



# Most Trusted Brands 2022

**SPECIAL REPORT**

Trust in nonprofits



## What is Morning Consult's Most Trusted Brands™?

Morning Consult's Most Trusted Brands 2022 is the definitive measure of brand trust across industries, showcasing the companies and products that have earned or maintained consumer trust in 2022.

In this report, we unpack why trust is important, how trust is built and how it's broken in the nonprofit industry. We then zero in on the top 10 most trusted brands in the nonprofit industry, diving into three different case studies of brands that have stood out in their trust metrics.

### Methodology

The analysis behind Morning Consult's Most Trusted Brands is drawn from two powerful datasets: Research Intelligence and Brand Intelligence.

The Research Intelligence dataset was fielded April 20-23, 2022, among a representative sample of 4,410 U.S. adults, with an unweighted margin of error of +/-1 percentage point. An additional survey to support this report was conducted April 8-11, 2022, among a sample of 4,004 U.S. adults, with an unweighted margin of error of +/-2 points.

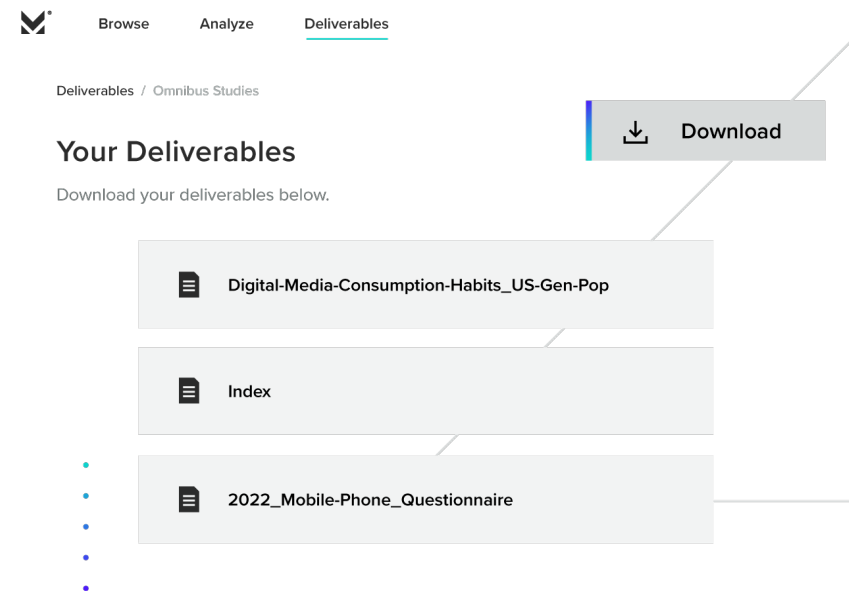
Brand rankings are based on net trust, or the share of respondents who said they trust each brand to do the right thing "a lot" or "some" minus the share who said "not much" or "not at all."

## THE DATA BEHIND OUR INSIGHTS

### Research Intelligence

Morning Consult Research Intelligence (MCRI) is our custom research offering. Our custom global survey research capabilities power intelligent business strategy and influential campaigns for hundreds of Fortune 500 companies, trade associations, and other leading organizations. Research Intelligence gives clients the flexibility to answer specific business questions that have and dive into the why.

LEARN MORE ABOUT RESEARCH INTELLIGENCE



## KEY TAKEAWAYS



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### Americans instinctively trust nonprofits

Roughly 3 in 5 Americans (57%) reported that they tend to trust nonprofits, and a nonprofit would have to do something bad to lose their trust.



### Show me the money

An open-end analysis reveals that putting donations to good use is a top reason adults trust nonprofits. At the same time, perceived misuse of funds is the most cited reason for not trusting nonprofits.



### Nonprofits are still susceptible to scandal

Forty-three percent of Americans said they have experienced a loss of trust with a nonprofit, and those who report a loss in trust are generally unforgiving.



### Nonprofits must do what they say and say what they do

An advanced analysis reveals that the best thing nonprofits can do to build trust is to *consistently deliver on what they promise*.

## Most U.S. adults instinctively trust nonprofits

U.S. adults' impulse to trust nonprofits seems like a reputational advantage, but the reality is more complex. High levels of trust put these organizations in the position of needing to constantly defend their reputation. Nonprofits must take an active and consistent approach to maintain trust, while simultaneously avoiding actions that might endanger trust — not just for themselves, but for an entire sector's reputation. This dynamic is only getting trickier in a hyper-politicized climate with [declining levels of institutional trust](#).

The data also reveals that while 57% of U.S. adults reported a tendency to trust nonprofits, these organizations are not immune from scandal. Forty-three percent of respondents said they experienced a loss of trust with a nonprofit, and adults who've lost trust appear to be an unforgiving group: Fewer than 1 in 5 (18%) said they would be willing to consider the nonprofit again, and just 8% reported continuing to give to the nonprofit after a lapse in trust.

It is vital that nonprofits develop strategies to sustain their trust, both organizationally and sector-wide.

### Respondents who lost trust in a nonprofit were asked about the ways in which their behavior changed as a result

I stopped considering giving to a nonprofit and started giving to different nonprofits instead.

45%

I stopped considering giving to a nonprofit, and I will never give to them again because of it.

38%

I stopped considering giving to a nonprofit, but I would be willing to consider giving to them again in the future.

18%

I continued to give to a nonprofit that did something to lose my trust.

8%

Survey conducted April 8-11, 2022, among 1,734 U.S. adults who reported a loss of trust with a nonprofit, with an unweighted margin of error of +/- 2 points.



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## To foster trust, nonprofits need to do what they say and say what they do

Respondents were asked how important each of the following factors are when deciding to purchase from a particular brand instead of its competitors. Charted below are the average utility scores, which indicate the relative importance of each attribute across respondents.

	All U.S. adults	Current donors	Likely donors	Gen Z adults	Millennials	Gen Xers	Baby boomers
Consistently delivers on what they promise	259	263	262	230	243	257	285
Uses its resources effectively	240	247	246	170	218	246	275
Has a positive impact on my local community	170	170	172	169	167	175	169
Listens to the needs of the communities they serve	144	142	145	165	151	143	134
Is known to demonstrate ethical behavior	125	125	127	136	129	123	122
<b>Average utility score: 100</b> Covers an issue area I really care about	124	131	127	109	110	124	139
Is a nonprofit I feel a personal connection to	79	83	80	88	71	83	79
Has a good reputation	74	69	70	71	79	75	70
Makes an effort to be diverse and inclusive	56	54	55	93	68	53	37
Is a nonprofit I love	45	45	44	47	47	45	44
Is a nonprofit I've given to in the past	44	43	43	51	45	42	41
Has been recommended to me by someone I trust	38	36	36	52	50	34	27
Is a well-known nonprofit	35	31	31	39	41	37	28
Has good reviews	34	31	31	40	44	33	24
Has been around for a long time	32	29	29	41	38	31	25

A score of 100 indicates that factor has an average likelihood of being considered the most important to a given respondent. A score of 200 indicates the factor is twice as likely as average, while a score of 50 indicates it is half as likely to be considered the most important.

The public wants to see nonprofits consistently deliver on their promises. This is the most important trust variable across current and likely nonprofit donors as well as across generations. Using resources effectively and having a positive impact on local communities are also vital ingredients for nonprofits to build trust.

Zooming out to examine the top three trust variables highlights the importance of action in building trust. What are the nonprofit's behaviors and impact? These actions play a role in building the perceptions around lower-utility variables such as being a well-known organization.

Zooming in to examine using resources effectively highlights a major opportunity but also a major threat. An open-end analysis reveals that putting donations to good use is a top reason adults trust nonprofits, while perceived misuse of funds is the most cited reason for not trusting a nonprofit.





# Most Trusted Nonprofits

Net trust, among adults in each country

1  **St. Jude Children's Research Hospital**  
St. Jude Children's Research Hospital  
Net trust: 81.8

3  **American Heart Association**  
American Heart Association | Net trust: 74.94

5  **American Red Cross**  
American Red Cross | Net trust: 71.57

7  **Shriners Hospitals for Children**  
Shriners Hospitals for Children | Net trust: 71.4

9  **RMHC**  
Ronald McDonald House Charities  
Net trust: 69.61

2  **Make-A-Wish**  
Make-A-Wish Foundation | Net trust: 80.65

4  **Special Olympics**  
Special Olympics | Net trust: 73.67

6  **American Cancer Society**  
American Cancer Society | Net trust: 71.47

8  **Habitat for Humanity**  
Habitat for Humanity | Net trust: 71.09

10  **ASPCA**  
American Society for the Prevention of Cruelty to Animals (ASPCA) | Net trust: 67.02

While consumers may value action-oriented variables to build trust, the list of Morning Consult's Most Trusted Nonprofits tells us a more complicated story.

The 2022 list consists of highly recognizable brands. Many of these brands have been established for decades, and more than anything, these nonprofits have succeeded in continuing to dominate the category based largely on their high levels of brand awareness and their long-standing reputations.

Examining these nonprofits lays out a hard-to-achieve pathway to success: getting Americans to know your brand while establishing a legacy of following through on organizational promises.

Thinking about how this list may change in future years, demographic trends suggest there might be a shift underway between the top two spots. For both Gen Z adults and millennials, as well as for higher-income earners (those in households making \$100,000 or more annually), Make-A-Wish Foundation ranks as the No. 1 Most Trusted Brand in the nonprofit category.



## Gen Zers stand out as a priority for nonprofits as they look to build their reputation with the next generation of donors and volunteers

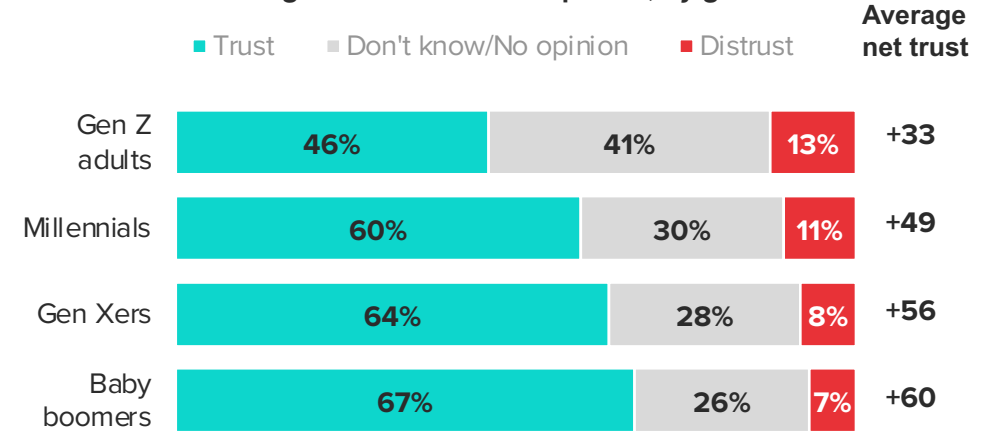
On average, the youngest generation of adults is less aware of the nonprofits tested. Lower awareness creates a major challenge for nonprofits as they consider engaging with Gen Zers, a generation already inundated with ads and marketing — and skeptical of them all.

Just 2 of the 50 nonprofits tested are more trusted by Gen Z: American Civil Liberties Union and Equal Justice Initiative. But for both EJI and the ACLU, net trust was just 3 points higher with Gen Z than with the public overall.

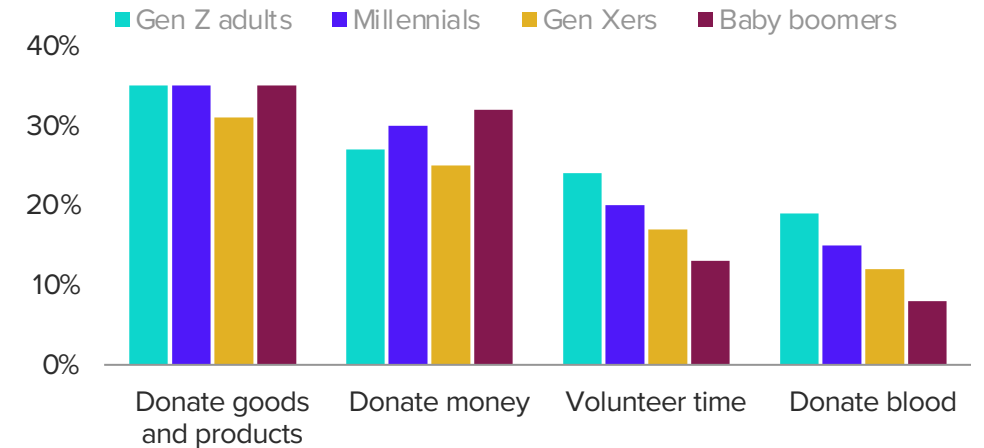
However, there are real glimmers of hope regarding this younger generation. While they seem to latch less onto individual brands, their plans to give to a nonprofit are in line with or higher than those of other generations. This makes capturing the attention of Gen Zers and getting them to remember your brand that much more important.

Survey on nonprofit trust was conducted April 20-23, 2022, among a representative sample of 4,410 U.S. adults, with an unweighted margin of error of +/- 1 point. Survey on donation intent was conducted April 8-11, 2022, among a representative sample of 4,004 U.S. adults, with an unweighted margin of error of +/- 2 point.

Average trust levels of nonprofits, by generation



Share who said they definitely plan on giving to a nonprofit in any of the following ways in the next 12 months:



## Large health institutions face issues with brand awareness and reputation, though the severity of these challenges differs greatly

Not every health institution — or nonprofit — can be St. Jude Children's Research Hospital. The organization is well-known and well-trusted, nearly universally. But a look at St. Jude and similar organizations reveals real problems for the category: Many institutions struggle with awareness outside of their region and others face serious generational headwinds.

Looking at regional obstacles, the net trust of Boston's Dana-Farber Cancer Institute sits at +47 in the Northeast but comes in significantly lower in the Midwest, South and West. The Cleveland Clinic faces similar challenges, with higher levels of net trust in the Midwest (+47), and lower levels of net trust in other regions.

Generationally, there are major challenges facing a number of these organizations, but the pain is especially acute for Shriners Hospitals for Children and the Mayo Clinic. These organizations have high net trust among the public overall, at +71 and +64, respectively, but suffer disproportionately with Gen Z.

	City of Hope	Cleveland Clinic	Dana-Farber Cancer Institute	Mayo Clinic	Shriners Hospitals for Children	St. Jude Children's Research Hospital
Gen Z adults	14.68	21.03	16.31	24.25	29.94	54.84
Millennials	33.58	26.95	30.3	49.61	62.7	78.05
Gen Xers	28.7	41.18	25.31	70.64	76.18	83.7
Baby boomers	40.53	53.92	38.46	85.13	86.71	91.76
Northeast	37.76	44.5	46.83	67.54	74.73	86.61
Midwest	28.2	47.45	26.36	69.34	68.75	82.1
South	31.47	35.68	26.88	62.71	75.97	81.33
West	36.27	34.66	29.49	60.25	63.58	78.78

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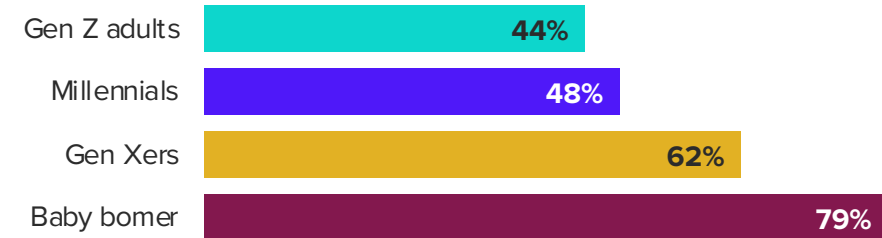
## In the U.S., people may be feeling the effects of climate change, but that isn't translating into trust for environmental nonprofits

Environmental nonprofits are some of the worst-performing nonprofit brands in terms of trust. No environmental nonprofit falls into the top 50% of the Most Trusted Brands rankings. These nonprofits suffer from two major issues: 1) low awareness and 2) partisan divisions that depress the reputation of these nonprofits.

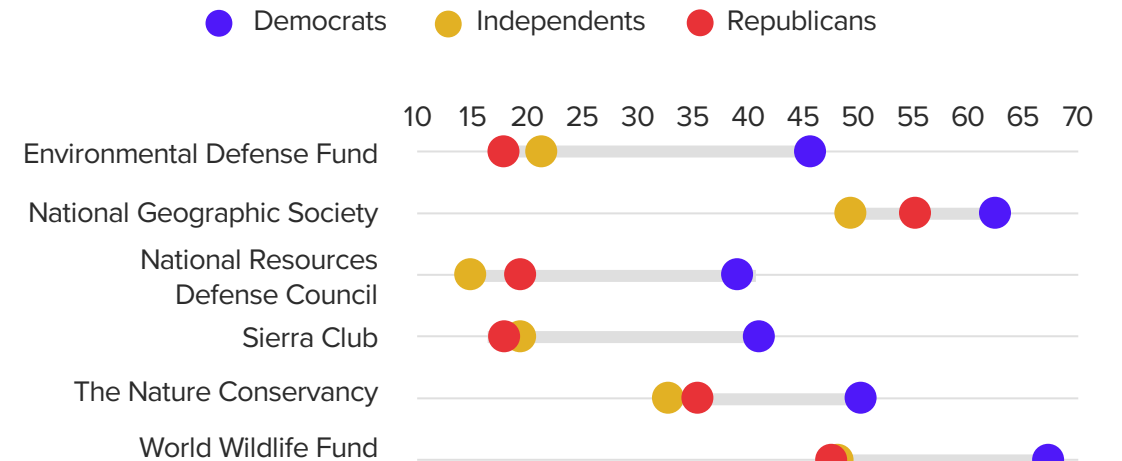
This partisan divide is particularly acute for the Environmental Defense Fund and Sierra Club. EDF faces a 28-point net trust gap between Democrats and Republicans, while Sierra Club suffers from a 23-point difference.

Potentially even starker for the Sierra Club brand is the awareness drop-off by generation. While majorities of baby boomers and Gen Xers are aware of Sierra Club, fewer than half of the younger cohorts report even knowing of Sierra Club. This is worrisome for the organization, whose issues are especially salient and important to the youngest generations.

### Share who are aware of Sierra Club



### Net trust



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### ABOUT THE AUTHOR

**Caroline Bye oversees all nonprofit research at global intelligence company Morning Consult. She heads Morning Consult's efforts to deliver real-time insights for leaders in the nonprofit sector.**

Caroline's current portfolio of clients ranges from multinational to regional nonprofits, and her work also spans across advocacy organizations, higher education and government work. She leads a team of researchers who work with organizations to better understand brand health, to conduct meaningful thought leadership research and to highlight public opinion on key organizational priorities.

Prior to her current role, Caroline partnered with corporate industry executives as a managing director of client services at Morning Consult, where she led a team focused on tailoring customized research intelligence to inform decisions for six of the Fortune 50 companies.

Before joining Morning Consult, Caroline worked in political consulting, delivering research insights on the political climate, campaign effectiveness, messaging strategy and more. She offered guidance and insights to political campaigns, PACs, nonprofits and advocacy organizations in that role, and her extensive background in politics deepens her understanding of key data insights.



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