



**CHARITY COMMISSION**  
FOR ENGLAND AND WALES

**User research and feedback:  
a Commission perspective**

## Introduction

This paper complements the presentation on the SORP microsite that draws on data from Google Analytics.

Together, the paper and presentation are designed at providing the SORP Committee with:

- The user research tools the Commission has available.
- How different research tools have been used in practice to analyse on-line use of the register display, with reference to the Commission's [new register](#) and one of its predecessors: beta search.
- Caveats in interpreting the information.
- High-level conclusions from the Commission's perspective.

It is hoped that the information provided proves a sound basis for subsequent discussion.

## User research in the Commission

User research helps us learn about users, their behaviours and needs and what that means for the design of our services.

We use several tools and methods in order to understand our users:

- User testing – This involves setting participants tasks, often using a prototype; we then observe and listen as they progress.
- Personas – These are fictional characters based on our research who represent different user types that might use the service.
- Interviews – Either face to face, by phone or Teams.
- Google analytics – This allows us to anonymously track user behaviours when interacting with a website, including pages viewed, what they did whilst on a page etc.
- Surveys – All our content and services have a survey.
- System Usability Scale or SUS score – This is a tool for measuring the usability of a service/website. It consists of a 10-item questionnaire with 5 response options ranging from strongly agree to strongly disagree.
- Focus groups – A group of users brought together to discuss concerns and features of a design.

Over the years we have built an extensive list of people who are willing to assist with user research. The details are stored in our user engagement tracker. They are a mix of trustees and charity employees, to members of the public and professional advisors. The charities income range goes from very small (£2k per year) through to very large (£700 million). Having this variation means we can easily get the right people to assist with our research.

Over the years we have worked on the following projects:

- New register of charities
- Annual returns
- Update charity details
- Register a charity
- Reporting serious incidents form
- Moved our site to Gov.UK

User research was central to each of these.

## What users told us about the beta register: survey comments

The beta register comments for the 2019 calendar year were analysed as a starting point for possible areas of further user research. 1,876 users completed the survey out of 3,813,358 users that year.

The following themes arose from the 867 users who answered that they could not find what they wanted, though not all users gave a reason:

1. More information required on the proportion of charity expenditure is spent on direct charitable activities, and how this is spent, including:
  - Comments raised on what the different categories mean, such as £7 million included in 'other' expenditure.
  - 'I was hoping to find out how a charity performed relative to others, in terms of what percentage of money I donate will actually go towards funding the work for others, rather than just going back into more fund-raising.'
  - How much charitable spending is spent on salaries of staff and CEOs in particular
  - How much charitable spending is spent on 'admin.'
  - Who is helped by the charity 'not immediately obvious'
2. More information required on grant-making, including:
  - Average size of grants made
  - Details of how grants are distributed and of current/past grant recipients
  - Application process for making grants/link to an online form
  - Application deadlines
  - Eligibility criteria
3. Information is out-of-date or incomplete, including:
  - Details of amalgamations not included (new /old charity details; loss of financial information on the old charity once removed)
  - More than five years' accounts wanted
  - Recipients of 'Consultancy and professional support' and 'management fees'
  - No annual reports available for smaller charities (and one charity querying why there is no facility for it, as a small charity, to upload its accounts 'to demonstrate public benefit').
4. There was minimal information on why users view/download charity accounts, apart from the following comment:
  - Ratio of highest pay to lowest pay, and the highest and lowest pay figures (and the user said they were unsuccessful in obtaining this information).

It seems reasonable that users in part are seeking answers to questions cited above. Users did, however, have complaints on the accounts being displayed, including:

- Accounts relate to a previous year
- Accounts are missing
- Accounts submitted on time but flagged as 'late' on the Register, and vice versa
- Accounts relate to a different organisation

**By far the most comments were received in relation to 1 and 2 above.**

These themes are clearly not statistically representative of register users as a whole, but they do provide a flavour of where further user research could be targeted.

### **Developments since the launch of the new register**

The new register remedies/will remedy some of the issues raised by users:

- The new register displays the number of staff in income bands from £60k upwards. As agreed with the sector during the AR18 consultation, the register does not display the total employee benefits for the highest paid member of staff.
- The new register provides information on income from government contract and grants.
- Details of amalgamations should be addressed as part of Phase 2 of the new register project.

## New register user behaviour: Google analytics

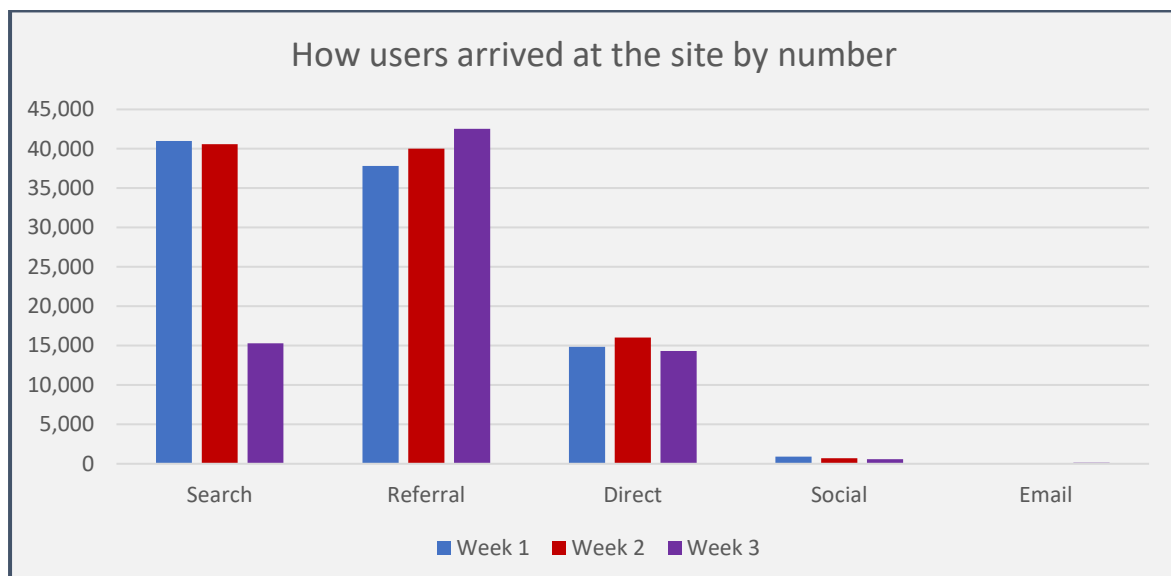
The new register of charities went live on 2 September 2020 and the figures quoted were captured using Google analytics to demonstrate user behaviours during the first three weeks, to coincide with the Commission’s internal monthly reporting cycle.

It should be stressed that all analytics data is anonymous: the Commission cannot – nor would it want to – identify an individual user and map them to a particular behaviour.

Week 1		Week 2		Week 3	
Total users	<b>88,792</b>	Total users	<b>92,262</b>	Total users	<b>69,591</b>
Total sessions	<b>128,019</b>	Total sessions	<b>136,317</b>	Total sessions	<b>109,922</b>
Total page views	<b>1,043,010</b>	Total page views	<b>1,080,237</b>	Total page views	<b>966,494</b>
Av. Views per session	<b>8.15</b>	Av. Views per session	<b>7.92</b>	Av. Views per session	<b>8.79</b>
Av. Session duration	<b>04:42</b>	Av. Session duration	<b>04:51</b>	Av. Session duration	<b>05:36</b>
Av. Sessions per user	<b>1.44</b>	Av. Sessions per user	<b>1.48</b>	Av. Sessions per user	<b>1.58</b>

### Acquisition

When looking at how users arrived at the site, over the three weeks we can see a decrease in users arriving via social media. In the first week the new register was discussed on Twitter, including in tweets issued by the Commission. The main increase since launch has been via referrals (e.g. via a link on Gov.UK). In week 3, for the first time we saw 126 visits via an embedded link in emails sent to clients by a firm of solicitors.



## Sections viewed

The table below shows the sections that were selected from the left-hand navigation menu: the Trustees section remained the most popular page throughout the three weeks.

The Accounts and Annual Return section has been consistently in the top three each week. Financial History has hovered at fifth most popular, but the Assets and Liabilities section was comparatively one of the least popular pages.

Week 1		Week 2		Week 3	
Section	Clicks	Section	Clicks	Section	Clicks
Trustees	56,377	Trustees	58,013	Trustees	52,951
Accounts and AR	48,052	Contact	53,469	Contact	50,667
Contact	43,803	Accounts and AR	50,291	Accounts and AR	47,850
What, who, how, where	42,098	What, who, how, where	42,657	What, who, how, where	39,597
Financial history	31,053	Financial history	28,951	Financial history	26,829
Governance	28,603	Governance	27,579	Governance	25,278
Governing document	24,537	Overview	25,330	Overview	23,427
Overview	24,142	Governing document	24,084	Governing document	22,489
Assets and liabilities	5,565	Assets and liabilities	4,379	Assets and liabilities	3,827
Linked charities	1,256	Linked charities	927	Linked charities	924

## Accounts downloads (Top 5)

Below are the Top 5 charity accounts downloaded from the site: the majority are trusts. The list is in contrast to the top charities viewed. The Top 10 usually contains the likes of Cancer Research UK, Oxfam, Macmillan etc.

Week 1		Week 2		Week 3	
Charity	Downloads	Charity	Downloads	Charity	Downloads
29 <sup>th</sup> May 1961 charity	42	29 <sup>th</sup> May 1961 Charity	47	Help for Heroes	65
Ikon Church	37	PF Charitable Trust	40	29 <sup>th</sup> May 1961 Charity	48
PF Charitable Trust	30	The Batchworth Trust	27	PF Charitable trust	34
Lennox Hannay Trust	28	Jane Hodge Foundation	25	Denise Coates Fdn.	33
Cleeve Hill Common	27	Allan & Nesta Ferguson Chty.	24	Constance Travis Trust	29
TOTAL	26,117	TOTAL	29,921	TOTAL	28,240

## Comparison

In the table below, the total number of accounts downloads from the first three weeks of the new register is compared with the three previous weeks and the same period one year ago. There has been a significant increase since the new register went live, though the increase is less marked when compared with an average weekly figure of 24,378 downloads during the first quarter of 2020.

Previously, only downloads from the beta register were tracked, which undoubtedly plays a part in any increase.

2 <sup>nd</sup> – 8 <sup>th</sup> Sept 2020 (Week 1)	26,117
9 <sup>th</sup> – 15 <sup>th</sup> Sept 2020 (Week 2)	29,921
16 <sup>th</sup> – 22 <sup>nd</sup> Sept 2020 (Week 3)	28,240
19 <sup>th</sup> – 25 <sup>th</sup> Aug 2020	18,079
12 <sup>th</sup> – 18 <sup>th</sup> Aug 2020	17,961
4 <sup>th</sup> – 10 <sup>th</sup> Sept 2019	21,911
11 <sup>th</sup> – 17 <sup>th</sup> Sept 2019	22,404

## Constituency search

- First week: 506 clicks to the constituency search
- Second week: 290
- Third week: 170

There is a noticeable decrease, when compared to the first week. However, the constituency search was a focus of Commission Tweets during the first week, which could explain pattern observed over the three weeks.

## Welsh Register

This is the first time the Commission has published a Welsh version of the register of charities:

- First week: 331 clicks to the Welsh option
- Second week: 79
- Third week: 46

## Register data

The register also enables users to access information on the Top 10 charities, wider sector data and download the full register<sup>1</sup>.

From the register home page, during the **first week** there have been:

- 814 clicks to the full register download

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<sup>1</sup> The full register download comprises the dataset for all charities on the register, though the data is limited to the data that we make publicly available for any charity. Some data that is shown on an individual charity's register entry is excluded, such as data on salaries and government contracts/grants.



- 432 clicks to the Top 10 charities link
- 242 clicks to the sector data link

70 went on to download the Top 10 charities

483 went on to download the full register

91 went on to download the table build script

2 went on to download the data definition.

From the Register home page, during the **second week** there have been:

- 534 clicks to the full register download
- 264 clicks to the Top 10 charities link
- 111 clicks to the sector data link

60 went on to download the Top 10 charities

397 went on to download the full register

69 went on to download the table build script

From the register home page, during the **third week** there have been:

- 292 clicks to the full register download
- 163 clicks to the Top 10 charities link
- 86 clicks to the sector data link

30 went on to download the Top 10 charities

311 went on to download the full register

52 went on to download the table build script

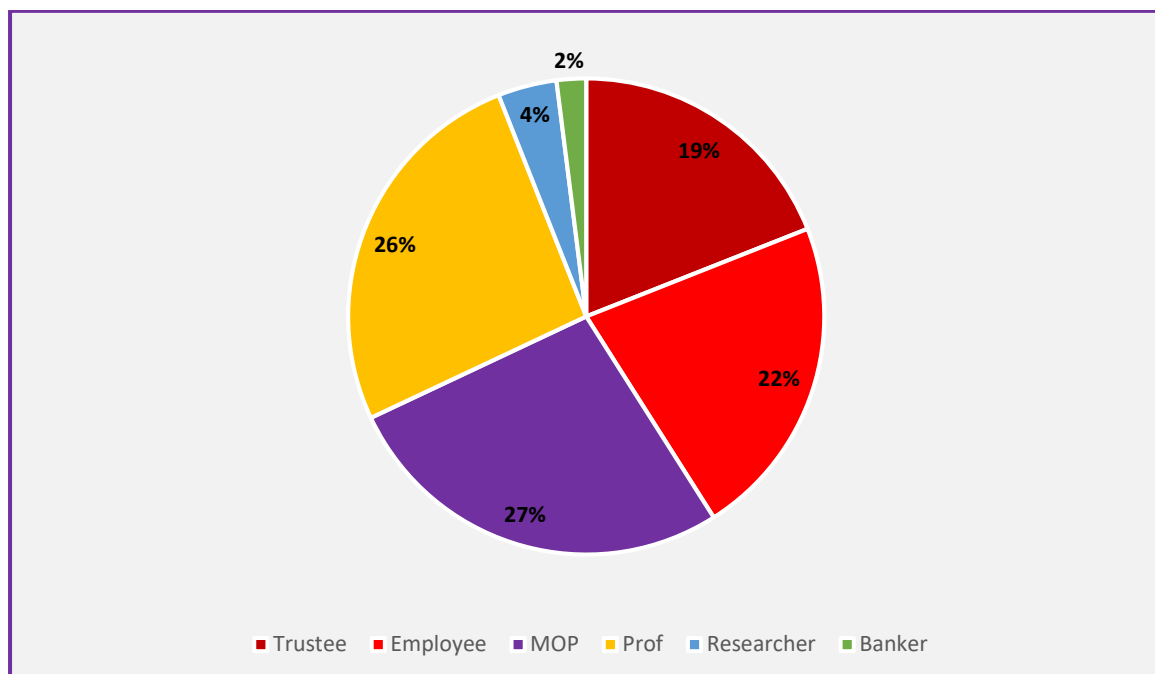
## New register user feedback: survey results

This section outlines the user feedback that was captured in the new register survey. Again, the survey feedback is anonymous unless the person completing the surveys agrees to be contacted afterwards and supplies an email address.

In the first three weeks since launch, the Commission had received 502 responses to its survey.

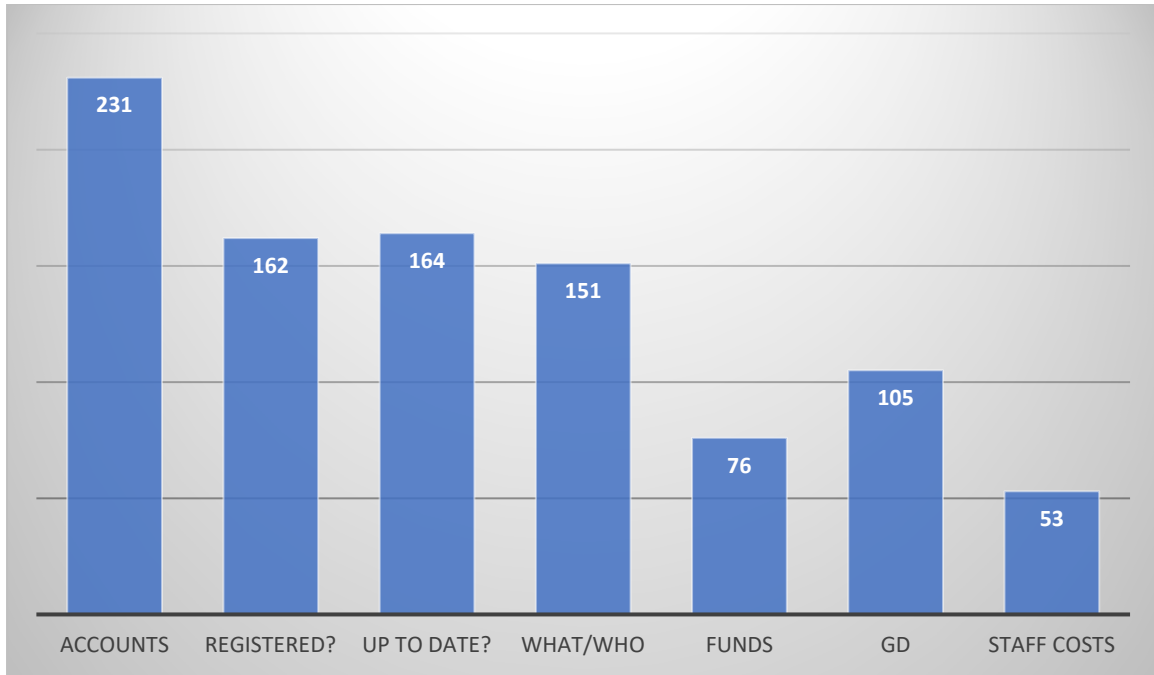
### Who is visiting the site?

Members of the public (MOP), trustees and professionals, such as lawyers and accountants, formed the majority of visitors to the new register.



### What are users looking for?

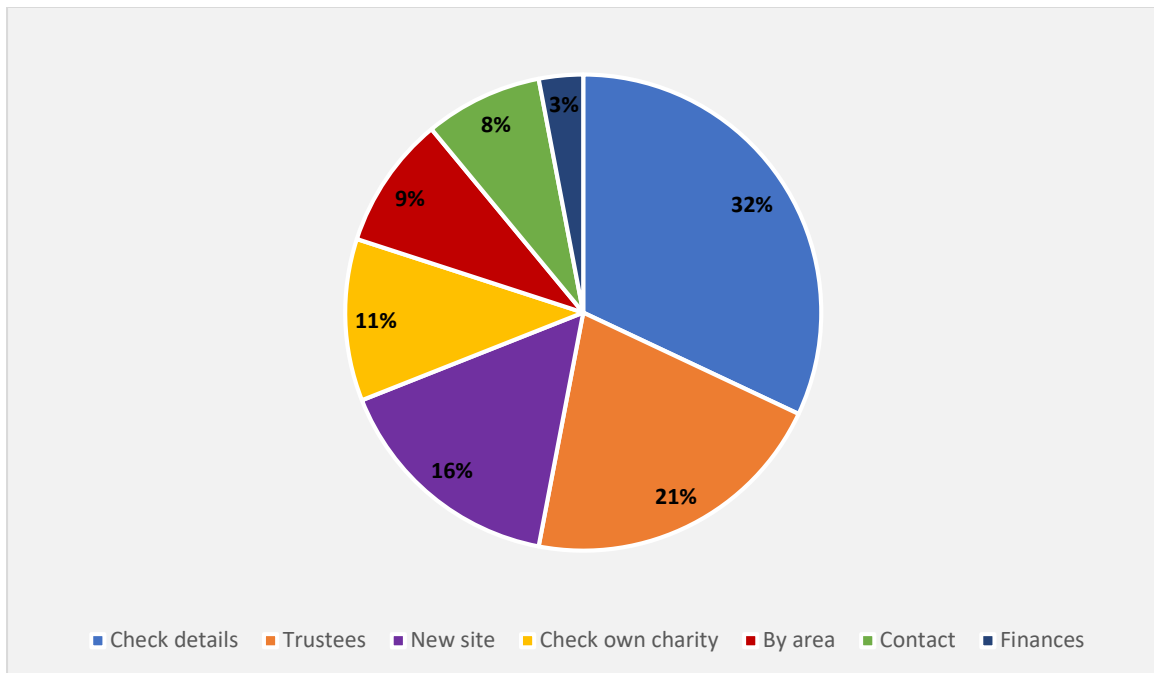
The main reason users told us why they visited the register was because they wanted to look at a charity's accounts. The next most common reasons included: checking whether a charity is registered, seeing if a charity's filing is up-to-date or checking the 'Who, What, How' details of a charity; these three reasons were each cited by roughly equal numbers of users.



Note: users can select more than one reason, so responses do not sum to 502.

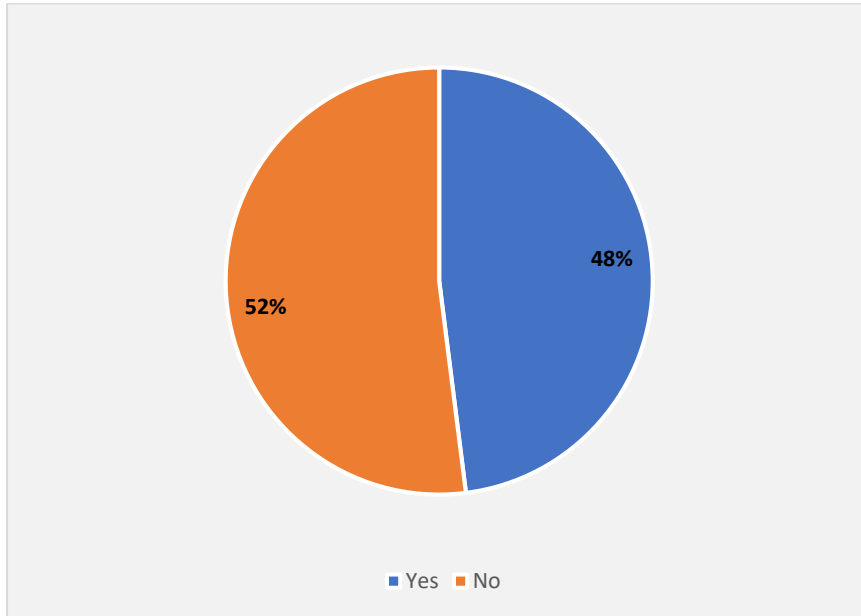
**Where users selected ‘other’**

Of the 122 users who selected another reason why they visited, almost a third were interested in searching for charities by area. A fifth wanted to check a charity’s trustees and a sixth were interested in the new site for its own sake.



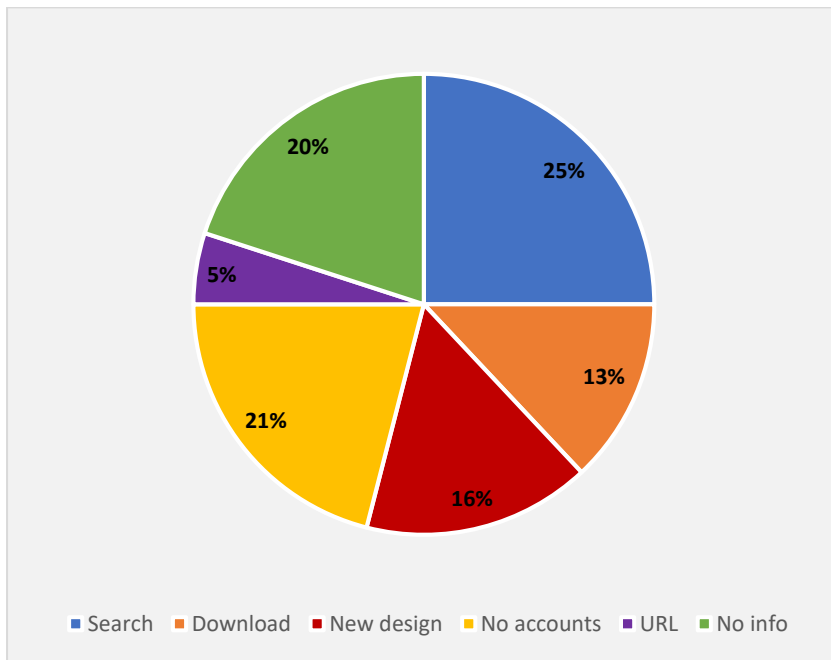
## Did they find what they wanted?

About half the respondents did not find what they wanted. The survey results between January 2020 and August 2020 from the beta site were very similar: 49% responded that they found what they were looking for, but 51% said they could not find what they wanted.



## Why they couldn't find what they wanted

When looking at the reasons why people couldn't find what they wanted<sup>2</sup>, 16% said it was the new design/navigation and 25% said it was the search.



<sup>2</sup> 256 out of a possible 261 users gave a reason why they could not find the information they wanted.

However, this did not seem to stop them finding information. For example, of those that commented on the design, many simply said they preferred the old version. Everything available on the old register can be found on the new site.

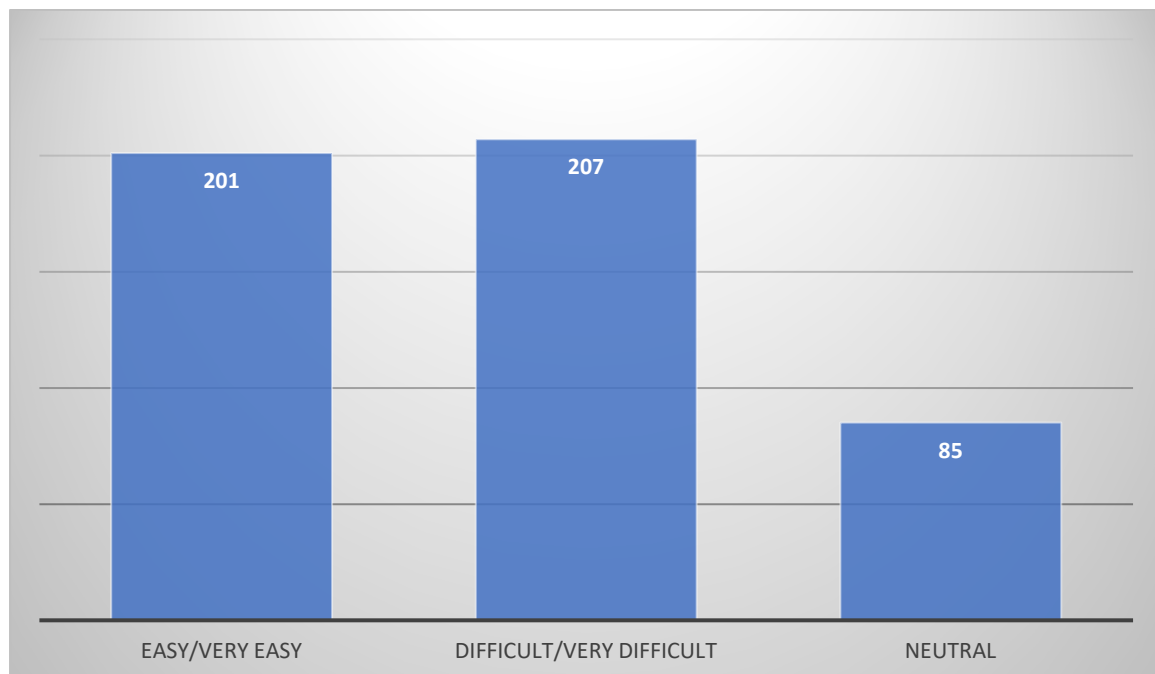
Regarding the search, many comments suggested that the number of results returned is too great. Again, comments suggest that this did not stop them finding the correct charity.

However, as research is always ongoing, we are contacting users to find out more about their issues and will make improvements where required.

34% said no accounts were available (21%) or accounts could not be downloaded (13%). Accounts are not always available to download, since the duty to file accounts and the trustees' annual report with the Commission only applies to CIOs (irrespective of income), and to all other registered charities whose gross yearly income exceeds £25,000. Accounts for even these charities may be unavailable if a charity is late in filing or has only recently been registered.

Other charity information may also be unavailable if a charity is late in filing or if a charity need not supply certain information by virtue of its income. Users may also be looking for data that we request from charities and do not publish (such as overseas spending), or data that we simply do not collect (such as information on how to apply for grants from grant-making charities). These reasons may account, at least in part, for the 21% of users who said the information they were looking for was unavailable.

### How easy was it to use the site?



*Note: users do not have to respond to this question so figures sum to 493 not 502.*

Of those that found it difficult:

- 86 responded it was the design or navigation in the new site
- 52 said it was the search, such as too many search results returned
- 33 said the download/print details: the print function does not currently consolidate all the sections for an individual charity, so a user must print each section separately.
- 18 said they couldn't find the information
- 17 said it was the excessively long URL for users wanting to share register links
- 9 said they couldn't download the accounts

Some of the issues mentioned above, namely the long URL, download/print full details, downloading accounts and the search are known to the Commission and it will be looking to improve these.

## Caveats and conclusions

As with all data collection methods a few caveats exist:

1. Google analytics can provide useful statistical information about user behaviour, but it is not all-encompassing. For example, a small minority of users with some types of assistive technology, or users who have set their security settings in a certain way, may prevent analytics from working.
2. The user feedback we get from surveys is extremely useful but represents only a small percentage of total users who visit a site.
3. It is still early days for the new register and regular users of our previous register site will take time to get used to the new layout and design.

We can, however, conclude:

1. Most users arrived on the new register either via a search or referral.
2. The new register was mostly visited by members of the public, trustees and professionals.
3. Users of the beta site said they were keen for information on grant-making and on the proportion of charity expenditure is spent on direct charitable activities, and how this is spent. The new register goes some way to address this.
4. Most users told us they visited the new register because they wanted to look at a charity's accounts. The next most common reasons included checking whether a charity is registered, seeing if a charity's filing is up-to-date or checking the 'Who, What, How' details of a charity.
5. The Trustees section of a charity's entry was consistently the most popular page viewed on the new register. The Accounts/Annual Return section is the most popular financial page viewed, with Financial History about half as popular in week three. The Assets and Liabilities section is comparatively far less popular, possibly appealing to a more niche audience.
6. Some users said that they were unable to find the information or accounts they wanted, but to what extent that may be related to the different reporting requirements for different types and size of charity is unknown.
7. Approaching 80,000 sets of accounts have been downloaded in the first three weeks since launch. Unfortunately, we have no data on why users are downloading accounts, or the information users are seeking that we could be perhaps publishing.
8. 1,640 users clicked to download the full register and 1,191 did so. While we might expect that number to include some researchers wishing to analyse particular aspects of the charitable sector, we do not fully understand the reasons behind these downloads.