€183.82	€108.39

	Gender			Age			Region			
	Total	Male	Female	16-34	35-54	55+	Conn Ulster	Munster	Rest of Leinster	Dublin City/ County
Base for stats	1430	693	733	464	501	465	243	398	374	414
Mean Score €	€154.53	€170.88	€138.60	€128.59	€127.67	€209.39	€129.46	€151.89	€140.57	€184.37

	Class			Children				Pets		
	Total	ABC1 F50+	C2DE F50-	U18	No U18	Over 18 living at home	No over 18 living at home	Over18 mainly living away home	No pets	Have pets
Base for stats	1430	713	666	510	627	383	664	307	638	776
Mean Score €	€154.53	€183.48	€125.02	€126.77	€182.51	€134.43	€169.23	€178.12	€171.88	€138.99

Table 6 – How much money have you given in last 12 months?

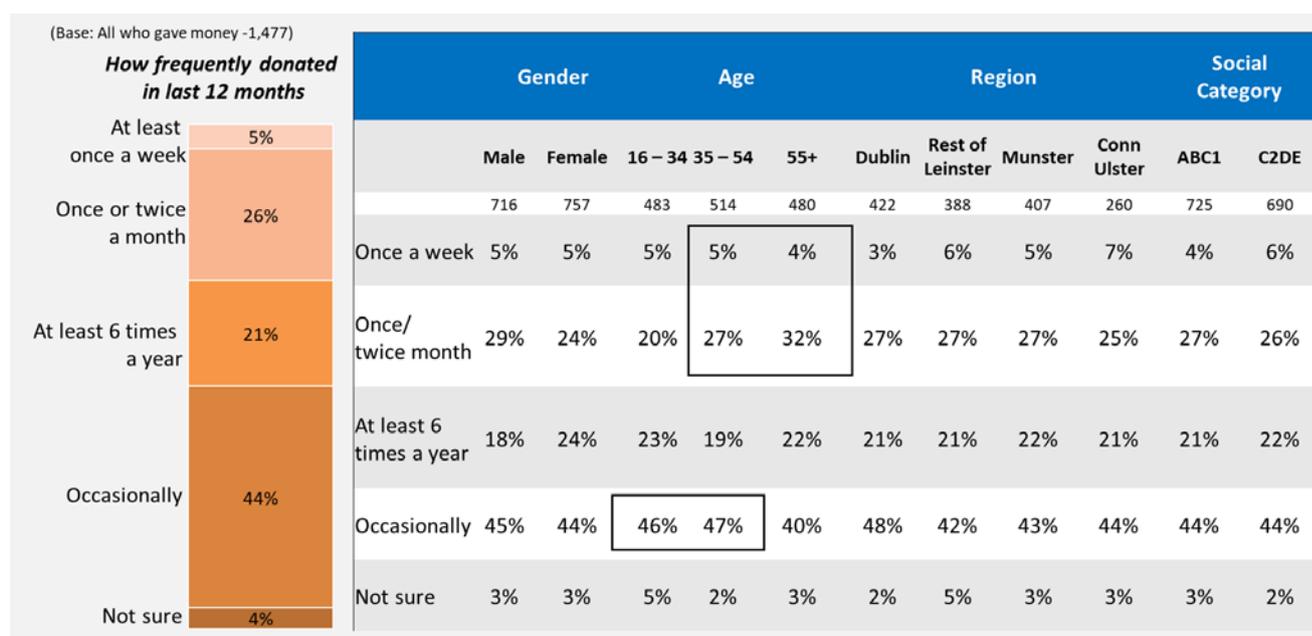


Figure 15 - How frequently have you given money in the last 12 months

The most popular ways of donating money to a charity were through:

1. buying a raffle or lottery ticket, particularly over 35s and those from households in the lower social category
2. sponsoring someone, higher among females
3. through a charity website using a credit/debit card, most popular among under 35s

Other notable demographic differences included:

- Females and those from households in the lower social category were more likely to buy from charity shops than males and those from households in the higher social category
- Females were more likely than males to make a text donation
- More males than females, and more over 55s said they gave money to door-to-door fund raisers and donated to a cash collection or paid by cheque
- Under 35s and females were significantly more likely to donate via social media than their counterparts
- Over 55s were the most likely to have direct debit or standing order

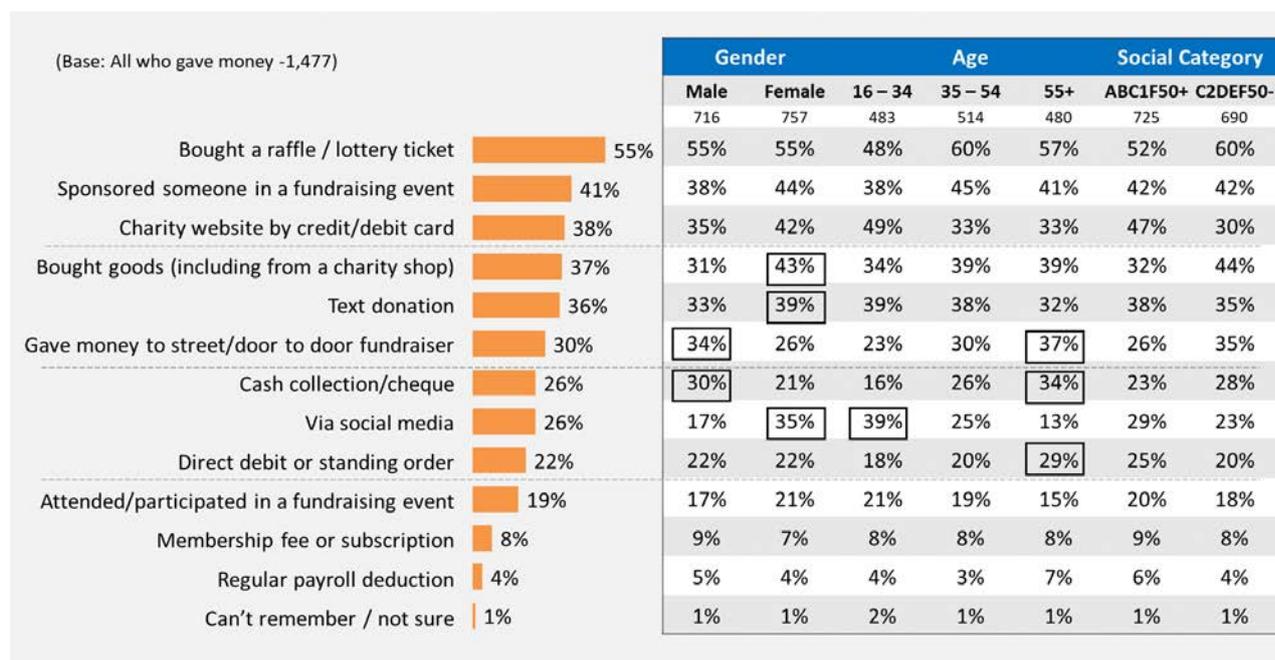


Figure 16- How have you given money to charity in the last 12 months

The importance of local charities is clear. 53% said their most frequent donations are to local charities. This is strongest provincially across Munster and Connaught/Ulster, 61% and 66% respectively, compared to 40% in Dublin and 51% across Rest of Leinster. The difference between social categories is also apparent in respect of donating locally – whilst 60% of those from households in the lower social category favour local charities, this is 15% points lower for those from households in the higher social category, at 45%.

Just over one third, 35%, said their most frequent donations are to national charities. This is highest among those living in Dublin, 46% compared to 38% Rest of Leinster, and a quarter in Munster and Connaught/Ulster.

More males than females said they donated most frequently to national charities, 37% compared with 32% females.



Figure 17- Which of the following do you most frequently donate to

## 5.2 Donating clothing / other items

Almost six in ten of those who had donated had given clothing or other items using bags or stickers posted through their letterbox. This was more popular with under 35s and those from households in the lower social category.

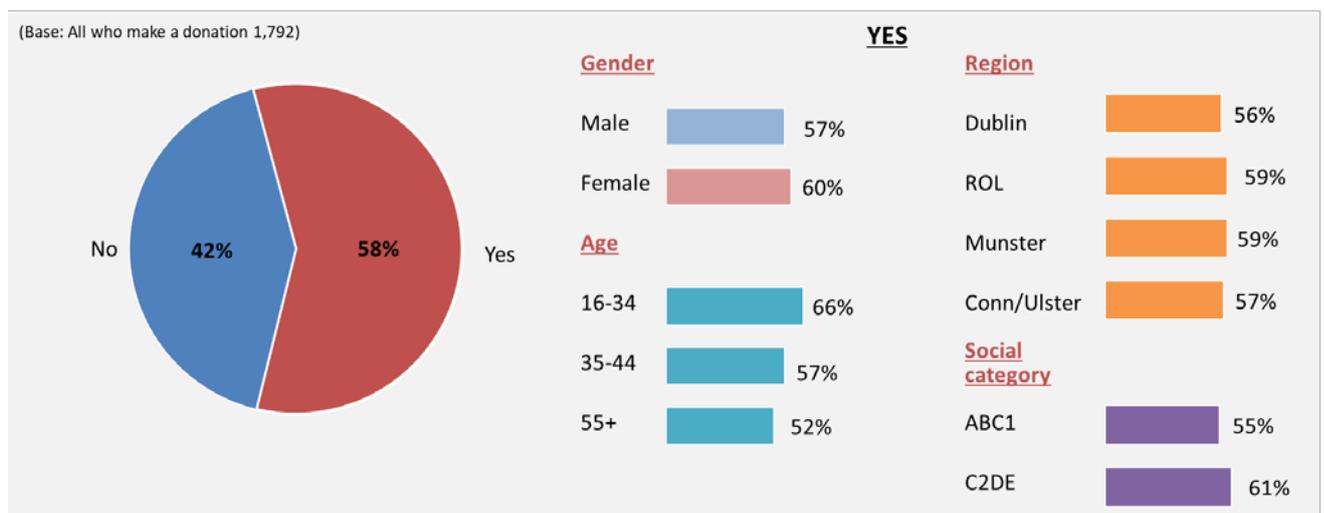


Figure 18- Have you ever donated unwanted clothes or other items using bags or stickers which were posted through your letterbox

Those surveyed who had some involvement in charities were more likely to have donated clothing or other items, with the highest number being service users.

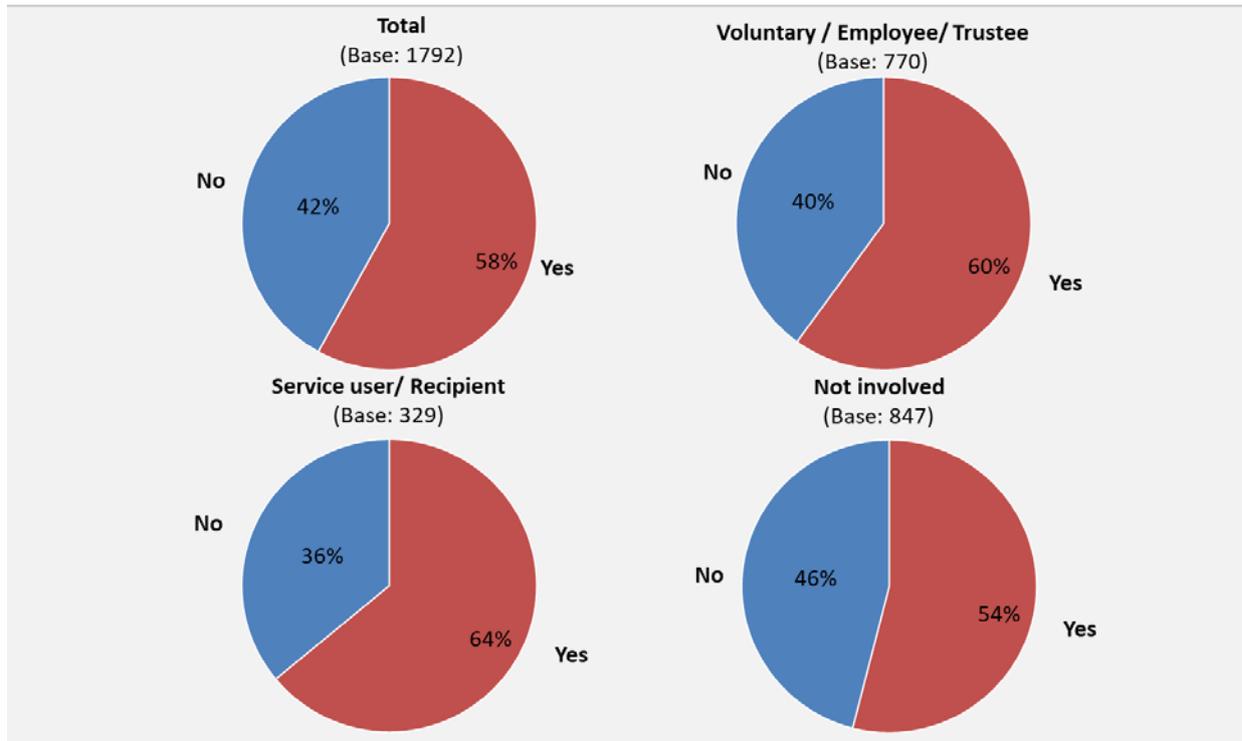
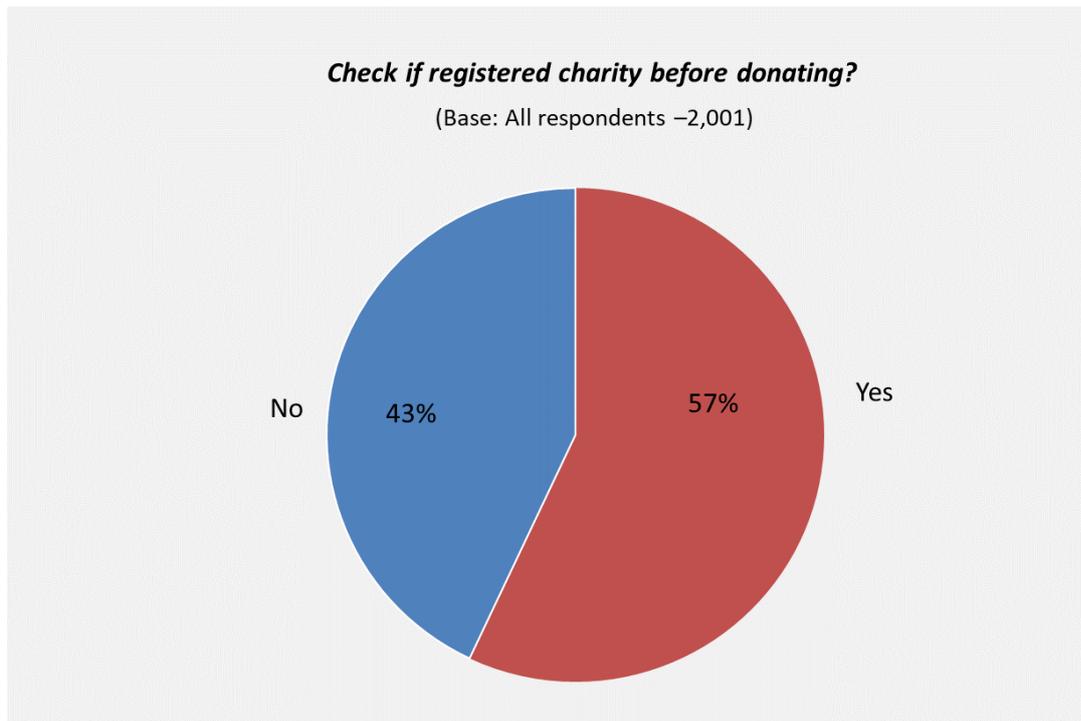


figure 19- Have you ever donated...

All respondents were asked whether they would check that the organisation referenced on charity bags and stickers posted through the door was a registered charity before donating. 43% did not check this.



*Figure 20 - Do you, or would you, check that the organisation referenced on a clothing collection bag or sticker posted through your letterbox is a registered charity before donating*

Similarly, 30% said they do not check if a charity has a Registered Charity Number (RCN) before donating, and 12% admitted they did not know what an RCN was.

Only one fifth, 19%, of respondents said they always checked whether a charity had an RCN before donating, and 39% sometimes checked. There were no notable differences in this across demographic groups or according to engagement with charities, or among those who had an awareness of regulation.

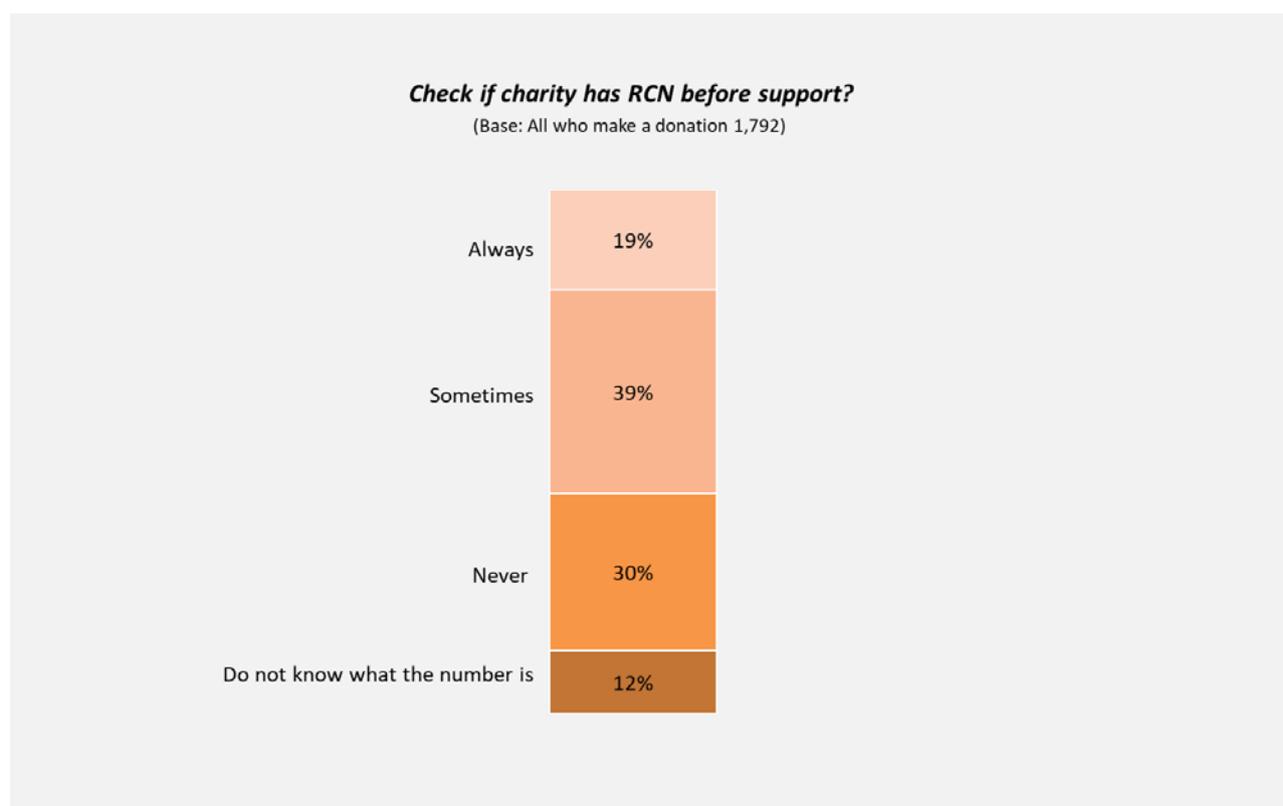


Figure 21 – Do you check if a charity has a Registered Charity Number (RCN) before you support it

The importance of a charity's website was highlighted when those who do check out a charity before donating were asked how they did this. 49% looked at the charity's website, rising to 60% among under 35s. Those who had "an awareness of regulation", 51%, were more likely to check a charity's website than those without an awareness of regulation, 40%.

23% did say they would check if a charity had an RCN and 19% would check the Register of Charities.

13% said they referred to social media, rising to 20% among under 35s, and 11% asked a friend or relative.

Nevertheless, nearly one quarter, 23%, said they do not check out a charity before supporting it.

Those who do not check out a charity before donating were more likely to be people who responded 'no', to the question 'Are charities regulated in Ireland', and also do not have any connections / involvement with charities.

(Base: All who make a donation 1,792)

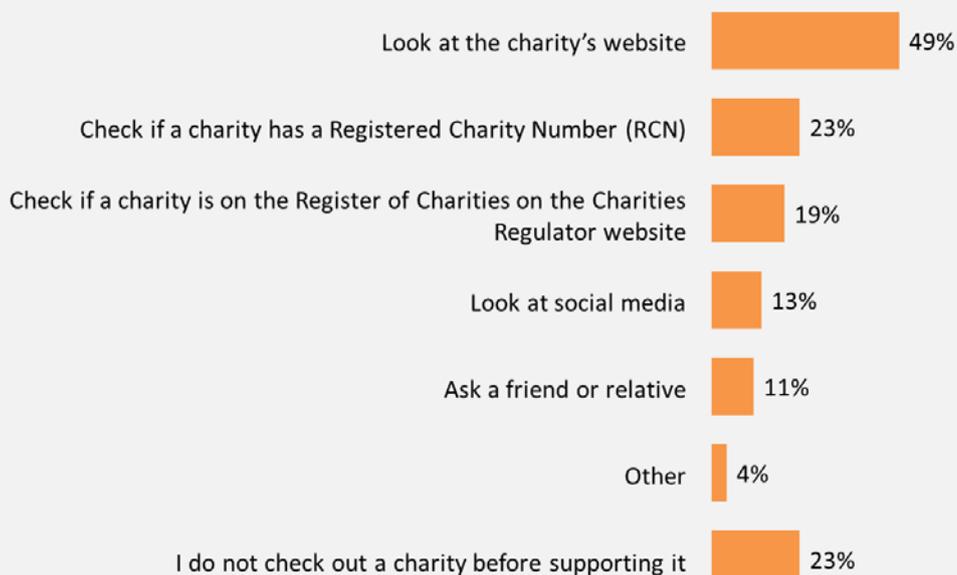


Figure 22 – Do you check out a charity before deciding to support it

Q5m. Do you check out a charity before deciding to support it?									
	Charity involvement				Are charities regulated in Ireland		Age		
	Total	Vol/ Employee / Trustee	Service user/ Recipient	Not involved	Yes	No	16-34	35-54	55+
<b>Total (Wtd.)</b>	1792	770	329	847	1487	305	566	663	563
	100%	100%	100%	100%	100%	100%	100%	100%	100%
I Do not check out a charity before supporting it	23%	18%	16%	29%	21%	35%	21%	23%	27%
Look at its website	49%	54%	63%	45%	51%	40%	60%	49%	39%
Ask a friend or relative	11%	13%	15%	9%	11%	13%	14%	9%	10%
Look at social media	13%	16%	17%	12%	13%	14%	20%	13%	8%
Check if a charity is on the Register of Charities on the Charities Regulator website	19%	23%	21%	16%	21%	9%	18%	18%	20%
Check if a charity has a Registered Charity Number (RCN)	23%	27%	30%	18%	25%	12%	19%	25%	24%
Other	4%	4%	3%	4%	3%	5%	2%	4%	5%

Table 7 – How do you check out a charity before deciding to support it?

### Types of charities

The top five types of charities respondents said that they donated to are:

1. Homeless or refuge services, 56%
2. Medical or health related, 46%
3. Local community organisations, 43%
4. Children or youth, 37%
5. Animal rescue or welfare, 36%

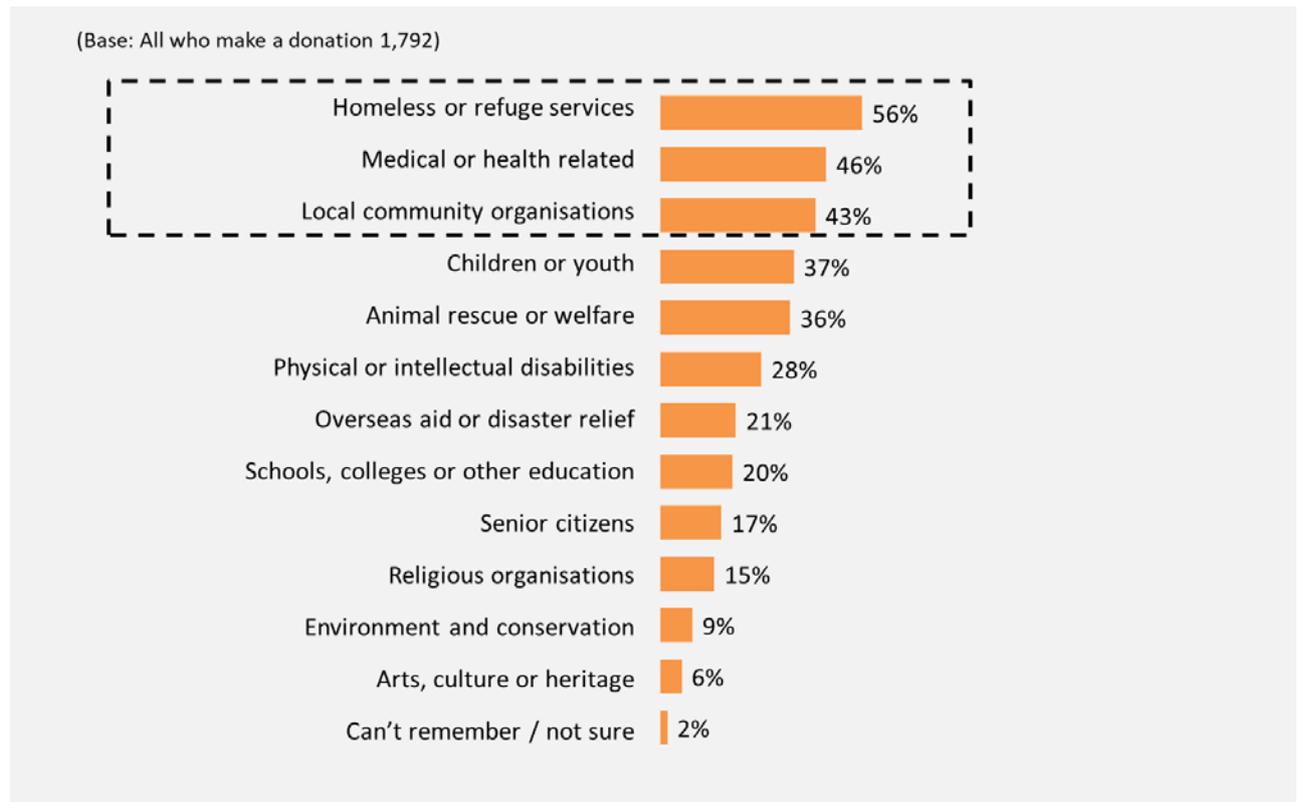


Figure 23- What type of charities have you supported in the last 12 months?

Almost two thirds are influenced to choose a charity by personal interest or connection, 65%

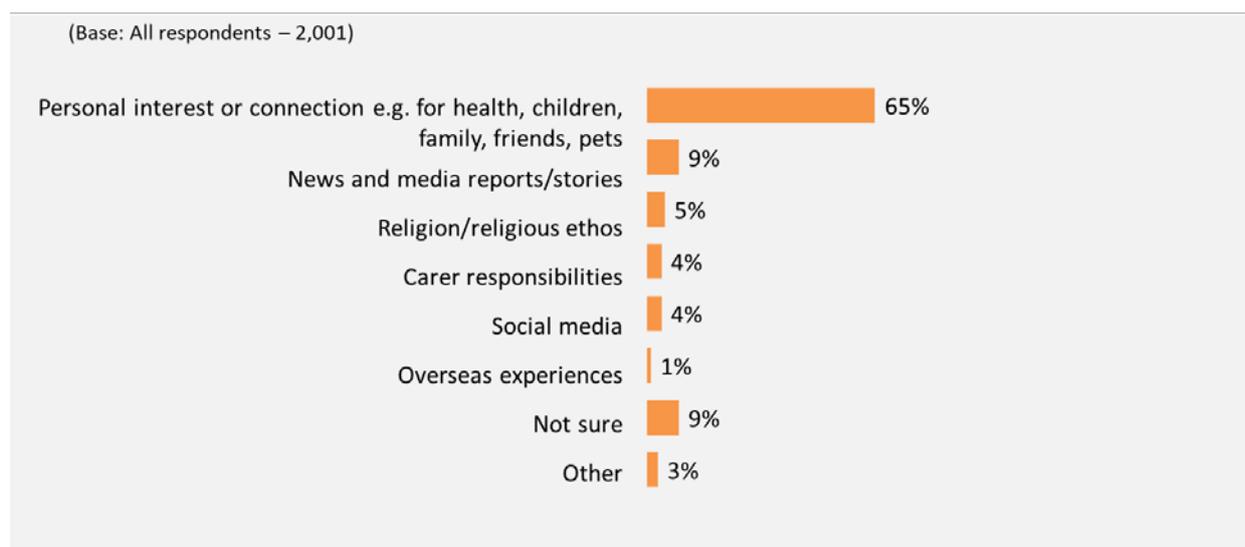


Figure 24- What, if anything, influences you most in the choices you make in terms of the types of charities you support or might support

The charity choices influenced by personal interest to the greatest extent are medical/health related, homelessness/refuge services and local community services. These charities are also chosen in high proportions among those with carer responsibilities, along with charities supporting physical/intellectual disabilities and children/youth services.

Social media is most influential for homeless/refuge services and animal welfare charities.

Q5g. What type of charities have you supported in the last 12 months?

	Total	Personal interest or connection	News and media reports/stories	Overseas experiences	Carer responsibilities	Religion/religious ethos	Social media
Total	1792	1179	166	25	71	93	76
	100%	100%	100%	100%	100%	100%	100%
Homeless or refuge services	56%	56%	65%	38%	64%	43%	74%
Medical or health related	46%	51%	40%	19%	51%	28%	37%
Local community organisations	43%	45%	41%	36%	48%	36%	34%
Children or youth	37%	39%	39%	32%	49%	19%	28%
Animal rescue or welfare	36%	39%	25%	26%	35%	23%	46%
Physical or intellectual disabilities	28%	30%	24%	26%	47%	16%	23%
Overseas aid or disaster relief	21%	18%	34%	53%	21%	31%	17%
Schools, colleges or other education	20%	22%	17%	21%	28%	11%	23%
Senior citizens	17%	17%	19%	11%	22%	15%	16%
Religious organisations	15%	12%	15%	21%	15%	61%	9%
Environment and conservation	9%	10%	10%	3%	8%	4%	9%
Arts, culture or heritage	6%	6%	6%	7%	7%	0	16%
Can't remember / not sure	2%	2%	2%	0	2%	2%	2%

Table 8 – What type of charities have you supported in the last 12 months

The three top reasons for selecting a charity to support are to help people worse off, 48%, belief in the cause, 41%, and a desire to contribute to worthwhile causes, 37%. 29% said they enjoyed giving and feeling they were making a difference, 25% focused on supporting emergency situations.

23% cited giving back to a charity which has directly helped them or someone they know, rising to 48% among those who had been a service user/recipient.

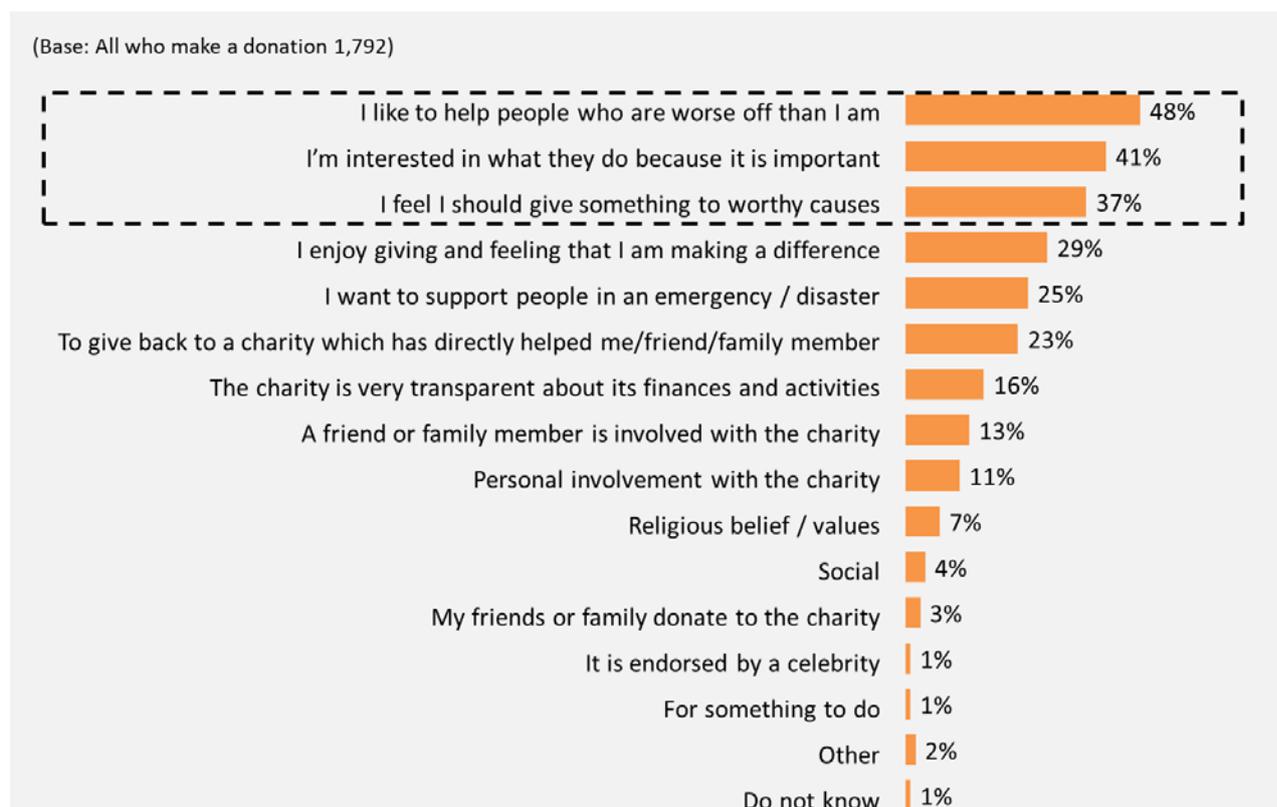


Figure 25- What are the main reasons behind why you support the charities that you do

## 5.2 Impact of COVID-19

88% of respondents said they have not changed the type of charity they support as a result of COVID-19.

Where changes had been made, by 12% of the sample, respondents had adjusted their focus towards donating to help those most in need and affected by the pandemic, 29%, and more local charities, 19%. 14% admitted to being more conscious now of vulnerable groups in need.

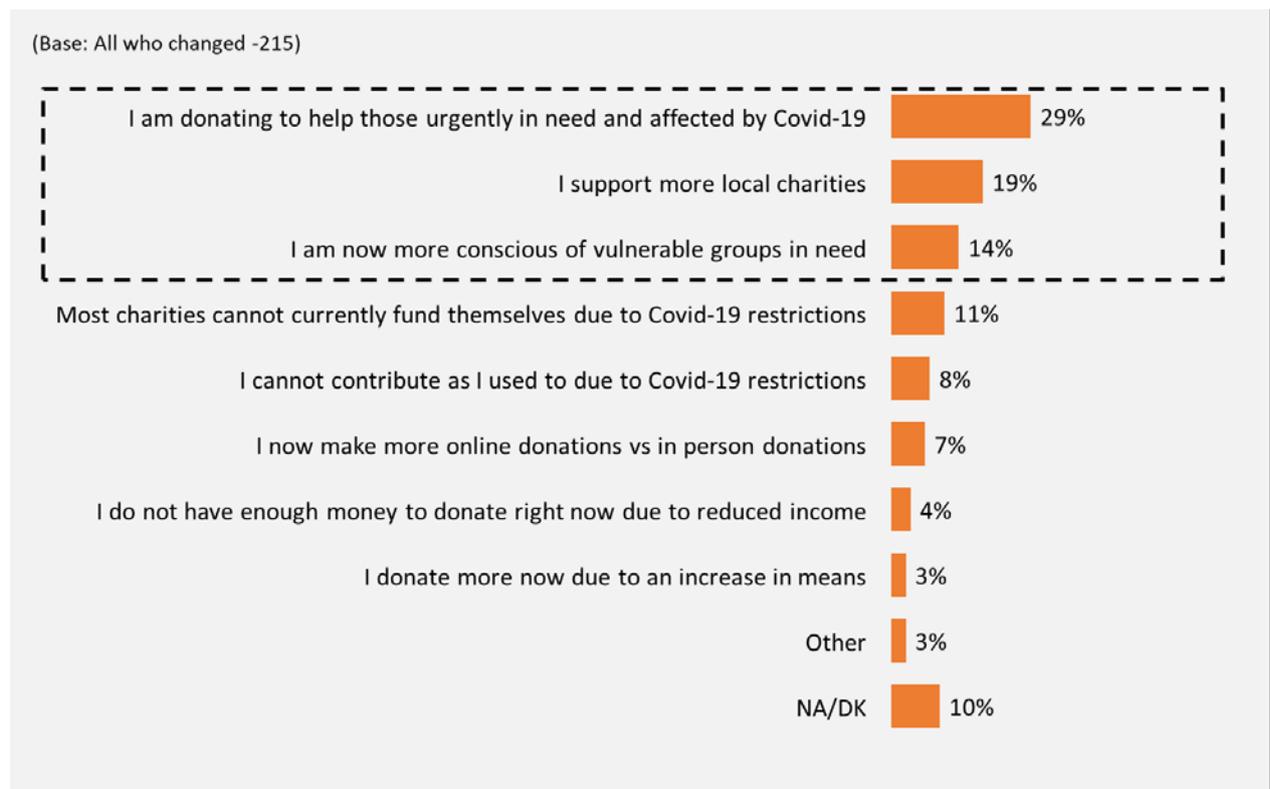


Figure 26 - Why have you changed

### 5.3 Section Three – Trust and Confidence

Just over one third, 36%, rated the trust and confidence they have in charities generally as 8, 9 or 10 out of 10. More females than males gave these higher ratings, 39% compared to 32% males. Under 35s were also more likely to rate trust and confidence as 8 to 10; 40% under 35s, 35-54s 32% and 55+ 36%.

Respondents demonstrated the greatest degree of trust and confidence in charities they personally support and in small local charities. International charities were the least likely to receive ratings of 8, 9 or 10.

(Base: All respondents – 2,001)

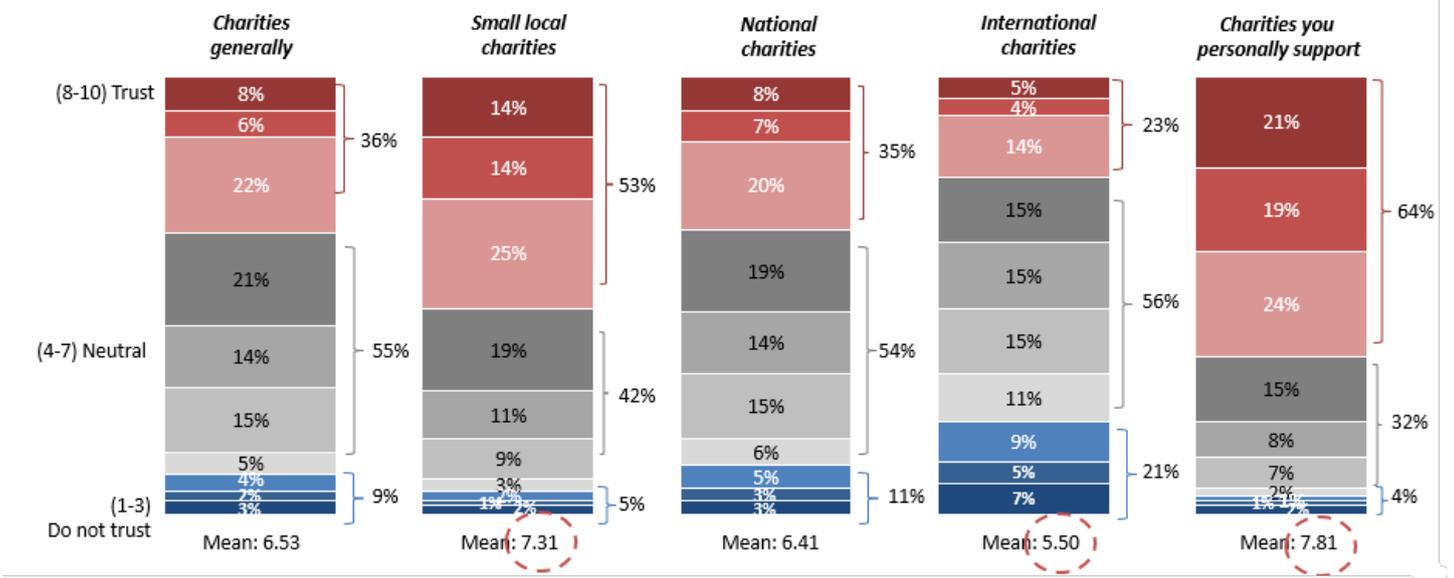


Figure 27 – How much trust and confidence do you have in charities generally

16% reported that their trust and confidence in charities had increased over the past two years. Half said it had not changed, and one third said it had decreased.

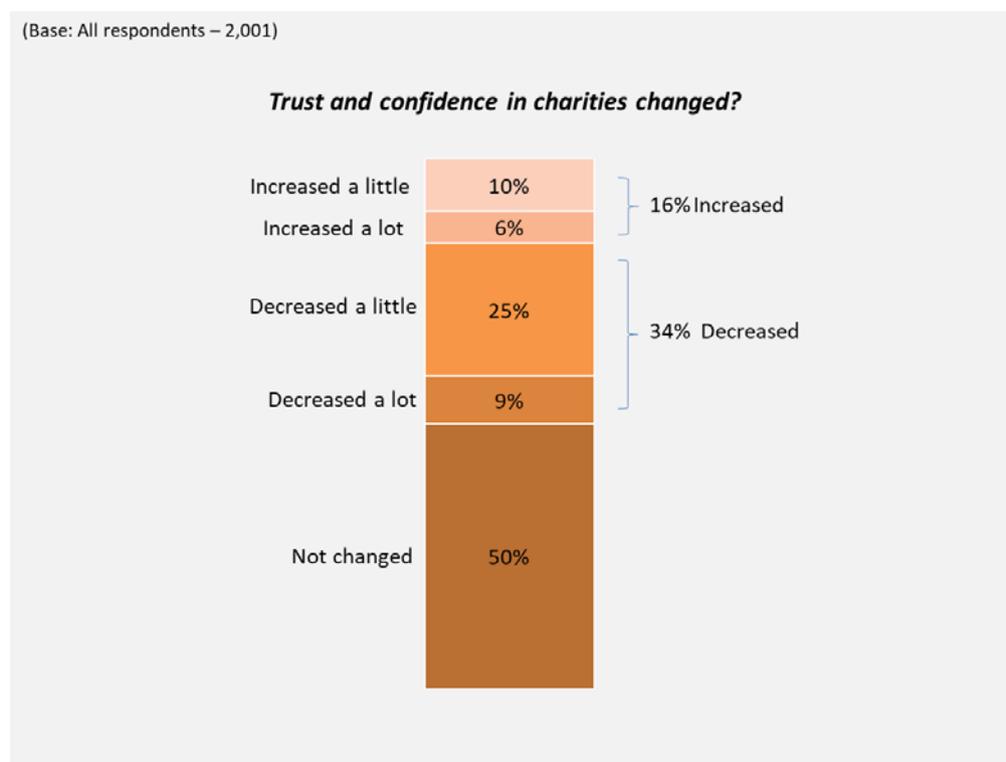


Figure 28 – Over past 2 years has your overall trust and confidence in charities in general changed

Those most likely to report an increase were those with some engagement with charities. Over 55s were most inclined to report a decrease in trust and confidence, 41%, compared with 38% in 35-54s and 24% in under 35s.

Q11. Over the past 2 years has your overall trust and confidence in charities in general changed?

	Family member or close friend have involvement with charity				Age		
	Total	Vol/ Employee/ Trustee	Service user / recipient	Not involved	16 – 34	35 – 54	55+
TOTAL (WTD.)	2001	793	350	1013	636	745	620
	100%	100%	100%	100%	100%	100%	100%
Not changed	50%	48%	46%	52%	51%	51%	47%
Increased	16%	21%	23%	10%	24%	11%	12%
Decreased	35%	32%	31%	38%	24%	38%	41%

Table 9 – Over past 2 years has your overall trust and confidence in charities in general changed

Concerns around financial decisions and administration were the top reasons for those who responded that their trust and confidence in charities had decreased. Negative media coverage was also influential, among 18%. A second tier of questioning of those respondents revealed concerns around media reports of fraud and not enough money going to the cause.

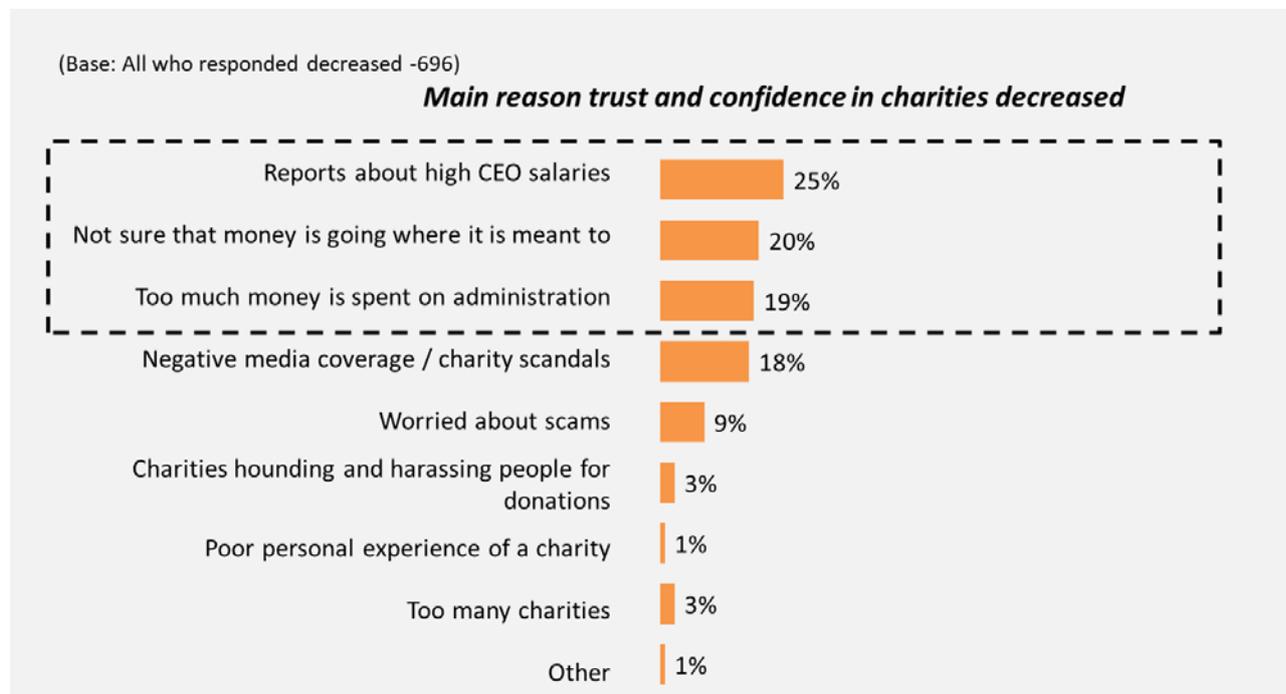


Figure 29 – Main reason your trust and confidence in charities has decreased over last 2 years

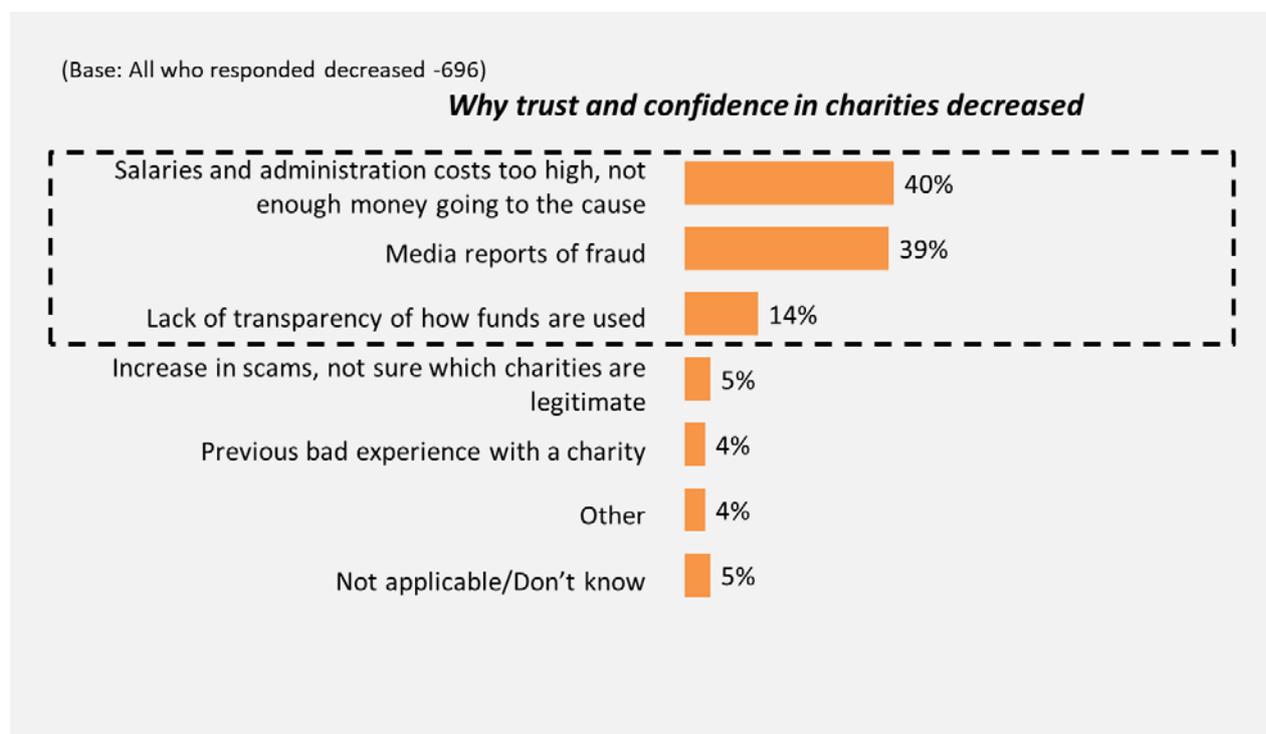


Figure 30 – Why trust and confidence has decreased over past 2 years

Consequently, knowing what percentage of donations actually goes to the cause would greatly increase confidence for two thirds of respondents and somewhat increase confidence for over one fifth. Overall, 9 out of 10 respondents would feel increased confidence if this type of transparency was available.

Similarly, confidence would increase for 9 out of 10 if they saw evidence of what the charity had achieved.

Generally, transparency is key, particularly in respect of financial arrangements. Transparency across various aspects of financial administration would make a difference – ‘greatly’ increase confidence - for half the respondents to the survey.

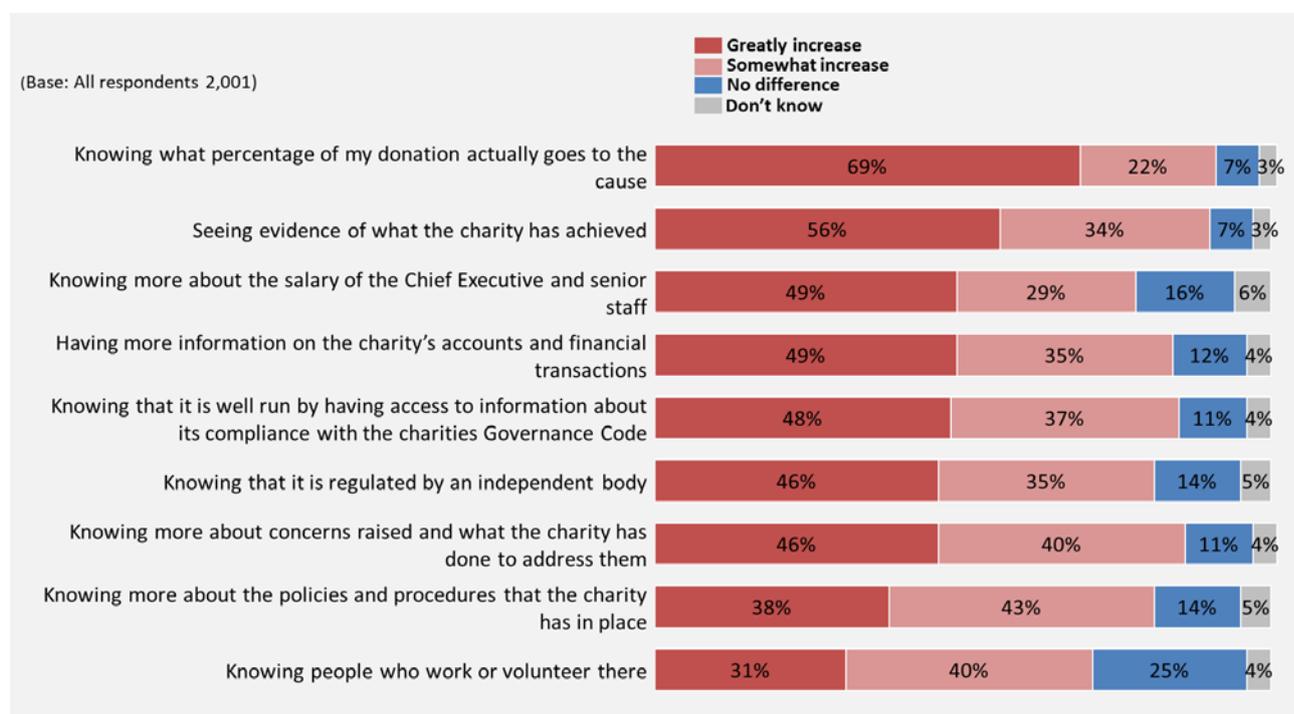


Figure 31 – Which of the following would increase trust and confidence in a charity

91% rated trust and confidence in a charity when deciding whether to donate to them as ‘Important’ – 65% said ‘very important’ and 26% ‘somewhat important’.

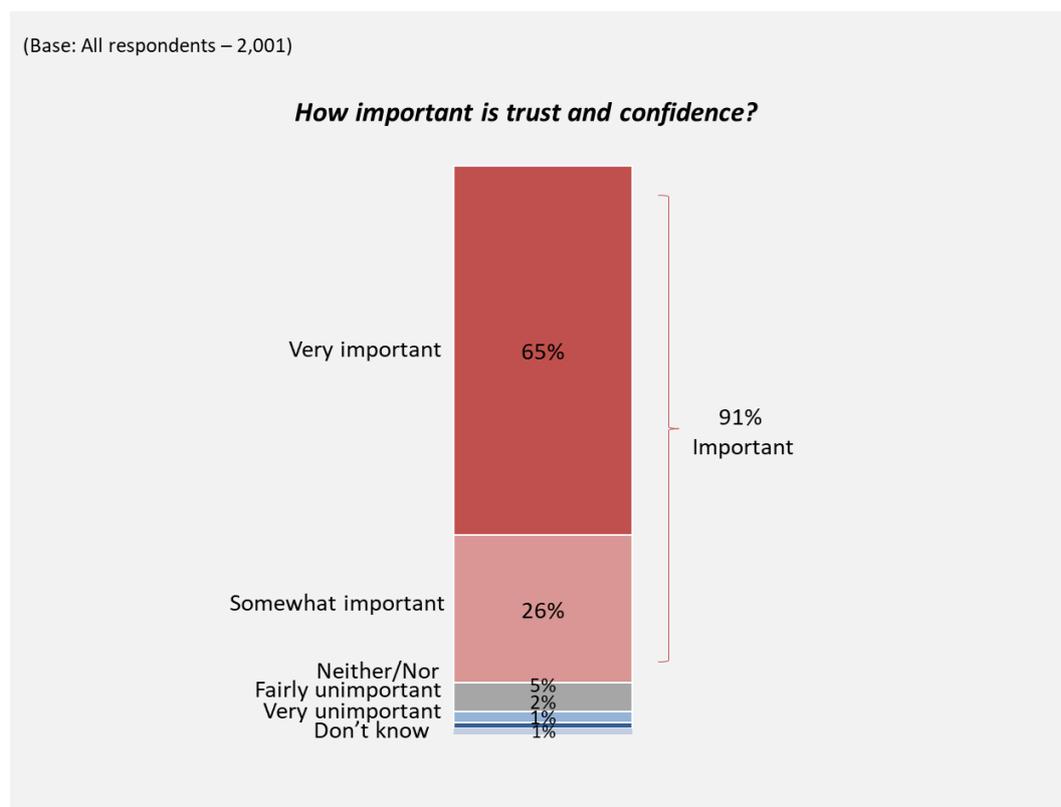


Figure 32 -How important is trust and confidence

Where the public had heard of the Charities Regulator, there was a greater inclination to say trust and confidence was ‘very important’, 72%, compared to 57% among those who had not heard of the Charities Regulator.

Q13. How important is your trust and confidence in a charity when it comes to deciding if you are going to donate to them?

	Heard of the Charities Regulator		
	Total	Yes	No/ Unsure
Total	2001	1121	880
	100%	100%	100%
Very Important (5.00)	65%	72%	57%
Somewhat important (4.00)	26%	22%	31%
Neither/ Nor (3.00)	5%	3%	7%
Fairly unimportant (2.00)	2%	1%	2%
Very unimportant (1.00)	1%	1%	1%
Do not know	1%	*	1%

Table 10 – How important is trust and confidence

Over 50% of those surveyed said they were ‘very concerned’ around a lack of openness and transparency about how donations are used, Chief Executive and senior staff salaries, high administration and running costs and lack of information about how a charity is run.

Openness and transparency was a concern for over 9 out of 10 respondents overall with 65% very concerned, 27% somewhat concerned.

More of those in the 55+ age group than under 55s answered ‘very concerned’ across all 8 statements.

Of least concern, albeit still featuring in the responses of over 70% of people surveyed, were data protection and privacy and fundraising methods and practices.

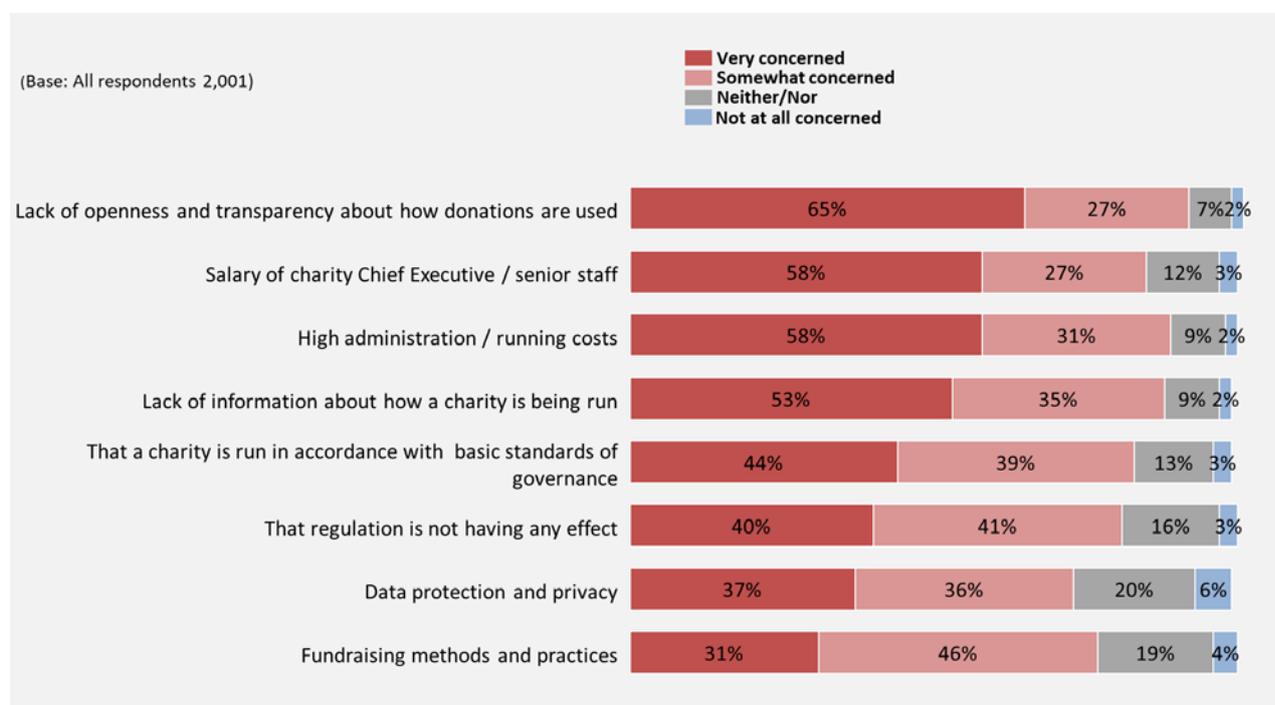


Figure 33 – How concerned are you about the following in charities

Over 8 out of 10 were concerned that the regulation is not having any effect. As a consequence, the most widely provided response among those with this concern to the question ‘Tell us why you think that regulation is not having any effect and what could be done to improve regulation?’ was the provision of more transparency on finances with 24% of respondents stating this was the reason. Echoing responses elsewhere this cohort also referred to the need for lower salaries for CEOs and upper management, 10%, and tighter controls/regulations, 10%.

The call for transparency was highest among those respondents that were aware that charities are regulated and those who had heard of the Charities Regulator. References to

salaries and tighter controls/regulations were highest among those not aware that charities were regulated or of the Charities Regulator.

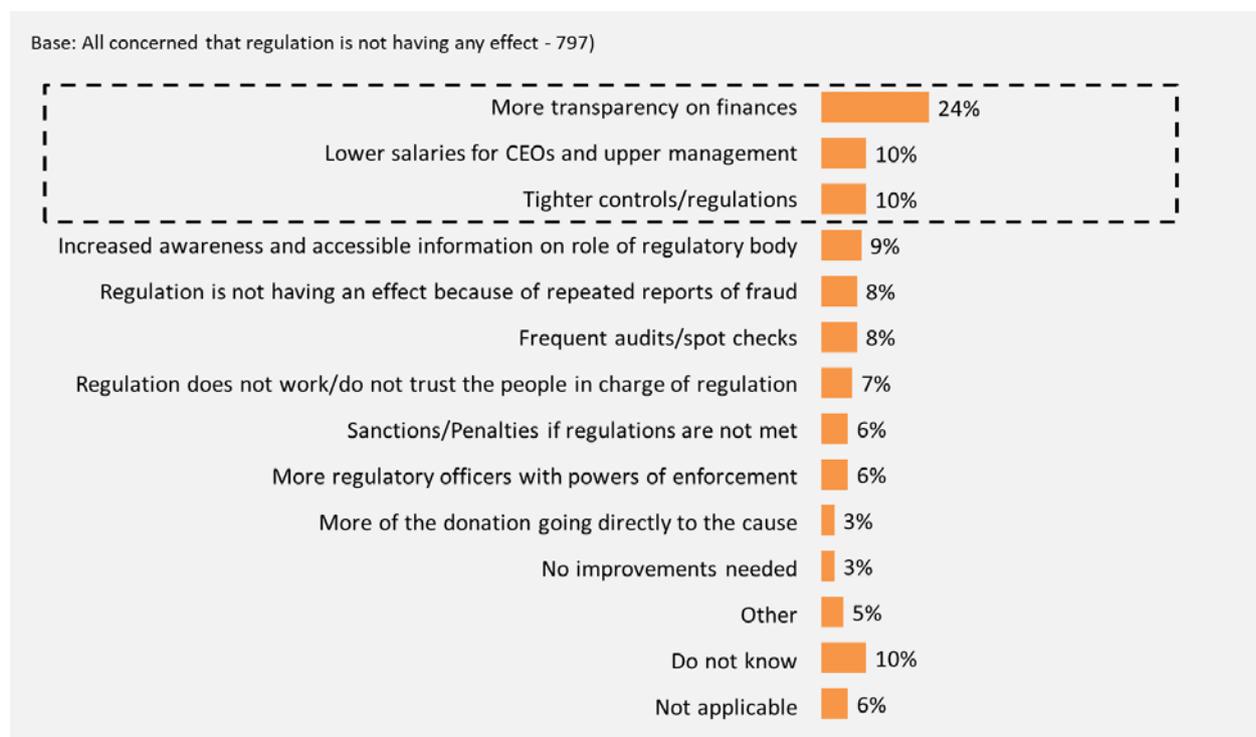


Figure 34 – Why regulation is not having any effect and what could be done to improve regulation

Q14a. Tell us why you think that regulation is not having any effect and what could be done to improve regulation

	Total	Are charities regulated in Ireland		Heard of the Charities Regulator	
		Yes	No	Yes	No/Unsure
BASE :	797	667	130	515	282
Very concerned that regulation is not having any effect	100%	100%	100%	100%	100%
More transparency on finances	24%	25%	19%	26%	20%
Reduction in salary for CEO and upper management	10%	8%	19%	9%	12%
Tighter controls/regulations	10%	9%	12%	9%	10%

Table 11 - Why regulation is not having any effect and what could be done to improve regulation

## 5.4 Section Four – The Charities Regulator

The survey asked respondents who they would contact if they had a concern about a registered charity. From a given list there were three top answers:

- The Charities Regulator, the first organisation mentioned by 26%
- The charity itself, with 17% first mentions
- An Garda Síochána, with 13% first mentions

Overall, the Charities Regulator was most widely mentioned, either as the first or subsequent mention among 50% of respondents. Nevertheless, 50% of the sample did not reference the Charities Regulator, and the range of other organisations cited in response to this question indicated a general lack of awareness and some confusion.

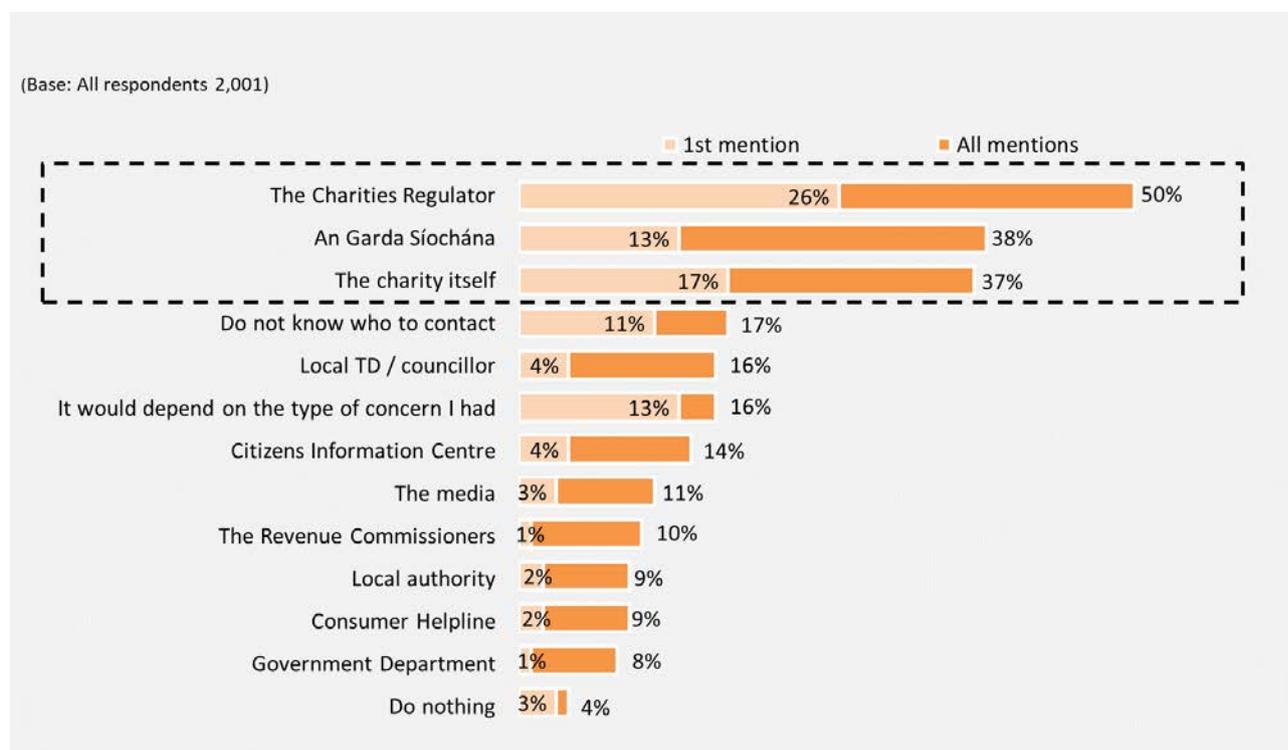


Figure 35 - Would contact if concerned about a registered charity

When asked directly ‘Have you heard of the Charities Regulator?’ 56% of respondents said they had, 16% were unsure and 28% said no. Levels of awareness increased by age group, to 72% awareness among those aged 55+.

When given three options to describe how much they knew about the Charities Regulator only 5% claimed they knew ‘a lot’. 49% described what they knew as ‘a little’ and 46% said ‘just the name’. Of those surveyed, the 31% who had heard of the Charities Regulator had come across the organisation through traditional media sources – newspaper, TV, radio or

other media, 23% said ‘in the news’ but did not specify a source and 14% came across the Charities Regulator through a charity they were involved in.

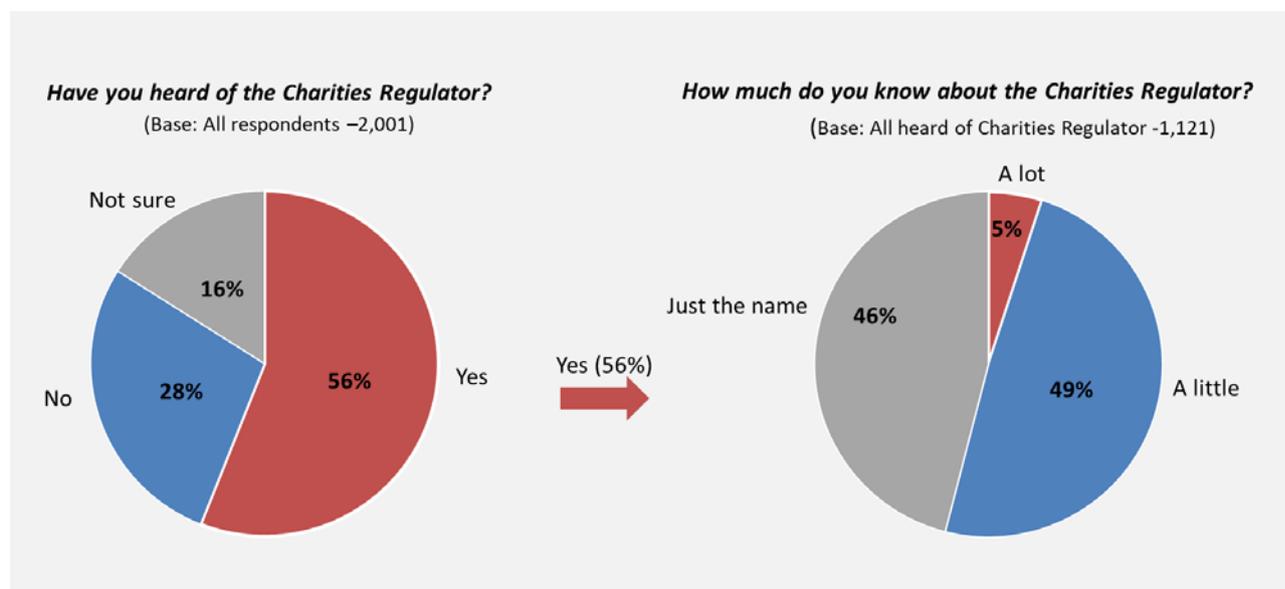


Figure 36 – Have you heard of the Charities Regulator and how much do you know about the Charities Regulator

Q16. Have you heard of the Charities Regulator?				
	Age			
	16 – 34	35 – 54	55+	
Total	636	745	620	
	100%	100%	100%	
Yes	40%	57%	72%	
No	43%	25%	16%	
Not sure	17%	18%	12%	

Table 12 – Have you heard of the Charities Regulator

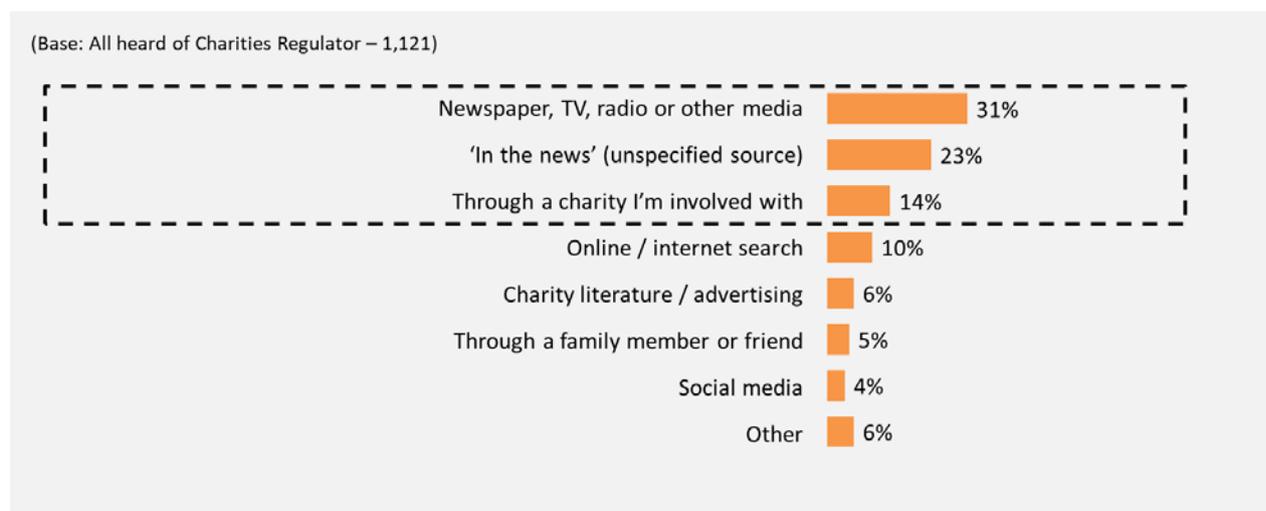


Figure 37 – How did you hear about the Charities Regulator

The survey asked all respondents to review a list of activities and responsibilities and to indicate which they thought the Charities Regulator is responsible for. The top two answers related to the Charities Act:

- Nearly three quarters, 73%, selected 'Monitoring charities and ensuring they comply with the Charities Act 2009'.
- 60% selected 'Investigating and taking legal action against charities for breaches of the Charities Act 2009'.

The third most widely selected responsibility was the maintenance and publication of the Register of Charities.

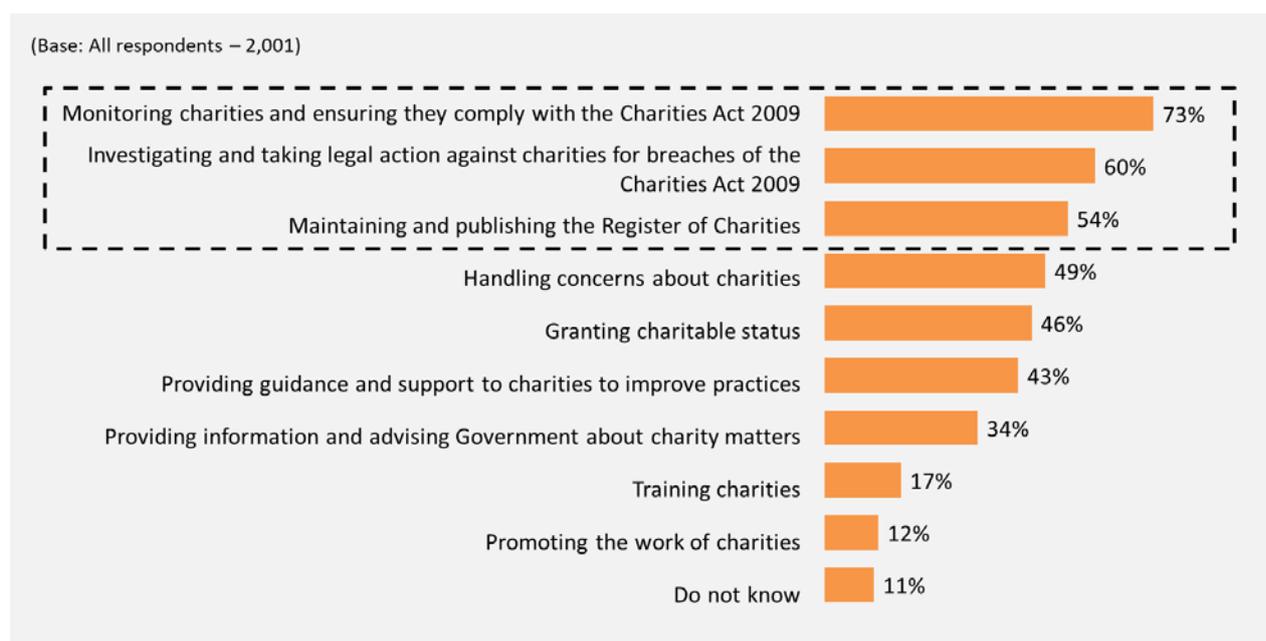


Figure 38 – Which of the following do you think the Charities Regulator is responsible for

A number of responsibilities were referenced to a greater extent by those who stated they believed charities are regulated in Ireland and by those who had heard of the Charities Regulator.

Q17. Which of the following do you think the Charities Regulator is responsible for?					
	Total	Are charities regulated in Ireland		Heard of the Charities Regulator	
		Yes	No	Yes	No/Unsure
Total	2001	1629	372	1121	880
	100%	100%	100%	100%	100%
Maintaining and publishing the Register of Charities	54%	58%	36%	63%	43%
Handling concerns about charities	49%	52%	32%	57%	39%
Granting charitable status	46%	50%	30%	54%	37%
Training charities	17%	17%	16%	17%	17%
Monitoring charities and ensuring that they comply with the Charities Act 2009	73%	76%	59%	82%	62%
Investigating and taking legal action against charities for breaches of the Charities Act 2009	60%	63%	46%	68%	50%
Promoting the work of charities	12%	12%	12%	11%	13%
Providing guidance and support to charities to improve practices	43%	45%	34%	47%	38%
Providing information and advising Government about charity matters	34%	36%	28%	39%	28%
Do not know	11%	8%	26%	4%	20%

Table 13 - Which of the following do you think the Charities Regulator is responsible for

When asked what the Charities Regulator should be responsible for the top two answers remained the same.

The third most selected response changed from maintaining and publishing the Register of Charities, which moved into fourth place at 61%, to an additional responsibility as a response option for this question - checking charity financial accounts, at 69%.

The fifth most selected response was an additional option included for this question of monitoring charities to ensure they spend their money on good causes, 60%.

Handling concerns about charities was cited as something the Charities Regulator should be responsible for by 60%. This had been mentioned by 49% within the previous question, what respondents believed the Regulator is responsible for.

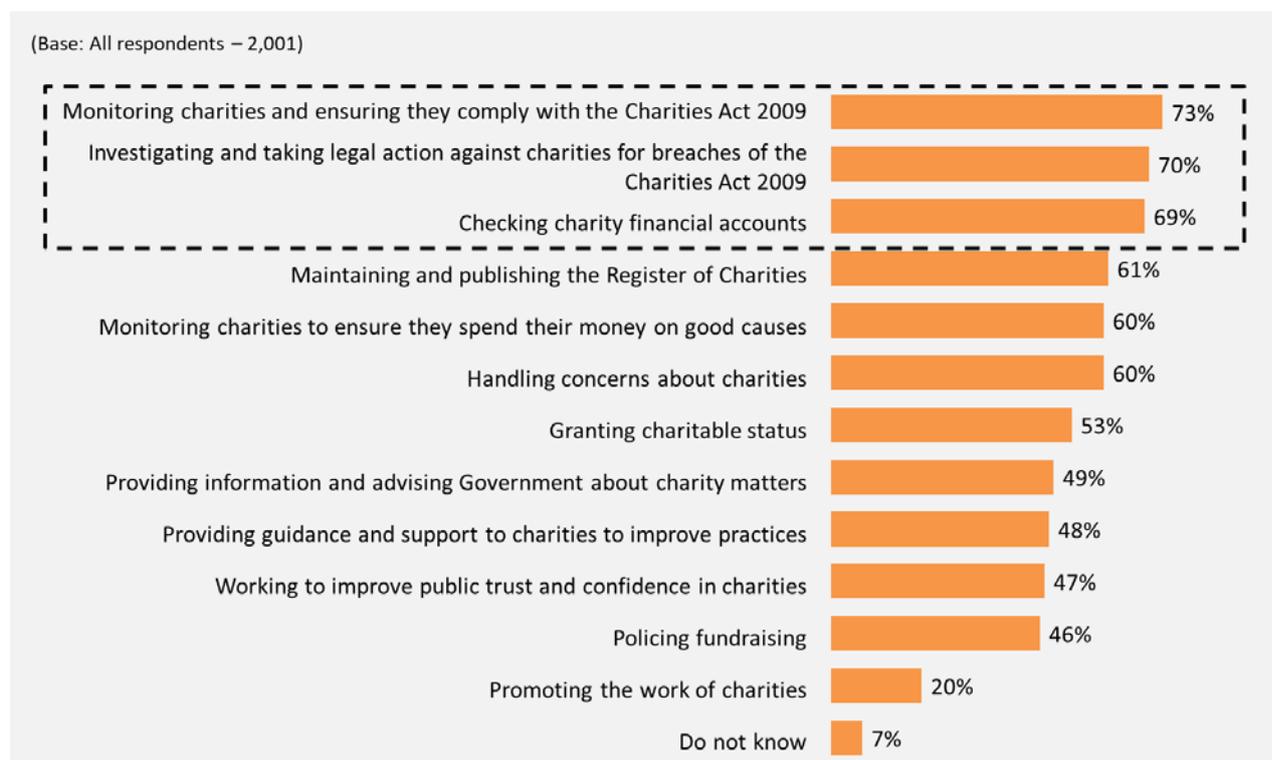


Figure 39 – Which of the following do you think the Charities Regulator should be responsible for

A number of responsibility statements were provided, and the sample was asked to identify whether the Charities Regulator or the charity itself should be responsible. The option ‘equally responsible’ was also available.

There was a tendency to use ‘equally responsible’ by around half the sample in the majority of cases, suggesting confusion around these lines of responsibility.

An exception was for publishing a list of the current charity trustees, where 37% believed this to be the responsibility of the charity. However, 28% believed this rested with the Charities Regulator, and 35% said the responsibility was shared.

Ensuring the charity is well run and ensuring that the public has access to information about how the charity is providing a benefit to the public were also most likely to be seen to sit with the charity itself, amongst 37% and 34% of respondents respectively.

The Charities Regulator received the highest proportion of mentions for ensuring that a charity operates within the law (34% of respondents), and in relation to ensuring the public has access to charity accounts and financial reports (30% of respondents). Nevertheless, the majority, 52% and 46% respectively, saw these as shared responsibilities.

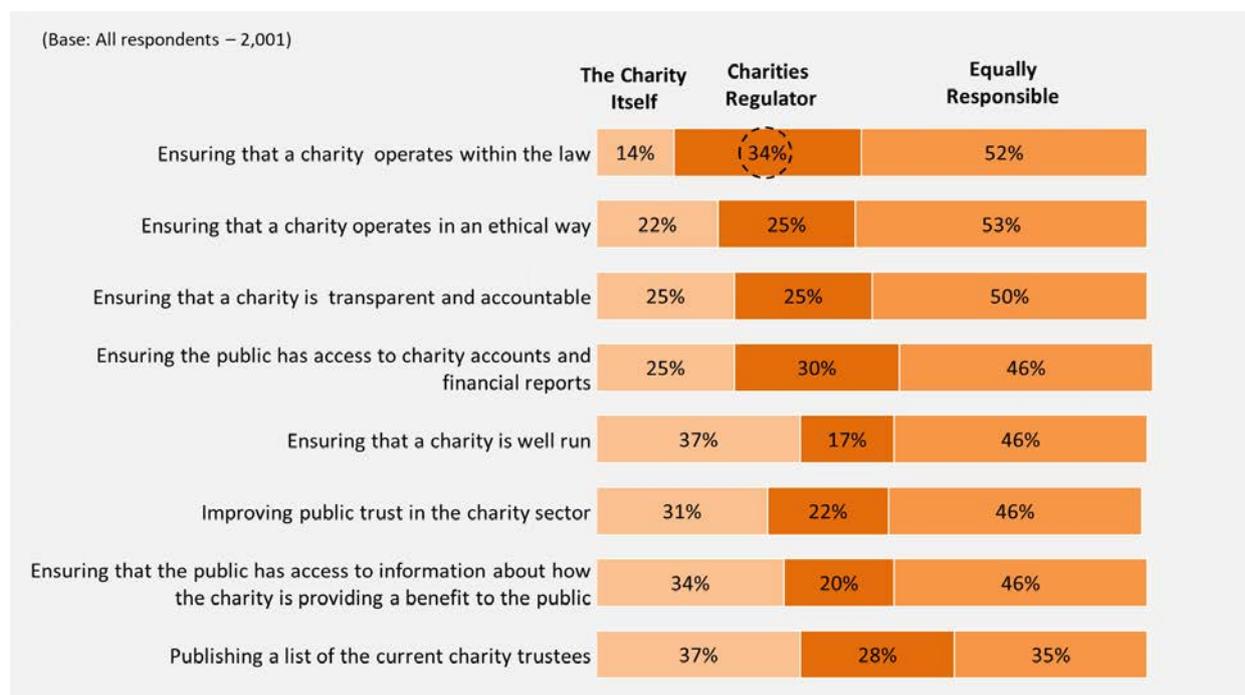


Figure 40 -Indicate who you think is or should be responsible for each of the following

To further clarify the public perception of the role of the Charities Regulator, the survey asked respondents to rank five statements in order of importance to illustrate how the Charities Regulator should operate.

Of close to equal importance were:

- That it maintains and publishes an online Register of Charities operating in Ireland which can be searched for free and
- That the Register of Charities includes information on the finances and activities of each registered charity and a list of current charity trustees

Of least importance, although still mentioned in first, second or third place by over one quarter was ‘That it does not charge charities fees to submit reports or make changes to their charity information’.

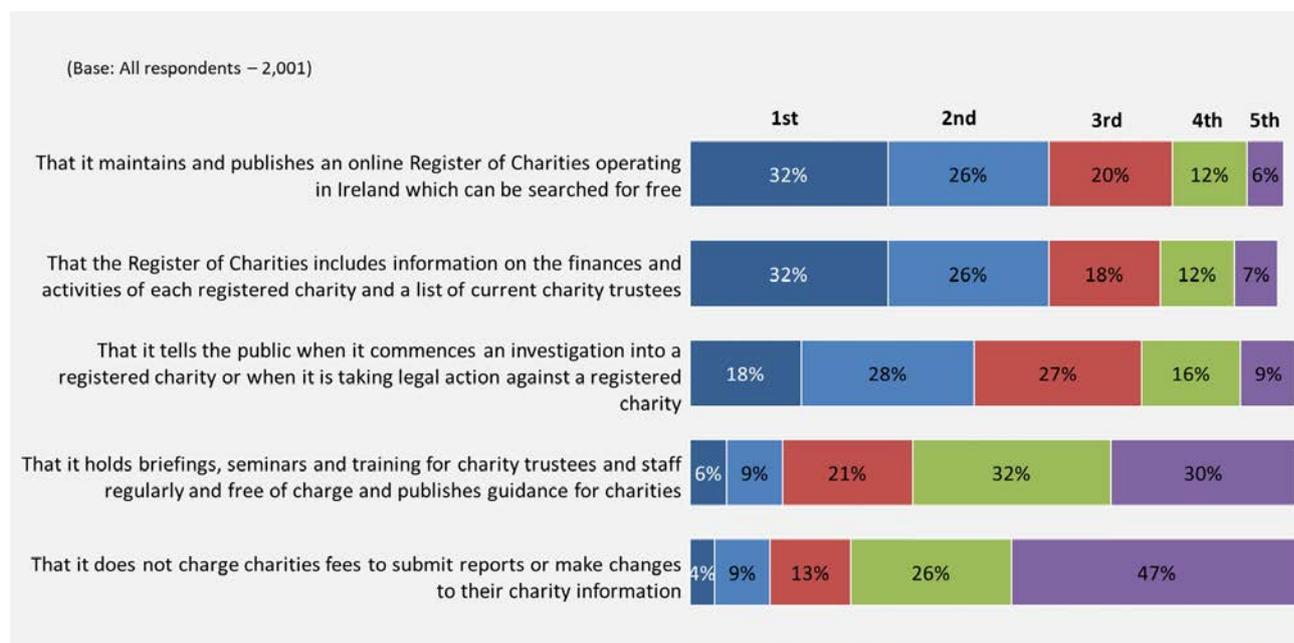


Figure 41 - Thinking about how the Charities Regulator should operate, 5 statements ranked in the order of importance

All respondents were asked to rate the importance of the role of the Charities Regulator as an independent statutory body responsible for registering and regulating charities operating in Ireland.

62% gave the rating very important. A further 24% said somewhat important, resulting in over 8 out of 10 using one of the two 'important' ratings.

Those with an awareness of regulation in Ireland and those who had heard of the Charities Regulator were most likely to provide a strong importance rating, as were those who had made a donation to a charity in the past 12 months and those aged 55 +.

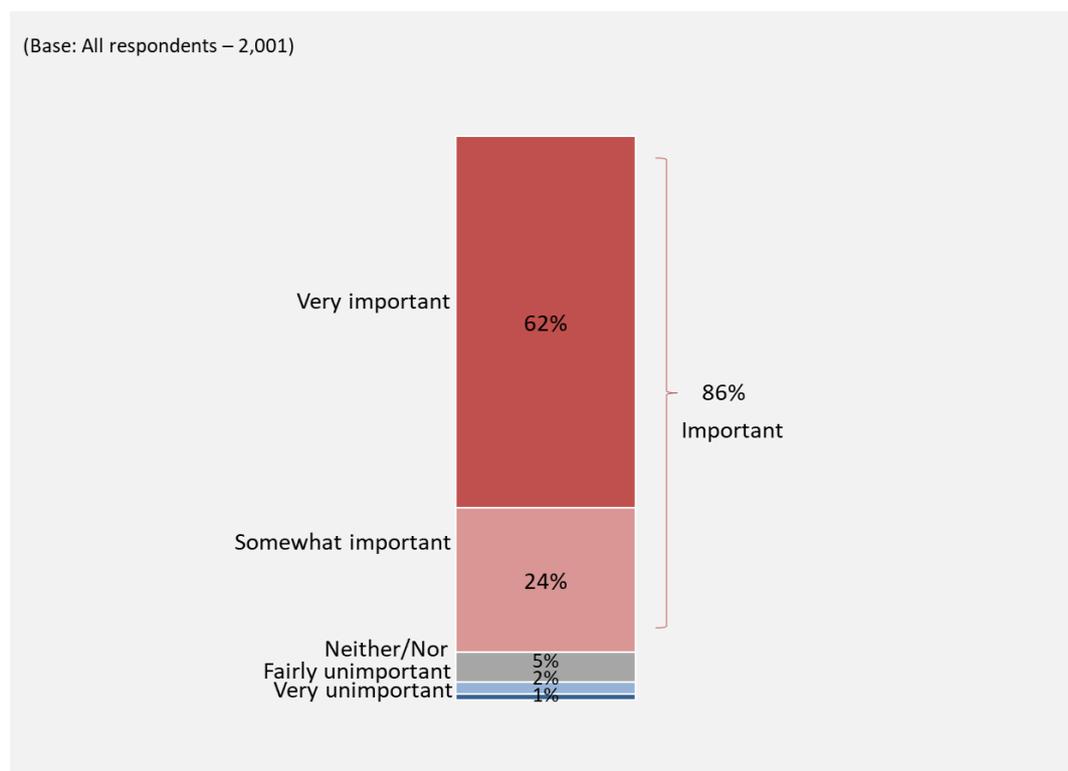


Figure 42 - How important do you personally regard the role of the Charities Regulator as an independent statutory body responsible for registering and regulating charities operating in Ireland?

Q21. How important do you personally regard the role of the Charities Regulator as an independent statutory body responsible for registering and regulating charities operating in Ireland?

	Are charities regulated in Ireland?		Made a donation to charity in the last 12 months		Heard of the Charities Regulator		Age			
	Total	Yes	No	Yes	No/Unsure	Yes	No/unsure	16 – 34	35 – 54	55+
TOTAL (WTD.)	2001	1629	372	1792	209	1121	880	636	745	620
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Very Important (5.00)	62%	66%	46%	63%	49%	73%	48%	46%	62%	78%
Somewhat important (4.00)	24%	24%	26%	25%	18%	21%	28%	36%	23%	14%
Neither/ Nor (3.00)	5%	4%	8%	4%	12%	3%	8%	5%	6%	3%
Fairly unimportant (2.00)	2%	2%	2%	1%	7%	1%	4%	3%	2%	1%
Very unimportant (1.00)	1%	1%	1%	1%	2%	1%	1%	1%	1%	2%
Do not know	6%	3%	17%	5%	12%	2%	11%	9%	7%	2%
<b>SUMMARY</b>										
Important	86%	89%	72%	88%	68%	94%	76%	82%	85%	93%
Unimportant	3%	3%	3%	2%	9%	2%	5%	4%	3%	2%
Base for stats	1882	1574	308	1698	184	1103	779	579	695	608
Mean Score	4.53	4.56	4.36	4.57	4.20	4.67	4.33	4.35	4.53	4.70

Table 14 - How important do you personally regard the role of the Charities Regulator as an independent statutory body responsible for registering and regulating charities operating in Ireland?

## 5.5 Section Five – Raising Awareness

One third of the sample would refer directly to website of the Charities Regulator if they wanted to find out more about charity regulation and 4% would email or phone the Regulator.

The majority however would undertake an internet search.

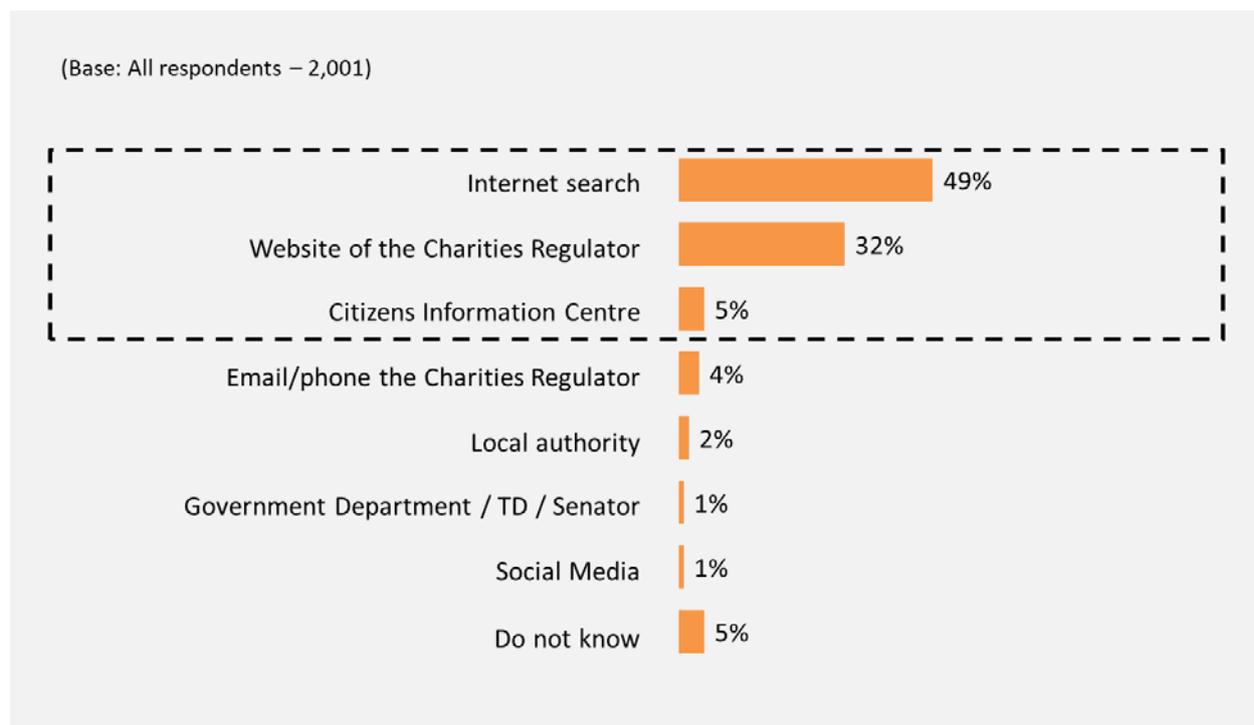


Figure 43 – First point of call to find out more about charity regulation

Raising awareness through a multi-media approach appears to be necessary. Social media posts were of interest to close to 4 out of 10, and one quarter said they would pay attention to TV adverts.

The reach of social media posts declined by age and the reach of TV adverts increased by age.

Respondents indicated that the Charities Regulator could better inform people through its website, 50%, traditional platforms such as TV or radio ads, 47% and adverts on social media, 37%.

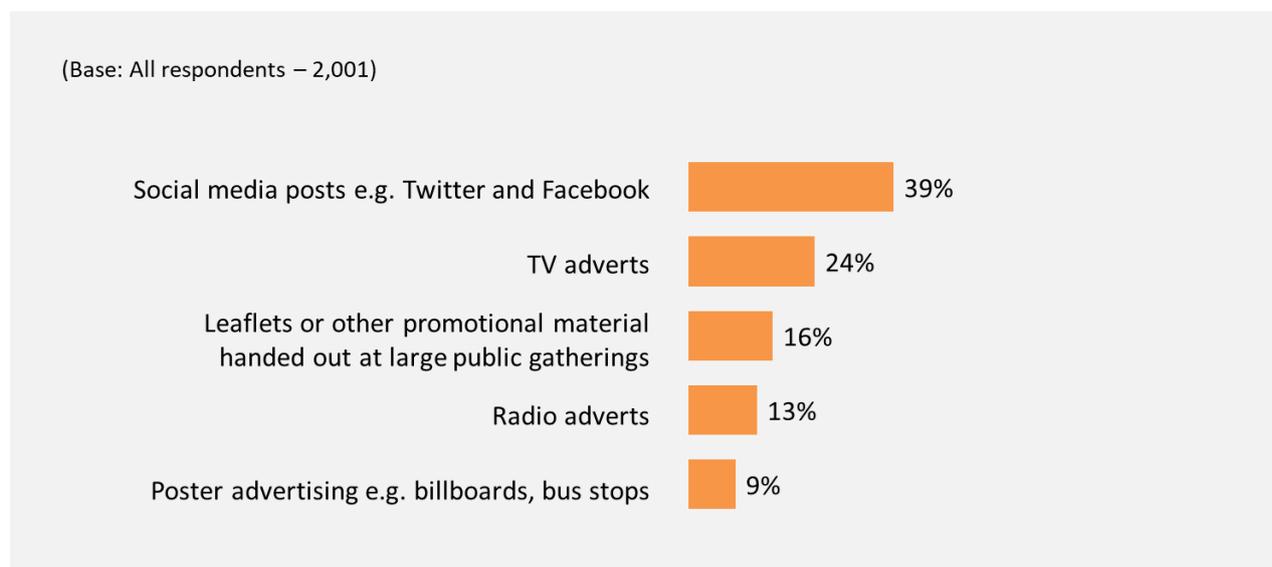


Figure 44 - The Charities Regulator is keen to raise public awareness of the Regulator and the important role it plays. Which of the following would you pay most attention to

Q23. The Charities Regulator is keen to raise public awareness of the Regulator and the important role it plays. Which of the following would you pay most attention to?				
	Total	Age		
		16 – 34	35 – 54	55+
Total	2001	636	745	620
	100%	100%	100%	100%
Social media posts e.g. Twitter and Facebook	39%	50%	43%	22%
TV adverts	24%	13%	22%	36%
Leaflets or other promotional material handed out at large public gatherings such as Ploughing Championships, sporting	16%	19%	12%	18%
Radio adverts	13%	8%	15%	16%
Poster advertising e.g. billboards, bus stops	9%	10%	8%	9%

Table 15 - The Charities Regulator is keen to raise public awareness of the Regulator and the important role it plays. Which of the following would you pay most attention to

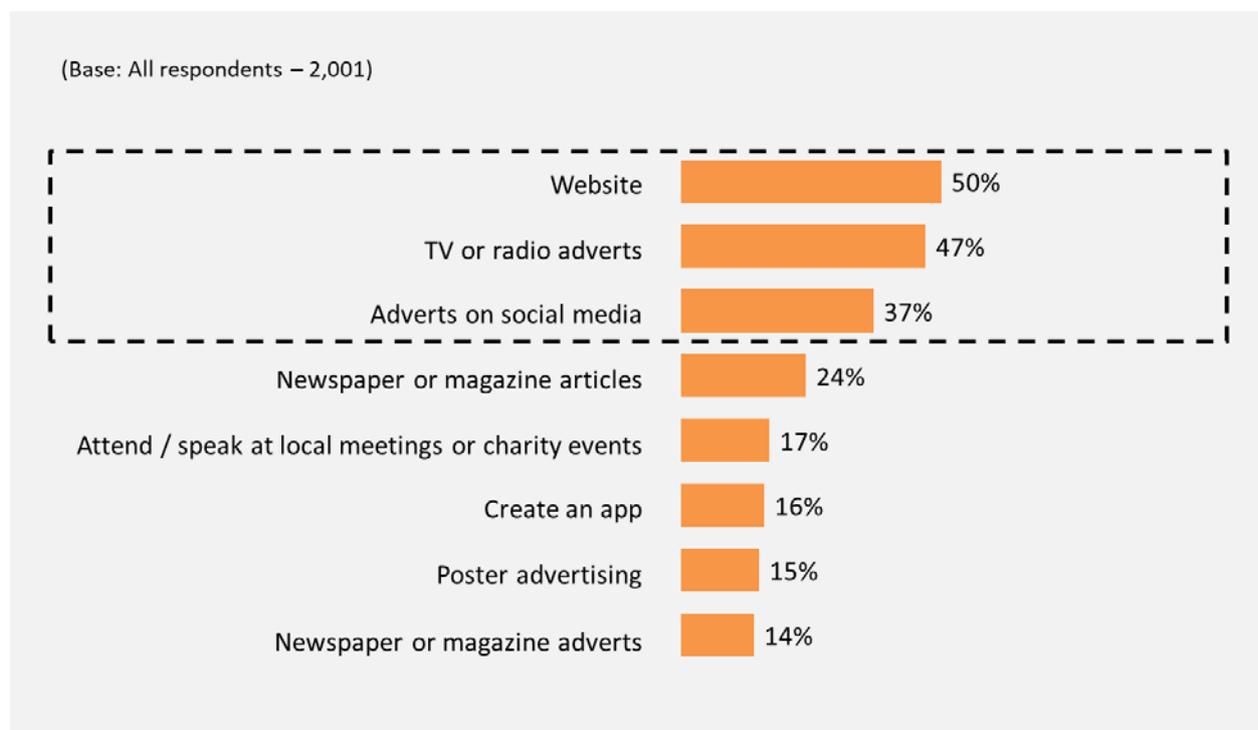


Figure 45 – How else could Charities Regulator better inform you about what it does

Q24. How else could the Charities Regulator better inform you about what it does?				
	Total	Age		
		16 – 34	35 – 54	55+
Total	2001	636	745	620
	100%	100%	100%	100%
Website	50%	52%	49%	50%
TV or radio adverts	47%	44%	48%	48%
Adverts on social media	37%	51%	37%	22%
Newspaper or magazine articles	24%	19%	20%	35%
Attend / speak at local meetings or charity events	17%	22%	13%	14%
Create an app	16%	17%	16%	15%
Poster advertising	15%	18%	14%	13%
Newspaper or magazine adverts	14%	16%	11%	17%

Table 16 - How else could Charities Regulator better inform you about what it does

## 6 Next Steps

The results of this survey, demonstrate that there is further scope for the Charities Regulator, individual charities and representative bodies to educate the public about the sector, in particular:

- its diversity
- that charities are regulated
- that not all not-for-profit organisations are charities
- that informed giving on the part of the public is key to ensuring that donations go where the public intends them to go
- the link between administration costs on the one hand and the scope and complexity of a charity's activities and required standards of governance on the other

Consideration may be given to addressing knowledge gaps across a sizeable proportion of the population in respect of the Charities Regulator, its role and remit alongside suggested best practice for the general public in respect of engaging with charities, making donations and raising concerns.

Work is required to improve public perceptions of the charity sector, ensure fair and accurate media coverage and address issues around transparency. Targeting certain demographics or building on the confidence felt among those who have a level of awareness and appreciation of the structures and governance through their personal involvement with the sector may form a useful advocacy springboard.

The sector is highly valued by the Irish public. Engagement and support remain strong, despite the challenges of the COVID-19 pandemic. With continued support of the Regulator the signs are there that public support will continue, and transparency, confidence and trust may be further improved to the benefit of all.

## ***APPENDIX***

## **APPENDIX I – Public Survey Questionnaire**

## Irish public survey

### *Introduction*

*Hello, today we invite you to complete a survey for the charity sector.*

### *Consent:*

Amárach Research is an independent Irish market research agency, governed by the Data Protection Acts 1998 and 2003 and fully compliant with GDPR regulations.

You may withdraw your consent to participate at any time, without obligation. If you withdraw consent during the survey, no answers you have provided will be stored.

Any data you provide is kept confidential and will be reported in an aggregated form. All data is stored on secure servers. All data is anonymised, and no data or verbatim comments used in the report or associated materials will be identifiable to you.

Examples of data we will record as part of this survey are; your age, gender, your household and where in the country you live, in order to ensure to obtain a representative sample of the population.

### **Please select one of the following options:**

1:I understand what is outlined above and I consent to opt in to the survey

2:No, thanks. I do not wish to participate

**Q1. How important are charities and the work that they do in Irish society? Please rate on a scale of 1 to 5, where 1 = not at all important and 5 = very important (please select one)**

1	2	3	4	5

**Q1a On a scale of 1 to 5, where 1 is very little and 5 is a very significant impact, how would you rate the impact of charities in Irish Society? (please select one)**

1	2	3	4	5

**Q2. Do you or any family member or close friend have any of the following involvement with a charity or charities? (please select all that apply)**

Received money or help from a charity	
Used a service provided by a charity	
Employed by a charity or carried out work for a charity in a paid role	
Volunteers for a charity	
Is a charity trustee	
No Involvement	

**Q3. Which of the following is a charitable activity regulated by charity law? ROTATE**

	Yes	No	Don't Know
Online fundraising platforms like GoFundme			
Raising money for one sick child to get an operation			
Church			
Primary school			
Sports Clubs			
Hobby Club e.g. Bridge or Chess Clubs			
Residents Association			
Museum			
Political campaigns and protests (e.g. Black lives matter)			
Animal rescue			

**Q3a. Is there a difference between a good cause and a registered charity?**

Yes	
No	
Don't Know	

**SCRIPTING: If Yes at Q3a,**

**Q3b. What is the difference?** (please type in)

--

**Q4. Are charities regulated in Ireland?** (please select one)

Yes, charities are regulated	
No, charities are not regulated	
Not sure	

**SCRIPTING: If Yes at Q4,**

**Q4a. What is the name of the organisation responsible for regulating charities In Ireland?** (please select one)

<b>Companies Registration Office</b>	
<b>The Revenue Commissioners</b>	
<b>An Garda Siochana</b>	
<b>Department of Social Protection or other Government Department</b>	
<b>Charities Regulator</b>	
<b>Charities Institute Ireland</b>	
<b>The Wheel</b>	
<b>Unsure / don't know</b>	

**ASK ALL**

**Q4b. Are you aware that only registered charities are regulated?**

Yes	
No	

**Q5. Have you made a donation of money, your time or goods directly to a charity at any time in the last 12 months?**

(please select all that apply)

Yes, money	
Yes, goods (including second hand goods)	
Yes, my time	
Not sure	
No	

**SCRIPTING: If answered *Yes*, money to Q5 –**

**Q5a. How much money have you given in the last 12 months (include loose change in cash collections)?** (please select one)

Less than €10	
€10 or more but less than €50	
€50 or more but less than €100	
€100 or more but less than €200	
€200 or more but less than €500	
€500 or more	
Not sure	

**SCRIPTING: If answered *Yes*, money to Q5 –**

**Q5b. How frequently have you given money in the last 12 months?** (please select one)

At least once a week	
Once or twice a month	
At least six times a year	
Occasionally	
Not sure	

**SCRIPTING: If answered *Yes*, money to Q5 –**

**Q5c. How have you given money to a charity in the last 12 months?**

(please select all that apply) ROTATE

Bought goods (including from a charity shop)	
Cash collection /cheque	
Bought a raffle / lottery ticket	
Gave money to a street or door to door fundraiser	
Attended / participated in a fundraising event	
Sponsored someone in a fundraising event	
Direct debit or standing order	
Charity website by credit/debit card	
Text donation	
Membership fee or subscription	
Regular payroll deduction	
Via social media	
Can't remember / not sure	

**SCRIPTING: If answered *Yes, money, goods or time* to Q5 –**

**Q5d. Which of the following do you most frequently donate to?**

(please select one)

Local charity	
National charity	
International charity	
Not sure	

**SCRIPTING: If answered *Yes, money, goods or time* to Q5 –**

**Q5e. Have you ever donated unwanted clothes or other items using bags or stickers which were posted through your letterbox?**

(please select one)

Yes	
No	

**ASK ALL**

**Q5f. ‘Do you, or would you, check that the organisation referenced on a clothing collection bag or sticker posted through your letterbox is a registered charity before donating? (please select one)**

(please select one)

Yes	
No	

**SCRIPTING: If answered *Yes, money, goods or time* to Q5 –**

**Q5g. What type of charities have you supported in the last 12 months?**

(please select all that apply) ROTATE

Medical or health related	
Physical or intellectual disabilities	
Senior citizens	
Children or youth	
Homeless or refuge services	
Animal rescue or welfare	
Overseas aid or disaster relief	
Local community organisations	
Religious organisations	
Arts, culture or heritage	
Environment and conservation	
Schools, colleges or other education	
Can't remember / not sure	

**ASK ALL**

**Q5h. What, if anything, influences you most in the choices you make in terms of the types of charities you support or might support?**

(please select one) ROTATE

Personal interest or connection e.g. for health, children, family, friends, pets	
News and media reports/stories	
Overseas experiences	
Carer responsibilities	
Religion/religious ethos	
Social media	
Something else (please specify)	
Not sure	

**SCRIPTING: If answered Yes, money, goods or time to Q5 –**

**Q5i. Have you changed the type of charity you support as a result of the Covid-19 pandemic?**

(please select one)

Yes	
No	

**If yes to Q5i**

**Q5j Why have you changed?**

--

**SCRIPTING: If answered Yes, money, goods or time to Q5 –**

**Q5k. What are the main reasons behind why you support the charities that you do?**

(please select top 3 reasons) SCRIPTING NOTE: Top 3 , not ranked. Allow <3 but ensure at least 1 answer ROTATE

Personal involvement with the charity	
A friend or family member is involved with the charity	
To give back to a charity which has directly helped me or a friend or family member	
I enjoy giving and feeling that I am making a difference	
I'm interested in what they do because it is important	
I feel I should give something to worthy causes	
Religious belief / values	
It is endorsed by a celebrity	
My friends or family donate to the charity	

I like to help people who are worse off than I am	
I want to support people in an emergency / disaster	
The charity is very transparent about its finances and activities	
Social	
For something to do	
Other	
Don't know	

**SCRIPTING: If answered Yes, money, goods or time to Q5 –**

**Q5l. Do you check if a charity has a Registered Charity Number (RCN) before you support it?**

(please select one)

Always	
Sometimes	
Never	
Don't know what that number is	

**SCRIPTING: If answered Yes, money, goods or time to Q5 –**

**Q5m. How do you check out a charity before deciding to support it?**

(please select all that apply)

Look at its website	
Ask a friend or relative	
Look at social media	
Check if a charity is on the Register of Charities on the Charities Regulator website	
Check if a charity has a Registered Charity Number (RCN)	
Other	
I don't check out a charity before supporting it	

**Q6. Thinking about charities overall, on a scale of 1 to 10 how much trust and confidence do you have in charities generally?**

(please rate on a scale of 1 to 10, 1- I don't trust them at all, to 10 - I trust them completely)

1 Don't trust at all	2	3	4	5	6	7	8	9	10 Trust completely

**Q7. Thinking about small local charities only, on a scale of 1 to 10 how much trust and confidence do you have in them?**

(please rate on a scale of 1 to 10, 1- I don't trust them at all, to 10 - I trust them completely)

1 Don't trust at all	2	3	4	5	6	7	8	9	10 Trust completely

**Q8. Thinking about national charities only, on a scale of 1 to 10 how much trust and confidence do you have in them?**

(please rate on a scale of 1 to 10, 1- I don't trust them at all, to 10 - I trust them completely)

1 Don't trust at all	2	3	4	5	6	7	8	9	10 Trust completely

**Q9. Thinking about international charities only, on a scale of 1 to 10 how much trust and confidence do you have in them?**

(please rate on a scale of 1 to 10, 1- I don't trust them at all, to 10 - I trust them completely)

1 Don't trust at all	2	3	4	5	6	7	8	9	10 Trust completely

**Q10. Thinking about the charities that you personally support or might support, on a scale of 1 to 10, how much trust and confidence do you have in them?**

(please rate on a scale of 1 to 10, 1- I don't trust them at all, to 10 - I trust them completely)

1 Don't trust at all	2	3	4	5	6	7	8	9	10 Trust completely

**Q11. Over the past 2 years has your overall trust and confidence in charities in general changed?**

(Please select one)

Increased a little	
Increased a lot	
Decreased a little	
Decreased a lot	
Not changed	

**SCRIPTING: All who selected *decreased a little or a lot* on Q11**

**Q11a.**

**What is the main reason your trust and confidence in charities has decreased over the last 2 years?**

(Please select one) ROTATE

Negative media coverage / charity scandals	
Poor personal experience of a charity	
Not sure that money is going where it is meant to	
Reports about high CEO salaries	
Too much money is spent on administration	
Charities hounding and harassing people for donations	
Worried about scams	
Too many charities	
Other – please specify	

**SCRIPTING: All who selected *decreased a little or a lot* on Q11**

**Q11b. Tell us a little bit more about why your trust and confidence has decreased over the last 2 years** (Please give short outline)

--

**Q12. Would the following increase your trust and confidence in a charity?**

(Select one response for each statement) ROTATE

	Greatly increase	Somewhat increase	Would make no difference	Don't know
Knowing what percentage of my donation actually goes to the cause				
Seeing evidence of what the charity has achieved				
Knowing more about the salary of the Chief Executive and senior staff				
Knowing that it is regulated by an independent body				

Having more information on the charity's accounts and financial transactions				
Knowing that it is well run by having access to information about its compliance with the Charities Governance Code				
The charity having a trust mark or similar mark of approval				
Knowing more about concerns raised and what the charity has done to address them				
Knowing more about the policies and procedures that the charity has in place				
Knowing people who work or volunteer there				

**Q13. How important is your trust and confidence in a charity when it comes to deciding if you are going to donate to them? (Please select one)**

Very Important	Somewhat important	Neither/ Nor	Fairly unimportant	Very unimportant	Don't know

**Q14. How concerned are you about the following in charities?**

(Select one response for each statement) ROTATE

	Very concerned	Somewhat concerned	Neither concerned nor unconcerned	Not at all concerned
Data protection and privacy				
That a charity is run in accordance with basic standards of governance				
Lack of openness and transparency about how donations are used				
That regulation is not having any effect				
Salary of charity Chief Executive / senior staff				
Lack of information about how a charity is being run				
High administration / running costs				
Fundraising methods and practices				

**SCRIPTING: For those that select 'very concerned' as response to 'that regulation is not having any effect' at Q14**

**Q14a. Tell us why you think that regulation is not having any effect and what could be done to improve regulation** (Please give short outline)

**Q15. If you had a concern about a registered charity, who would you contact?**

(select up to 3 you would contact) ROTATE

1<sup>st</sup> point of contact, 2<sup>nd</sup> point of contact, 3<sup>rd</sup> point of contact

	1st	2nd	3rd
The charity itself			
An Garda Síochána			
The media			
The Revenue Commissioners			
The Charities Regulator			
Local authority			
Government Department			
Local TD / councillor			
Citizens Information Centre			
Consumer Helpline			
Do nothing			
Don't know who to contact			
It would depend on the type of concern I had (SCRIPTING: Cannot then give 3 ports of call			
SCRIPTING: Option to say 'no further ports of call after 1 <sup>st</sup> / 2 <sup>nd</sup>			

**Q16. Have you heard of the Charities Regulator?**

(please select one)

Yes	
No	
Not sure	

**SCRIPTING: All who responded yes to Q16****Q16a. How much do you know about the Charities Regulator? (please select one)**

A lot	
A little	
Just the name	

**SCRIPTING: All who responded yes to Q16****Q16b. How did you hear about the Charities Regulator? (please select one)**

Through a charity I'm involved with	
Through a family member or friend	
Newspaper, TV, radio or other media	
'In the news' (unspecified source)	
Online / internet search	
Social media	
Charity literature / advertising	
Other (please specify)	

**Q17. Which of the following do you think the Charities Regulator is responsible for?**

(Select all that apply) ROTATE

Maintaining and publishing the Register of Charities	
Handling concerns about charities	
Granting charitable status	
Training charities	
Monitoring charities and ensuring that they comply with the Charities Act 2009	
Investigating and taking legal action against charities for breaches of the Charities Act 2009	
Promoting the work of charities	
Providing guidance and support to charities to improve practices	
Providing information and advising Government about charity matters	
Don't know	

**Q18. Which of the following do you think the Charities Regulator *should* be responsible for?**

(Select all that apply) ROTATE

Working to improve public trust and confidence in charities	
Monitoring charities and ensuring that they comply with the Charities Act 2009	
Monitoring charities to ensure they spend their money on good causes	
Maintaining and publishing the Register of Charities	
Handling concerns about charities	
Granting charitable status	
Investigating and taking legal action against charities for breaches of the Charities Act 2009	
Providing information and advising Government about charity matters	
Checking charity financial accounts	
Promoting the work of charities	
Policing fundraising	
Providing guidance and support to charities to improve practices	
Don't know	

**Q19. Indicate who you think is or should be responsible for each of the following:**

(Select one response for each statement) ROTATE

	The Charity itself	The Charities Regulator	Equally responsible
Publishing a list of the current charity trustees			
Ensuring the public has access to charity accounts and financial reports			
Ensuring that a charity is well run			
Improving public trust in the charity sector			
Ensuring that a charity is transparent and accountable			
Ensuring that a charity operates within the law			
Ensuring that a charity operates in an ethical way			
Ensuring that the public has access to information about how the charity is providing a benefit to the public			

**Q20. Thinking about how the Charities Regulator should operate, please rank the 5 statements below in what you think should be the order of importance, with 1 being the most important**

	Rank 1-5
That it maintains and publishes an online Register of Charities operating in Ireland which can be searched for free	
That the Register of Charities includes information on the finances and activities of each registered charity and a list of current charity trustees	
That it tells the public when it commences an investigation into a registered charity or when it is taking legal action against a registered charity (or other body or person for claiming that it is a charity)	
That it does not charge charities fees to submit reports or make changes to their charity information	
That it holds briefings, seminars and training for charity trustees and staff regularly and free of charge and publishes guidance for charities	
Don't know	

**Q21. How important do you personally regard the role of the Charities Regulator as an independent statutory body responsible for registering and regulating charities operating in Ireland? (Please select one)**

Very Important	Somewhat important	Neither/ Nor	Fairly unimportant	Very unimportant	Don't know

**Q22. Where would be your first port of call if you wanted to find out more about charity regulation? (please select one)**

Internet search	
Website of the Charities Regulator	
Email/phone the Charities Regulator	
Local authority	
Government Department / TD / Senator	
Citizens Information Centre	
Social Media	
Don't know	

**Q23. The Charities Regulator is keen to raise public awareness of the Regulator and the important role it plays. Which of the following would you pay most attention to?**

(please select your top response)

Leaflets or other promotional material handed out at large public gatherings such as Ploughing Championships, sporting events etc	
Social media posts e.g. Twitter and Facebook	
Poster advertising e.g. billboards, bus stops	
Radio adverts	
TV adverts	

**Q24. How else could the Charities Regulator better inform you about what it does?**

(please select all that apply)

Website	
Newspaper or magazine articles	
Newspaper or magazine adverts	
Adverts on social media	
Attend / speak at local meetings or charity events	
TV or radio adverts	
Poster advertising	
Create an app	

About you:

**Q25. What is your gender?** (please select one)

Male	
Female	
Other	

**Q26. What age group are you in?** (please select one)

16 – 24	
25 – 34	
35 – 44	
45 – 54	
55 – 64	
65+	

**Q27. Where do you live?** (please select one)

Ulster (including Northern Ireland)	
Munster	
Leinster (not including Dublin City or county)	
Dublin City or County	
Connacht	

**Q28. Which of the following best describes where you live?** (please select one)

Urban/city centre	
Sub-urban	
Semi-rural	
Rural	
I'd rather not say	

**Q29. Are you currently?** (please select one)

Employed full-time	
Employed part-time	
Self Employed	
Unemployed and looking for work	
Unemployed and not looking for work	
Retired	
Studying	

Unable to work	
Other	
I'd rather not say	

**Q30. What is the highest level of education you have attained to date? (please select one)**

No formal education	
Junior Certificate or equivalent	
Leaving Certificate or equivalent	
Trade / Technical / Vocational Qualification	
Diploma/Degree	
Post-graduate	
Other	
I'd rather not say	

**Q31. Please indicate to which occupational group the Chief Income Earner in your household belongs, or which group fits best.**

*The Chief Income Earner is the person in your household with the largest income, this could be you. If the Chief Income Earner is retired and has an occupational pension please answer for their most recent occupation. If the Chief Income Earner is not in paid employment but has been out of work for less than 6 months, please answer for their most recent occupation.*

Higher managerial, professional	
Intermediate managerial, professional	
Supervisory or clerical, junior managerial	
Skilled manual worker (e.g. Skilled Bricklayer, Carpenter, Plumber, Painter, Bus, Ambulance Driver, HGV driver, AA patrolman, publican)	
Semi or unskilled manual work (e.g. Manual workers, all apprentices to be skilled trades, Caretaker, Park keeper, non-HGV driver, shop assistant)	
Casual worker - not in permanent employment	
Student	
Homemaker	
Retired and living on state pension	
Unemployed or not working due to long-term sickness	
Full-time carer of other household member	
Farmer 50+ Acres	
Farmer 50- Acres	
I'd rather not say	

**Q32. How many people are in your household? Please select the number of each:**

Children under 18	
Children 18+ - living at home	
Children 18+ - mainly living away from home	
Adults	
I'd rather not say	

**Q33. Do you have pets? Please type in the number:**

No pets	
Yes, I have pets	
I'd rather not say	
Number of pets	

**Thank you for participating in this survey. Please select 'Done' to complete the survey.**

## APPENDIX II - DataXcel



### Email Data

- Consumer Database 150k Irish Consumer records.
- Data is collected via own data collection sites such as Freeprizedraws.ie or fpd.ie
- GDPR and eprivacy compliant with focus on user Consent driven process – all email data is optional opt-in tick boxes.
- Traffic to our sites are anonymous clicks sourced from online affiliate partners such as competitions.ie
- Clicks must complete a registration process which sets out how their data will be used, by who and the user provides their preferred consent which is completely optional and has passed a GDPR and eprivacy audit both internally and by external GDPR consultants.
- Selectable by name, age, gender, income, residential status, location, user device type, internet usage, socio-economic profile, etc...
- Our compliance process is explained [HERE](#)