

BrandVue's Most Loved Charity Brands 2022

*Who is winning the hearts
of UK charity supporters?*





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Introduction

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The power of love

Welcome to BrandVue's Most Loved Charity Brands 2022 – a recognition and celebration of the most emotively connected brands within the third sector.

We know that people's most deeply held relationships with charities are emotional by default. Whether based on a connection to a specific cause or driven by a desire to help others, relationships with charities are full of personal meaning.

However, the relationship between charities and their supporters is like a bridge. It requires thoughtful design, sturdy construction and regular maintenance.

The potential result is an emotional connection between a charity and its

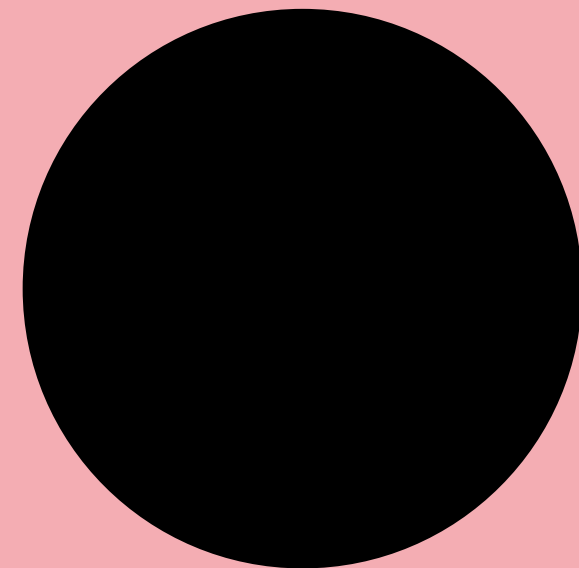
supporters that is highly personal, valued and can last for decades.

Within this report we reveal the UK's most loved charity brands, and the leaders within nine categories: animal welfare, healthcare, children & family, social justice, humanitarian aid & relief, environmental protection, disability, armed forces and mental health.

These rankings are based on 60,000 interviews collected over the past year, through Savanta's market intelligence platform BrandVue Charities: the largest and most comprehensive brand, audience and supporter tracking engine in the market.

Which brands are the top performers?

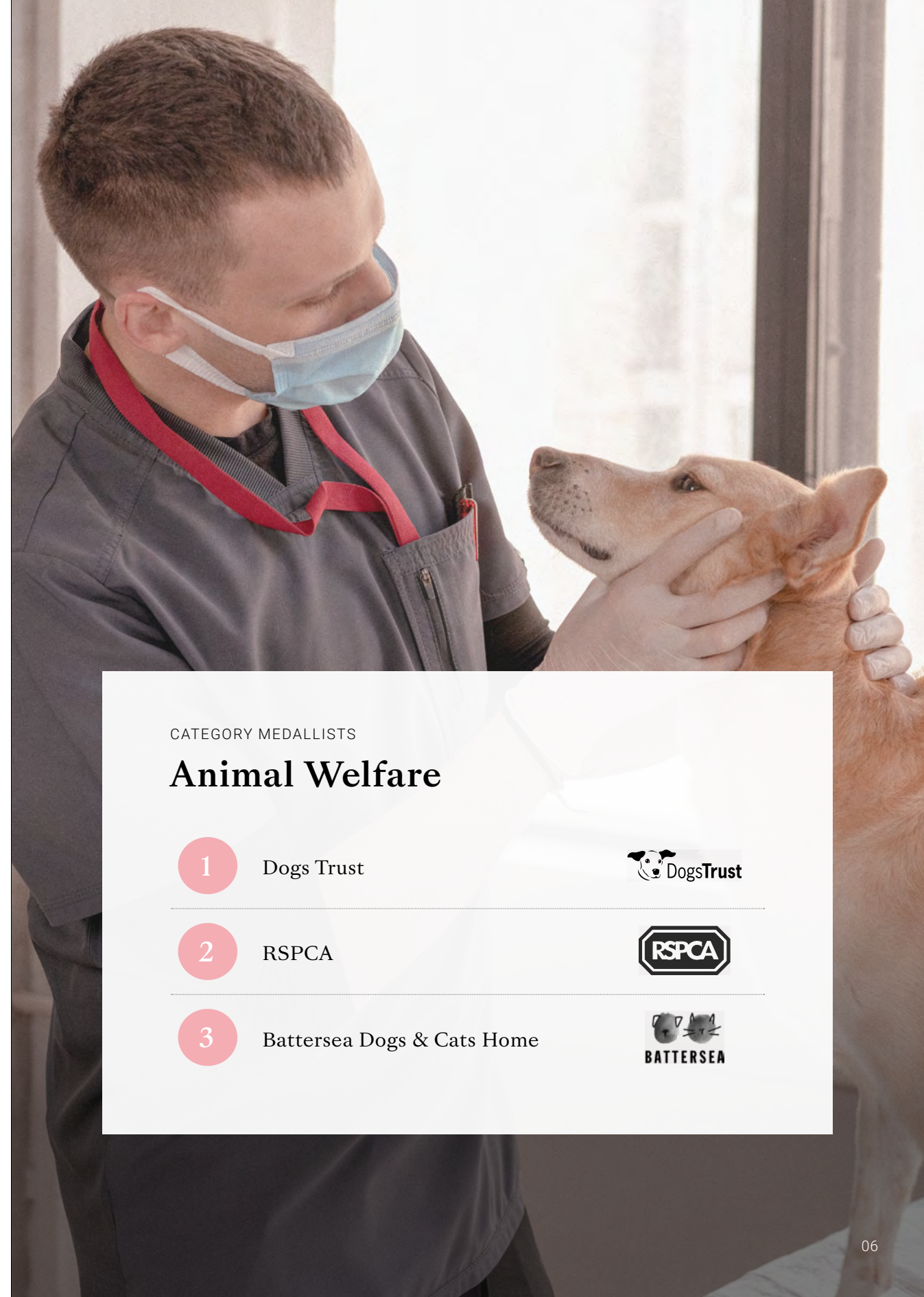
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Top 3 category medallists




Context is everything. While there are valuable insights to be seen in how the charity sector operates as a whole, brand associations, engagement and support vary by sub-sector.

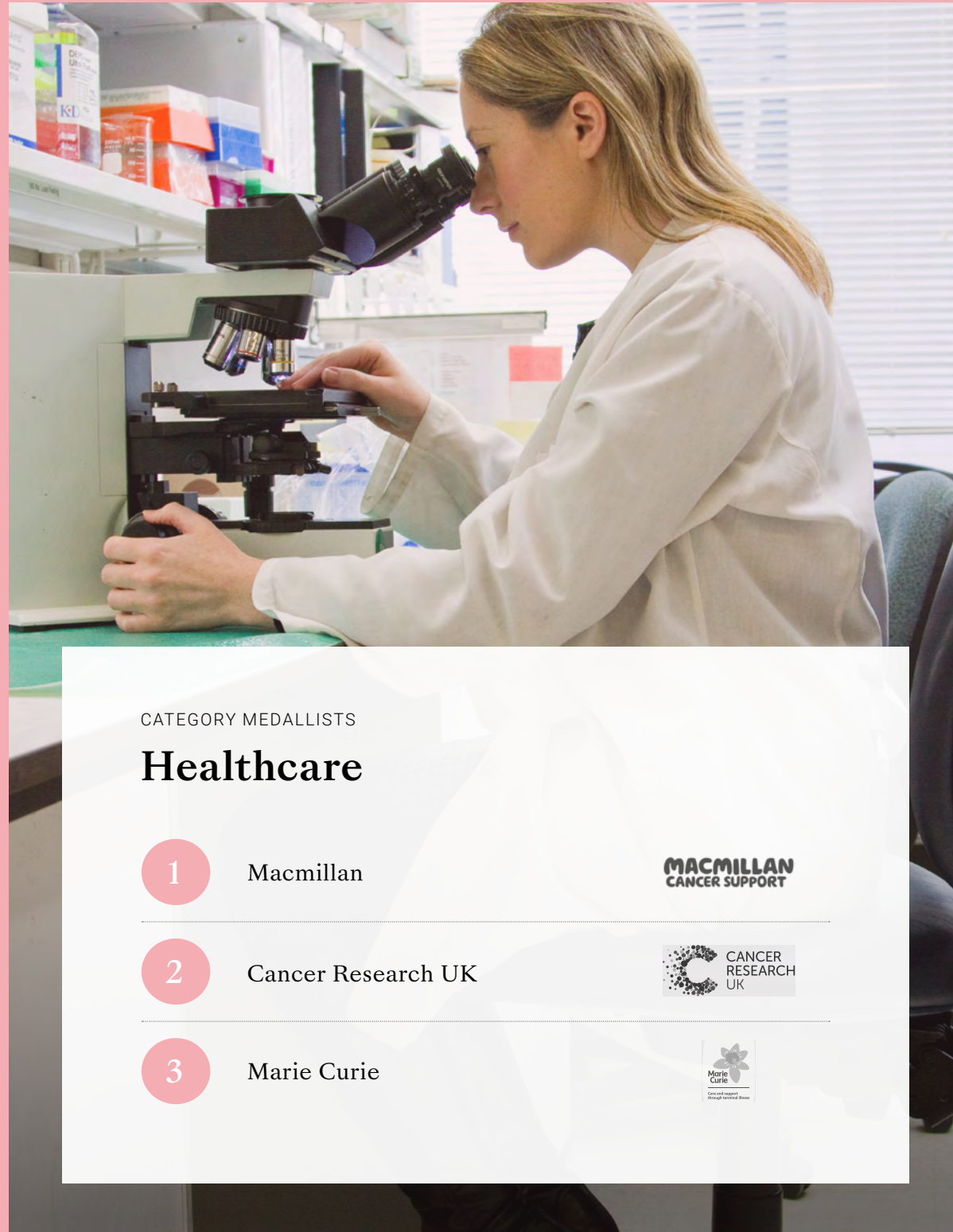
We have compiled a top three of charity brand love across the following sub-sectors: animal welfare, healthcare, children & families, social justice, humanitarian aid & relief, environmental protection, disability, armed forces, and mental health.



CATEGORY MEDALLISTS

Animal Welfare

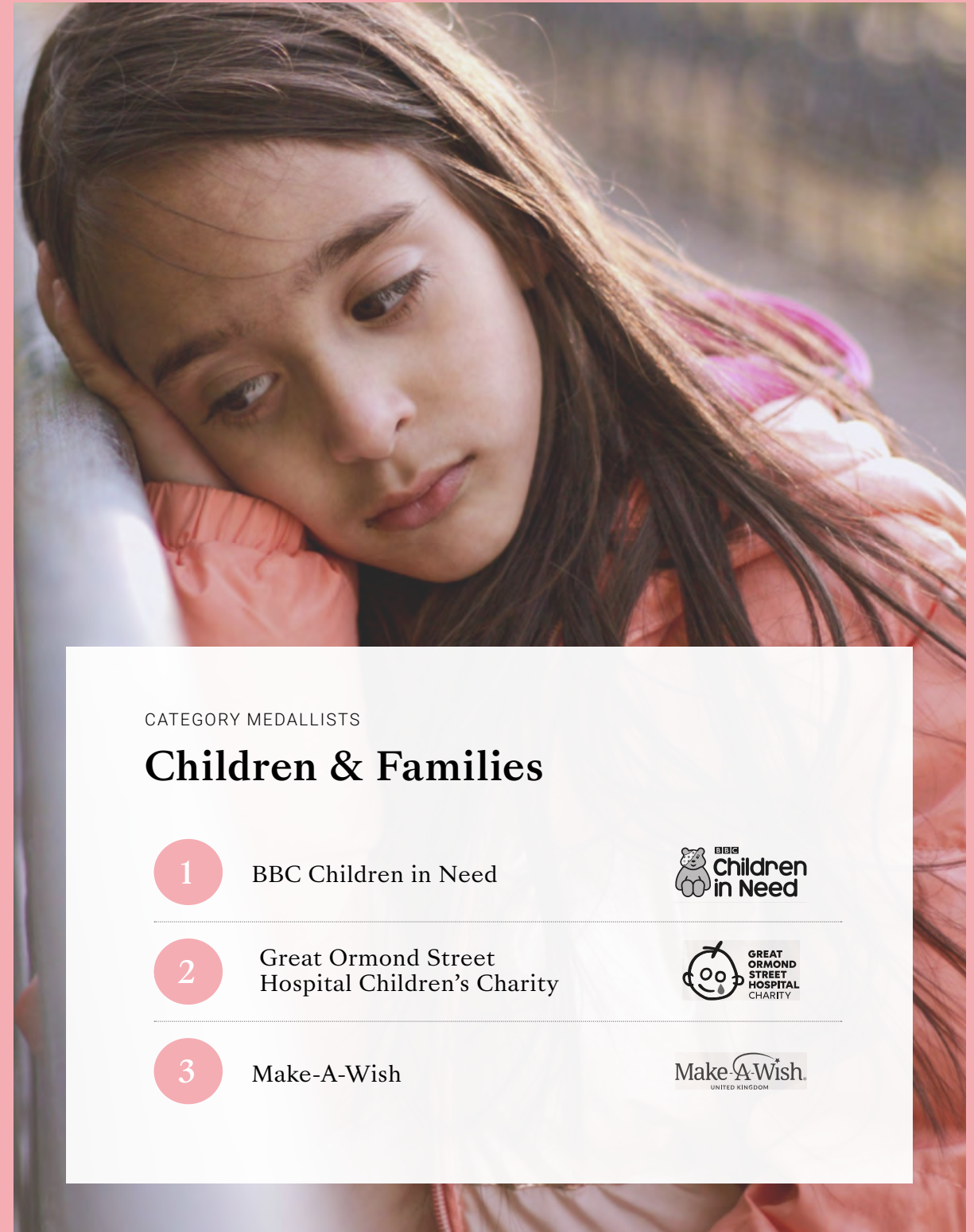
- 1** Dogs Trust 
- 2** RSPCA 
- 3** Battersea Dogs & Cats Home 



CATEGORY MEDALLISTS




Healthcare

- 1 Macmillan 
- 2 Cancer Research UK 
- 3 Marie Curie 



CATEGORY MEDALLISTS




Children & Families

- 1 BBC Children in Need 
- 2 Great Ormond Street Hospital Children's Charity 
- 3 Make-A-Wish 



CATEGORY MEDALLISTS




Social Justice

- 1** Women's Aid 
- 2** Refuge 
- 3** Freedom From Torture 



CATEGORY MEDALLISTS




Humanitarian Aid & Relief

- 1** Islamic Relief Worldwide 
- 2** Royal National Lifeboat Institution 
- 3** Muslim Aid 



CATEGORY MEDALLISTS

Environmental Protection

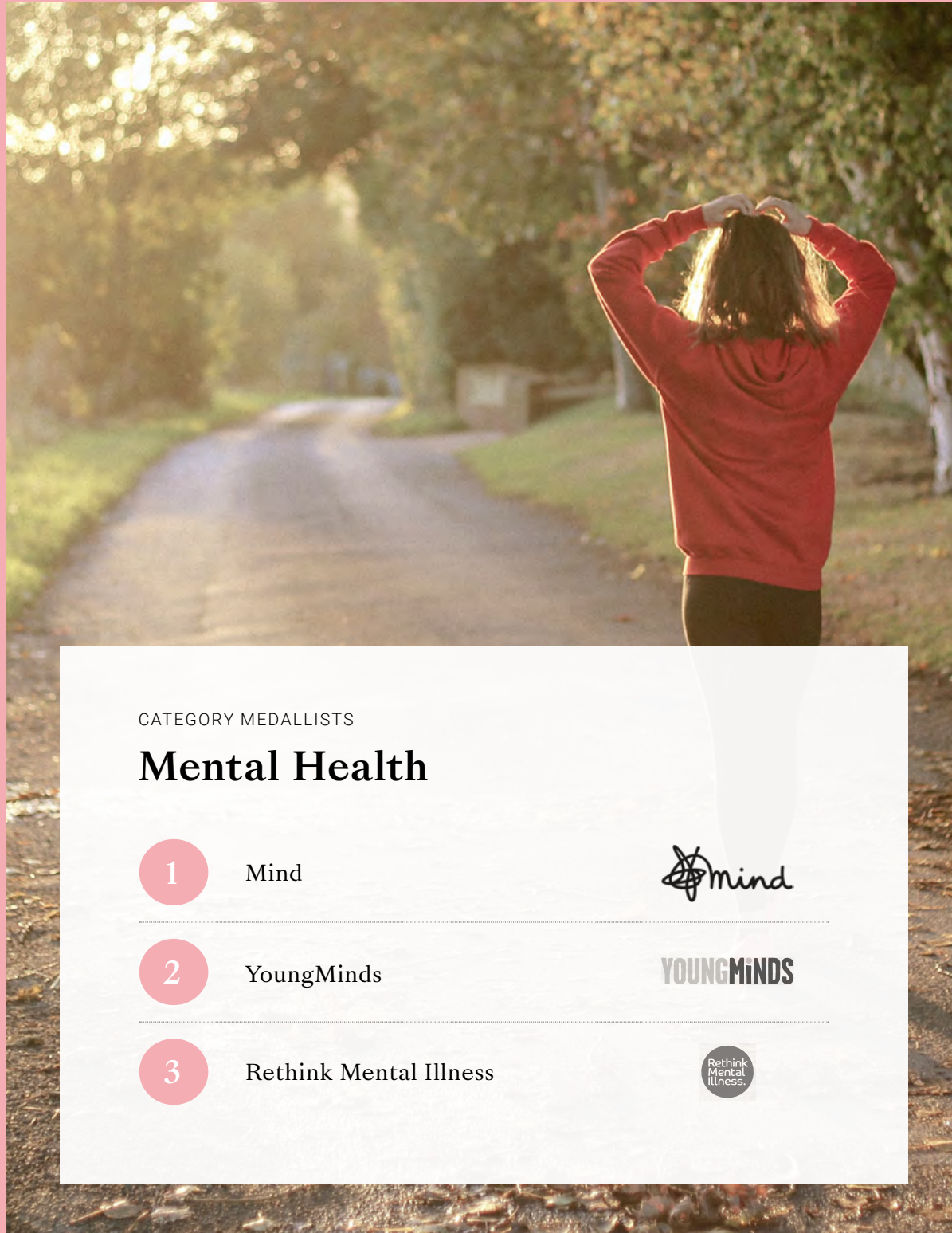
- 1** WWF 
- 2** The Climate Coalition 
- 3** The Climate Group 



CATEGORY MEDALLISTS




Disability

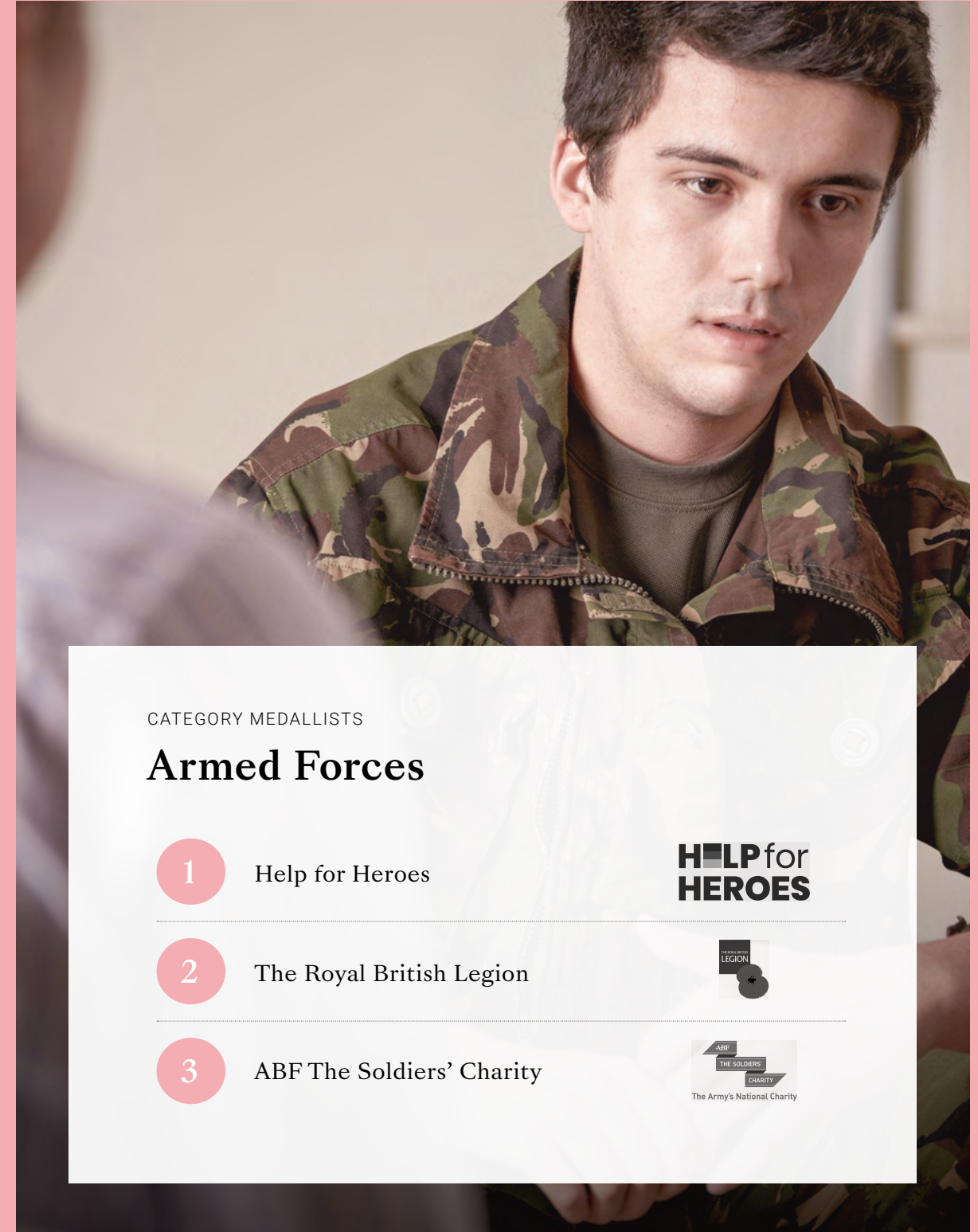
- 1** Guide Dogs for the Blind Association 
- 2** National Autistic Society 
- 3** Motor Neurone Disease Association (MNDA) 



CATEGORY MEDALLISTS




Mental Health

- 1 Mind 
- 2 YoungMinds 
- 3 Rethink Mental Illness 



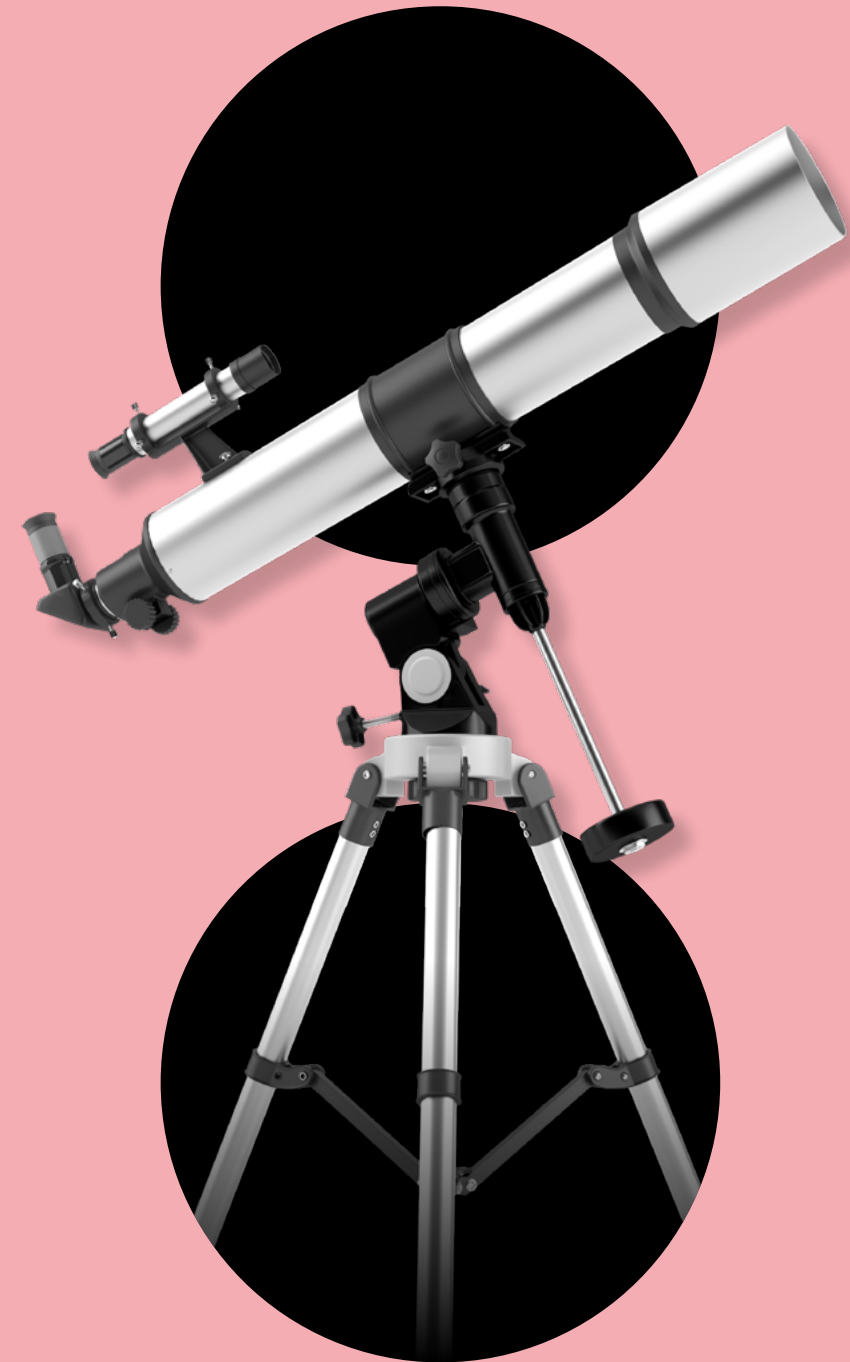
CATEGORY MEDALLISTS

Armed Forces

- 1 Help for Heroes 
- 2 The Royal British Legion 
- 3 ABF The Soldiers' Charity 

Observation and analysis

How does brand love manifest among charities? 12



How does brand love manifest among charities?

Love can serve as a vehicle to increase both financial and in-kind support for a specific charity and improve its key brand metrics.

Whilst we have seen the top three most loved charities remain the same over the last year, with an amplified public focus on people's health due to the pandemic, we have seen a significant increase in love towards health and wellbeing charities, especially those focused on children – BBC Children in Need, Great Ormond Street Hospital, and the Make-A-Wish foundation.

Despite the fact that consumers who love the top charities in each category are on average nearly six times (5.6x) more likely to have supported them in the past year, compared to people with a lower affinity, the support rate amongst people who love a specific, often a smaller charity is much higher. It is nearly sevenfold for The Trussell Trust (6.8x), and over tenfold for both Islamic Relief (10.8x) and Freedom for Torture (12.2x), compared to those who are less passionate about these charities.

Furthermore, people who love any of the top three charities are three times more likely to understand the charities

and their cause or mission (76%) than those who are more lukewarm towards these charities (25%).

Alongside having an understanding, trust is a necessary ingredient for establishing a healthy relationship with a charity – and we see that loved charities are significantly more trusted by the public. Data from BrandVue reveals that an average of 85% of respondents who love the top three most-loved charities also trust them. This share is over four times higher compared to people with lower affinity (20%).

The public consider having trust in a charity that they love to be as important as believing a charity to be caring. They also value other brand attributes such as being passionate, committed, and friendly when considering a charity that they love. Whilst for those over 55, it is also important for a charity to be established and honest, compared to those under 55 who like a brand to be inspiring and credible.

Love is also the force which deepens support for a specific charity and turns their relationship into a long-lasting one. This logic can be demonstrated in patterns of engagement with various channels of a charity. People who love the top three charities are more likely to have engaged with almost all tested channels of engagement in the past 12 months.

Engagement through a number of different channels has a strong correlation with loyalty, including financial donations (both individual and regular), word-of-mouth and endorsement on social media, purchase of branded merchandising and volunteering, and engagement with charity shops.

Monetary forms of support are a crucial element that help ensure longevity of a charity. Whilst we have seen an increased pressure on personal finances over the last 12 months, the overall proportion of people who say that they have made an individual or regular donation has remained static, opting instead to increase items donated

to a charity shop or a food bank or make a fundraising donation. Year-on-year, individual donations to health and children's charities by those who love the brand have increased by 88% and 17%, respectively

Equally important is the power of word of mouth: the propensity to take on the role of an informal brand ambassador, positively promoting the charity, grows by +18% amongst those who love the top three charities, increasing to 20% amongst the top three loved health charities and 24% amongst the top three loved children's charities.

Inspiring love among the general public is in the interest of each charity that operates in a saturated sector and competes with other organisations for supporters. With an abundance of organisations and causes clamouring for their attention, people need a compass to navigate this increasingly complex sector. Only charities that succeed in creating an emotional bond, can cut through the noise. This anchor point is love.











The league table in full













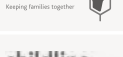







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







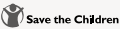










Charity trends for the year ahead 17























No. 01-100

Ranking	Brand	Change (vs. 2021)
1	 Macmillan Cancer Support	⊖
2	 Cancer Research UK	⊖
3	 Dogs Trust	⊖
4	 BBC Children in Need	⊖
5	 Great Ormond Street Hospital Children's Charity	⊕
6	 Make-A-Wish	⊕
7	 RSPCA	⊖
8	 Marie Curie	⊕
9	 Battersea Dogs & Cats Home	⊖
10	 The Guide Dogs for the Blind Association	⊕



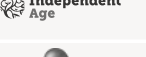







Ranking	Brand	Change (vs. 2021)
11	 St George's Hospital Charity	⊕
12	 British Heart Foundation	⊖
13	 Islamic Relief Worldwide	⊕
14	 Mind	⊖
15	 Lifeboats	⊕
16	 Cats Protection	⊕
17	 WWF	⊖
18	 Help for Heroes	⊖
19	 Sands	⊕
20	 PDSA	⊕
21	 Redwings Horse Sanctuary	NEW
22	 Muslim Aid	⊖
23	 Children with Cancer UK	⊖
24	 Childline	⊖
25	 The Royal British Legion	⊖
26	 Cash for Kids	⊕
27	 YoungMinds	⊕
28	 NSPCC	⊕
29	 Brooke	⊕
30	 Breast Cancer Now	⊕

Ranking		Brand	Change (vs. 2021)
31		World Animal Protection	↓
32		Young Lives VS Cancer	↓
33		The Trussell Trust	↑
34		World Cancer Research Fund	↓
35		Rethink Mental Illness	↓
36		Bliss	↑
37		Teenage Cancer Trust	↑
38		The Donkey Sanctuary	↑
39		The Lullaby Trust	↑
40		Save The Children	↓
41		Samaritans	↓
42		ABF The Soldiers Charity	↑
43		Comic Relief	↓
44		The Blue Cross	↓
45		Hospice UK	↑
46		SOS Childrens Villages	↑
47		British Red Cross	↓
48		Blood Cancer UK	↑
49		Combat Stress	↑
50		Breast Cancer Care	—

Ranking		Brand	Change (vs. 2021)
51		St John Ambulance	↓
52		Women's Aid	↓
53		Compassion	NEW
54		Maggie's	↓
55		C.A.L.M.	↓
56		Refuge	NEW
57		Salvation Army	↑
58		Starlight Children's Foundation	↓
59		The Smile Train	↑
60		Prostate Cancer UK	↑
61		SSAFA	↓
62		UNICEF	↓
63		Freedom From Torture	NEW
64		The Climate Coalition	NEW
65		Project Hope	↓
66		Tommy's	↑
67		Action for Children	↓
68		Age UK	↑
69		Climate Group	NEW
70		Plan International	↓

Ranking	Brand	Change (vs. 2021)
71	 Barnardo's	↓
72	 The Children's Society	↓
73	 Alzheimer's Research UK	↑
74	 The National Trust	NEW
75	 King's College Hospital Charity	↑
76	 Alzheimer's Society	↓
77	 Tearfund	↓
78	 CARE International	↓
79	 Samaritan's Purse International Limited	↑
80	 Blind Veterans UK	↓
81	 The Wildlife Trusts	↓
82	 DementiaUK	↓
83	 Carers UK	↓
84	 Sport Relief	↓
85	 Royal Marsden Cancer Campaign	↓
86	 Citizens Advice Bureau	NEW
87	 National Autistic Society	↓
88	 Royal Voluntary Service	NEW
89	 Motor Neurone Disease Association (MND)	↓
90	 Stonewall	↓



Ranking	Brand	Change (vs. 2021)
91	 SHELTER	↓
92	 WaterAid	↓
93	 Independent Age	↓
94	 British Lung Foundation	↓
95	 Wildfowl and Wetlands Trust (WWT)	↓
96	 World Vision	↓
97	 Catholic Agency for Overseas Development (CAFOD)	↓
98	 Crisis	↑
99	 The Anthony Nolan Trust	NEW
100	 RSBC (Royal Society for Blind Children)	↓

Charity trends for the year ahead

The past year has been another extraordinary one for the charities sector. Charities are continuing to face immediate challenges to adapt their ways of working, and the services that they deliver.

Here, we look at some of the key trends that we will see shaping the strategies and ways of working in the charities sector in the year ahead.

1 The trend towards localism will be deepened – with potential to drive devolution

Charities played a key role in supporting local communities facing complex social issues during the Covid-19 pandemic. As a result, we may see a deepening of the trend towards localism, already evident pre-pandemic, with people strengthening ties to local communities and increasingly interested in how they can benefit those closest to them. This shift of focus has the potential to transfer more power to communities, adding momentum behind the decentralisation of power.

2 The demand for community-based charity services will continue to grow

According to research by the Charities Aid Foundation (CAF), 75% of charity leaders said that demand for their organisation's services had increased over the first year of the pandemic, and 86% expected that demand would continue to increase. Many households face significant financial pressures, and charities are increasingly filling gaps of public service provision. Both National Council for Voluntary Organisations (NCVO) and CAF report that the extent of government funding is uncertain, suggesting that members of the public may have to lean on charities to get by.

3 Charities will face continued pressures to build resilience

Income generation was a persistent challenge for charities pre-pandemic and has been exceptionally tough for many charities over the last two years, with the current state of the economy suggesting that the coming year will be no easier. Growing inflation, shrinking household finances, and increasing public apprehension about their financial security in the coming year is likely to result in fewer people donating to charities. Despite the immediate financial pressures, charities will need to invest in their future financial resilience by developing their infrastructure and digital capabilities, staff skills, and their governance and leadership. We may see more charities developing their partnerships with businesses, trusts, and individual philanthropists to diversify their income streams.

4 Fundraising will keep shifting online

The pandemic has fast-tracked the move towards a society that is increasingly based online, offering contactless and cashless interactions. Charities have been forced to adapt their fundraising activities to more digital models in order to overcome the barriers presented by the lockdowns and social distancing measures over the last two years, and this is a shift that is here to stay. Indeed, CAF has reported that 48% of charities believe that the pandemic has changed charities forever, and 45% have increased their ability to accept card, contactless and digital donations, or payments. Online fundraising has the potential to be more cost efficient and effective, and we can expect charities to continue to invest in and innovate around their online fundraising capabilities. However, while online fundraising presents opportunities for charities to become more financially resilient, the Charity Digital Skills report published last year highlighted the digital skills gap that faces the sector: 67% of charities said that digital was a priority for their organisation, but 58% reported that their board has low digital skills or room for improvement.

5 Volunteering will take on new forms

Many of the changes to volunteering seen during the pandemic will remain, especially those that have enabled charities to expand their volunteering circles. During the pandemic, we saw a decline in volunteering amongst older people and disabled people, whilst a higher proportion of younger people volunteered for the first time. This sets a challenge for charities to ensure that their future volunteering opportunities are accessible and diverse – while also holding onto the growth in new volunteering groups. The growth in online opportunities for volunteering such as befriending and advocacy activities offers new opportunities for volunteers to get involved, and with a greater degree of flexibility. However, this route is also dependent on digital access, and so the option to volunteer in person will continue to be an important way for the less digitally connected to get involved.

6 Charities will have a role to play in green levelling up

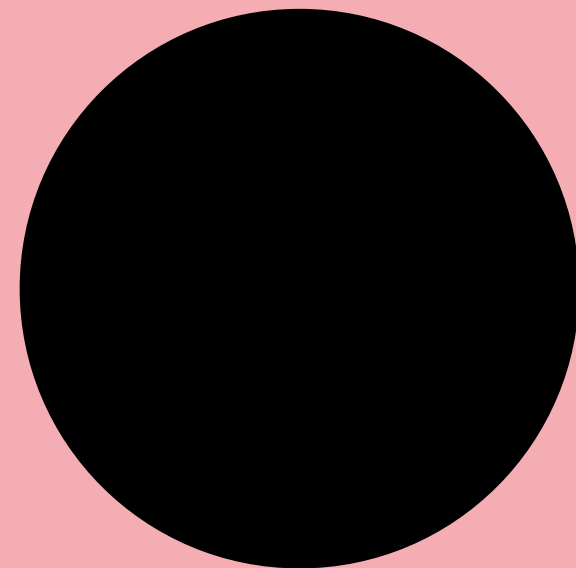
The issue of climate change has been gathering momentum in public debate, and the charity sector have a growing awareness of their role to play in addressing climate change. We will see a growing emphasis on how charities can help local communities tackle climate change – especially where the impacts of climate change intersect with their existing services. This will be particularly relevant where the impacts of climate change are expected to have an unequal effect on minority and vulnerable groups. Charities also have a key role to play in shifting conversations on climate change and can act as an example by setting their own organisational targets to run and deliver services in a sustainable way.



How Savanta can help you

Supporting charities to adapt for the future 20

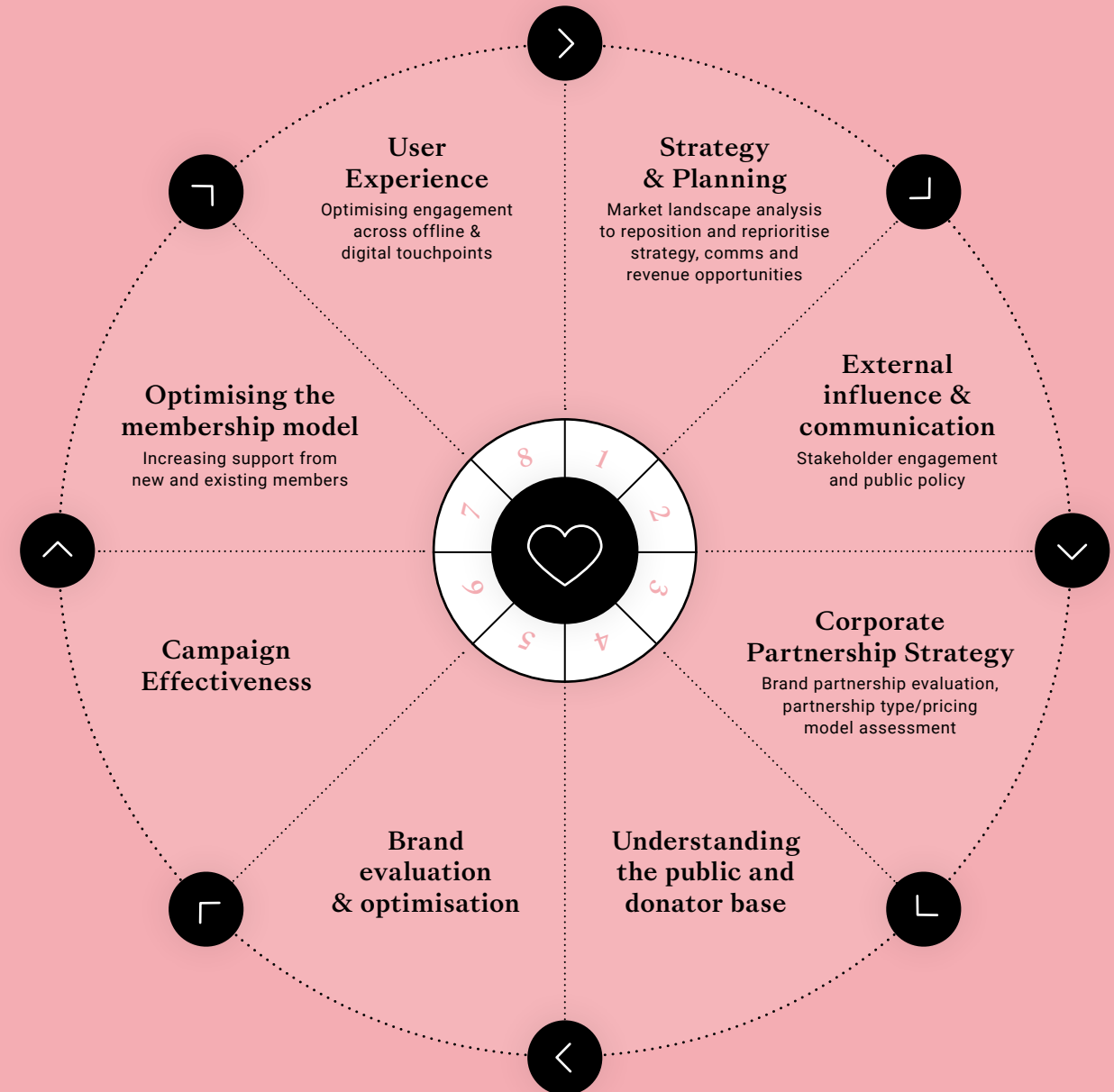
How the BrandVue data engine works 21



Supporting charities to adapt for the future

Helping charities to navigate a changing sector landscape and supporter behaviours

- ✓ Responding to the changed environment through redefined communications and policy positioning
- ✓ Identifying changes to donor behaviours, and how they vary by charity types
- ✓ Understanding changes to supporters' drivers to donate to specific charities and causes
- ✓ Developing wider supporter engagement behaviours and strategies to encourage supporter involvement
- ✓ Defining longer-term strategy while achieving short-term goals



How the BrandVue data engine works

Leveraging the full power of BrandVue Retail



We ask 60,000 people annually



120+ charity brands surveyed



Tracking perceptions daily



Sharing the who and why



Seeing the real-world value



We ask 60,000 people annually

It's important that we can be confident in our results, even when looking at niche groups. That's why we speak to 15 times more people than some Charity Index products offered by other companies. We believe all charities should have access to world-class research no matter how small their audience may be, and BrandVue gives the flexibility to do just this.



120+ charity brands surveyed

No charity operates in isolation, so it's important for us to understand the competitive environment, not just the big brands. We currently track 120 brands and we're always looking for the next charity to add to our list – suggestions welcome.



Tracking perceptions daily

Charities experience fluctuations throughout the year, with seasonal peaks like Christmas, campaigns and external news events. This is why instead of taking readings at one fixed point in time, we run our research continuously, and use averages to get a true reflection of where a charity is at, as well as measuring day by day change.



Sharing the who and why

Many products can tell you which charities the public support, but few can give a reason as to why. At Savanta we place a lot of value on the supporter journey – vital to ensuring a customer centric marketing approach and allowing marketers to focus on how to retain and grow supporters.



Seeing real-world value

Creating a strong brand can pay dividends, however it can sometimes be hard for charities to justify the expense. Using our robust data and publicly available records, we have provided a realworld value to charity brands, empowering brand managers and marketers with the information they need to make brand decisions.



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