



WHAT CANADIAN DONORS WANT

2017 SURVEY FINDINGS

STUDY CONDUCTED FOR:

AFP FOUNDATION FOR PHILANTHROPY CANADA

BY: IPSOS

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OBJECTIVES:

- Review various findings
- Talk with you about how to use the data in your everyday work
- Link to or reference other research of relevance
 - References/Suggested Reading(s)
 - <http://www.afpnet.org/files/ContentDocuments/What%20Canadian%20Donors%20Want%20Webinar%20180301.pdf>
 - www.rhf-frh.ca/our-initiatives/giving/thirty-years-of-giving-in-canada/
 - www.rhf-frh.ca/our-initiatives/giving/giving-behaviour-of-canadian-millennials/
 - <https://institute.blackbaud.com/resources/>
 - <https://cygresearch.com/product/pre-sale-the-burk-donor-survey-2017/>
 - <https://givingreport.ngo/past-reports/>
 - <https://www.muttart.org/publications/surveys-results/>

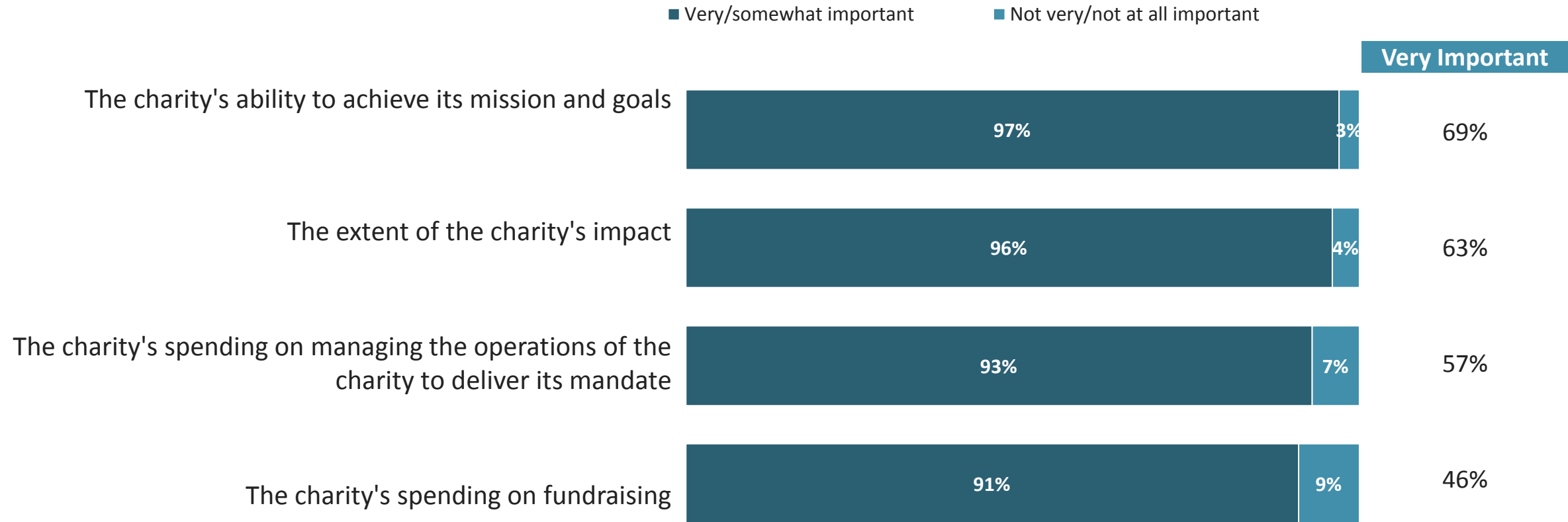


CONFIDENCE & TRUST IN CHARITIES

IMPORTANCE OF SPECIFIC FACTORS IN EVALUATING SUCCESS



Overwhelming majorities say all the factors tested in the survey are important in evaluating a charity's success and effectiveness. But the charity's ability to achieve its mission and goals and the extent of the charity's impact are seen as most important, while the charity's spending on operations and fundraising are relatively less important.



Q2. How important are each of the following to how you evaluate a charity's success and effectiveness?

Base: All respondents (n=1500)

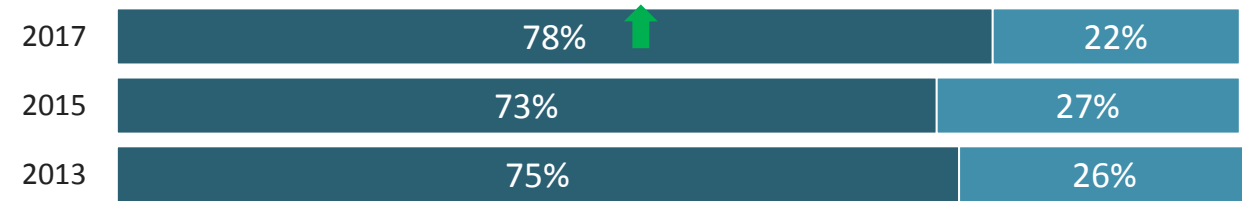
PUBLIC CONFIDENCE IN THE CHARITABLE SECTOR



Canadians continue to express higher confidence in the charitable sector than either the private and public sector. Moreover, confidence in the charitable sector, as well as the private sector, is up significantly.

■ Very/ Somewhat confident ■ Not very/ Not at all confident

Charitable sector (including charities and not-for-profit organizations)



Private sector organizations



Public sector (including the federal, provincial, and municipal levels of government)



Q4. Generally speaking, how confident are you in each of the following in Canada? Base: All Respondents 2017 (n=1500); 2015 (n=1502); 2013 (n=1003)



TRUST IN CHARITIES



Six in ten Canadians continue to think charities act responsibly with the donations they receive, are trustworthy and are by and large well-managed. This sustains or continues incremental increases since 2011.

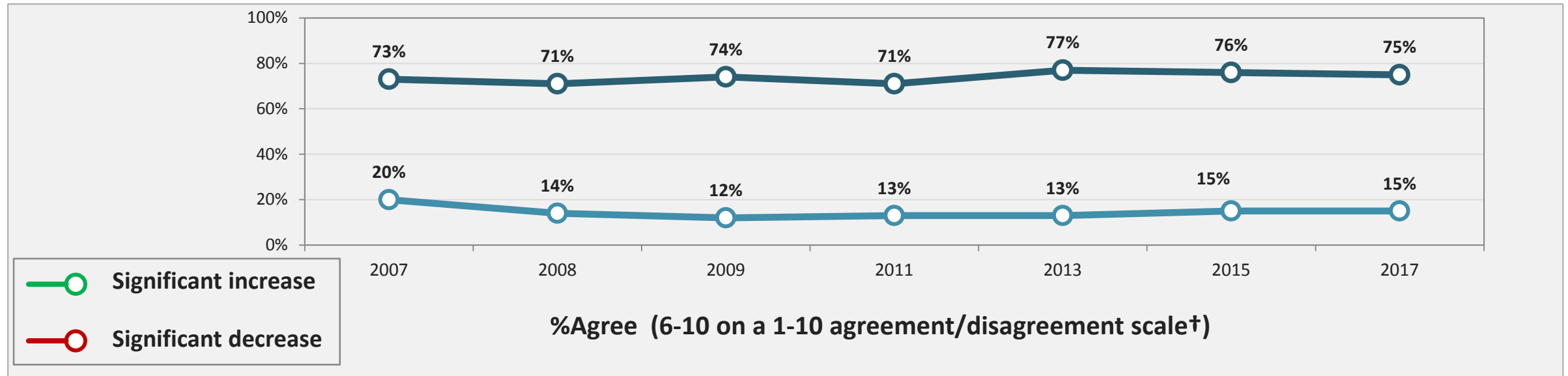


Q1. People have different attitudes towards charities and non-profit organizations. How much do you agree or disagree with each of the following statements as it relates to you personally on a scale of 0 to 10 where 0 is Disagree strongly and 10 is Agree strongly? Base: All Respondents 2017 (n=1500); 2015 (n=1502); 2013 (n=1003); 2011 (n=1027)

PERCEIVED IMPORTANCE OF THE CHARITABLE SECTOR



Three-quarters continue to feel that charities play an important role in addressing needs not being met by the government or the private sector. About one in ten think charities do not make much difference. These figures have been steady over the past few years.



† The question was asked on a 1-10 scale where “1” means disagree strongly and “10 “ means agree strongly.

—○ I think that charities play an important role in society to address the needs not being met by the government or private/public sector*
—○ Charities do not make much difference

* Prior to 2013, the question wording was “I think that charities play an important role in society as a change agent to address needs not being met by government or private/public sector.”

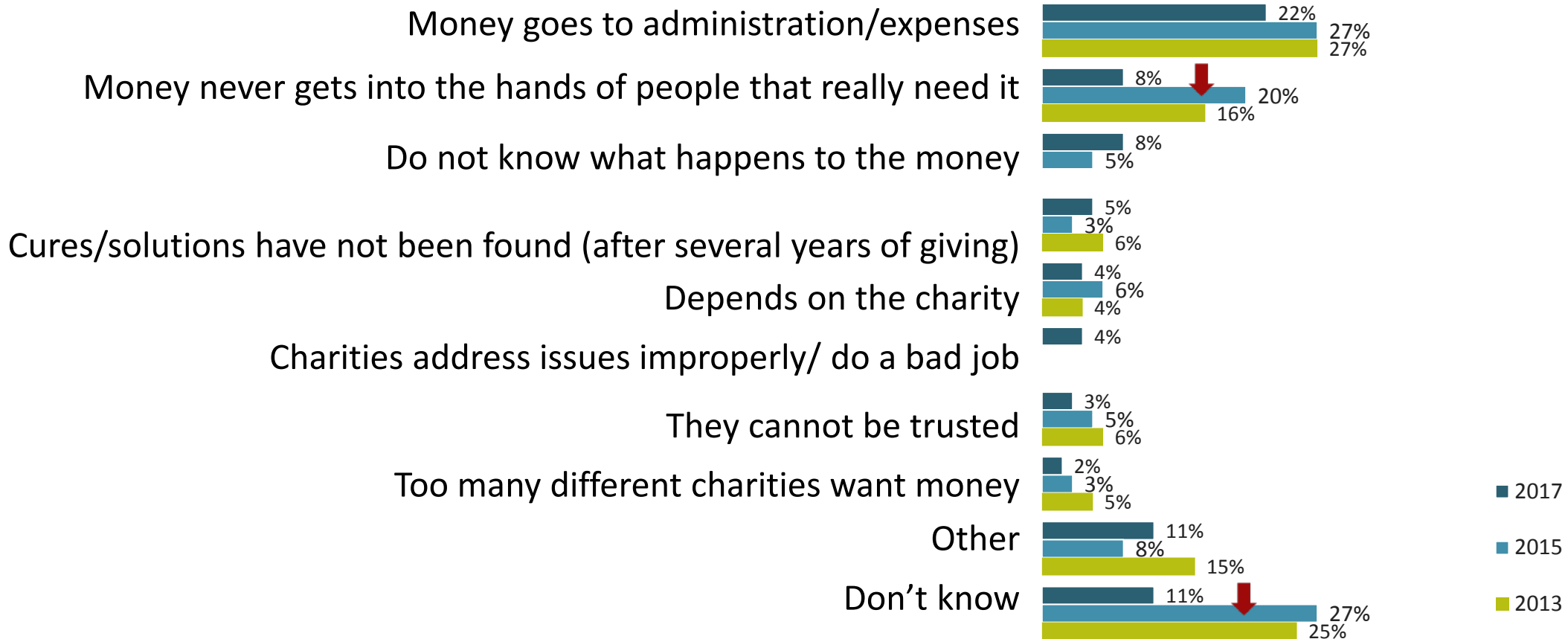
Q1. People have different attitudes towards charities and non-profit organizations. How much do you agree or disagree with each of the following statements as it relates to you personally? Base: All Respondents 2017 (n=1500); 2015 (n=1502); 2013 (n=1003); 2011 (n=1027); 2009 (n=1108); 2008 (n=1823); 2007 (n=1420)



WHY SOME SAY CHARITIES DO NOT MAKE A DIFFERENCE



A belief that donation dollars go to administration and overhead rather than directly to people in need remains the most common reason for perceptions that charities don't make much difference. But fewer believe the money doesn't get to those who need it, they are uncertain of where it goes.



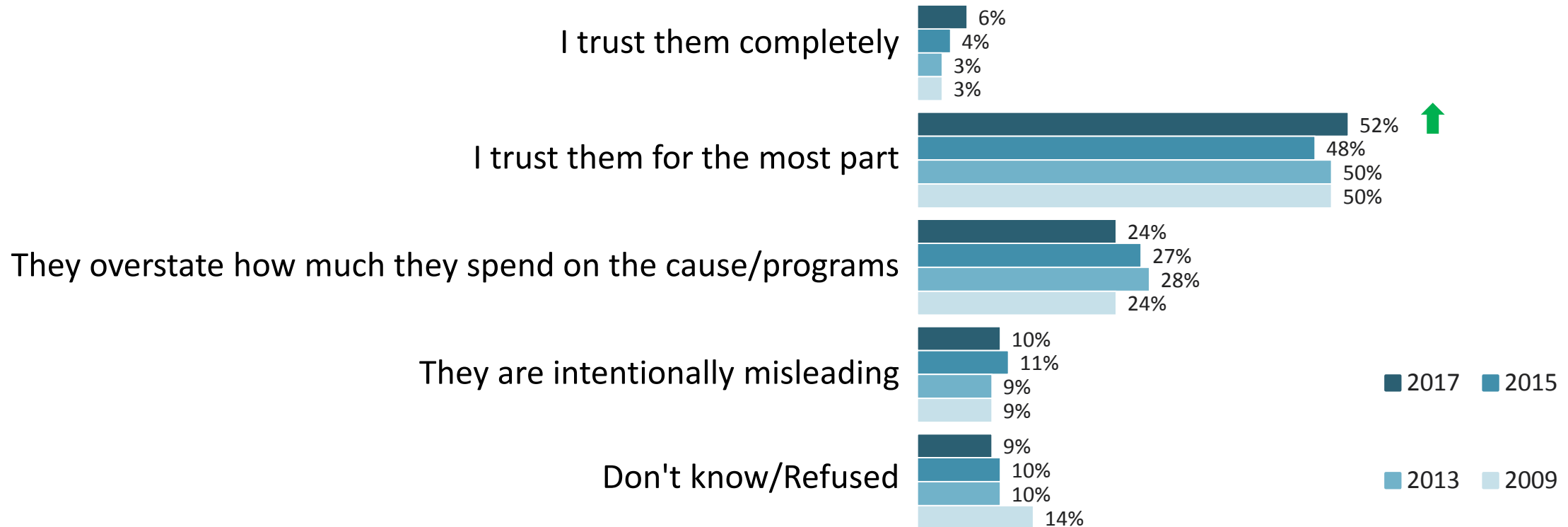
*Mentions of 2% or higher shown.

Q1b. Please explain why you agree that 'Charities do not make much difference'?
 Base: Respondents who gave a score of 6 or higher to the above statement 2017 (n= 219); 2015 (n=234); 2013 (n=142)

TRUST IN REPORTING OF OVERHEAD COSTS



A third of Canadians believe that charities overstate how much they spend on the cause or programs they support, including one in ten who believe charities intentionally mislead the public. However, this number is down since 2015, and more say they trust charities for the most part.



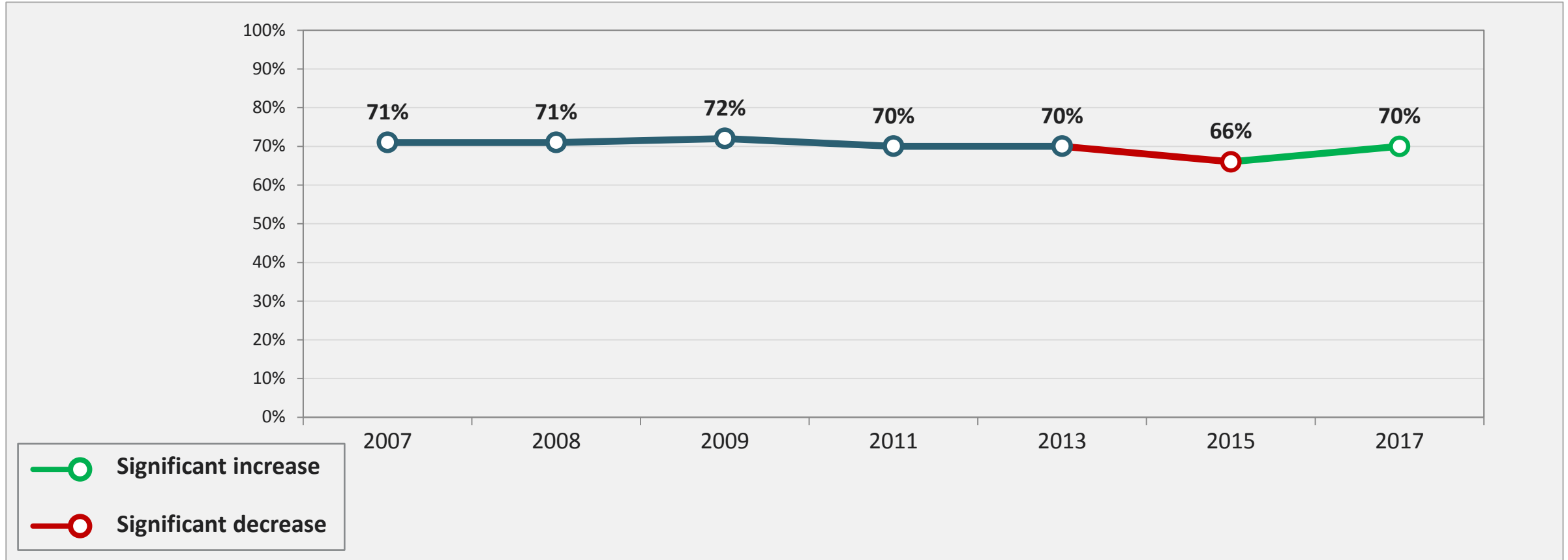
Q3. When it comes to what charities say about how much they spend on overhead costs such as fundraising, supplies, and administration versus the amount they spend on the cause/programs they support, which of the following statements comes closest to your own point of view? Base: All Respondents 2017 (n=1500); 2015 (n=1502); 2013 (n=1003); 2009 (n=1108)



STATE OF DONATIONS

MADE A FINANCIAL DONATION IN THE PAST 12 MONTHS

Seven in ten Canadians report having made a financial donation - up 4 points from 2015 – and back to the levels found in 2011 and 2013.



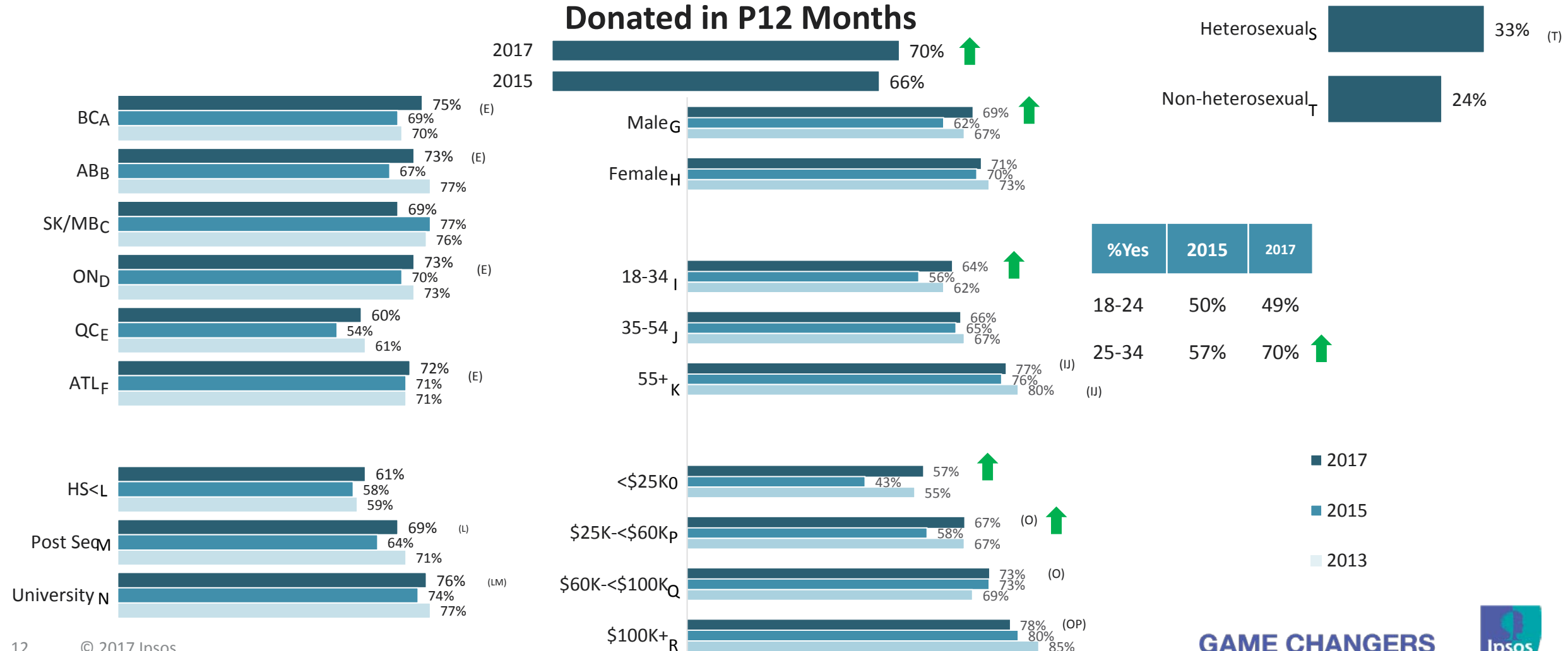
Q15. Have you made a financial donation to a charity or non-profit organization in the past 12 months ?

Base: All Respondents 2017 (n=1500); 2015 (n=1502); 2013 (n=1003); 2011 (n=1027); 2009 n=(1108); 2008 (n=1823; 2007 (n=1420)

MADE A FINANCIAL DONATION IN THE PAST 12 MONTHS – BY REGION AND DEMOGRAPHICS



The increase has come primarily from significant increases among those aged 25 to 34, lower household income (which makes sense with more younger donors) and among men. Heterosexuals are more likely than non-heterosexuals to have made a donation.



Q15. Have you made a financial donation to a charity or non-profit organization in the past 12 months ?
 Base: All Respondents 2017 (n=1500); 2015 (n=1502); 2013 (n=1003)

REASONS FOR NOT DONATING IN THE PAST 12 MONTHS



There has been an increase in the number of Canadians mentioning a lack of discretionary income/can't afford it.

	2011	2013	2015	2017
Can't afford it	54%	45%	50%	60% ↑
I don't trust them	5%	7%	8%	5%
Money doesn't go to the cause	5%	8%	6%	2%
I volunteer instead	1%	3%	4%	2%
I never donate to charities	-	9%	3%	7%
Prefer to give to other organizations	-	-	2%	3%
Other	17%	7%	6%	8%
None	10%	8%	3%	5%
Don't know/ Refused	6%	9%	12%	13%

*Mentions of higher than 2% shown.

Q22. Why haven't you made a financial donation to a charity or non-profit organization in the past 12 months? Base: Have not made a financial donation to a charity or non-profit organization in the past 12 months 2017 (n=448); 2015 (n=508); 2013 (n=290); 2011 (n=314)

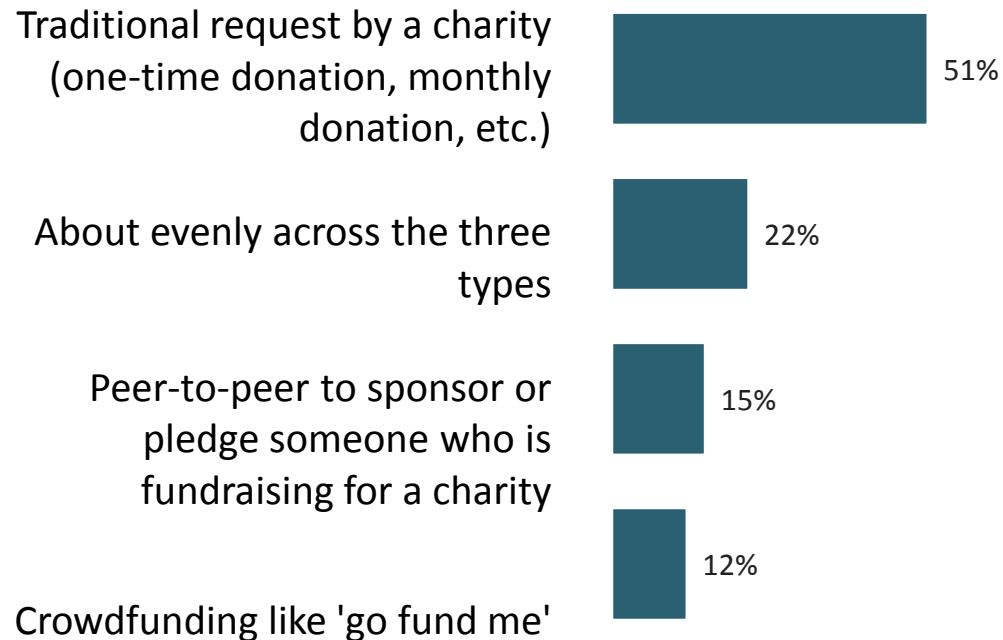


FUTURE DONATION

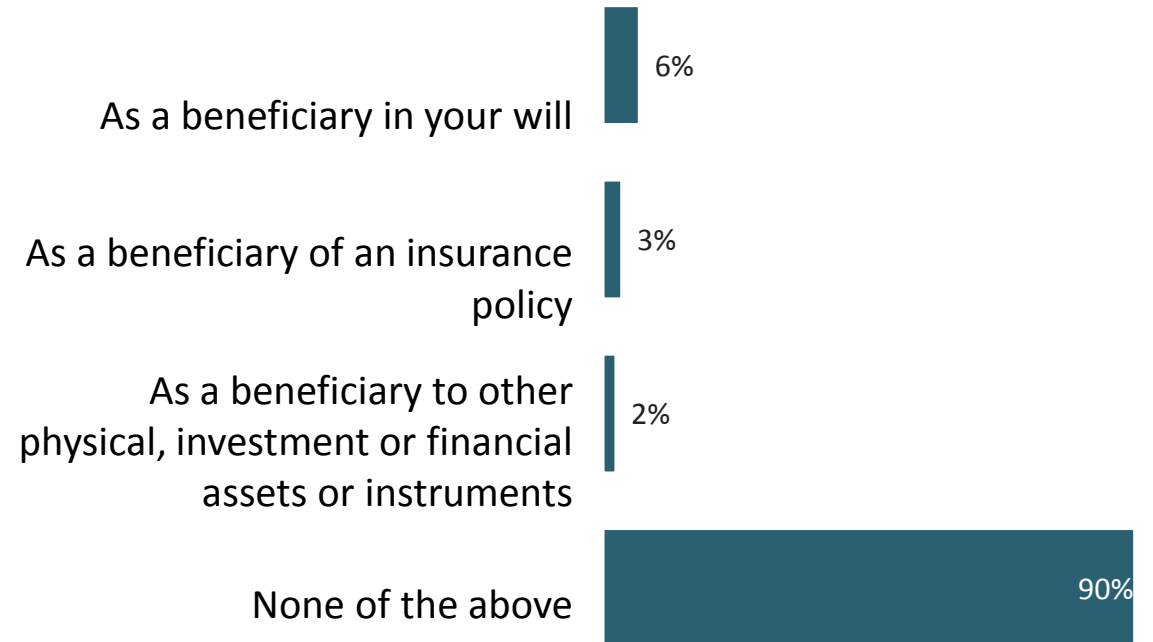


In the future, more than one-quarter of Canadians see themselves donating more to peer-to-peer or crowdfunding fundraising than traditional charity. An additional two in ten say they would donate evenly across the three types. Only one in ten have named a charity as a beneficiary of some form of their estate.

Fundraising type



Naming Charities as a Beneficiary



Q11. In the future, which do you see yourself donating more money to? Base: All Respondents 2017 (n=1500);
Q12. Have you named a charity ... Base: All Respondents 2017 (n=1500);



DIVERSITY

ETHNICITY AND IMMIGRATION

- There are some directional differences, but nothing that is statistically significant due to small sample sizes.
- Directionally, reported past 12 month donations is lower among East Asian/Chinese Canadians and First Nations/Aboriginal.
- It is also lower among those new to Canada (< 10 years).

% donated in the past 12 months by Main Ethnic Background				
White	East Asian incl. China	South Asian	Aboriginal/ Indian Band/First Nation	China
A	B	C	D	E
1282	78	32	28	66
1280	79*	32*	29**	66*
913	53	23	15	45
71%	67%	71%	54%	68%

% donated in the past 12 months by Years Lived in Canada			
<10 years		10+ years	
2015	2017	2015	2017
F	G	H	I
54	47	198	196
54*	47*	199	195
31	25	144	144
55%	54%	70%	74%

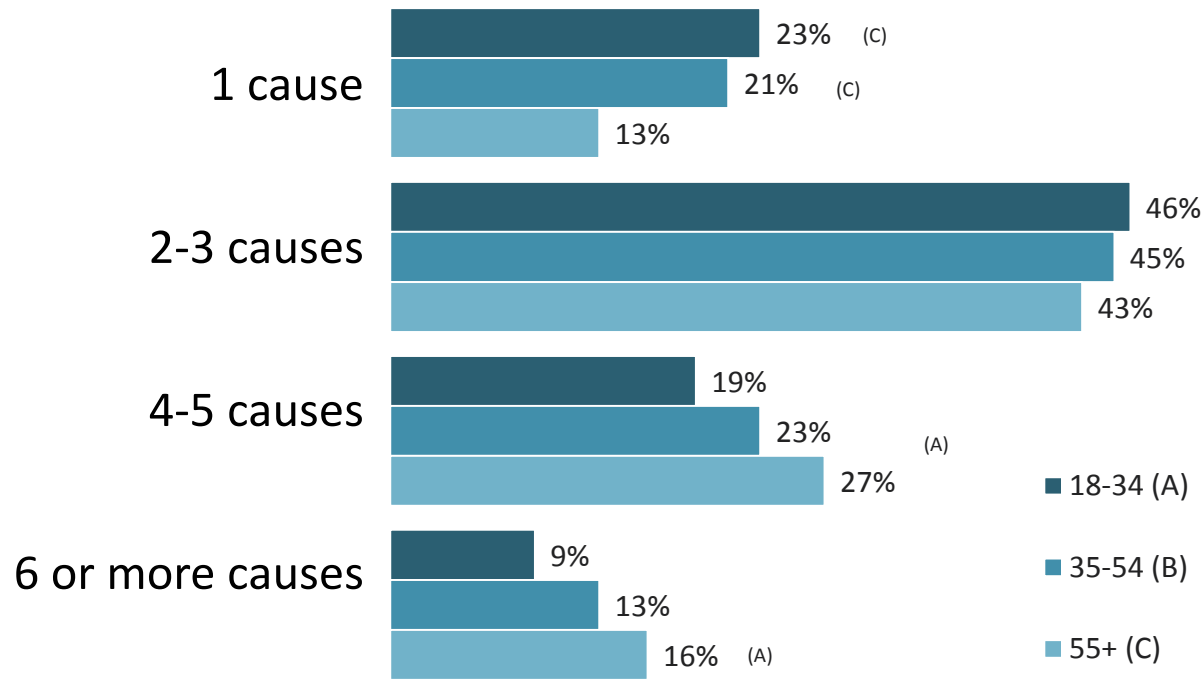
Q15. Have you made a financial donation to a charity or non-profit organization in the past 12 months ?
 Base: All Respondents 2017 (n=1500); 2015 (n=1502); 2013 (n=1003)

NUMBER OF CAUSES DONATED TO IN THE PAST 12 MONTHS



The number of causes donated to in the past 12 months is significantly higher among Boomers than Millennials (28% of Millennials donate to 4 or more causes compared to 43% among Boomers.).

There are some directional differences based on ethnic background, but nothing that is statistically significant due to small sample sizes. Directionally, the number of causes donated to is lower among East Asian/Chinese Canadians and First Nations/Aboriginal.



	Main Ethnic Background				
	White	East Asian incl. China	South Asian	Aboriginal/ Indian Band/First Nation	China
	D	E	F	G	H
1 cause	16%	33%(H)	30%	19%	36%(H)
2-3 causes	44%	40%	34%	60%	37%
4-5 causes	25%	23%	23%	14%	22%
6 or more causes	13%	4%	13%	7%	5%

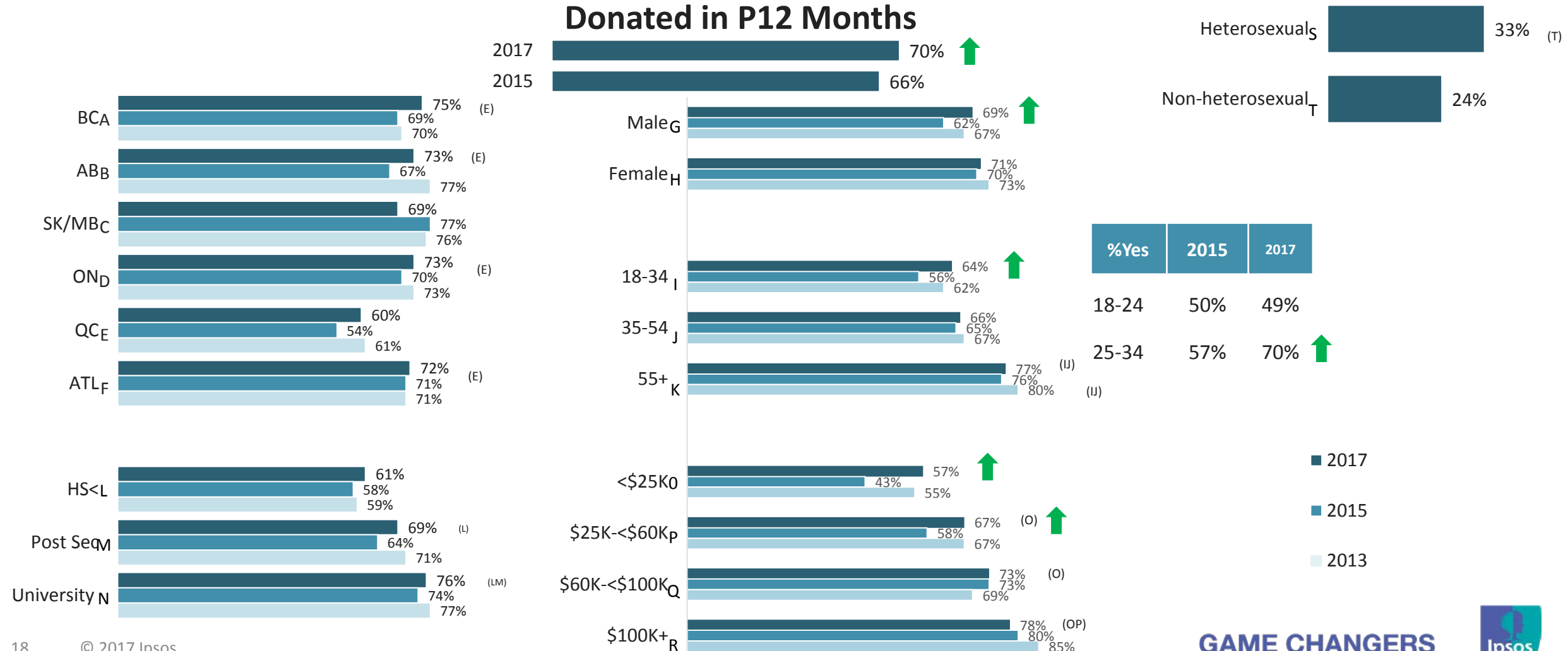
Q17. How many different charitable organizations did you donate money to in the past 12 months? Base: Have made a financial donation to a charity or non-profit organization in the past 12 months 2017 (n=1052); 2015 (n=994); 2013 (n=713); 2011 (n=713); 2009 (n=819)



MADE A FINANCIAL DONATION IN THE PAST 12 MONTHS – BY REGION AND DEMOGRAPHICS



The increase has come primarily from significant increases among those aged 25 to 34, lower household income (which makes sense with more younger donors) and among men. Heterosexuals are more likely than non-heterosexuals to have made a donation.



Q15. Have you made a financial donation to a charity or non-profit organization in the past 12 months ?
 Base: All Respondents 2017 (n=1500); 2015 (n=1502); 2013 (n=1003)

SEGMENTATION

DEVELOPMENT OF THE SEGMENTATION (1)

The development of the segmentation was loosely based on the *Seven Faces of Philanthropy*, a 1994 social science study which analyzed the motivations of people related to their support of non-profit organizations.

People were categorized into seven distinct groups based on their attitudes and beliefs:

- Re-payer: Doing Good in Return
- Investor: Doing Good is Good Business
- Socialite: Doing Good is Fun
- Communitarian: Doing Good Makes Sense
- Devout: Doing Good is a Moral Obligation
- Altruist: Doing Good Feels Right
- Dynast: Doing Good is a Family Tradition

Although the *Seven Faces of Philanthropy* was used as a guide, it was not a pre-defined solution. In developing the segmentation for the *What Canadian Donors Want* survey, we let the data dictate the segments based on a number of survey questions, and did not force a 7-segment solution.

DONATION MOTIVATIONS – SEGMENTATION (1)

The 2015 research identified 6 segments of donors based on their motivations for donating.

Affiliative: Enjoy going to fundraising events and donate to charities from which they or someone they know has benefited

Communal: Donate to locally-based charities that benefit those in their community

Pragmatist: Family tradition of donating to a specific charity and donate to a charity where a tax credit is provided



Benevolent: Doing good is a moral obligation and want to help those in need

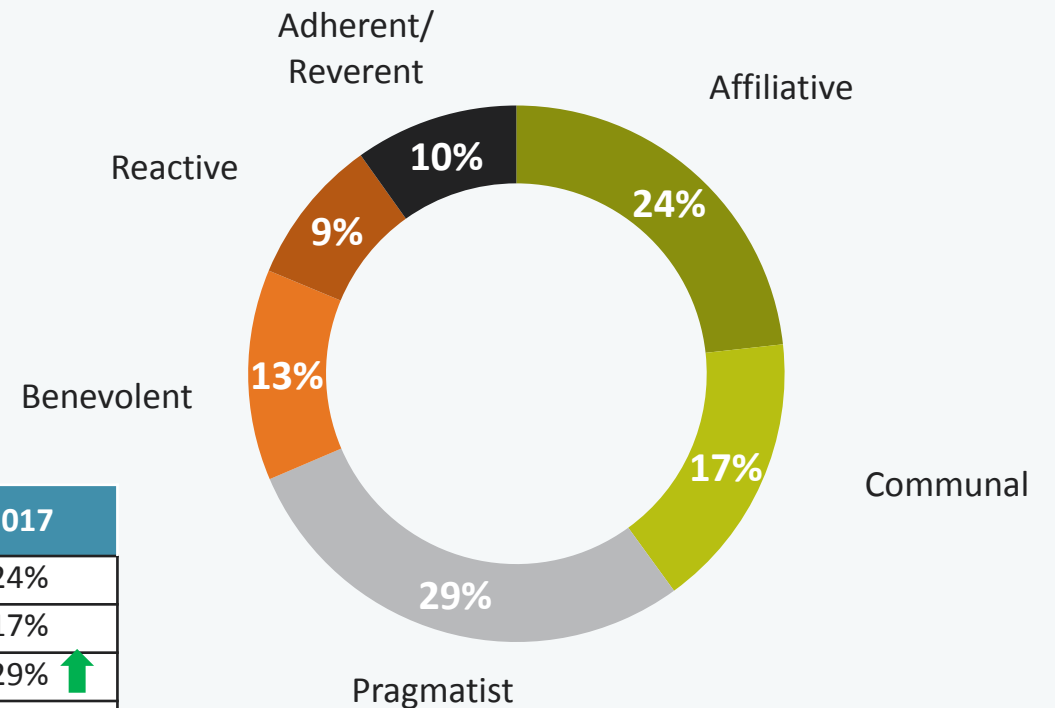
Reactive: Do not strongly associate with charities they donate to, and wait to be approached to donate

Adherent/Reverent: Donate to charities that share their beliefs or morals and motivated by their religious beliefs

Details on the segmentation methodology and process are provided in the Appendix.

In 2017, a simulator was used to re-create the segments. Most segments remained the same in size, but there was an increase in the proportion of Pragmatists and a similar decline in the proportion of Reactives.

	2015	2017
Affiliative	24%	24%
Communal	16%	17%
Pragmatist	25%	29% 
Benevolent	13%	13%
Reactive	12%	9% 
Adherent/Reverent	10%	10%



AVERAGE ANNUAL CONTRIBUTIONS – BY SEGMENTS



	2015	2017	
Affiliative	\$823	\$471	↓
Communal	\$503	\$304	↓
Pragmatist	\$943	\$1292	↑
Benevolent	\$1455	\$1182	↓
Reactive	\$431	\$396	
Adherent/Reverent	\$1872	\$1260	↓

Q18. Approximately how much in total did you donate to charitable organizations in the past 12 months? Base: Have made a financial donation to a charity or non-profit organization in the past 12 months (excluding no response) 2017 (n=1052); 2015 (n=994); 2013 (n=713); 2011 (n=713); (2009 n=819; 2008 n=1348; 2007 n=1022)



BENEVOLENT – 13%



BEHAVIOURS

Charities Donated to P12M – Top Causes

International: **61%** (31%)
Religion: **31%** (22%)
Social Services: **52%** (58%)

Reach of Charities

International community: **29%** (9%)
Developing countries: **31%** (4%)

Local community: **14%** (53%)

Number of Causes Donated to P12M

6 or more causes : **26%** (15%)

Average Amount Donated P12M

Donation amount: **\$1182** (\$773)

Method of Donation

Online via credit card: **19%** (12%)
Pre-authorized payment: **14%** (6%)

Types of Fundraising Donated to P12M

Traditional: **78%** (51%)
Peer-to-peer: **40%** (24%)
Crowdfunding: **27%** (16%)

Sources of Contact for Donations– Top Sources

By a cashier: **84%** (75%)
Letter in the mail: **77%** (61%)
E-mail: **64%** (45%)

BEHAVIOURS

Preferred Approach for Donation

Letter in mail: **42%** (34%)
E-mail: **39%** (27%)

Social Media: **4%** (10%)

Sources of Information on Charities – Top Sources

Organization’s website: **62%** (42%)
General online search **48%** (33%)
Word of mouth: **27%** (38%)

Social Media Usage

Facebook Account: **81%** (75%)
Twitter Account: **33%** (29%)
Instagram Account: **30%** (28%)

Volunteered in P12M

Volunteered time to charity: **39%** (32%)
Volunteer hours: **94** (88)

Likelihood to Donate in next 12M

‘Very likely’ to donate: **78%** (46%)

Impact of Increasing Tax Breaks for Charitable Donation

‘No impact’: **47%** (32%)

ATTITUDES

Confidence in Charities

Confident in charitable sector: **88%** (78%)

Importance of Charities

Charities play an important role: **87%** (75%)

Knowledge of Charitable Causes They Support

‘Very knowledgeable’: **30%** (21%)

Views of Charitable Organization Management

Charities well-managed: **71%** (61%)
Charities responsible with donations received: **77%** (63%)
Charities are trustworthy: **75%** (61%)

Evaluating a Charity’s Success and Effectiveness

‘Very important’ extent of charity’s impact: **74%** (63%)
‘Very important’ ability to achieve its mission & goals: **82%** (69%)

DEMOGRAPHICS

Region: Ontario: **44%** (38%); Quebec: **17%** (24%)

Gender: Female/Male: **56%/44%** (51%/49%)

Age: 18-34: **27%** (27%); 35-54: **28%** (34%); 55+: **58%** (39%)

Education: H.S. or less: **12%** (21%); University grad: **35%** (41%)-
Post-grad: **52%** (38%)

Household Income: <\$25K: **9%** (15%); \$100K+: **36%** (24%)



ABOVE AVERAGE



AVERAGE



BELOW AVERAGE

*Bracketed numbers represent the average figure.



DONATION MOTIVATIONS – SEGMENTATION (3)

13%

Benevolent

- Most likely to donate on their own without being prompted.
- Most likely to use pre-authorized payment as their method of donation.
- Second most likely to have donated to 6 or more causes.
- Least likely to say they prefer to support charities that help their local community.
- Most likely to say that the reason for their last donation was to help those in need
- Prefers to be approached for donations by email.
- Most likely to have donated in the P12 months through peer-to-peer funding.
- Most likely to donate to international charities including disaster relief, international development, human rights.
- Most likely to believe charities are trustworthy and are responsible with the donations received.

16%

9%

Reactive

- Most likely to have donated last to a charity that was well known.
- Least likely to have never donated in response to an invitation through social media.
- Least likely to say they enjoy and frequently attend fundraising concerts and events.
- Most likely to give to charities and organizations supporting health causes; and least likely to donate to international causes.
- Most likely to use a cheque as their method of donation.
- Most likely to prefer fundraising through a traditional request

10%

Adherent/ Reverent

- Most likely to say that the last charity they donated to shared their beliefs or morals.
- Most likely to have donated to religious causes.
- Most likely to have donated to 6 or more causes.
- Second highest annual average donation amount (\$1260).
- Most likely to make a financial donation in the next 12 months.
- Most likely to have donated to a charity in response to an invitation through social media.
- Most likely to say they are very knowledgeable about the charitable causes they support.
- Most likely to have volunteered in the past 12 months, averaging 172 hours.
- Most likely to agree that doing good is a moral obligation and like to give to help those in need.



MILLENNIALS V BOOMERS

Meet the Canadian Millennials

Environics has identified six different “tribes” of Millennials who are defined by their social values (see Appendix for more detailed profiles).

BROs and BRITTANYs – 38% of millennials



These are the “mainstream.” Young urban and suburban Millennials not looking to change the world. They start their day with a cup of Tim’s and end it with a beer. They are enthusiastic users of technology.

ENGAGED IDEALISTS – 19% of millennials



Popular archetypes of Millennials are based on this type. Skewed female and in B.C., they are socially aware and engaged. They tend to hold progressive values and are ambitious. Highly connected and heavy tech users.

NEW TRADITIONALISTS – 10% of millennials



Being spiritual and religious, this segment believes in a traditional family structure and have a more conservative mindset. They are practical consumers who watch their money, and have a low need for status recognition.

CRITICAL COUNTERCULTURE – 4% of millennials



These Millennials are civic-minded, ethical consumers, with a global consciousness. They are skeptical of advertising and approach consumption in a more utilitarian fashion.

DIVERSE STRIVERS – 10% of millennials



They love crowds, attention and pursue intensity in all they do. They are connected to their communities, believe in duty and want to get ahead. They also love to spend money, caring about their appearance and wanting brand-name products.

LONE WOLVES – 19% of millennials



This segment actively disengages from society and rejects authority. They are rebelling *without* a cause. They are simply skeptical about the world and what it has to offer.

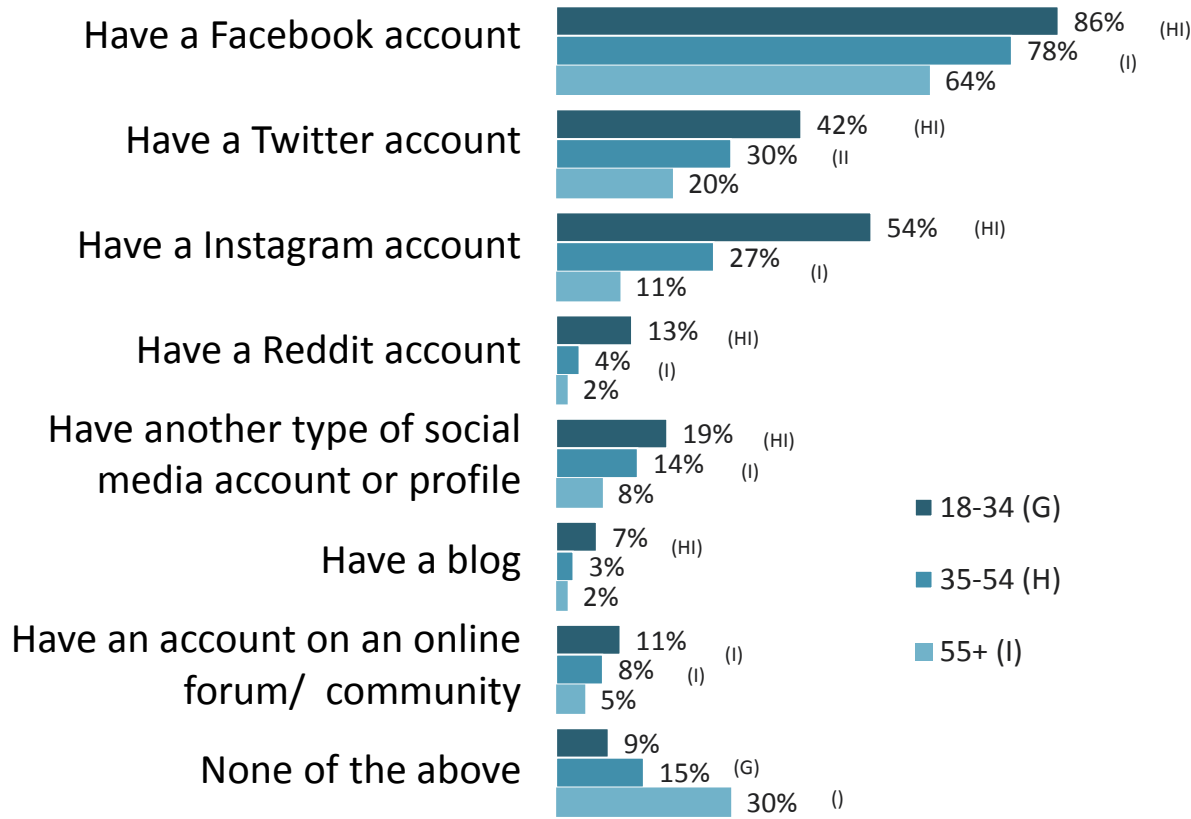
SOCIAL MEDIA USAGE – BY AGE AND REGION



Millennials are more likely than other age segments to have almost all of these social media accounts.

Quebecers are most likely to say they have a Facebook account. Atlantic Canadians and Albertans are the most likely to have a Twitter account.

Has specific social media accounts



	Region					
	BC	AB	SK/MB	ON	QC	ATL
	A	B	C	D	E	F
Facebook	71%	78%	70%	72%	80% _(ACD)	77%
Twitter	24%	40% _(ACDE)	25%	30% _(E)	23%	41% _(ACDE)
Instagram	28%	33% _(E)	28%	30% _(E)	22%	33% _(E)
Reddit	6%	8% _(E)	3%	5%	3%	4%
Another	16% _(E)	14%	14%	13%	10%	17%
Blog	3%	5%	5%	3%	4%	3%
Forum	9%	10% _(E)	6%	8%	5%	8%
None	22%	14%	20%	21% _(B)	16%	20%

Q34. Do you have any of the following? Base: All respondents 2017 (n=1500); 2015 n=1502)



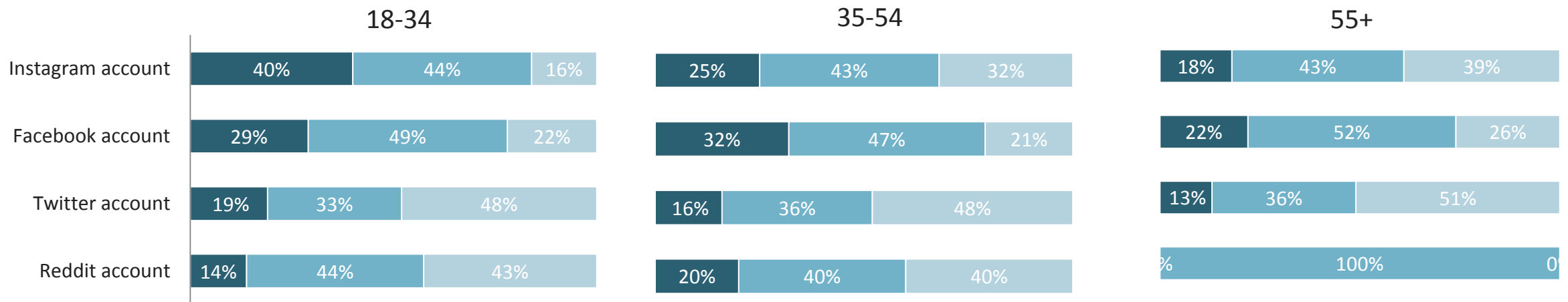
SOCIAL MEDIA USAGE – BY AGE



There is not much difference based on gender and donation behaviour in the past 12 months regarding how actively Canadians use their social media accounts (not shown). There are some differences based on age. Millennials are more likely than Gen Xers and Boomers to be very active on Instagram, while the two older groups are more likely to say they are more likely to only creep – don't like or post. Millennials and Gen Xers are more likely than Boomers to be very active on Facebook, while Boomers are more likely to say they only creep.

How is the account used

- I am very active, posting, sharing, liking or commenting on various things
- I am active, but mostly read and 'like' things more than I comment or post things of my own
- I mostly read what other people post on social media and I don't 'like' or comment



Q35. Which of the following best describes how actively you use each of your social media accounts? Base: Respondents who have a social media account (n=Varies)



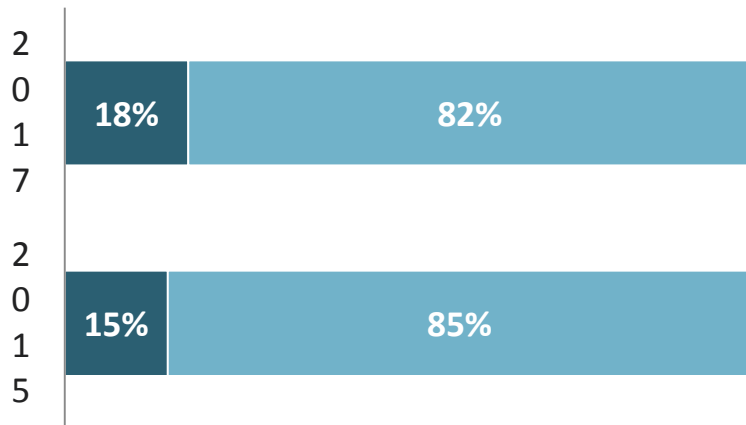
SOCIAL MEDIA DONATION REQUESTS



Eighteen percent of those on social media say they have donated in response to a request posted on social media, and this is up three points from 2015. Millennials and Gen Xers and those with higher education are more likely to have responded to these requests. Eighty percent of the requests that are received on social media were from someone they know.

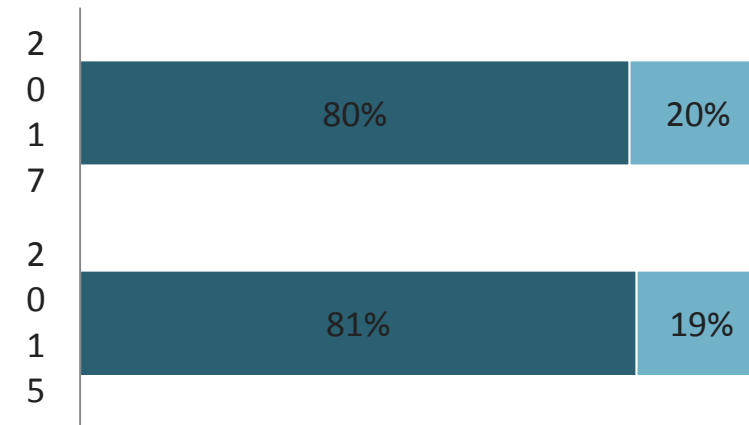
Donated to charity in response to an invitation through social media

■ Yes ■ No



Request came from someone you know personally or not

■ Yes ■ No



Donated to charity in response to invitation through social media						
Yes	18-34	35-54	55+	H.S. or Less	Post-Secondary	University Grad
	A	B	C	D	E	F
	23% _(C)	19% _(C)	13%	11%	18% _{((D)}	23% _(D)

Q36. Have you ever donated to a charity in response to an invitation or post that came to you through your social media account (e.g., Facebook, etc.)? Base: Respondents who have some social media account 2017 (n=1213); 2015 (n=1176)

Q37. Thinking of the times that you have donated to a charity in response to a social media request or post, would you say that most often the post or request has come from someone you know personally or not? Base: Respondents who have a social media account and donated to a charity in response to an invitation or post 2017 (n=223);

SPECIAL THANKS:

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RESEARCH COMMITTEE

Lorelei Wilkinson, CFRE, Chair

Nowshad Ali, CFRE

John Gormlay