The Next Generation of Giving in Canada

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Make everything as simple as possible, but not simpler.

Albert Einstein

Photo Credit: https://www.goodreads.com/author/show/9810.Albert_Einstein
WHY GENERATIONAL GIVING?
Civics: before 1946, 73+
Baby Boomers: 1946-64, 54 - 74
Generation Z: 1996 and beyond, so young!
Methodology

- Survey instrument developed and refined from 2010 and 2013 surveys – identical methodology
- Online survey of 971 Canadian Donors – excluding Quebec
- Adults 18+ who report donating to a charitable cause in the last 12 months (excluding children’s schools, places of worship, trade unions, alma maters)
- Conducted January 9-28, 2018 using an established industry sampling partner, consisting of opt-in research participants
- Follow Insights Association/industry best practices
- Data is self-reported, not transactional
DRAMATIC OVERSIMPLIFICATION OF GIVING TRENDS
X-BOOM: Canadian Giving superheroes for the near future
CONTRIBUTION TO TOTAL GIVING (PERCENT OF TOTAL DOLLARS)

- 25% Generation X
- 41% Boomers
- 15% Millennials
- 19% Civics
SO WHAT STRATEGIES AND TACTICS DO YOU SEE AHEAD OF YOU AFTER SEEING THE BIG PICTURE?
Canadian Generational Giving Priorities

Gen Y

Animal Welfare

Mature

Healthcare

Gen X

Children

Boomer

Arts
# Top Overall Giving Priorities

<table>
<thead>
<tr>
<th>Most Frequent Giving Choices by Generation</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Millennials</strong></td>
</tr>
<tr>
<td>Health</td>
</tr>
<tr>
<td>Animals</td>
</tr>
<tr>
<td>Worship</td>
</tr>
<tr>
<td>Children</td>
</tr>
<tr>
<td>Social Service</td>
</tr>
<tr>
<td>Education</td>
</tr>
<tr>
<td>Environment</td>
</tr>
</tbody>
</table>
Hey Dan Palotta, Canadian donors prioritize financial stewardship…

<table>
<thead>
<tr>
<th>Sector</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Efficiency</td>
<td>73%</td>
</tr>
<tr>
<td>Operating costs</td>
<td>61%</td>
</tr>
<tr>
<td>More about their impact</td>
<td>59%</td>
</tr>
<tr>
<td>Their general reputation</td>
<td>58%</td>
</tr>
<tr>
<td>More about their mission and services</td>
<td>54%</td>
</tr>
<tr>
<td>Executive salaries</td>
<td>49%</td>
</tr>
<tr>
<td>Funding sources</td>
<td>39%</td>
</tr>
<tr>
<td>Leadership</td>
<td>26%</td>
</tr>
</tbody>
</table>

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MINDSETS THAT DRIVE GIVING

Planning

Small and Spontaneous

Activism

Recognition

AVERAGE SCORES BY GENERATION

- Gen Z
- Millennials
- Gen X
- Boomers
- Matures
Gen X: Hard to get their attention

Boomers: Like to prioritize their giving

Millennials: Like to direct their donations

Matures: Easily annoyed by the ask

Gen Z: I want to be cultivated
Generational Exercise:

• You are a copywriter for your social impact organization and you’ve been asked to write an email to a generational cohort…
• Take a few minutes and write the opening paragraph in your email. It can be a solicitation, an advocacy email, whatever you’d like
• But we want you to make sure that you think through the representative generational statement and let that influence your writing
• When you’re done – share with those around you.
Trend: Technology Smart or Mobile Phones

Enhance
- Accessibility - Apps, Donor Info
- Communications – SMS, Social
- Response time – Text to Give
- Collaboration

Retrieve
- Data - Text, Photos, Videos, Donor Information!
- Money – mobile payments

Reverse
- Letters, The Art of Writing
- Movements to “Unplug”
- Security Concerns

Make Obsolete
- “Land line” Phones, Computers, Cameras
- Money, Credit Cards
- Privacy and anonymity
- Permanence of “place” work or home
GEN Z
84% DONATED
70% VOLUNTEERED

3 of the top 10 fundraisers for the Canadian Cancer Society four years ago were under 15

Do you have a generational fundraising plan for Gen Z?
SOCIAL + TECHNOLOGY = GAMERS

Players and fans raised $13 million for the Breast Cancer Research Foundation.

$250,000 War Child Campaign ... Armistice Day

[Image: Activision Blizzard]
TECHNOLOGY DATA

Know Your Donors.
Scoring frameworks
Dashboards
Measuring outcomes and impact
Transparency and accountability
Smart AI
Chatbots
ECONOMIC – HYBRID ORGS

New organizational models require “new” systems.

Graphic Credit: Stanford Social Innovation Review
http://www.ssireview.org/articles/entry/in_search_of_the_hybrid_ideal
POLITICAL/REGULATORY

The one thing you can be certain of? Taxes

The one thing that is still open for interpretation? CASL, GDPR

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CASE STUDY

We Day—along with associated brands Me To We and Free The Children—is dedicated to the proposition that young people must be taken seriously as a potent source of positive change.
Trend Exercise:

• You are your social impact organization’s trend expert and you have been tasked with leading a trend analysis of one key topic (technology, etc.)
• Make four categories on a sheet of paper: enhance, reverse, retrieve, make obsolete
• Work in pairs or some groups if you’d like on a common subject
ACTING ON TRENDS

CASE STUDY
How do you add Generational Responsibility?

- **A CGO** – *Chief Generational Officer* – a generalist who provides strategy and integration to other executives and the organization from a generational perspective

- Giving all current executives an expanded responsibility that must include generational thinking

- Concentrating generational strategy and tactical leadership with the CMO, CTO (data), and CDO positions
How does leadership generation-proof their organization?

• Hire managers/directors who understand the role of generational giving/engagement
• Training staff who need to incorporate generational thinking into their work (at least read Next Gen!)
• Uncover generational champions
• Assign them to review whether the organization has the staff (skills), structure, technology and culture to make a generational shift – or to add more generational strategy and tactics
• Give leadership and managers the ‘room’ to add generational thinking to their work
• Create generational pilots that can be:
  • Tracked over time
  • Used to test generational messaging/offers
  • Used to test generational channel choices
  • Used to test the ROI for generational tactics and strategies
A generationally-focused fundraiser
They gathered data over three years…

What do you see and what might it tell you to do moving forward?

It might say concentrate more resources on older donors. It may say concentrate on some channels over others...

But Chris needed to dig deeper
He added more generational testing

He saw considerable difference in cross sell rate
A Dutch Charity – generational study

• 20-30 years: a retention percentage of approximately 57% after 12 months.
• 30-40 years: 69% after 12 months
• 40-50 years: 71% after 12 months
• 50+: 80% after 12 months.
Generational testing of messaging

A generational-content approach from July to September 2018; in multiple countries; reaching 8 million individuals; with almost 70,000 taking action

### Positive
- **Hope**
  - Amnesty International
  - Sponsored:
  - When we work together with people just like you to stand up for human dignity, we can change things for the better. If you share our hope for a fair and free world enjoyed by all, join us today.

- **Pride**
  - Amnesty International
  - Sponsored:
  - We are a global movement of millions who have achieved incredible triumphs over the years. Because of our members, people have been freed, lives have been saved and justice has been done. Join us today and help fight for human dignity.

- **Love**
  - Amnesty International
  - Sponsored:
  - Because of the love and dedication of our members, people have been freed, lives have been saved and human dignity has been protected. We continue to campaign relentlessly and give a voice to those who've had their taken away. Join a movement of millions today.

- **Joy**
  - Amnesty International
  - Sponsored:
  - When human rights are denied, we won't be silent! Because of our members, people have been freed, lives have been saved and justice has been done. Join us today and bring joy to someone's life.

### Negative
- **Fear**
  - Amnesty International
  - Sponsored:
  - In a world without human rights, we are all at risk. The outrageous abuses happening to someone else today could happen to you tomorrow. Join a movement of millions who protect the rights of people everywhere.

- **Anger**
  - Amnesty International
  - Sponsored:
  - We live in a challenging time for human rights. Every year, hundreds of thousands of people are killed during conflicts and crises, while millions more are left needing protection and support. We must confront these appalling abuses and show governments around the world our anger. Join a movement of millions and make your voice heard.

- **Sadness**
  - Amnesty International
  - Sponsored:
  - People across the world are being harassed, tortured, jailed and even killed — just because of who they are or what they believe. We must make sure these stories of suffering are heard so they can never happen again. Join us today.
recursive probabilistic fractal

300 million hierarchical pattern recognizers
Generational Click Rates

Click rates

- • hope
- • joy
- • love
- • pride
- • anger
- • fear
- • sadness

- 0%-2%
- 2%-4%
- 4%-6%
- 6%-8%
- 8%-10%
How do you build different generational funnels?
IT TAKES DARKNESS TO SEE LIGHT

BETTER TO LIGHT ONE SMALL CANDLE THAN TO CURSE THE DARKNESS.

- CHINESE PROVERB

AMNESTY INTERNATIONAL
GENERATIONAL TACTICS TO TAKE HOME

1. Gather age data and results and share it internally to begin a conversation

2. Ask acquisition agencies you may hire to incentivize older donors

3. Do you ask acquisition agencies to exclude younger donors e.g. we won’t pay for anyone under X

4. Test, pilot, and massage channels and approaches by generation to maximize programs
Be sure and visit the Blackbaud Institute for your copy of the Next Generation of Canadian Giving 2018!

And to learn what actions/initiatives you can take with Next Gen in your hand:

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