WHAT CANADIAN DONORS WANT

WEBINAR – 2017 SURVEY FINDINGS

STUDY CONDUCTED FOR:

AFP FOUNDATION FOR PHILANTHROPY CANADA

BY: IPSOS

GAME CHANGERS

Presenters

Mary Bowyer, CFRE, Senior Manager, Philanthropy, Renascent Foundation

Mary brings more than 20 years of professional fundraising experience in a variety of philanthropic sectors such as health-care, education, social services/child welfare, mental health, the environment and animal welfare.

Mary is a founding member of the AFP Foundation for Philanthropy – Canada's Research committee and current chair of the what Canadian donors want working group.

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Presenters

Diana MacDonald, Director, Canada, Ipsos Public Affairs

Diana has been a member of the Canada Public Affairs team for more than four years. She has worked in the field of public opinion and market research for more than 20 years. Diana is experienced in all areas of research and specializes in satisfaction and reputation research, and has worked with clients from the public, private and non-profit sectors.

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Presenters

Nowshad "Shad" Ali, CFRE, President & CEO at On Purpose Leadership Inc.

Shad works with corporate and social impact clients in leadership and organization development. His over 25 years experience in not-for-profit and association management includes senior roles at Osteoporosis Canada, Canadian Diabetes Association, The Lung Association and Big Brothers and Big Sisters. Shad has worked on Donor Modeling projects for organizations such as Canadian Red Cross, Meewasin, McGill, Dalhousie and Manitoba Universities. Shad has a wide array of expertise including Board Development, Human Resource Management and Training. Shad holds the CFRE designation as well as he is certified as a Values and Behaviour Analyst.

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For your generous support in funding the "What Canadian Donors Want" research.

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ABOUT AFP AND THE AFP FOUNDATION FOR PHILANTHROPY - CANADA

The Association of fundraising professionals (AFP) is the largest association of fundraising professionals in the world. AFP has over 32,000 members world-wide with 3,800 of them in Canada. AFP promotes the importance and value of philanthropy, and enables people and organizations to practice ethical and effective fundraising. AFP Canada was formally created in 2017.

The philanthropic arm of AFP, the AFP Foundation for Philanthropy – Canada, supports many programs and services through its fundraising efforts. Fulfilling the promise of philanthropy by funding programs and services In the areas of research, diversity & Inclusion, supporting the profession and leadership. To find out more, please visit **www.afpnet.org/afpcanada**

The AFP Foundation for Philanthropy – Canada Research Committee conducts an annual “Call for Research” and will be releasing “Retail demand for impact investing” by John Gormaly and Dr. Brent McKnight within the next two weeks. Please visit **www.afpnet.org/afpcanada** to see the research.

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ABOUT THIS RESEARCH

RESEARCH OBJECTIVES

- The Association of Fundraising Professionals represents more than 30,000 members in 232 chapters throughout the world.
- The Association works to advance philanthropy through advocacy, research, education and certification programs, and fosters development and growth of fundraising professionals and promotes high ethical standards in the fundraising profession.
- For several years IPSOS has conducted research for the Association through both syndicated research (*What Donors Want*) and custom research. The 2017 What Canadian Donors Want study was designed to measure the following:
    - Public confidence in and perceived importance of the role of charitable/non-profit organizations
    - Views of charitable organization management and investment areas
    - Views of volunteerism
    - Ways of being contacted and preferred methods of contact
    - What motivates Canadians to donate
    - Attitudinal segmentation of Canadian donors
    - Opinions of crowd-funding and social media
    - Perceptions of the future of charities

METHODOLOGY

- Online survey using the IPSOS proprietary online panel.
- Nationally representative sample of n=1500 Canadians aged 18 years and older.
- Overall data has been weighted by region, age, and gender according to 2016 census data.
- Fielding October 10-17, 2017.
- While not a random probability sample, a sample of this size has a theoretical margin of error of ± 2.5, 19 times out of 20.
- Tracking data from previous waves of the survey have been included where available and appropriate.

REPORTING CONVENTIONS

- Statistically significant changes between data from 2015 and 2017 are presented as follows:
  - Significant increase ⬆
  - Significant decrease ⬇
- Statistically significant differences between subgroups are denoted with letters (Each subgroup is denoted with a letter (e.g., a, b, c, etc.). If the letter “a” appears beside the response of a certain subgroup that means that the response of that subgroup is significantly higher than the response of the subgroup denoted with the letter “a.”)
- Where totals do not add to 100% it is due to rounding or the respondent was able to give more than one response.
- The survey asked respondents to identify their age, gender, education, household income, ethnicity and other variables. Respondents self-identified their sexual orientation including a prefer not to say option. Where results are shown by sexual orientation, non-heterosexual includes: Gay, Lesbian, Bisexual, Queer, Two-spirited, Asexual, Pansexual, Questioning, Other. See Appendix for the composition of the sample based on these variables.

KEY LEARNING

GAME CHANGERS

KEY LEARNING

- Public confidence in the charitable sector has increased compared to two years ago.
- Although a sizeable minority of Canadians continue to believe that charities overstate the proportion of donation dollars that go directly to the cause versus going to overhead and administrative costs, there has been an increase in the proportion who trust charities in this area. Trust in this area is important as 57% of Canadians indicate that a charity's management of its operations is a very important factor in evaluating a charity's success and effectiveness.
- Other factors that play a very important role in assessing a charity are the charity's ability to achieve its mission and goals and the extent of the charity's impact (69% and 63%, respectively).
- After falling in 2015, the percent of Canadians who report making a financial donation to a non-profit or charity in the past 12 months has rebounded back to the levels found in 2011 and 2013. The increase has come primarily from older millennials (age 25-34), who appear to be back in a position to donate (reported household incomes are higher than reported two years ago in 2015).
- Although the number of donations has increased, the average annual contribution has fallen from $924 to $772, which is more in line with the proportion found in 2013. This may be related to consumer confidence measures which indicate that although Canadians are quite positive about the national economy, there is less confidence in their regional economy and their personal finances.
- Canadians are spreading their donation dollars across more causes. There has been a decline in the number who are donating to a single cause and an increase in the proportion who are donating to multiple charities.
- Although a third of Canadians continue to say they have volunteered their time to a charity or non-profit (consistent with the level found in 2015), the time spent volunteering is down from 110 hours in 2015 to 88 hours.

KEY LEARNING

- Although disease/medical charities remain toward the top of the list of types of charities Canadians are donating to, the number of donors who are donating to these causes has declined again (drop noted between 2013 and 2015) and is now at the lowest levels in several years.
- While a large minority of Canadians proactively donate on their own, more say they are approached by the charity. The most common way that Canadians are contacted for donations are by a cashier adding a donation to a bill at a store (75%) and by a letter in the mail (61%).
- How Canadians report being contacted for donations generally matches their preferred approach. A letter in the mail continues to be the most preferred method of being contacted, but there have been increases in preference for being approached via e-mail or at the point of purchase. The proportion who report being approached via street canvassing is much higher than the proportion who prefer to be approached for donations this way (41% vs. 5%).
- An increasing proportion of those who have a social media account have responded to a donation invitation or request that came through their social media account, and consist with learning in 2015, the vast majority report these requests came from someone they know personally.
- The greatest share of donation requests that Canadians respond to continue to come from traditional requests by a charity, but sizeable numbers report responding to peer-to-peer requests and, to a lesser extent, crowdfunding requests.
- One in ten Canadians report that they have named a charity as a beneficiary in their will, an insurance policy or to other physical, investment or financial assets or instruments.

SECTION 1:
Confidence in, importance of, and Management of Charities

POLLING QUESTION

Please provide your response to all four questions

1) MY ORGANIZATION PROVIDES STEWARDSHIP REPORTS TO ALL DONORS

☐ YES ☐ NO

2) MY ORGANIZATION REGULARLY COMMUNICATES IMPACTS, ACHIEVEMENTS AND ADVANCEMENTS MADE TO OUR DONORS

☐ YES ☐ NO

3) MY ORGANIZATION HAS THE CAPACITY AND RESOURCES (HUMAN, FINANCIAL, PHYSICAL AND TECHNOLOGICAL) TO REASONABLY ACHIEVE OUR STATED PLANS AND GOALS

☐ YES ☐ NO

4) DONORS TO MY ORGANIZATION HAVE CONFIDENCE IN OUR CAPACITY TO ACHIEVE OUR STATED PLANS AND GOALS

☐ YES ☐ NO

PUBLIC CONFIDENCE IN THE CHARITABLE SECTOR

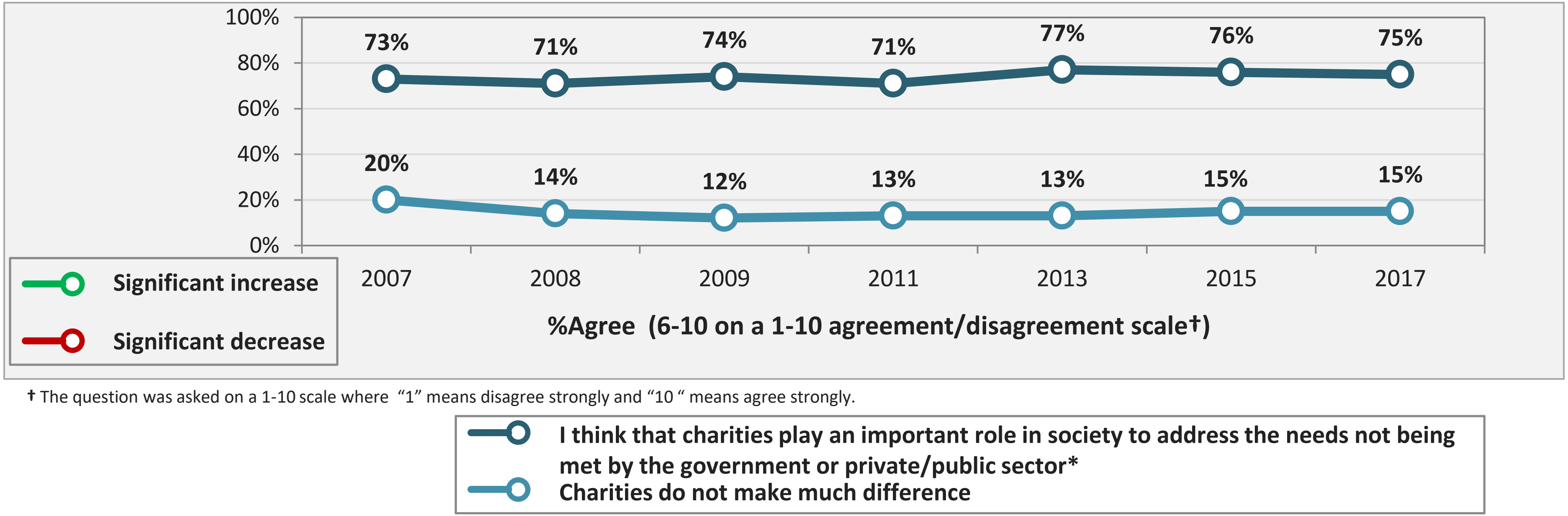
Canadians continue to express higher confidence in the charitable sector than either the private and public sector. Moreover, confidence in the charitable sector, as well as the private sector, is up significantly.

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)

GAME CHANGERS

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.

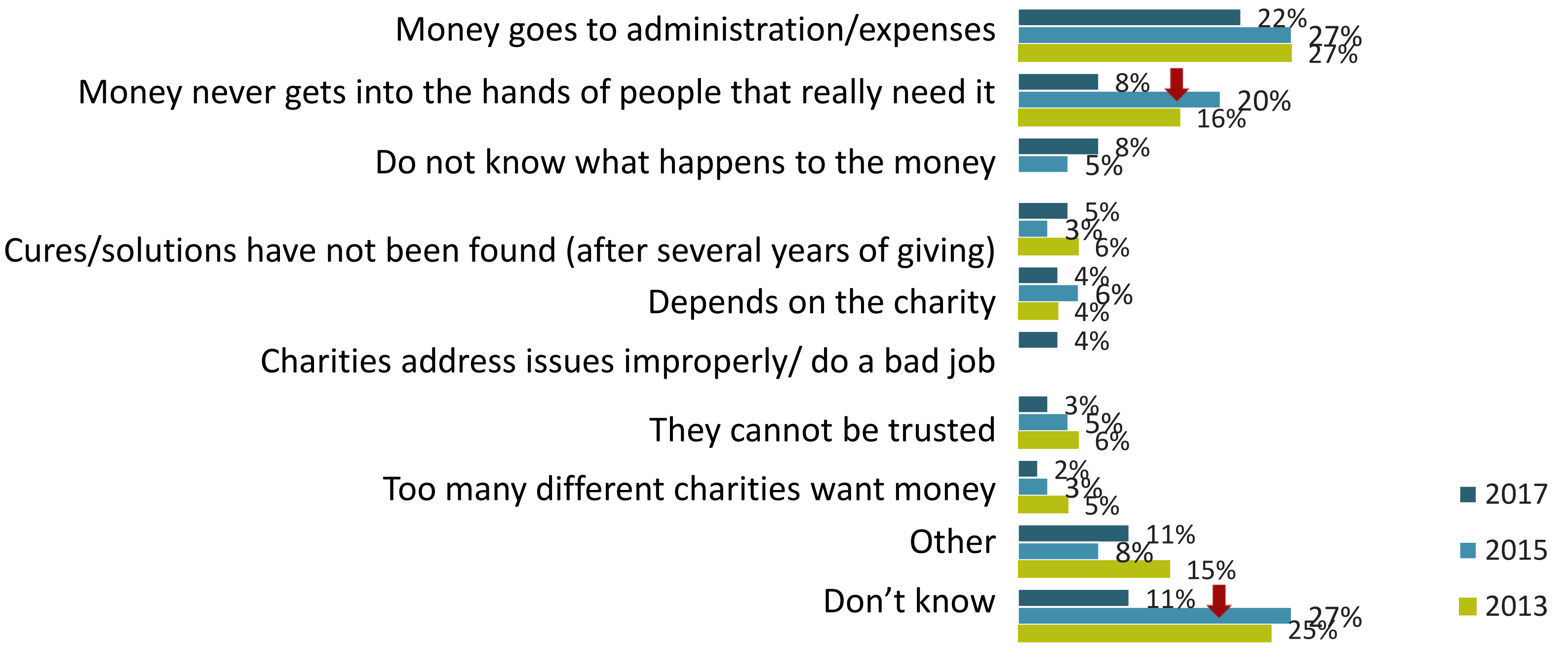
* Prior to 2013, the question wording was "I think that charities play an important role in society as a change agent to address needs not being met by government or private/public sector."

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)

GAME CHANGERS

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.

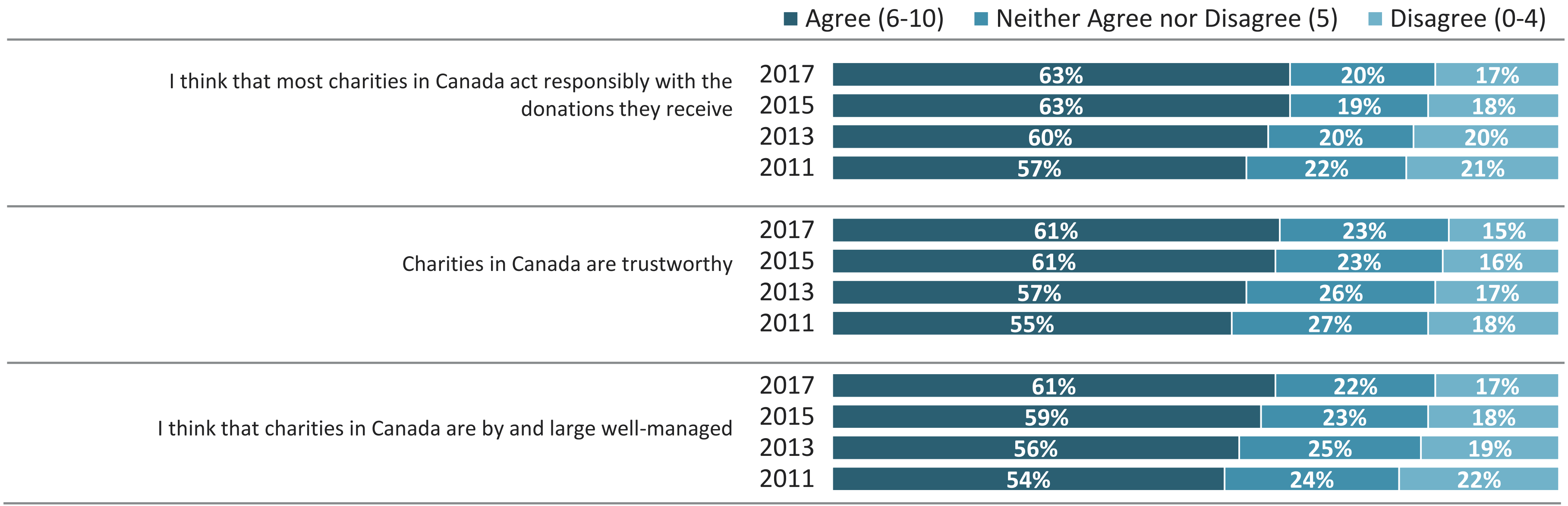
Q1b. Please explain why you agree that 'Charities do not make much difference'?

Base: Respondents who gave a score of 6 or higher to the above statement 2017 (n= 219); 2015 (n=234); 2013 (n=142)

GAME CHANGERS

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.

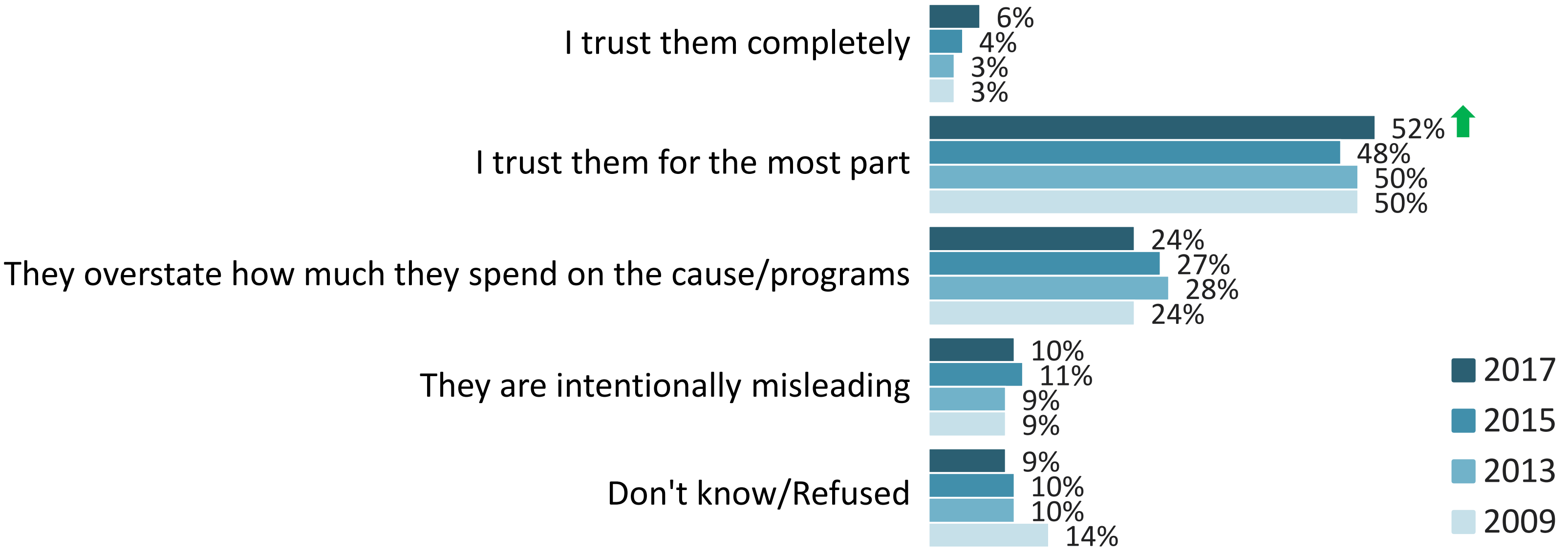


Q1. People have different attitudes towards charities and non-profit organizations. How much do you agree or disagree with each of the following statements as it relates to you personally on a scale of 0 to 10 where 0 is Disagree strongly and 10 is Agree strongly? Base: All Respondents 2017 (n=1500);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

GAME CHANGERS

TRUST IN REPORTING OF OVERHEAD COSTS

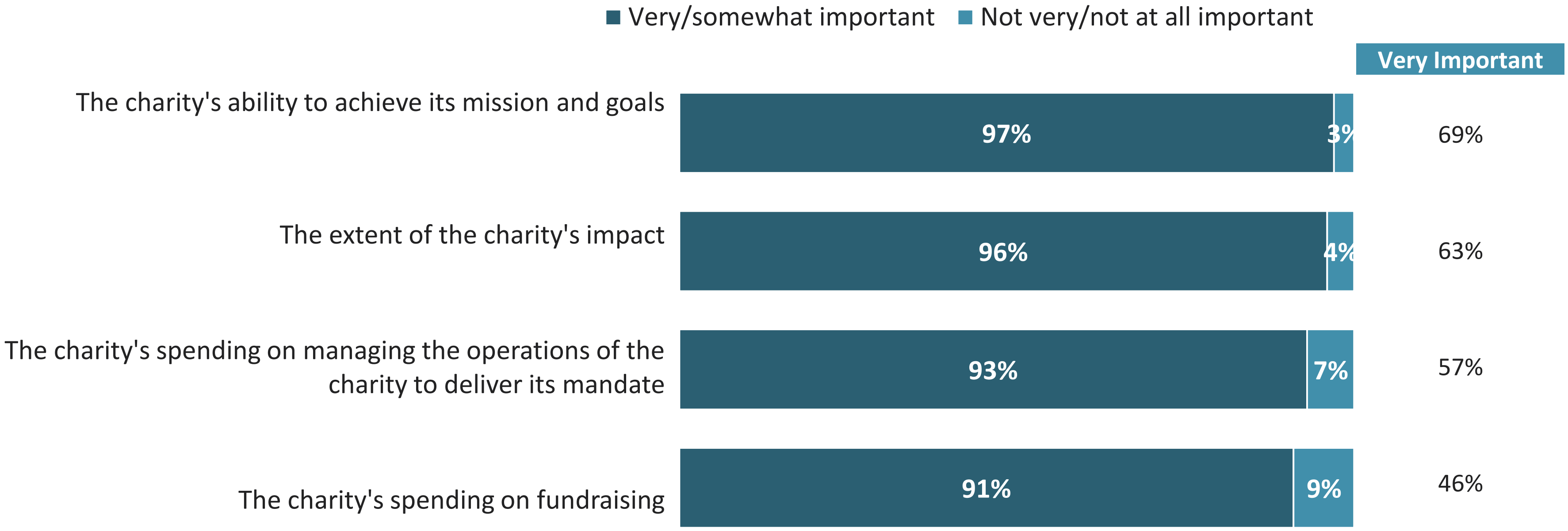
A third of Canadians believe that charities overstate how much they spend on the cause or programs they support, including one in ten who believe charities intentionally mislead the public. However, this number is down since 2015, and more say they trust charities for the most part.



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)

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)

GAME CHANGERS

EXTERNAL POINTS OF INTEREST

How does your organization fare?

ACCORDING TO COMPASS POINTS UNDERSERVED STUDY (WHILE LARGELY U.S. FOCUSED):

- ONLY 9% BELIEVE THEIR ORGANIZATION HAS SUFFICIENT RESOURCES TO CARRY OUT THEIR FUNDRAISING PLANS.

- ONLY 12% REPORT THEIR ORGANIZATIONS AS HAVING A CULTURE OF PHILANTHROPY

- ONLY 32% REPORT THEIR ORGANIZATION PRACTICES GOOD DONOR STEWARDSHIP

-BOARD MEMBER ENGAGEMENT IN FUNDRAISING ACTIVITY CONTINUES TO BE OF CONCERN.

-REFERENCE: HTTPS://WWW.COMPASSPOINT.ORG/UNDERDEVELOPED

SECTION 2:
Views on Funding The Sector

GAME CHANGERS

POLLING QUESTION

Please provide your response to both questions

1) I BELIEVE GOVERNMENTS (ALL LEVELS) WILL INCREASE ALLOCATIONS TO CHARITIES IN THE FUTURE.

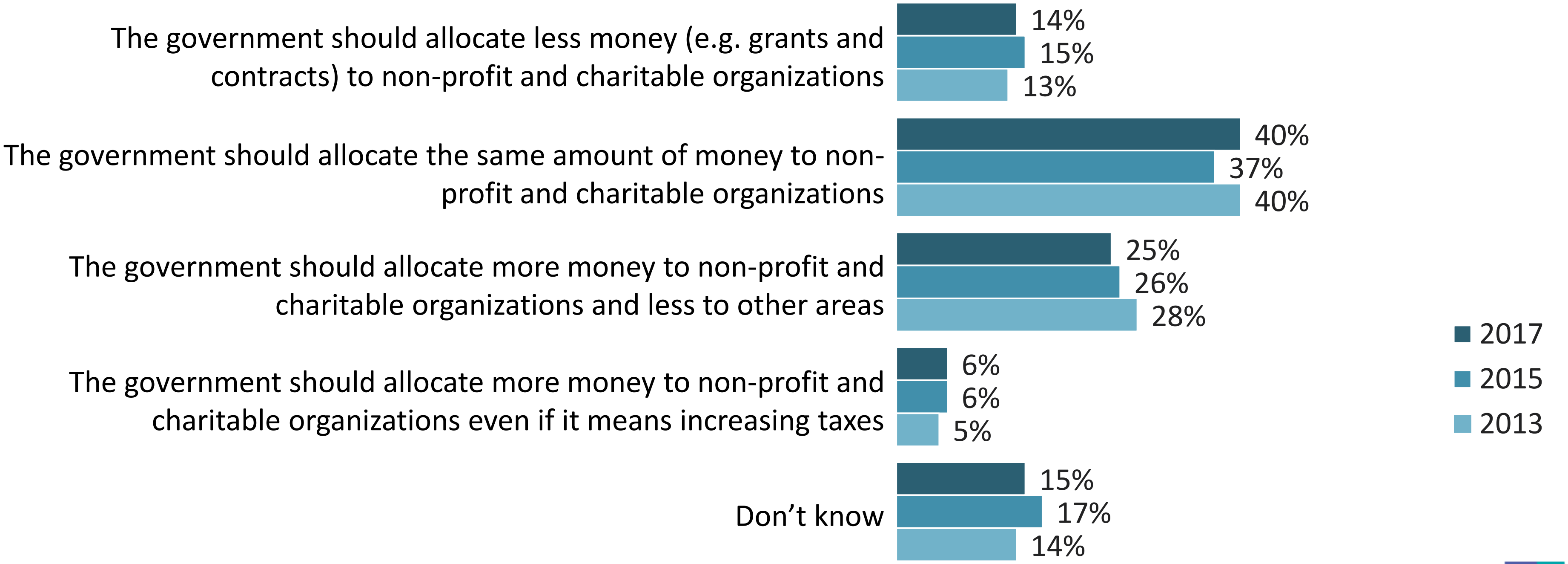
☐ YES ☐ NO

2) I BELIEVE INDIVIDUAL DONORS ARE PREPARED TO AND WILL STEP UP AND INCREASE DONATIONS IN THE FUTURE

☐ YES ☐ NO

GOVERNMENT FUNDING TO THE CHARITABLE SECTOR

As in previous waves, there is no consensus about whether the government should allocate more money to non-profit and charitable organizations. Three in ten support allocating more money, while half as many believe the government should allocate less, and four in ten support the status quo.

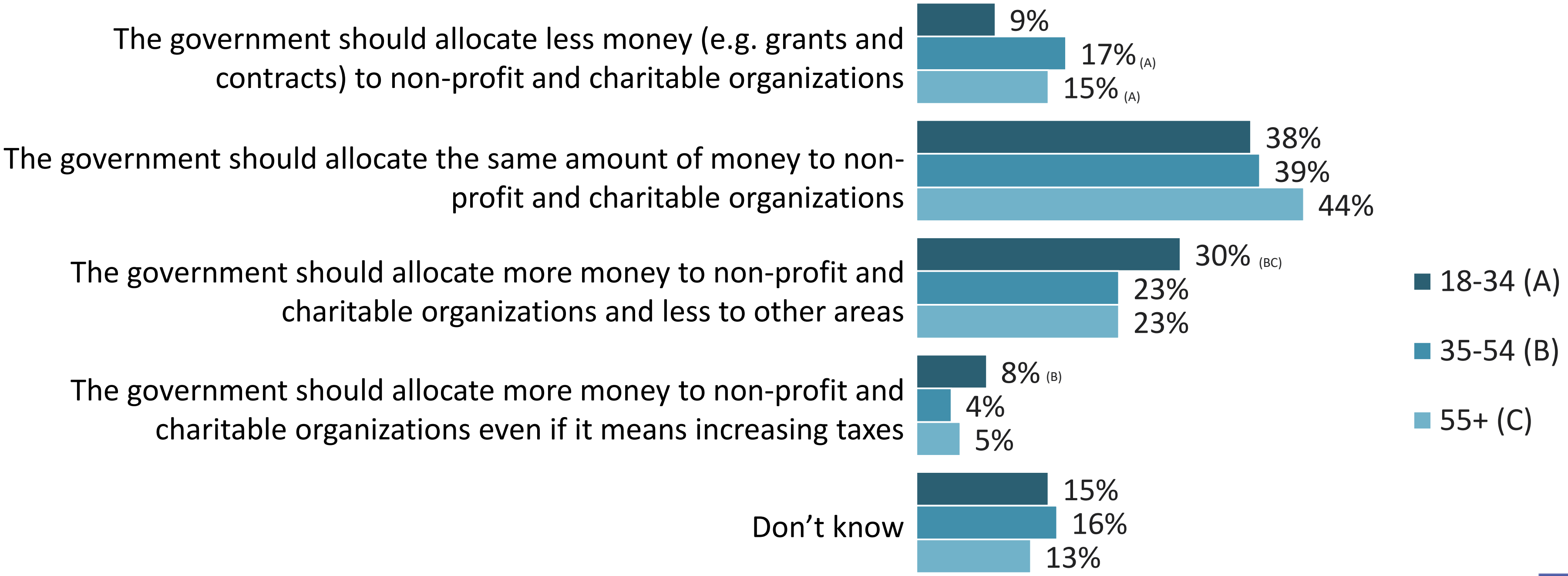


Q5. Which of the following best describes your opinion? Base: All Respondents 2017 (n=1500); 2015 (n=1502); 2013 (n=1003)

GAME CHANGERS

GOVERNMENT FUNDING TO THE CHARITABLE SECTOR – BY AGE

Millennials are less likely than Gen Xers and Boomers to think government should allocate less money to non-profit organizations, and are more likely than other age groups to think government should spend more money.

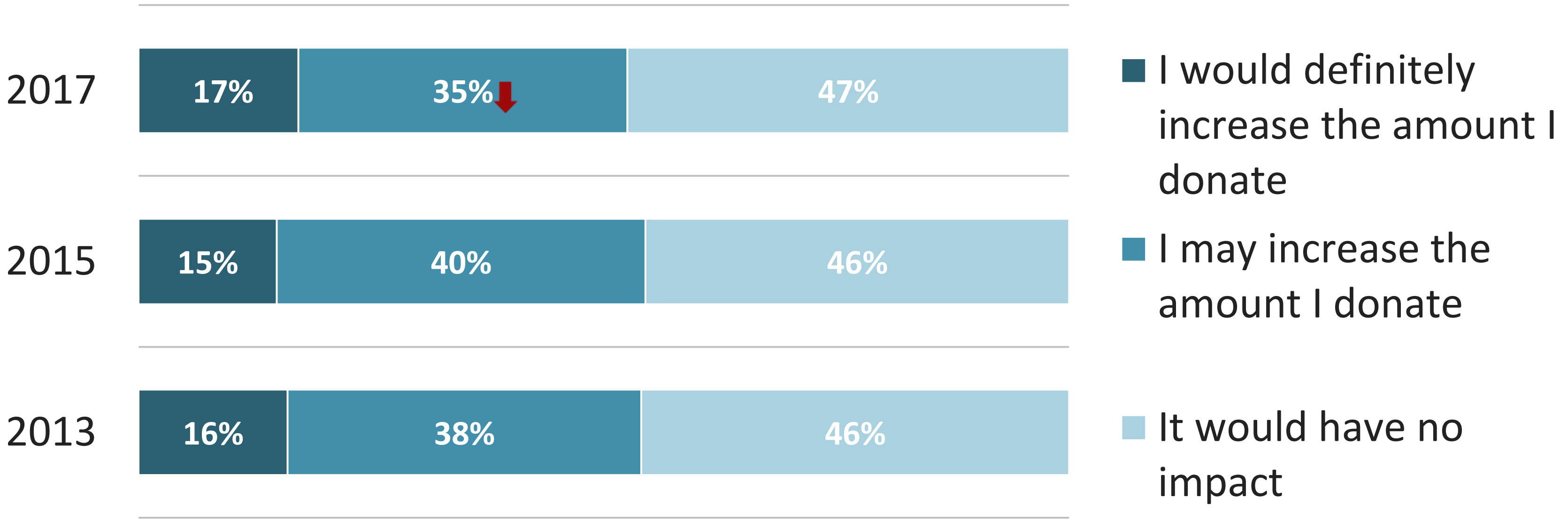


Q5. Which of the following best describes your opinion? Base: All Respondents 2017 (n=1500); 2015 (n=1502); 2013 (n=1003)

GAME CHANGERS

INCREASING TAX BREAKS FOR CHARITABLE DONATIONS

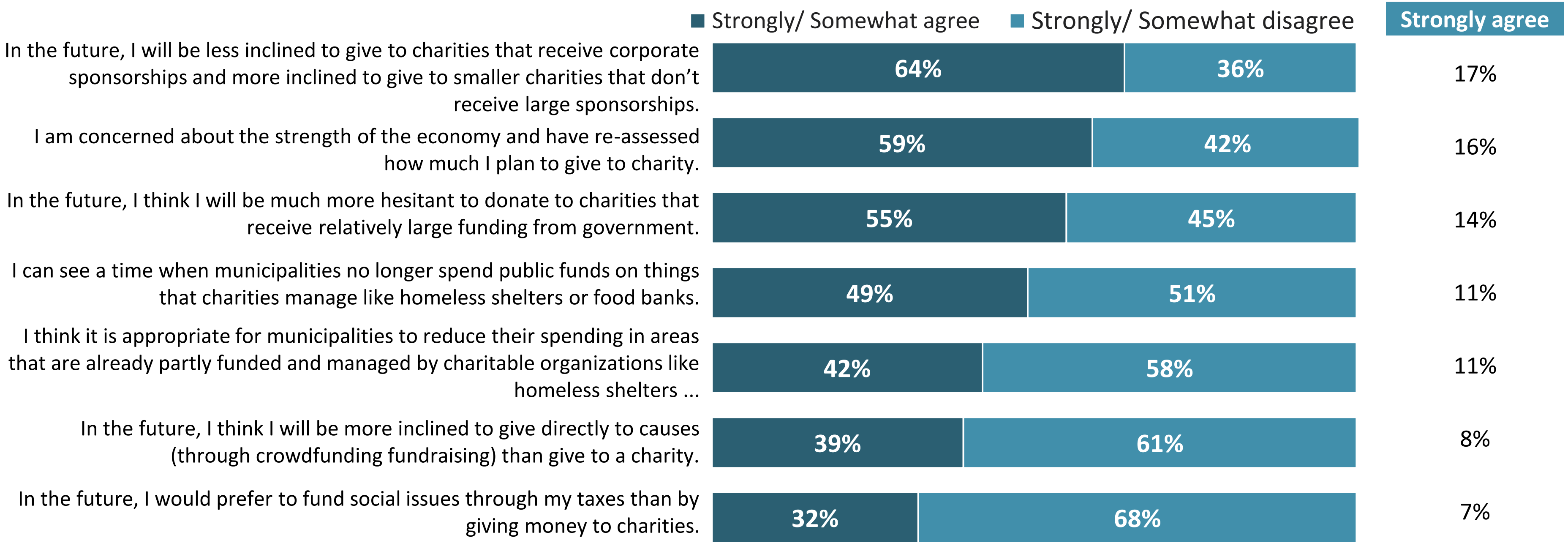
The public continues to be split on reaction to increased tax breaks for charitable donation – with 52% saying it may or would influence them to donate more.



Q28. If the government were to increase the tax break received for donating to charitable organizations, what impact would it have on the amount you donate?
Base: All Respondents 2017 (n=1500); 2015 (n=1502); 2013 (n=1003)

FUTURE VISION OF CHARITIES

Majorities say they will be less inclined to give to charities who have a corporate sponsorship or receive large funding from government. A majority say they will reassess how much they give over concern about the economy. Half think that in time municipalities will not fund areas covered by charities and four in ten think municipalities should reduce funding in these areas. Four in ten say they will be more inclined to give to causes through crowdfunding, while three in ten would prefer to fund social issues through their taxes rather than charities.



Q38. Do you agree or disagree?
Base: All respondents (n=1500)

GAME CHANGERS

FUTURE VISION OF CHARITIES

Millennials anticipate that in the future they will be more inclined to give directly to the cause through crowdfunding rather than give to a charity, and show a greater preference for funding social issues thorough their taxes rather than by giving to charity. Gen Xers are also more open to funding these issues through their taxes.

% Agree	18-34 (A)	35-54 (B)	55+ (C)
In the future, I will be less inclined to give to charities that receive corporate sponsorships and more inclined to give to smaller charities that don't receive large sponsorships.	62%	63%	67%
I am concerned about the strength of the economy and have re-assessed how much I plan to give to charity.	60%	58%	58%
In the future, I think I will be much more hesitant to donate to charities that receive relatively large funding from government.	53%	51%	59% (B)
I can see a time when municipalities no longer spend public funds on things that charities manage like homeless shelters or food banks.	51%	49%	48%
I think it is appropriate for municipalities to reduce their spending in areas that are already partly funded and managed by charitable organizations like homeless shelters ...	45% (C)	45% (C)	38%
In the future, I think I will be more inclined to give directly to causes (through crowdfunding fundraising) than give to a charity.	53% (B) (C)	43% (C)	26%
In the future, I would prefer to fund social issues through my taxes than by giving money to charities.	44% (B) (C)	28%	28%

Q38. Do you agree or disagree?
Base: All respondents (n=1500)

FUTURE VISION OF CHARITIES

Those who think government should allocate less money to charities are more likely than others to say they will be more hesitant to donate to charities that receive large government funding, that they can see a time then municipalities no longer spend funds on things charities manage, and that it is appropriate for municipalities to reduce their spending in areas partly funding and managed by charities.

% Agree	Allocate less money to charities	Allocate same amount of money to charities	Allocate more money to charities and less to other areas	Allocate more money to charities even if it means increasing taxes
	A	B	C	D
In the future, I will be less inclined to give to charities that receive corporate sponsorships and more inclined to give to smaller charities that don't receive large sponsorships.	71% (B)	63%	66%	65%
I am concerned about the strength of the economy and have re-assessed how much I plan to give to charity.	65% (D)	61% (D)	60% (D)	47%
In the future, I think I will be much more hesitant to donate to charities that receive relatively large funding from government.	76% (BCD)	52%	51%	47%
I can see a time when municipalities no longer spend public funds on things that charities manage like homeless shelters or food banks.	63% (BCD)	46%	48%	45%
I think it is appropriate for municipalities to reduce their spending in areas that are already partly funded and managed by charitable organizations like homeless shelters ...	71% (BCD)	43%	34%	24%
In the future, I think I will be more inclined to give directly to causes (through crowdfunding fundraising) than give to a charity.	45% (B)	37%	42%	40%
In the future, I would prefer to fund social issues through my taxes than by giving money to charities.	30%	30%	35%	42% (AB)

Q38. Do you agree or disagree?
Base: All respondents (n=1500)

EXTERNAL POINTS OF INTEREST

How does your organization fare?

ACCORDING TO IMAGINE CANADA'S EARNED INCOME REPORT:

• AMONG CHARITIES THAT ENGAGE IN EARNED INCOME GENERATION, THE MONIES PRODUCED ACCOUNT FOR AN AVERAGE OF JUST UNDER ONE THIRD (31%) OF TOTAL REVENUES.

• THREE IN FIVE EARNED INCOME-GENERATING CHARITIES (60%) REPORT THESE ACTIVITIES ACCOUNT FOR 30% OR LESS OF TOTAL REVENUES, THOUGH A SMALL NUMBER OF CHARITIES GENERATE VERY LARGE PROPORTIONS OF TOTAL REVENUES FROM THESE ACTIVITIES.

• JUST OVER TWO FIFTHS OF RESPONDENTS (42%) SAID THEIR EARNED INCOME-GENERATING ACTIVITIES PRODUCED A SURPLUS, WHILE ABOUT ONE THIRD (31%) REPORTED THAT THEY REGISTERED A NET LOSS (I.E., THEY DID NOT AT LEAST BREAK EVEN).

•THE PRIMARY FINANCIAL ROLE OF EARNED INCOME SEEMS LARGELY TO BE DETERMINED BY HOW LARGE A PERCENTAGE OF TOTAL REVENUES IT GENERATES — AMONG CHARITIES USING EARNED INCOME TO SUPPORT PARTICULAR PROGRAMS, IT ACCOUNTS FOR AN AVERAGE OF ABOUT ONE QUARTER OF TOTAL REVENUES (27%) AS COMPARED TO TWO FIFTHS OF REVENUES (39%) AMONG CHARITIES WHERE IT SUPPORTS BOTH PARTICULAR PROGRAMS AND PROVIDES GENERAL ORGANIZATIONAL FUNDING.

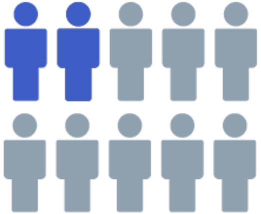
REFERENCE: HTTP://SECTORSOURCE.CA/RESEARCH-AND-IMPACT/IMAGINE-CANADA-RESEARCH/EARNED-INCOME

How does your organization fare?

45% of Canadians have no knowledge of impact investing.

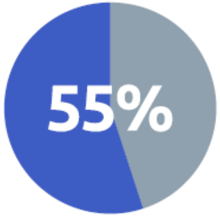
Investment portfolios

Current



In 2017, 2 out of 10 hold investments with intentional social impact.

Ideal



believe portfolios should have some level of impact investment.

Recently Funded research project by the AFP Foundation for Philanthropy: Retail Demand for Impact Investing; John Gormaly and Dr. Brent McKnight

How does your organization fare?

Impact investing refers to investments made with the intention to create measurable social and/or environmental value, in addition to financial returns. The impact investing market in Canada is currently small but poised for growth. A series of reports by the Responsible Investment Association found over $9.22 billion in Canadian impact investment assets under management in 2015, up from $4.13 billion in 2013; an increase of 123%[ix].

Impact investing differs in important ways from socially responsible investing (SRI) in that SRI seeks to "minimize negative impact rather than proactively create positive social or environmental benefit"[x], whereas impact investments intend to create positive social or environmental benefits in addition to a financial return. Impact investing takes numerous forms including low interest debt and patient capital, social impact bonds (SIB) or pay for success models, impact investment funds, and equity solutions. Early impact investors were high net worth individuals who saw impact investing as **a way to align their investments with their values and as a form of catalytic philanthropy to dramatically scale social programs and other solutions**.

Recently Funded research project by the AFP Foundation for Philanthropy: Retail Demand for Impact Investing; John Gormaly and Dr. Brent McKnight

SECTION 3:

Giving, Volunteering and Donation Behaviour

GAME CHANGERS

POLLING QUESTION

Please respond to both questions

1) IT IS GETTING EASIER TO FIND FRONTLINE VOLUNTEERS

☐ YES ☐ NO

2) IT IS GETTING EASIER TO FIND GOVERNANCE AND LEADERSHIP VOLUNTEERS

☐ YES ☐ NO

POLLING QUESTION

Please respond to both questions

1) I HAVE A WILL

☐ YES ☐ NO

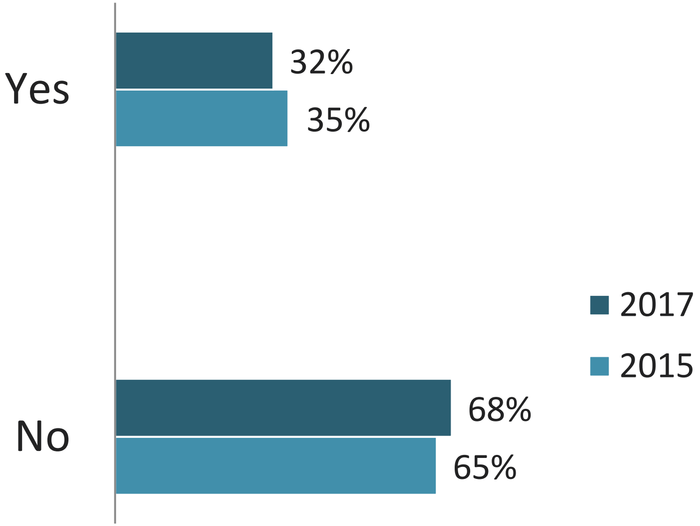
2) I HAVE NAMED A CHARITY IN MY WILL OR OTHER INSTRUMENT (INSURANCE POLICY, ETC.)

☐ YES ☐ NO

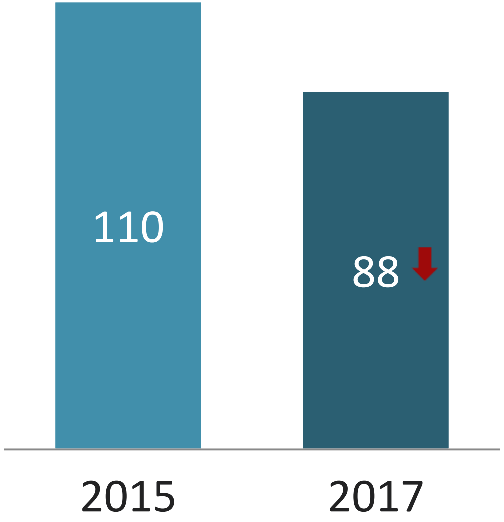
GAME CHANGERS

One-third of Canadians volunteered their time to a charity or non-profit in the past 12 months and spent an average of 88 hours. The average number of volunteer hours is down from 110 in 2015.

Volunteered for charity or non-profit organization



Time spent volunteering (Mean in hours)

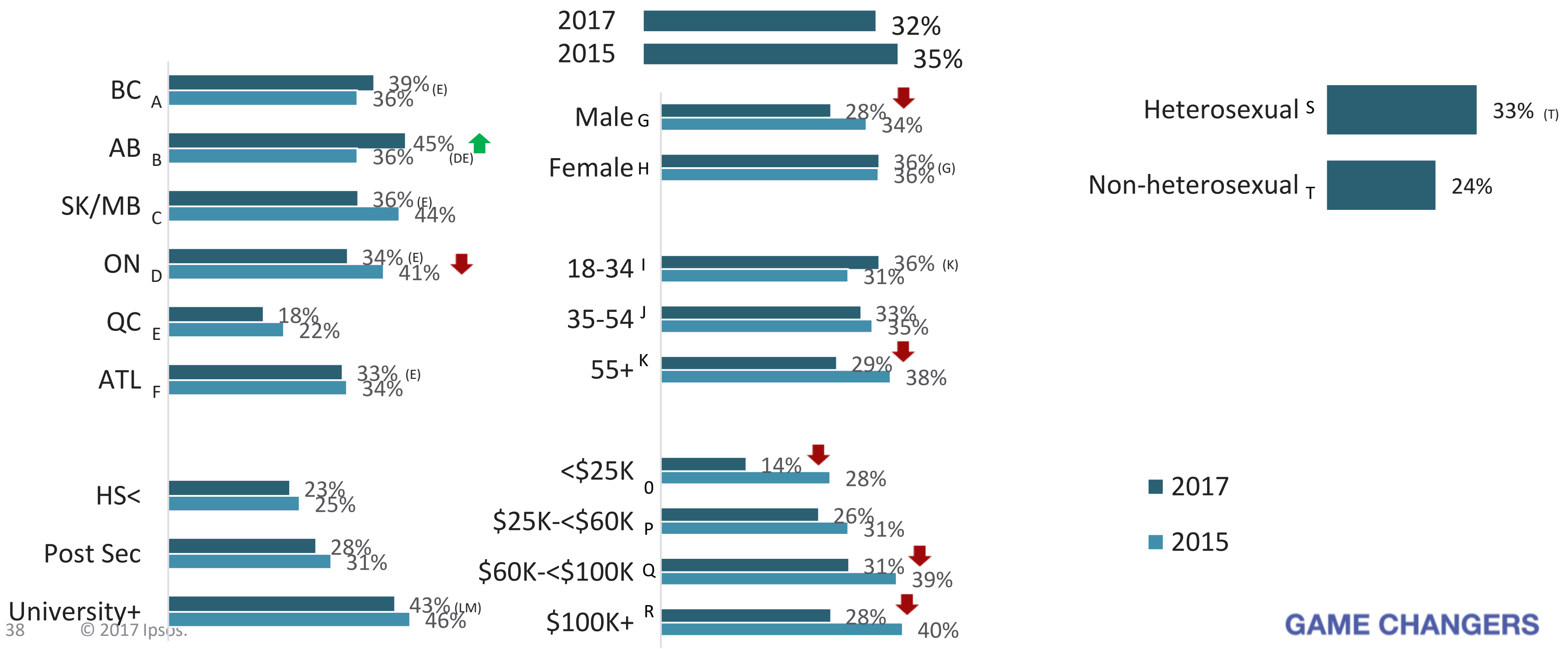


Q13. Have you volunteered your time to a charity or non-profit organization in the past 12 months? Base: All respondents 2017 n=1500); 2015 (n=1502)
Q14. How much time would you say you volunteered in total in the past 12 months? Base: Volunteered in past 12 months 2017 (n=485); 2015 (n=530)

GAME CHANGERS

Although overall charitable volunteerism has not changed significantly, there has been a significant increase in Alberta, and declines in Ontario, among men, those aged 55+, and most income groups. Heterosexuals are more likely than non-heterosexuals to have volunteered their time to a charity or non-profit in the past 12 months.

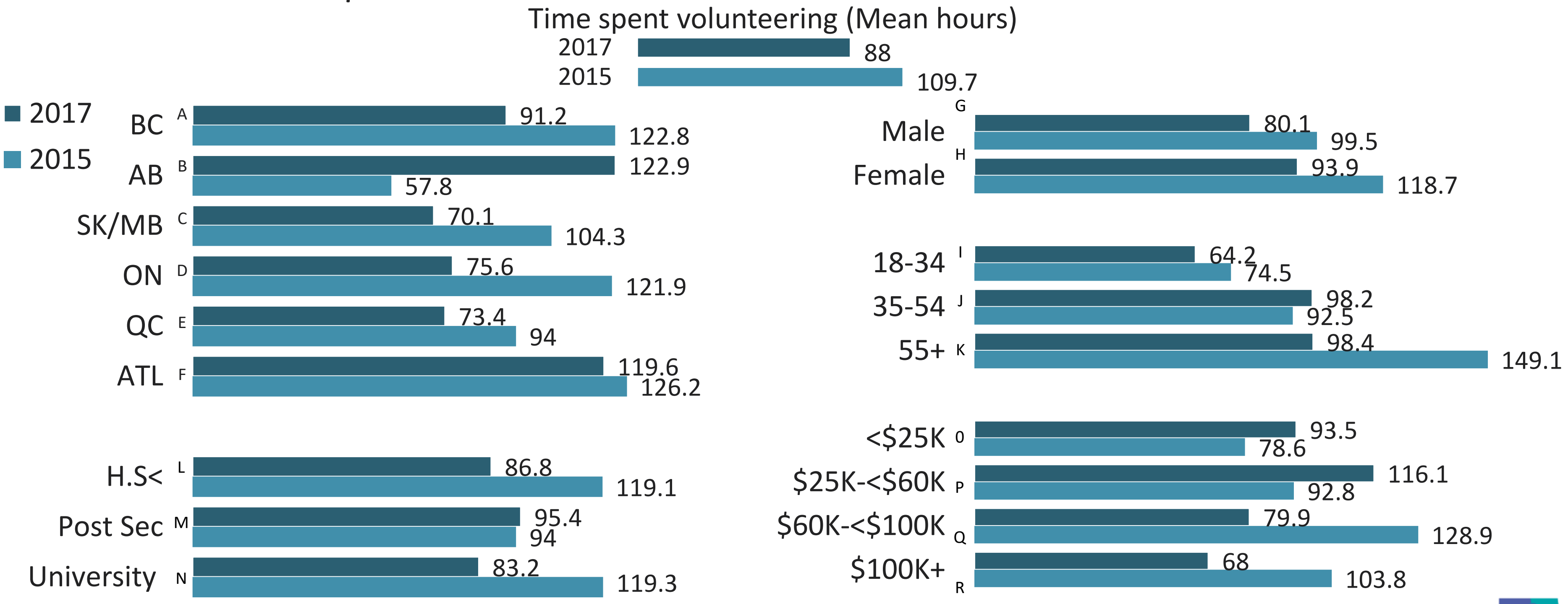
Volunteered in P12 Months



Q13. Have you volunteered your time to a charity or non-profit organization in the past 12 months? 2017 (n=1500); 2015 (n=1502);

AVERAGE VOLUNTEER HOURS – BY REGION AND DEMOGRAPHICS

The drop in time spent on volunteering is down significantly or marginally among most regional and demographic groups, particularly in Ontario and among those aged 55 and older and those with incomes above $60K. Time spent volunteering is up in Alberta, and among those with incomes of less than $60K.

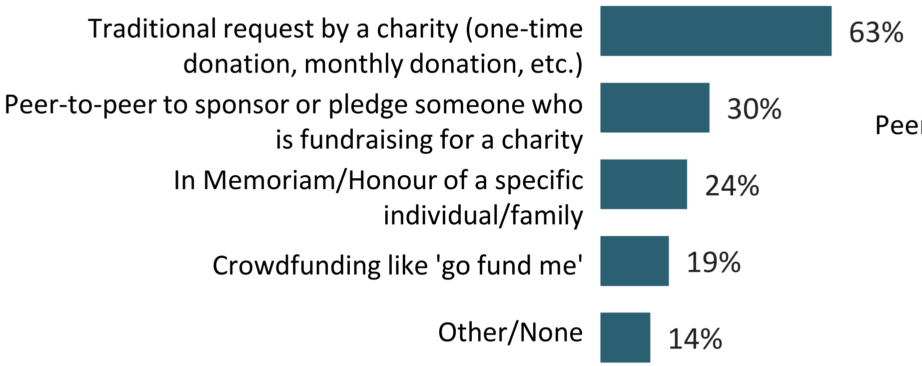


Q14. How much time would you say you volunteered in total in the past 12 months? Base: Volunteered in past 12 months (n=485)

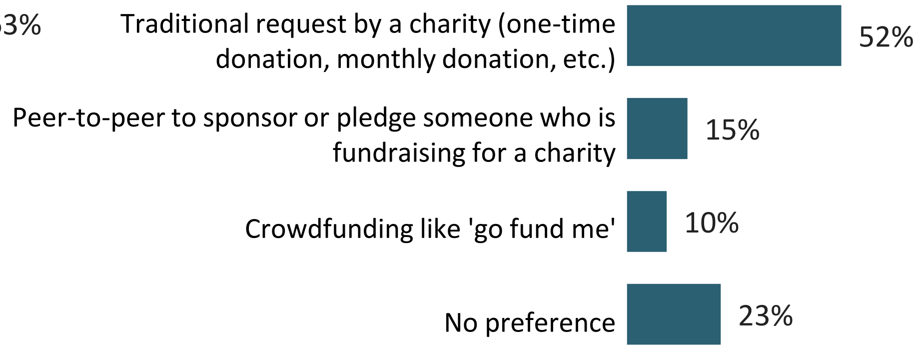
GAME CHANGERS

Most charitable donors donate through a traditional request, but about half have donated to peer-to-peer or crowdfunding. One-quarter have donated by in Memoriam/Honour. Traditional requests are their most preferred type of fundraising.

Types of fundraising donations in past 12 months



Preferred type of fundraising



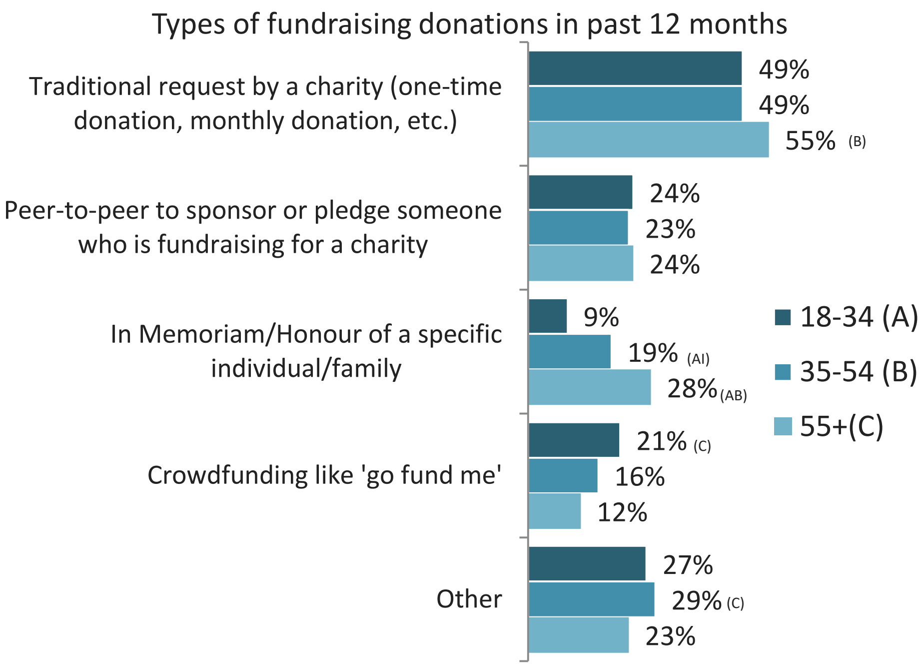
Crowdfunding is a type of fundraising where a large number of people are asked to donate a small amount of money to benefit an individual or family in need. An example would be “go fund me”. Peer-to-peer is a type of fundraising where an individual asks their circle of friends and peers to sponsor them / pledge money toward a campaign they are supporting. An example would be a cancer run or walk event.

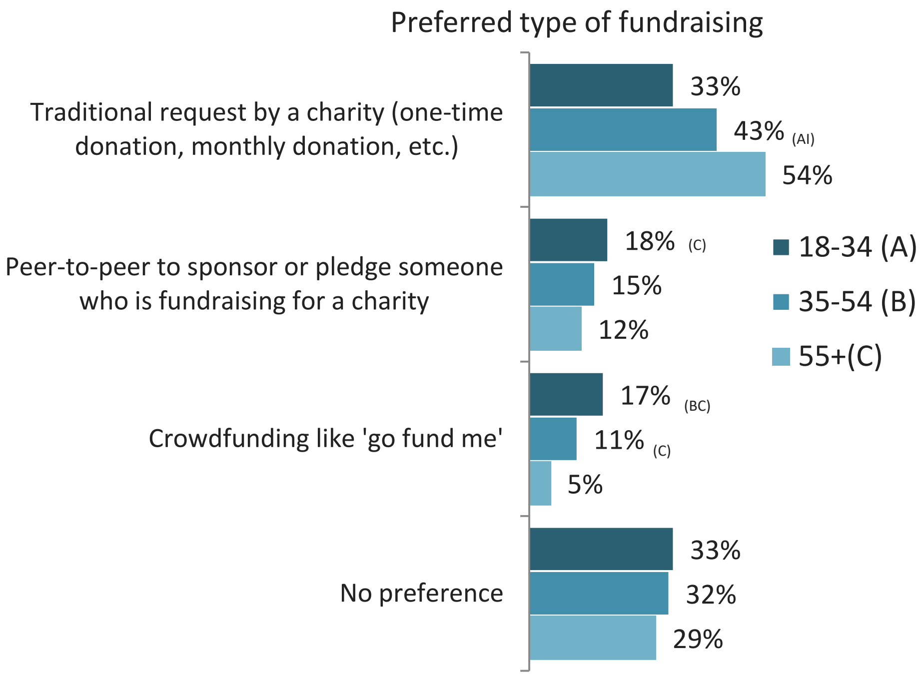
.

Q9. In the past 12 months, have you donated money through the following types of fundraising? Base: Donated in the past 12 months (n=1052));
Q10. Is there one type of fundraising that you most prefer? Base: Donated in the past 12 months (n=1052);

FUNDRAISING METHODS – BY AGE

Boomers are more likely than other age segments to have donated money in memoriam, while Millennials are less likely to have used this method. Boomers are more inclined to prefer traditional requests by a charity, and Millennials are more likely than other segments to prefer crowdfunding.



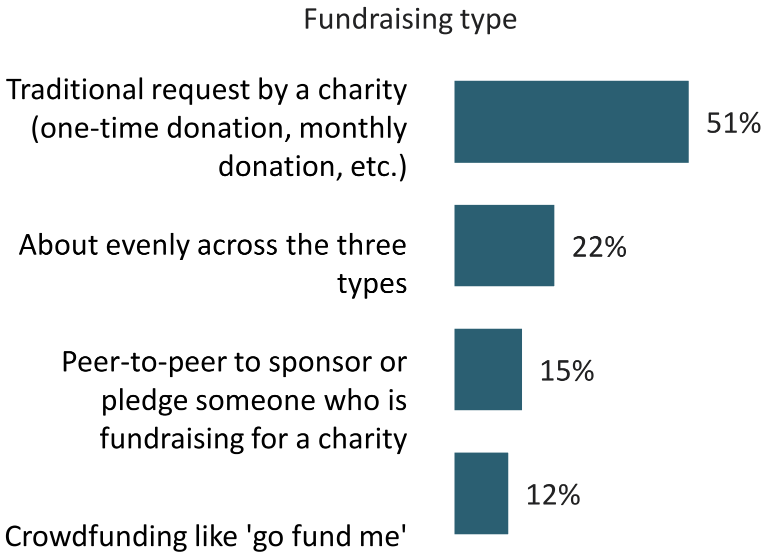


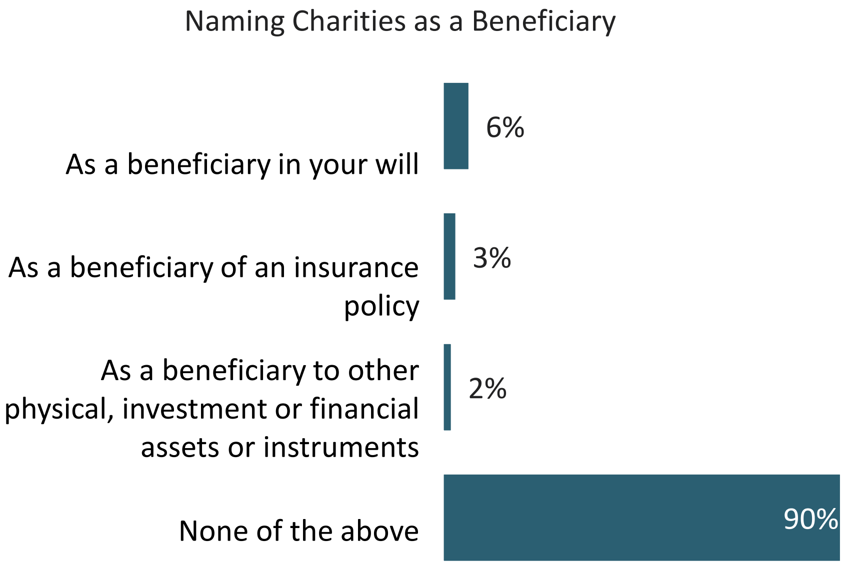
Q9. In the past 12 months, have you donated money through the following types of fundraising? Base: Donated in the past 12 months (n=1052));
Q10. Is there one type of fundraising that you most prefer? Base: Donated in the past 12 months (n=1052);

GAME CHANGERS

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.



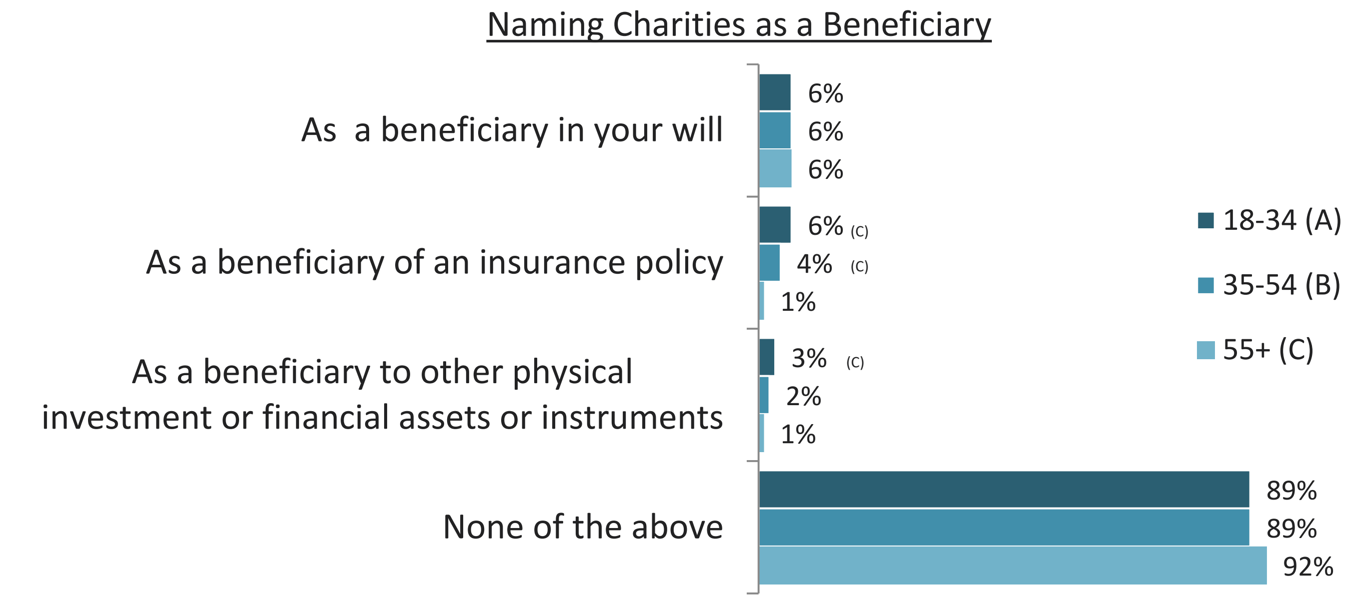


Q11. In the future, which do you see yourself donating more money to? Base: All Respondents 2017 (n=1500);
Q12. Have you named a charity ... Base: All Respondents 2017 (n=1500);

GAME CHANGERS

FUTURE DONATION

Millennials and Gen Xers are more likely than Boomers to say they have named a charity as a beneficiary of an insurance policy. Millennials are also more likely than the two other age segments to have named a charity as a beneficiary to other physical investment or financial assets.



Q12. Have you named a charity ... Base: All Respondents 2017 (n=1500);

How does your organization fare?

AS REPORTED BY STATS CAN:

- PERCENTAGE OF POPULATION VOLUNTEERING CONTINUES TO DECLINE
  - Male (42% in 2013; 46% in 2010); Female (45% 1n 2013; 48% in 2010)
- AVERAGE VOLUNTEER HOURS CONTINUES TO DECLINE
- MORE CANADIANS DONATING BUT PERCENTAGE OF POPULATION DONATING IS IN DECLINE
- MIRRORING THE TYPICAL VOLUNTEER AND THE TYPICAL CANADIAN, THE AVERAGE DONOR IS GETTING OLDER. IN 2013, 35% OF ALL DONORS WERE AGED 55 AND OVER, UP FROM 29% IN 2004.
- AVERAGE DONATION AMOUNTS CONTINUE TO FLUCTUATE BUT WERE HIGHER IN 2013 THAN IN 2010
  - Female Donors ($484 in 2013; $451 in 2010); Male Donors ($580 in 2013; $491 in 2010)
- FOUR FIFTHS OF ANNUAL DONATIONS WAS MADE BY 25% OF DONORS

REFERENCE: VOLUNTEERING AND CHARITABLE GIVING IN CANADA; HTTP://WWW.STATCAN.GC.CA/PUB/89-652-X/89-652-X2015001-ENG.HTM

SECTION 4:
How and Why Canadians Give

POLLING QUESTION

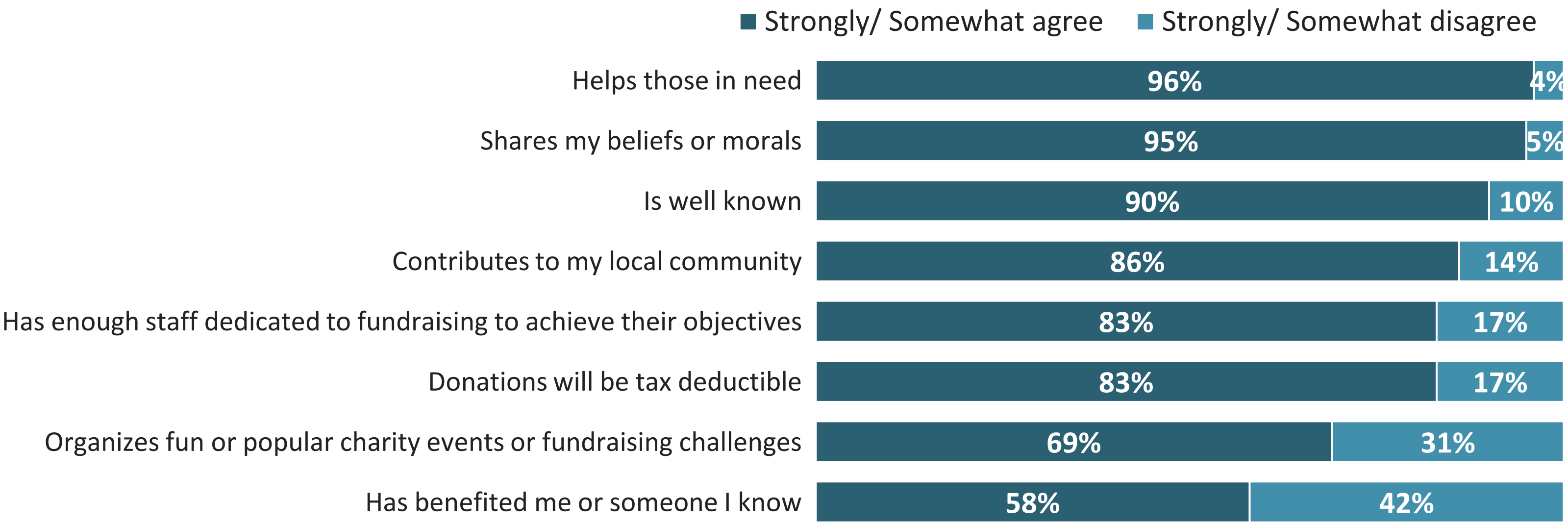
Please choose only one response from list below

MY PREDOMINANT REASON FOR GIVING TO A SPECIFIC CHARITY OR CAUSE IS BECAUSE:

- ❑ IT HELPS THOSE IN NEED
- ❑ THE CHARITY SHARES MY BELIEFS AND MORALS
- ❑ THE CHARITY IS WELL KNOWN
- ❑ CONTRIBUTES TO MY LOCAL COMMUNITY
- ❑ CHARITY HAS RESOURCES TO ACHIEVE OBJECTIVES
- ❑ THE TAX CREDIT
- ❑ ORGANIZES FUN AND EXCITING CHARITY EVENTS
- ❑ HAS BENEFITTED ME OR SOMEONE I KNOW

DONATION MOTIVATIONS*

There is nearly universal agreement among past 12 month donors that they are at least somewhat motivated out of a desire to help those in need and at least to some extent pre-disposed toward charities that share their beliefs or morals. The number who strongly agree with these two motivations is up from 2015. But, community benefits and giving back because the charity benefitted them or someone they know (increase in strongly agree) remain very prevalent.



	Strongly agree 2017	Strongly agree 2015
Helps those in need	64% ↑	56%
Shares my beliefs or morals	53% ↑	43%
Is well known	58%	55%
Contributes to my local community	48% ↑	42%
Has enough staff dedicated to fundraising to achieve their objectives	30%	26%
Donations will be tax deductible	50%	53%
Organizes fun or popular charity events or fundraising challenges	24%	22%
Has benefited me or someone I know	31% ↑	26%

Source: Loosely based on The Seven Faces of Philanthropy : A New Approach to Cultivating Major Donors by Russ Alan Prince and Karen Maru File.

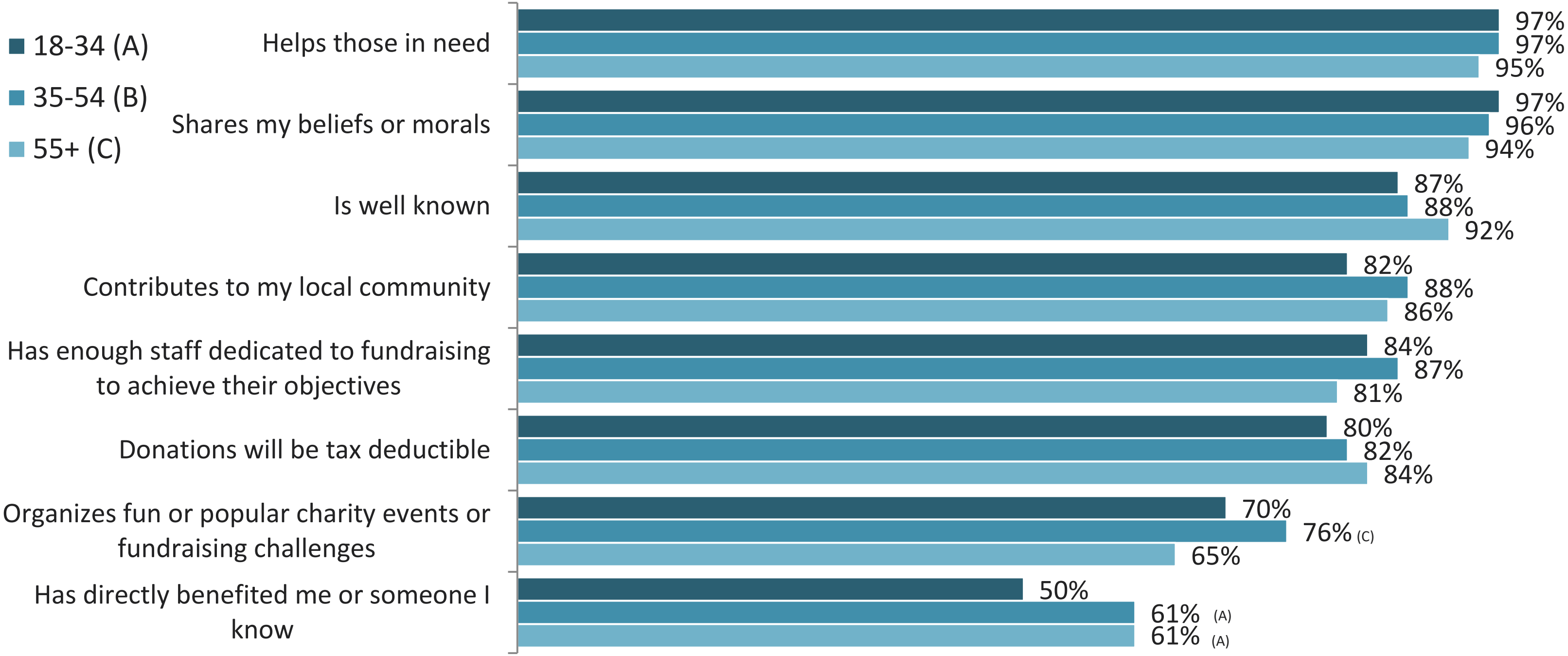
Q26. How much do you agree or disagree with each of the following statements when it comes to the charity you last donated to?

Base: Have made a financial donation to a charity or non-profit organization in the past 12 months 2017 , and named charity last donated to 2017 (n=851); 2015 (n=904)

GAME CHANGERS

DONATION MOTIVATIONS*

Gen Xers are more likely than Boomers to be motivated to donate to a charity that organizes fun or popular charity events. Gen Xers and Boomers are more motivated to donate to a charity that directly benefitted them or someone they know.



Source: Loosely based on The Seven Faces of Philanthropy : A New Approach to Cultivating Major Donors by Russ Alan Prince and Karen Maru File.

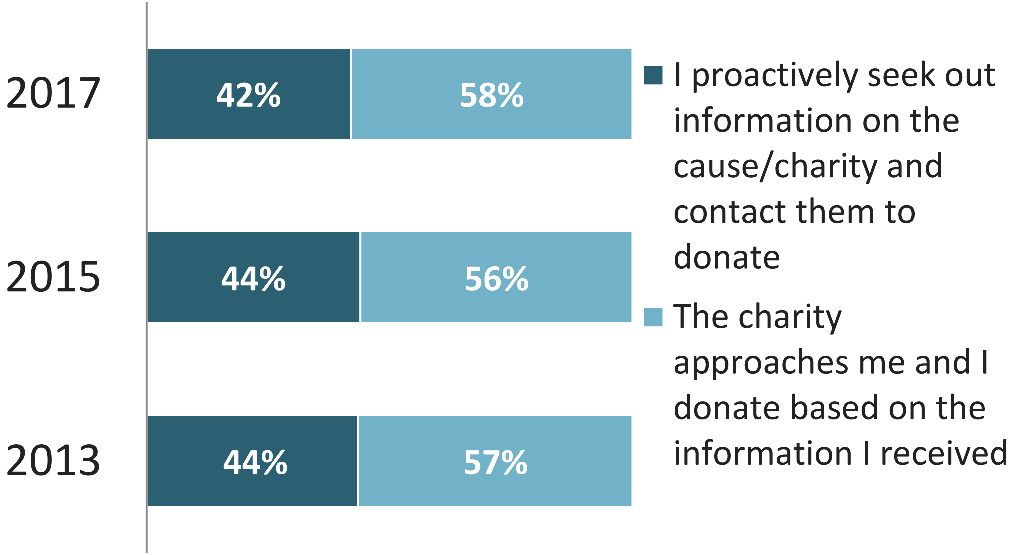
Q26. How much do you agree or disagree with each of the following statements when it comes to the charity you last donated to?

Base: Have made a financial donation to a charity or non-profit organization in the past 12 months and named charity last donated to 2017 (n=851); 2015 (n=904)

GAME CHANGERS

APPROACH TO SELECTING A CHARITY

A considerable number of Canadians, four in ten, proactively seek out information on a charity and donate on their own more often. Six in ten continue to wait to be approached for a donation most often. These proportions have remained quite consistent over the past four years (3 waves).



	Past 12 month Donors	Non-Past 12 month Donors
I proactively seek out information on the cause/ charity and contact them to donate	43%	38%
The charity approaches me and I donate based on the information I received	57%	62%

Q31. Which of the following best describes how you approach selecting a charity? Base: All respondents 2017 (n=1500); 2015 (n=1502); 2013 (n=1003)

GAME CHANGERS

APPROACH TO SELECTING A CHARITY – BY SEXUAL ORIENTATION

Non-heterosexual Canadians are more likely than their heterosexual counterparts to proactively seek out information on a charity and contact them to donate.

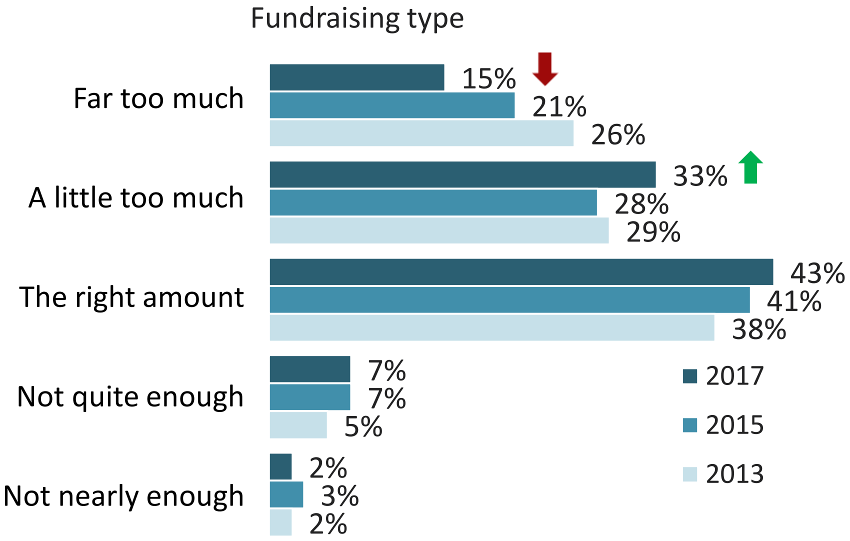
	Heterosexual (P)	Non-Heterosexual (Q)
I proactively seek out information on the cause/ charity and contact them to donate	41%	52%(P)
The charity approaches me and I donate based on the information I received	59%(Q)	48%

Q31. Which of the following best describes how you approach selecting a charity? Base: All respondents 2017 (n=1500); 2015 (n=1502); 2013 (n=1003)

GAME CHANGERS

FREQUENCY OF BEING CONTACTED FOR A DONATION

While still half of Canadians think they are approached for donations too much, the number who say they are approached far too much is down six points from 2015, while the proportion who say a little too much is up five points. Notably, those who have not donated in the past year are more likely than donors to say that they are not approached enough. It is notable that those who perceive being approached "not quite enough" or "a little too much" donate more money on average.



Donation Amount
$664
$934
$647
$981
$794

	Past 12month Donors(A)	Non-Past 12 month Donors(B)
Far too much	15%	18%
A little too much	36%(B)	27%
The right amount	43%	42%
Not quite enough	5%	10%(A)
Not nearly enough	1%	3%(A)

Q7. In general, do you feel that you are approached for donations: Base: All Respondents 2017 (n=1500); 2015 (n=1502); 2013 (n=1003)

GAME CHANGERS

FREQUENCY OF BEING CONTACTED FOR A DONATION – BY DEMOGRAPHICS

Older Canadians, particularly Boomers, those with incomes of $100k and above, those living outside Quebec are more likely to think that they are approached too much. Also, heterosexual respondents are more likely than their non-heterosexual counterparts to think they are approached a little too much.

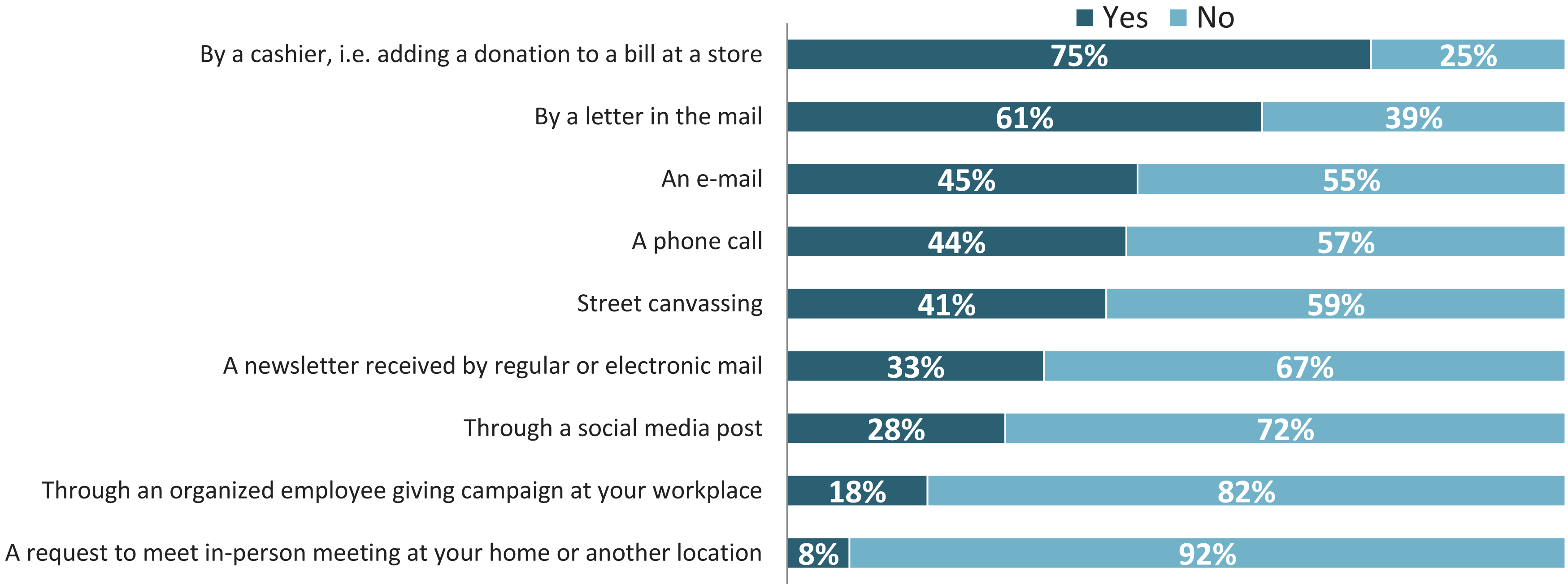
	Total	18-34 (A)	35-54 (B)	55+ (C)	<$25 (D)	$25K-$60K (E)	$60K-<$100k (F)	$100K+ (G)
Far too much	15%	6%	16% (I)	21% (I)	10%	15%	14%	20% (DEF)
A little too much	33%	24%	31% (I)	41% (IJ)	28%	31%	33%	39%
The right amount	43%	52% (JK)	44% (K)	35%	47% (G)	45% (G)	45% (G)	35%
Not quite enough	7%	13% (JK)	7% (K)	2%	11% (FG)	8% (G)	6%	3%
Not nearly enough	2%	4% (JK)	1%	1%	4%	1%	2%	2%

	Total	BC (H)	AB (I)	SK/MB (J)	ON (K)	QC (L)	ATL (M)	Heterosexual (N)	Non-Heterosexual (O)
Far too much	15%	16%	18%	13%	18% (M)	13%	9%	15%	12%
A little too much	33%	37% (E)	35% (E)	35% (E)	36% (E)	23%	41% (E)	34% (Q)	23%
The right amount	43%	40%	39%	46%	40%	51% (HIK)	42% (G)	42%	56% (P)
Not quite enough	7%	7%	5%	5%	5%	10% (IK)	5%	6%	7%
Not nearly enough	2%	1%	3% (H)	1%	2%	3%	3%	2%	2%

Q7. In general, do you feel that you are approached for donations: Base: All Respondents 2017 (n=1500); 2015 (n=1502); 2013 (n=1003)

WAYS OF CONTACT FOR DONATIONS

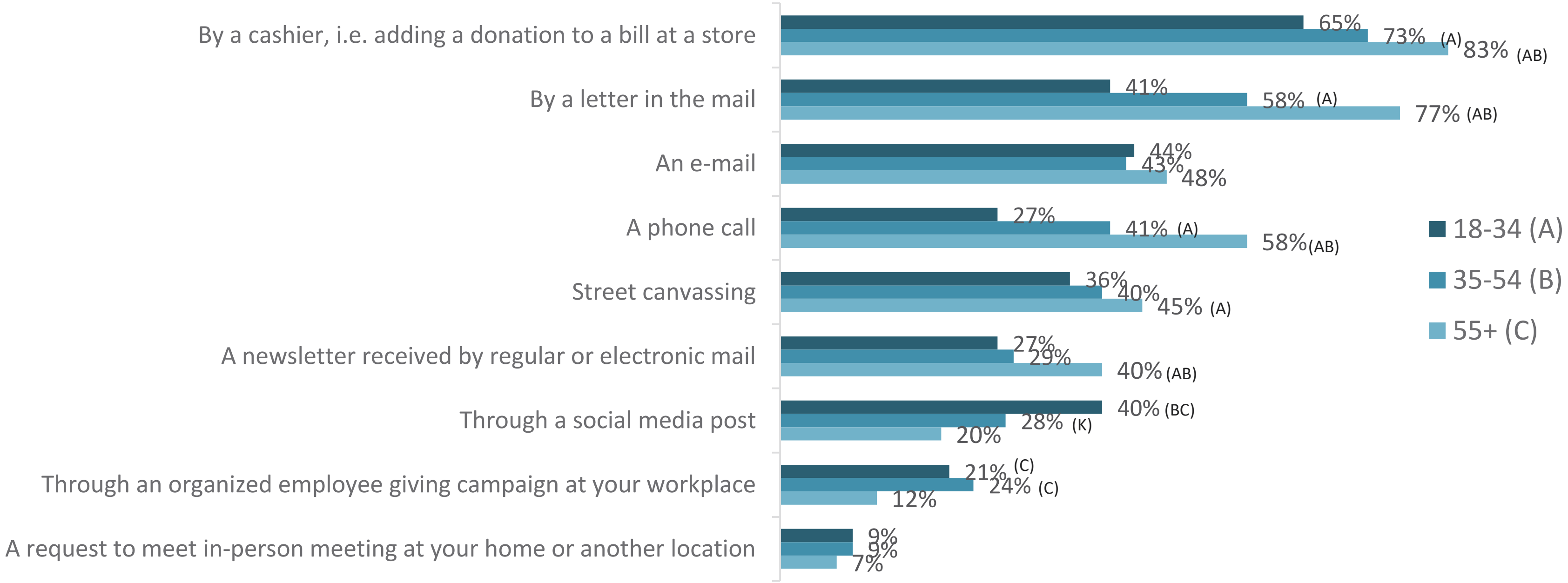
The most common ways Canadians have been contacted to donate are by a cashier adding a donation to a bill at a store, followed by a letter in the mail. Sizeable proportions of about four in ten have been contacted by e-mail, a phone call or street canvassing.



Q6. In the past year, have you been contacted in the following ways by fundraising or development staff of charities, educational institutions, or other kinds of non-profit organizations to ask you to donate money?
Base: All Respondents 2017 (n=1500);

WAYS OF CONTACT FOR DONATIONS – BY AGE

Gen Xers and Boomers are more likely than Millennials to have been contacted to donate by a cashier, letter in the mail, and phone calls, and Boomers are also more likely to have been contacted by a newsletter. Millennials and Gen Xers are more likely to have been contacted via a social media post and through an organized employee giving campaign.



Q6. In the past year, have you been contacted in the following ways by fundraising or development staff of charities, educational institutions, or other kinds of non-profit organizations to ask you to donate money?
Base: All Respondents 2017 (n=1500);

PREFERRED APPROACH FOR DONATIONS

Mail solicitation is the most commonly accepted method to be approached for a charitable donation, followed by e-mail solicitation. Moreover, preference for e-mail solicitation and by a cashier have increased since 2015.

	2013	2015	2017
A letter in the mail	38%	31%	34%
An e-mail	18%	20%	27% ⬆
By a cashier (i.e. adding a donation to a bill at a store)	18%	14%	20% ⬆
A newsletter received by regular or electronic mail	15%	12%	14%
Social media	9%	8%	10%
Through an organized employee giving campaign at your work	9%	9%	9%
Street canvassing	7%	5%	5%
A phone call	3%	6%	4%
An in-person meeting at your home or another location	8%	5%	4%
Other	1%	1%	2%
Don’t know	11%	16%	12% ⬇

*Mentions of 4% or higher are shown.

Q8. How do you prefer to be approached for charitable donations? Base: All Respondents 2017 (n=1500); 2015 (n=1502); 2013 (n=1003)

GAME CHANGERS

PREFERRED APPROACH FOR DONATIONS – BY AGE AND URBAN/RURAL

Boomers are more likely than their younger counterparts to prefer a letter in the mail. Millennials are more likely than others to prefer a cashier and social media, and Millennials and Gen Xers prefer an e-mail, an organized employee giving campaign, and a phone call. There are no significant differences between those who live in urban areas and rural respondents.

	18-34 (A)	35-54 (B)	55+ (C)	Urban (D)	Rural (E)
A letter in the mail	21%	31% (A)	45% (AB)	33%	38%
An e-mail	32% (C)	28% (C)	22%	27%	27%
By a cashier (i.e. adding a donation to a bill at a store)	25% (BC)	18%	18%	20%	19%
A newsletter received by regular or electronic mail	13%	12%	15%	13%	16%
Social media	17% (BC)	12%	3%	10%	7%
Through an organized employee giving campaign at your work	12% (C)	9% (C)	6%	9%	10%
Street canvassing	6%	4%	5%	5%	3%
A phone call	3% (C)	3% (C)	5%	4%	4%
An in-person meeting at your home or another location	4%	3%	5%	4%	6%
Other	1%	2%	2%	2%	1%
Don't know	15% (C)	14% (C)	8%	12%	10%

*Mentions of 4% or higher are shown.

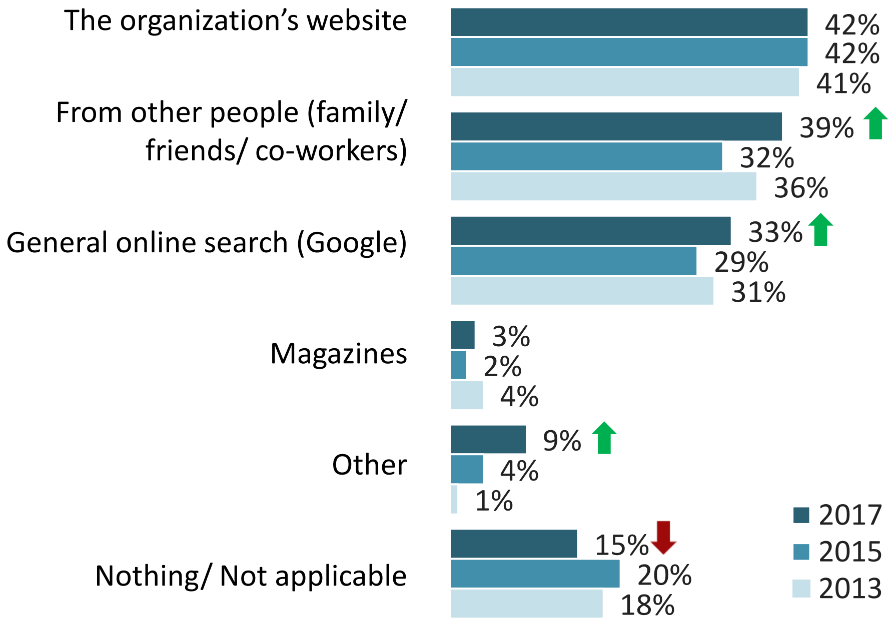
Q8. How do you prefer to be approached for charitable donations? Base: All Respondents 2017 (n=1500); 2015 (n=1502); 2013 (n=1003)

GAME CHANGERS

SOURCES OF INFORMATION ON CHARITIES

Since 2015, more of those who have donated to a charity are relying on other people or a general online search or other sources for information on charities.

NET: WEBSITE/ONLINE SEARCH: 56%



	Past 12-month Donors$_{(A)}$	Non-Past 12- month Donors$_{(B)}$
The organization's website	45%$_{(B)}$	36%
From other people (family/ friends/ co-workers)	41%	30%
General online search (Google)	33%	34%
Magazines	2%	4%
Other	3%	2%
None/ Not applicable	12%	22%$_{(A)}$

Q32. How do you typically find information on the charities that you support?
Base: Have donated to a charity 2017 (n=1411); 2015 (n=1502); 2013 (n=1003)

How does your organization fare?

- ACCORDING TO STATS CAN GENERAL SOCIAL SURVEY CHARITABLE GIVING BY INDIVIDUALS:
- IN 2013, 66% OF THE TOTAL DONATIONS MADE BY INDIVIDUALS WERE FROM PRIMARY DONORS, DEFINED AS THE 10% OF INDIVIDUALS WHO GAVE THE MOST MONEY DURING THE YEAR.
- THE THREE TYPES OF ORGANIZATIONS TO WHICH DONORS GAVE THE BIGGEST AMOUNTS WERE RELIGIOUS ORGANIZATIONS (41% OF ALL DONATIONS), HEALTH ORGANIZATIONS (13%) AND SOCIAL SERVICES ORGANIZATIONS (12%).
- WHEN ASKED ABOUT THE REASONS FOR DONATING, THE VAST MAJORITY (91%) OF DONORS SAID THEY FELT COMPASSION TOWARDS PEOPLE IN NEED. THE OTHER REASONS OFTEN CITED INCLUDE THE IDEA OF HELPING A CAUSE IN WHICH THEY PERSONALLY BELIEVED (88%) AND WANTING TO MAKE A CONTRIBUTION TO THEIR COMMUNITY (82%).
- JUST UNDER 30% OF DONORS REPORTED THAT THEY DID NOT GIVE MORE BECAUSE THEY DID NOT THINK THE ORGANIZATIONS WOULD USE THEIR MONEY EFFICIENTLY OR EFFECTIVELY. DONORS AGED 55 AND OLDER (34%) IN PARTICULAR WERE MORE LIKELY THAN DONORS BETWEEN 15 AND 34 YEARS (23%) TO HAVE THIS IMPRESSION.

REFERENCE: SPOTLIGHT ON CANADIANS: HTTP://WWW.STATCAN.GC.CA/PUB/89-652-X/89-652-X2015008-ENG.HTM

SECTION 5:
Changing Giving Habits

GAME CHANGERS

POLLING QUESTION

Please respond to all three questions

1) GENERALLY MY ORGANIZATION IS RAISING MONEY FROM MORE CANADIANS THIS YEAR OVER LAST YEAR

☐ YES ☐ NO

2) GENERALLY MY ORGANIZATION IS RAISING MORE MONEY FROM PREVIOUS YEAR DONORS

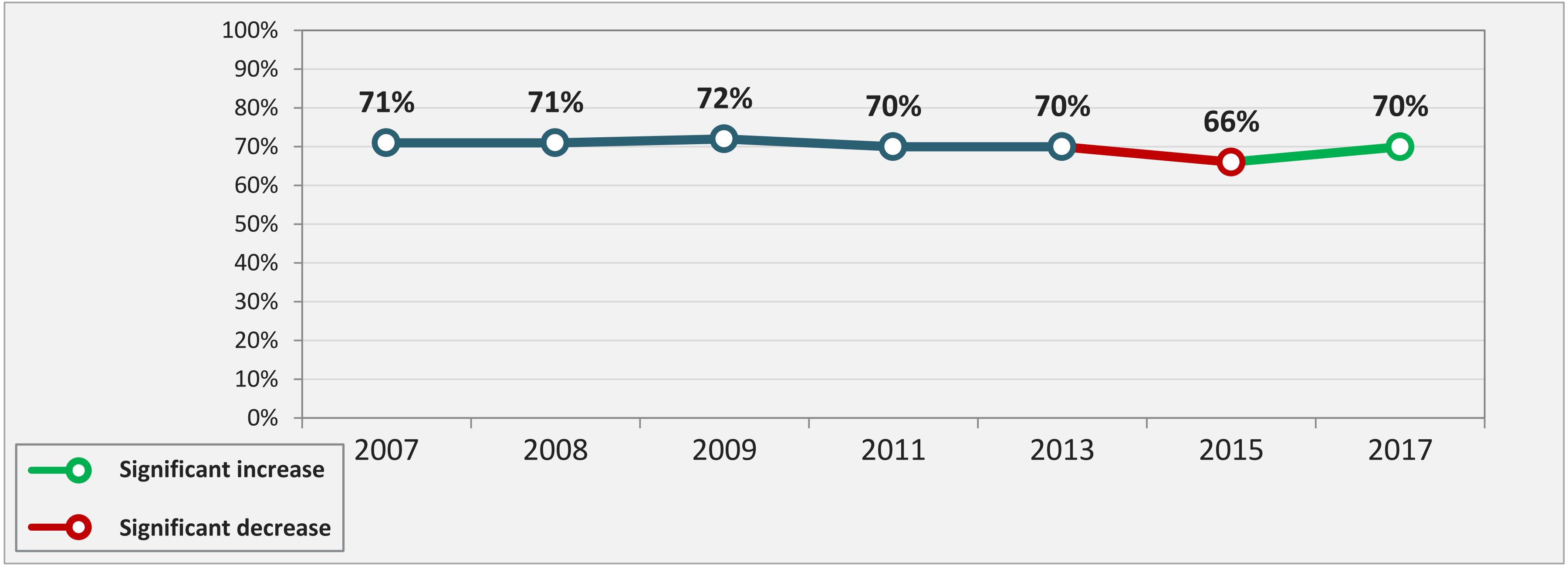
☐ YES ☐ NO

3) GENERALLY MY ORGANIZATION'S FUNDRAISING EFFECTIVENESS IS ON PAR WITH THE MARKETPLACE IN RELATION TO THE TWO CHARACTERISTICS ABOVE

☐ YES ☐ NO ☐ DON'T KNOW

MADE A FINANCIAL DONATION IN THE PAST 12 MONTHS

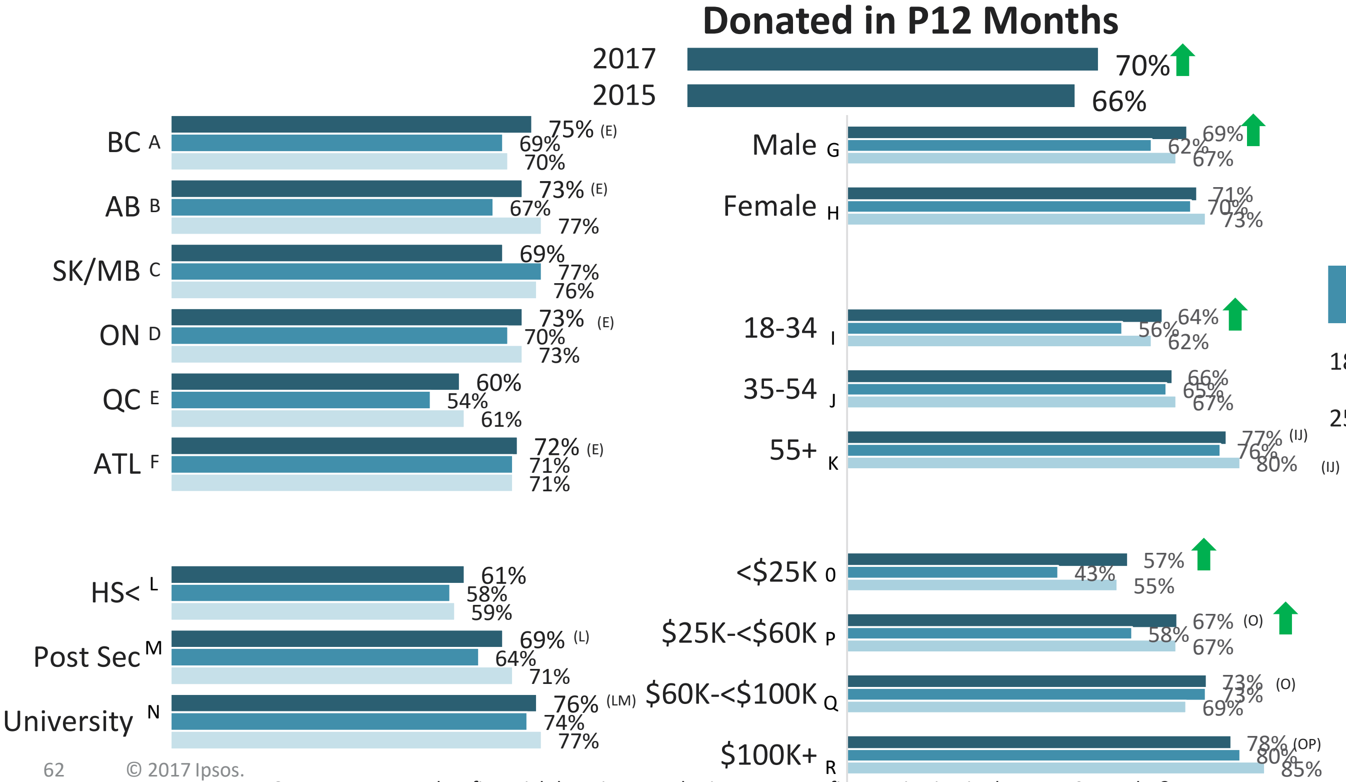
Seven in ten Canadians report having made a financial donation - up 4 points from 2015 – and back to the levels found in 2011 and 2013.



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.



%Yes	2015	2017
18-24	50%	49%
25-34	57%	70%

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)

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)

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.

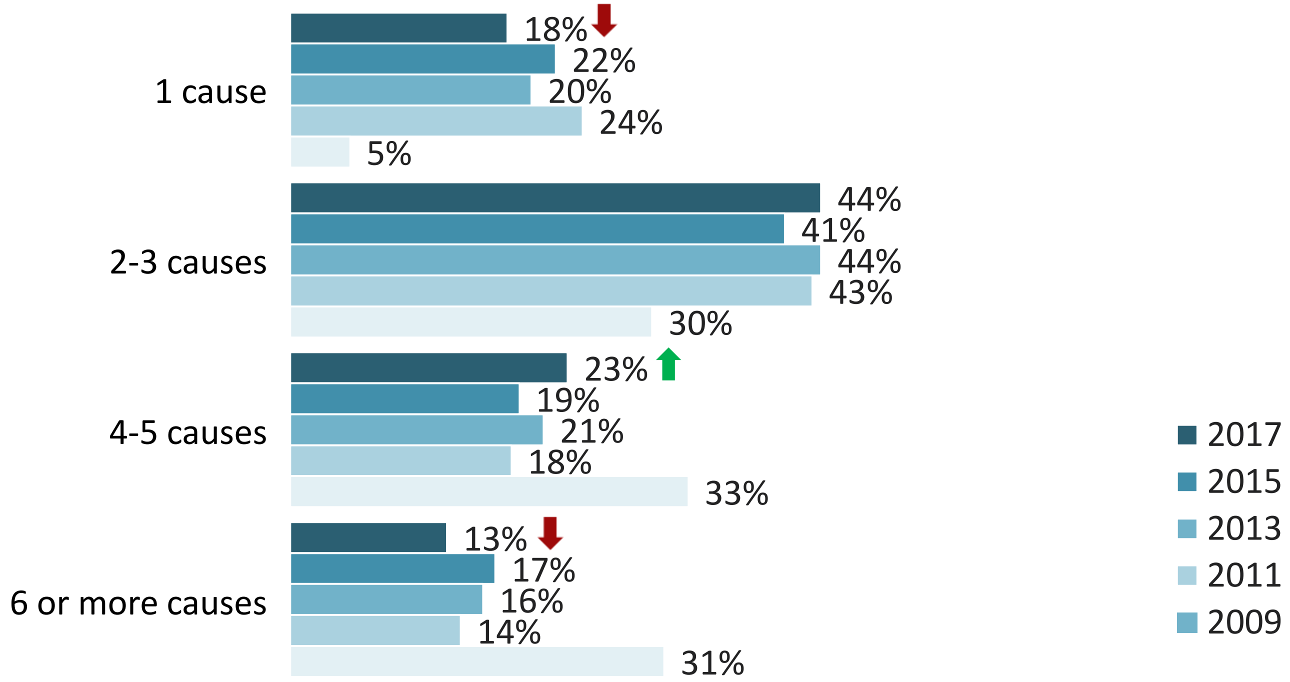
	2011	2013	2015	2017
Can't afford it	54%	45%	50%	60% ⬆
I don't trust them	5%	7%	8%	5%
Money doesn't go to the cause	5%	8%	6%	2%
I volunteer instead	1%	3%	4%	2%
I never donate to charities	-	9%	3%	7%
Prefer to give to other organizations	-	-	2%	3%
Other	17%	7%	6%	8%
None	10%	8%	3%	5%
Don't know/ Refused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

NUMBER OF CAUSES DONATED TO IN THE PAST 12 MONTHS

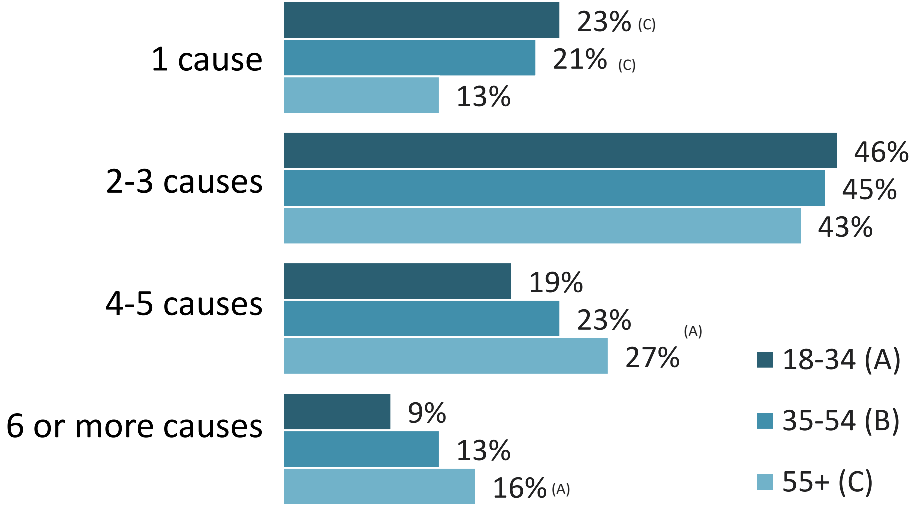
Consistent with past tracking the vast majority of donors report donating to multiple charities. Fewer are now donating to only one cause or to six or more causes, but more are donating to between four and five causes.



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)

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)

GAME CHANGERS

AVERAGE ANNUAL CONTRIBUTIONS

While there were more donors in 2017, Canadians are donating less. Donors report giving an average of $773 dollars in 2017, marginally lower than in 2015, but similar to 2013. The percentage of donors giving $1000 in yearly contributions has halved and back to the level found in 2013.

The decline in the amount of donation may be related to consumer confidence. Ipsos consumer confidence measures indicate that although seven in ten Canadians are positive about the national economy, far fewer are positive about their regional economy and their personal finances (about four in ten).

	2007	2008	2009	2011	2013	2015	2017
$1 - $50	21%	22%	20%	29%	22%	23%	27%
$51 - $100	17%	17%	19%	19%	17%	16%	17%
$101 - $200	17%	17%	18%	17%	16%	13%	15%
$201 - $500	22%	21%	22%	20%	19%	21%	18%
$501 - $1000	11%	9%	9%	6%	10%	9%	8%
Over $1000	11%	12%	12%	10%	17%	20%	14%
Mean	-	-	-	-	$726	$924	$772

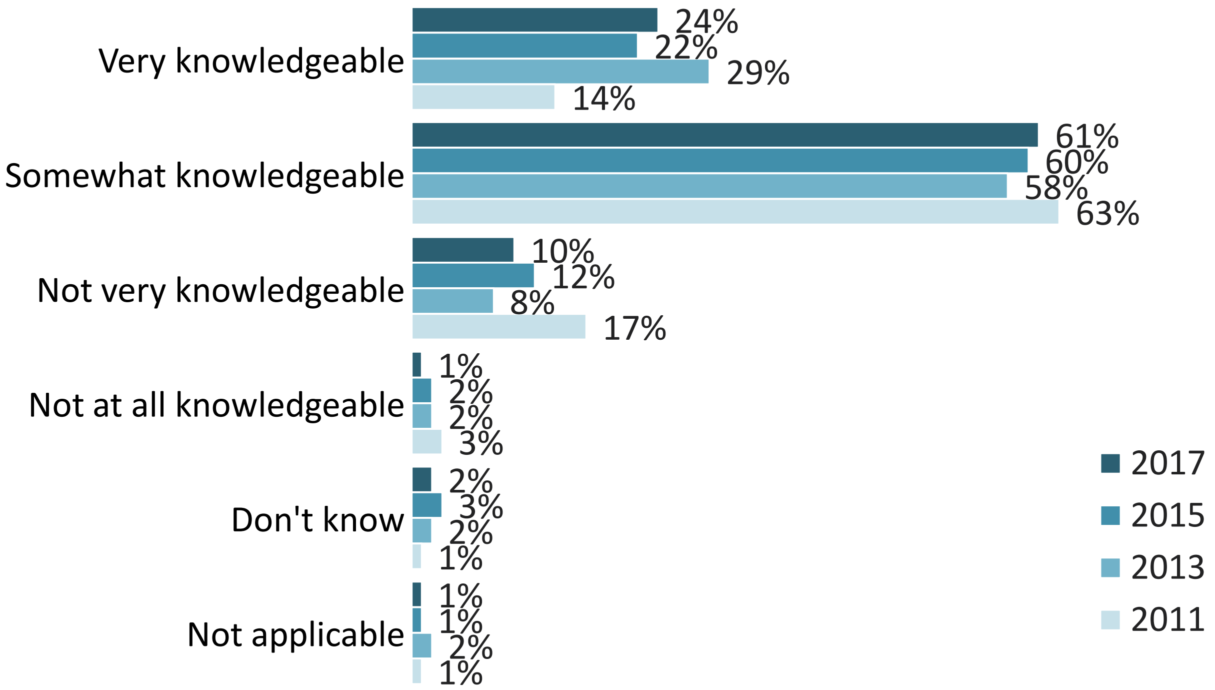
	2015	2017
18-24	$306	$231
25-34	$387	$627

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)

GAME CHANGERS

KNOWLEDGE OF CHARITIES CHOSEN FOR SUPPORT

While reported donor knowledge of charities that they support is not as high as it was in 2013, the level of knowledge reported in 2017 is marginally higher than a year ago.

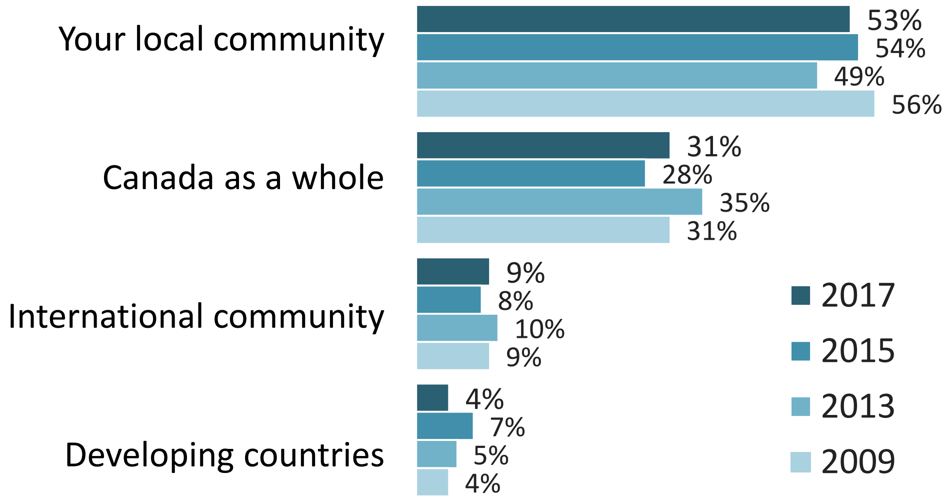


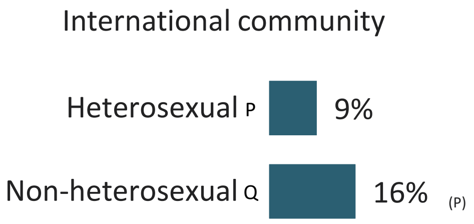
Q30. In general, how would you rate your knowledge of the charitable causes that you support? Base: Have made a financial donation to a charity or non-profit organization in the past 12 months 2017 (n=1047); 2015 (n=994); 2013 (n=713); 2011 (n=713)

GAME CHANGERS

LOCAL, NATIONAL AND INTERNATIONAL REACH

Donors are most likely to report donating to their local community rather than on charities with a national or international focus. The findings are consistent with 2015. Non-heterosexuals are more likely than heterosexuals to donate to charities with an international reach.





*Mentions of higher than 1% shown.

Q20. Thinking about the charities and non-profit organizations that you donated to in the past year, would you say they mostly benefited...Base: Have made a financial donation to a charity or non-profit organization in the past 12 months 2017 (n=1052); (n=2015 (n=994); (n=713); 2009 (n=819)

TYPES OF CAUSES SUPPORTED IN THE PAST 12 MONTHS

Donations to disease/medical charities continue to decline. Children/youth issues is on par as the most popular type of charity. There have been declines since 2015 in mention of several causes but, not surprisingly, after all of the weather related incidents and fires in the past year, more have supported disaster relief. Fewer compared to 2015 are donating to education charities.

	2009	2013	2015	2017
Disease/Medical condition (not including disabilities)	55%	54%	42%	37% ↓
Children/Youth issues	44%	35%	37%	35%
Food bank	39%	31%	29%	30%
Hospital/Medical Centre	35%	25%	26%	25%
Disaster relief	13%	22%	20%	24% ↑
Animals/Wildlife	27%	21%	22%	22%
Poverty in Canada (e.g., homeless, shelters and food banks)	22%	23%	24%	20% ↓
Place of worship	20%	16%	15%	16%
Religious causes	14%	10%	10%	13% ↑
Education/School	20%	16%	17%	13% ↓
Physical disabilities	17%	13%	14%	10% ↓
International development or aid/Third World poverty	13%	13%	13%	9% ↓
Mental disabilities	12%	10%	9%	8%
Environment	9%	9%	9%	7%
Women's issues	7%	7%	9%	6% ↓
Community team you play on or a group you participate in (e.g., sports, dance, language, etc.)	10%	7%	6%	6%
Fine Arts/Culture (theatre, opera, museums, etc.)	7%	6%	5%	5%
Human Rights/Civil Liberties	3%	5%	6%	4%
Peace	2%	2%	3%	1% ↓
Other	3%	2%	2%	4%

	2015	2017
Social Services (Net)	60%	59%
Health (Net)	60%	57%
International (Net)	30%	31%
Religion (Net)	20%	23%
Animals (Net)	22%	22%
Education (Net)	17%	13% ↓
Arts & Culture (Net)	11%	11%
Environment (Net)	9%	7%
Other	2%	4%

Q16. Thinking about the charities that you gave a financial donation to in the past 12 months, what types of causes did they support? Base: Have made a financial donation to a charity or non-profit organization in the past 12 months 2017 (1052); 2015 (n=994); 2013 (n=713); 2009 (n=819)

*Mentions of higher than 1% shown.

GAME CHANGERS

TYPES OF CAUSES SUPPORTED IN THE PAST 12 MONTHS – TOP TEN

Looking at the top ten causes, there are some differences by region, Quebecers are less likely than most other regions to donate to a food bank, places of worship, religious causes and disaster relief.

Women are more likely than men to donate to animals/wildlife and men are more likely than women to give to hospital/Medical Centre.

By age, Boomers are more likely than younger age groups to donate to a cause related to disease/medical condition, hospital /medical centre, and are more likely than Millennials to donate to a food bank, poverty in Canada and place of worship. Millennials are more likely than older age groups to donate to children or youth issues.

	BC A	AB B	SK/MB C	ON D	QC E	ATL F	Male G	Female H	18-34 I	35-54 J	55+ K
Disease/Medical condition (not including disabilities)	35%	33%	40%	38%	41%	29%	35%	40%	35%	31%	43% IJ
Children/Youth issues	32%	34%	43%	32%	43% AD	35%	34%	37%	48% JK	34%	28%
Food bank	32% E	32% E	36% E	29%	22%	42% DE	29%	30%	21%	32% I	33% I
Hospital/Medical Centre	22%	22%	24%	28% E	19%	42% ABCDE	29% H	22%	21%	22%	31% IJ
Disaster relief	35% CDE	29% CE	14%	24% E	16%	31% CE	25%	24%	22%	24%	26%
Animals/Wildlife	28%	22%	32%	20%	21%	20%	19%	26% G	23%	24%	20%
Poverty in Canada (e.g., homeless, shelters and food banks)	22%	16%	20%	22%	16%	19%	18%	21%	16%	19%	23% I
Place of worship	19% E	23% E	20% E	18% E	7%	15% E	16%	16%	11%	15%	20% I
Religious causes	13%	18% E	21% EF	15% E	7%	8%	13%	14%	12%	15%	13%
Education/School	16%	15%	13%	14%	11%	14%	15%	12%	15%	16% K	11%

Q16. Thinking about the charities that you gave a financial donation to in the past 12 months, what types of causes did they support? Base: Have made a financial donation to a charity or non-profit organization in the past 12 months 2017 (1052); 2015 (n=994); 2013 (n=713); 2009 (n=819)

*Mentions of higher than 1% shown.

DONATION DIVERSIFICATION – BY TYPE OF CHARITY

Place of worship continues to receive the highest share of donors' total contributions for the year, at 47%, followed closely by disease and medical charities at 43% of their donors' total yearly donations. Peace related charities receive the lowest share of their donors' total yearly contributions. Compared to 2015, donors are donating a lower percentage of their money to health charities.

	Mean 2015	Mean 2017
Place of worship	47.3	47.1
Disease/Medical condition (not including disabilities)	45.1	43.3
Hospital/Medical Centre	38.7	38.1
Children/Youth issues	37.9	37.6
Animals/Wildlife	37	37
Religious causes	35.6	34.8
Education/School	28.9	28.1
Disaster relief	25.6	25.6
Poverty in Canada (e.g., homeless, shelters and food banks)	25.2	25.2
Food bank	25.2	25.2
Fine Arts/Culture (theatre, opera, museums, etc.)	25.7	24.8
Physical disabilities	24.9	24.7
Women's issues	24	23.7
Human Rights/Civil Liberties	23.5	23.5
Community team you play on or a group you participate in (e.g., sports, dance, language, etc.)	22.3	22.3
Mental disabilities	22.1	21.6
Environment	21.9	21.6
International development or aid/Third World poverty	21.5	21.3
Peace	14.6	14.6

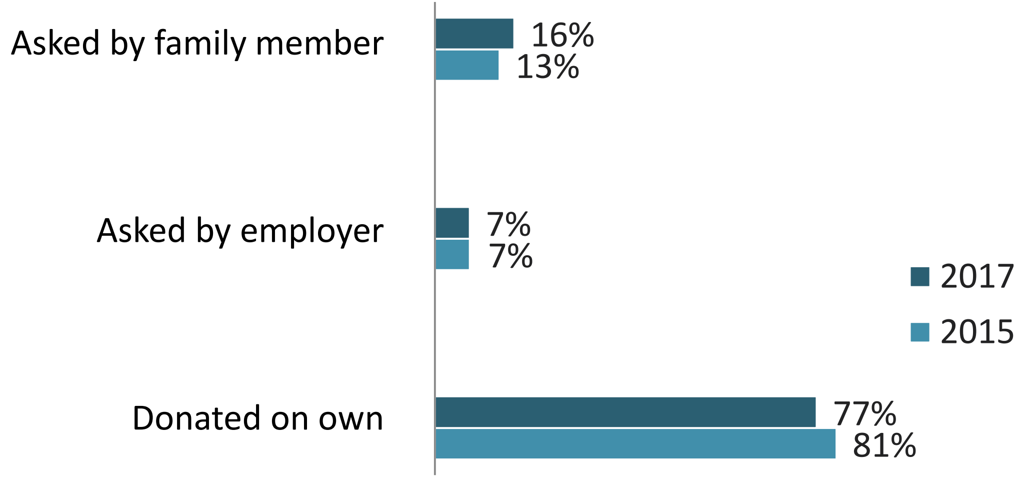
	Mean	
	2015	2017
Religion (NET)	54.6	54.6
Social Services (NET)	47.6	46.4
Health (NET)	55.7	45.9
Animals (NET)	33.7	37.0
International (NET)	32.1	29.9
Education (NET)	23.2	28.1
Arts & Culture (NET)	24.3	25.4
Environment (NET)	19.6	21.6

Q19. Using your best guess, please indicate what percentage of the money you donated last year was donated to charities that represent the following causes?
Base: Have made a financial donation to a charity or non-profit organization in the past 12 months 2017 (n=Varies)

GAME CHANGERS

DONATION DIVERSIFICATION – BY SOLICITATION TYPE

The vast percentage of the money donated by past 12 month donors was unsolicited (not asked by a friend or co-worker/employers), with almost eight in 10 saying they donated on their own. Note: the 77% includes those approached by charities.



Reported on Mean Score

Q21. Using your best guess, what percentage of the money you donated last year was because...
Base: Have made a financial donation to a charity or non-profit organization in the past 12 months 2017 (n=1052); 2015 (n=994)

GAME CHANGERS

CHARITY LAST DONATED TO

Donations to children's club (e.g., boys and girls club, children's breakfast clubs), has declined since 2015, and fewer donors are mentioning health and social services charities, and more do not remember the charity.

	2013	2015*	2017
Church/ Evangelical missionary (unsp.)	5%	8%	8%
Canadian Cancer Society	8%	5%	4%
Hospital (unsp.)	5%	5%	4%
Food bank	3%	4%	4%
United Way/Centraide	4%	5%	3%
Cancer (unsp.)	3%	5%	3%
Heart & Stroke Foundation	7%	4%	3%
Canadian Red Cross	3%	3%	3%
Children's hospital (unsp.)	2%	2%	3%
Animals/wildlife (unsp.)	1%	2%	3%
Salvation Army	2%	3%	2%
Operation Enfant Soleil	-	-	2%
SPCA	2%	3%	1%
Homeless shelter (unsp.)	1%	2%	1%
Sick Kids Foundation	1%	2%	1%
Children's club (unsp.)	2%	7%	1% ↓
World Vision	1%	2%	1%
War Amps	2%	2%	-
Veterans/Remembrance Day/Legion/Poppy	-	2%	-
Breast cancer (unsp.)	3%	2%	1%
Other	24%	12%	17%
Refused	6%	4%	1%

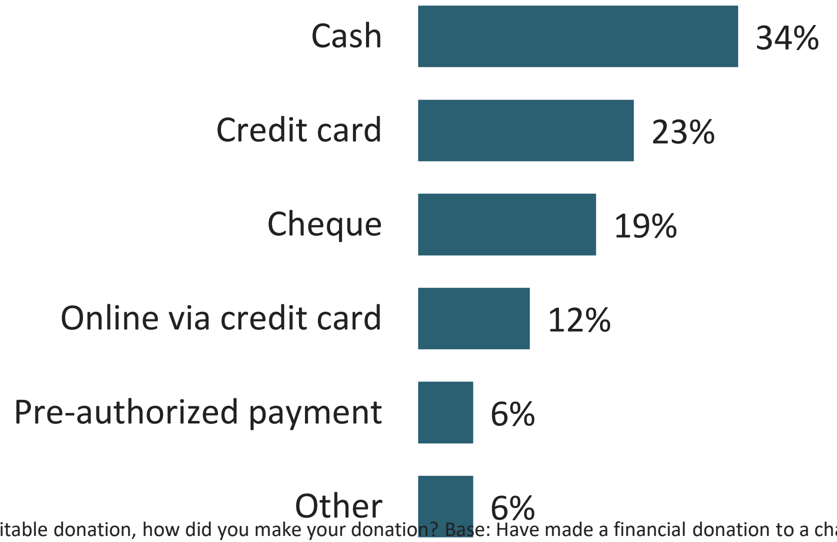
	2015	2017
Health (NET)	32%	25% ↓
Social Services (NET)	26%	15% ↓
Religion (NET)	8%	8%
Animals (NET)	8%	5%
International (NET)	8%	5%
Arts & Culture (NET)	1%	1%
Education (NET)	1%	1%
Environment (NET)	1%	1%
Other	12%	17%
Refused	4%	2%
Don't Remember	-	19% ↑

*Mentions of higher than 1% shown.

Q22a. Which charity did you last donate to?
Base: Have made a financial donation to a charity or non-profit organization in the past 12 months 2017 (n=1052); 2015 (n=994)

METHOD OF DONATION

Cash is the most common method of donation, followed by credit card and cheque and online among those who donated in the past 12 months.
Results from *IpsosCanadaNext study suggest that Canadians believe that within the next 10 years, we will be increasingly cashless, and online transactions will continue to grow.**

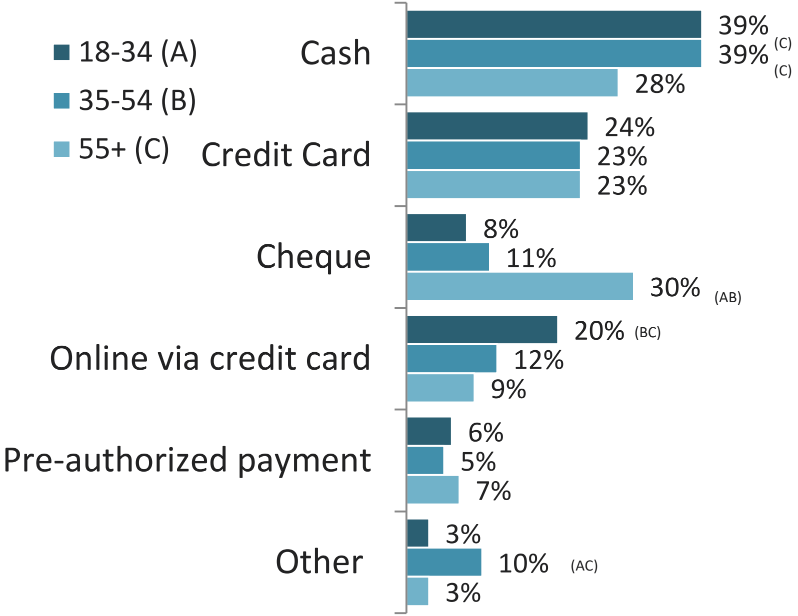


Q24. Thinking of your most recent charitable donation, how did you make your donation? Base: Have made a financial donation to a charity or non-profit organization in the past 12 months 2017 (n=1052)

*The *IpsosCanadaNext* study was conducted online in May 2017 among 2,000 Canadians, 18 years and older.

METHOD OF DONATION – BY AGE AND REGION

Cash is the most common method of donation for Millennials and Gen Xers, while Boomers are as likely to use a cheque as to use cash. The use of online via credit card is also higher among Millennials.
Atlantic Canadians are more likely than most other regions to make a cash donation, but are the least likely to have made a donation online via credit card. Quebecers are also more likely to use cash. British Columbians and Ontarians are as likely to use a credit card as to use cash, while Albertans use cash, credit card or cheque in similar proportions.



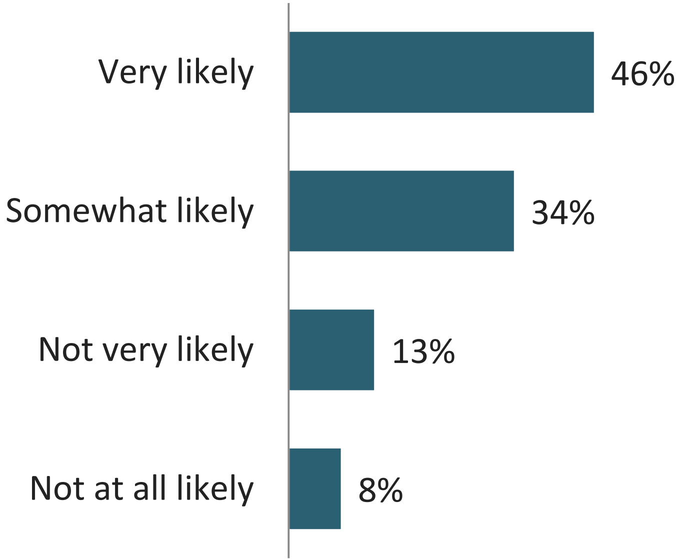
	Region					
	BC	AB	SK/MB	ON	QC	ATL
	D	E	F	G	H	I
Cash	27%	26%	38%	28%	48% (DEG)	59% (DEFG)
Credit card	30% (FHI)	23% (F)	9%	27% (FHI)	16%	14%
Cheque	21%	23%	21%	19%	17%	13%
Online via credit card	13% (I)	18% (HI)	13% (I)	14% (I)	9%	2%
Pre-authorized payment	2%	4%	9% (D)	7% (D)	6%	5%
Other	7%	5%	9%	5%	5%	7%

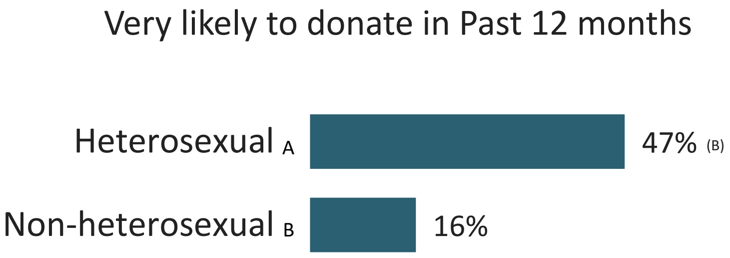
Q24. Thinking of your most recent charitable donation, how did you make your donation? Base: Have made a financial donation to a charity or non-profit organization in the past 12 months 2017 (n=1053)

LIKELIHOOD OF DONATING IN THE NEXT 12 MONTHS

About half of respondents indicate that they are very likely to donate in the next 12 months --- 80% very or somewhat likely.

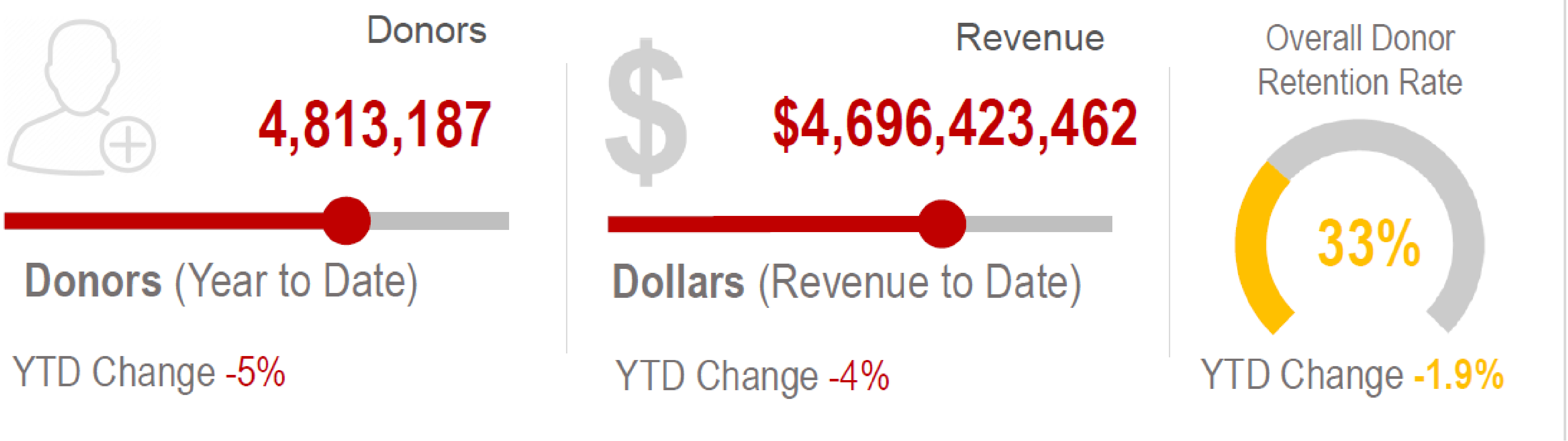
Heterosexuals are more likely than non-heterosexuals to say they are "very likely" to donate in the next 12 months.





Q27. How likely are you to make a financial donation to a non-profit or charitable organization in the next 12 months?
Base: All respondents (n=1500)

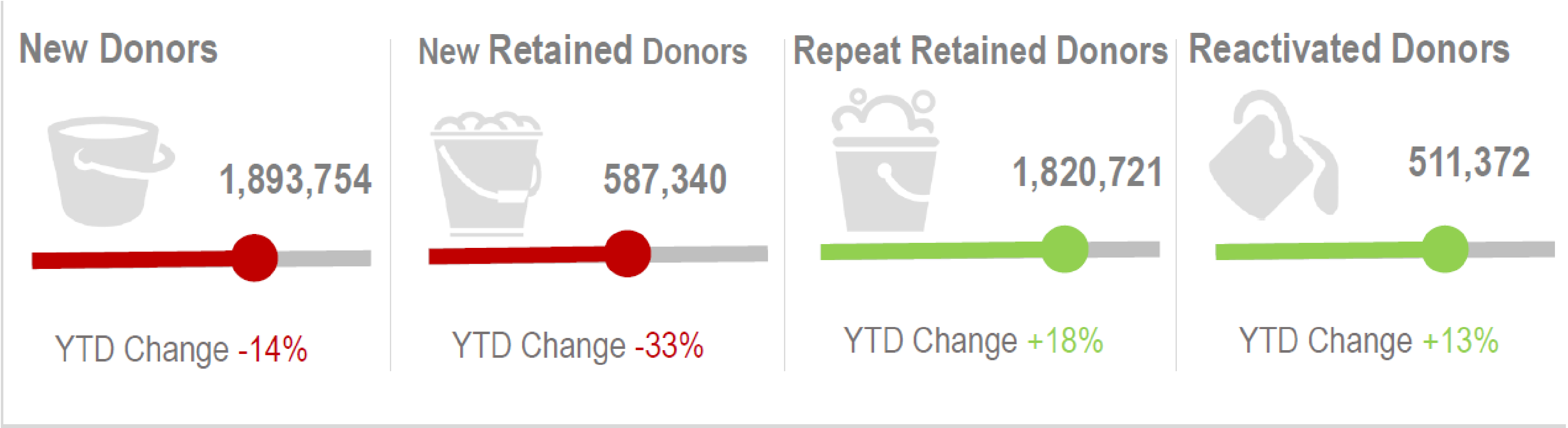
How does your organization fare?



Reference: Fundraising Effectiveness Project; http://afpfep.org/reports/download/

EXTERNAL POINTS OF INTEREST

How does your organization fare?

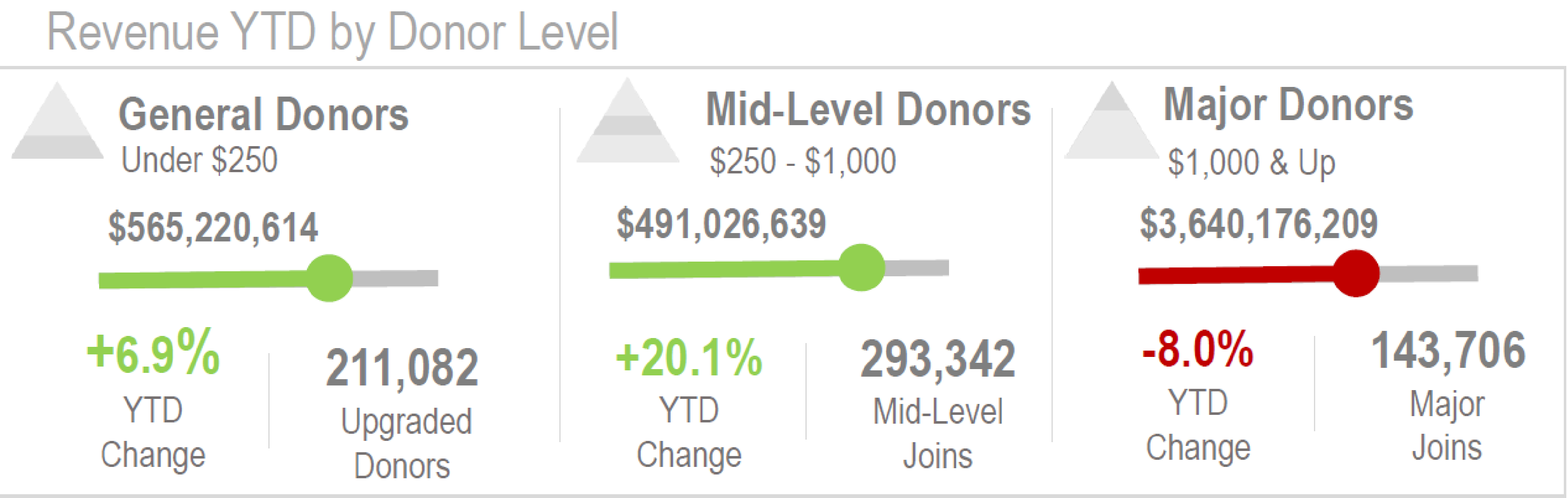


Reference: Fundraising Effectiveness Project; http://afpfep.org/reports/download/

GAME CHANGERS

EXTERNAL POINTS OF INTEREST

How does your organization fare?



Reference: Fundraising Effectiveness Project; http://afpfep.org/reports/download/

SECTION 6:
Social Media

POLLING QUESTION

Please provide your response to this question

1) MY ORGANIZATION HAS AN ACTIVE STRATEGY FOR FUNDRAISING USING SOCIAL MEDIA

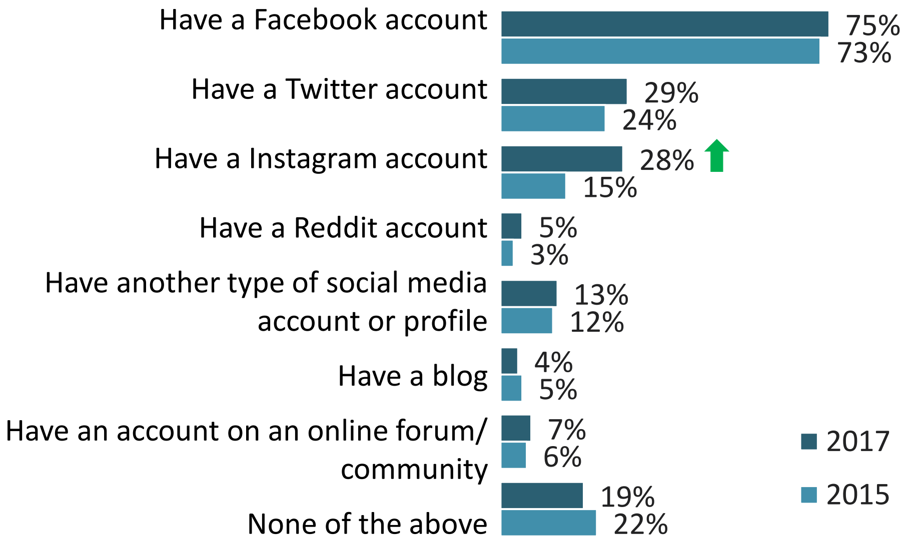
☐ YES ☐ NO

GAME CHANGERS

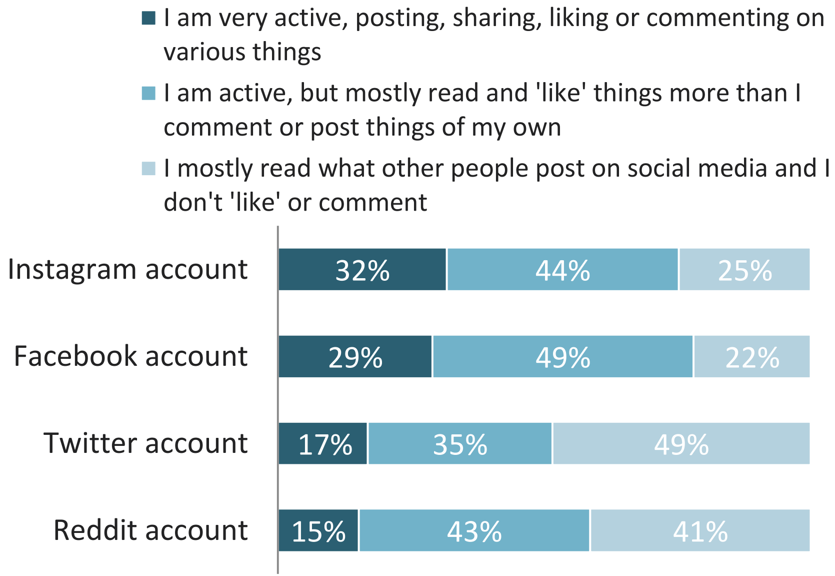
SOCIAL MEDIA USAGE

Similar to 2015, eight in 10 Canadians have a social media account, but there has been an increase in Instagram users. Among these, those who use Instagram and Facebook are more likely than Twitter and Reddit users to be very active, and to ‘like’ rather than comment, while Twitter and Reddit users are more likely to only creep – read posts, but not like or comment.

Has specific social media accounts



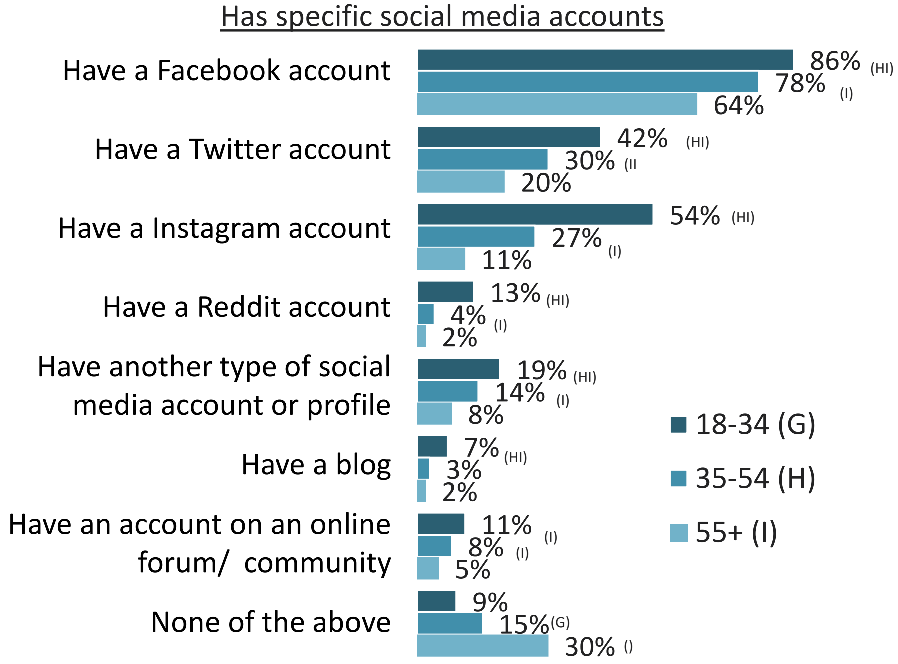
How is the account used



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



	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)

GAME CHANGERS

SOCIAL MEDIA USAGE – DONATION BEHAVIOUR

There is very little significant difference between past 12 month donors and non-past-12 month donors when it comes to social media usage, but past 12-month donors are more likely to have a social media account or profile other than Facebook, Twitter, Instagram or Reddit.

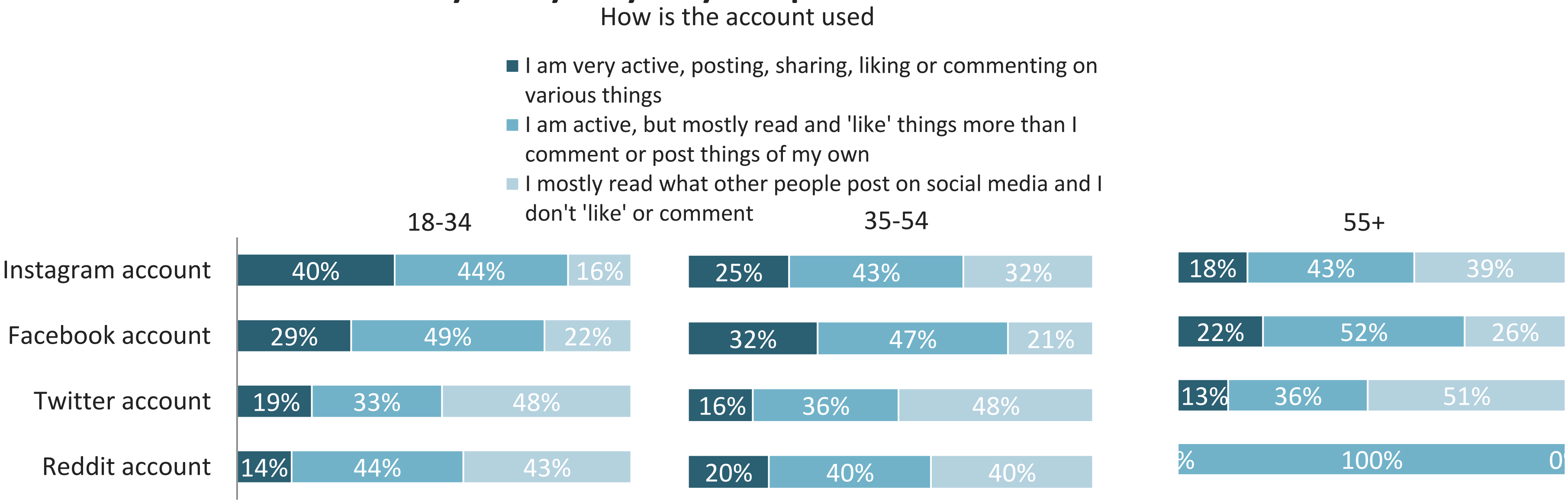
Has specific social media accounts

	Past 12-month Donors	Non-Past 12- month Donors
	A	B
Have a Facebook account	75%	74%
Have a Twitter account	30%	26%
Have a Instagram account	29%	28%
Have a Reddit account	5%	5%
Have another type of social media account or profile	15% (B)	10%
Have a blog	4%	4%
Have an account on an online forum/ community	7%	8%
None of the above	18%	21%

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

SOCIAL MEDIA USAGE – BY AGE

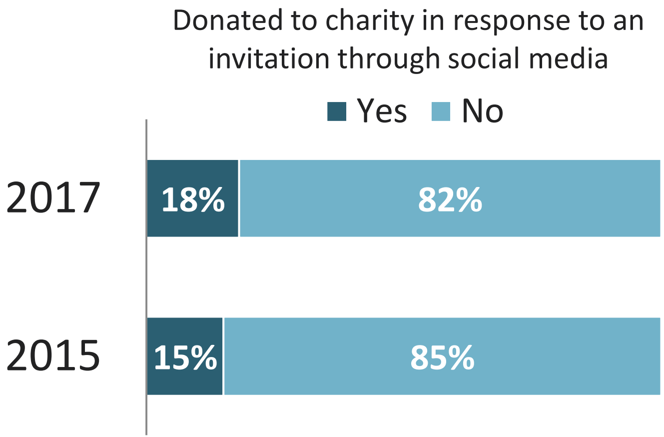
There is not much difference based on gender and donation behaviour in the past 12 months regarding how actively Canadians use their social media accounts (not shown). There are some differences based on age. Millennials are more likely than Gen Xers and Boomers to be very active on Instagram, while 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.

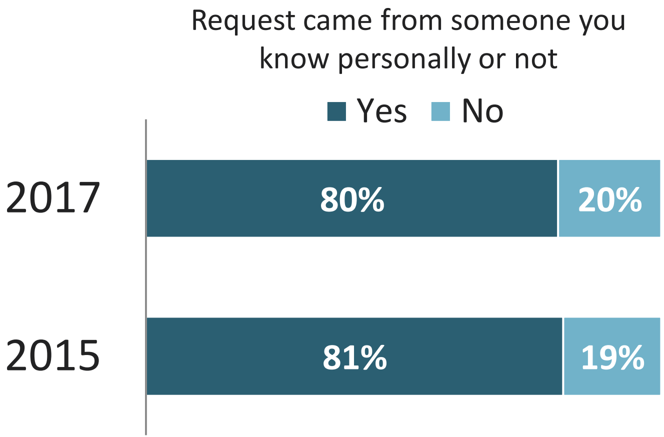


Q35. Which of the following best describes how actively you use each of your social media accounts? Base: Respondents who have a social media account (n=Varies)

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 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);

EXTERNAL POINTS OF INTEREST

How does your organization fare?

KEY FINDINGS

The Charitable Giving Report analyzes trends from over $18.2 billion in fundraising revenue from 2015. Here are some key findings:

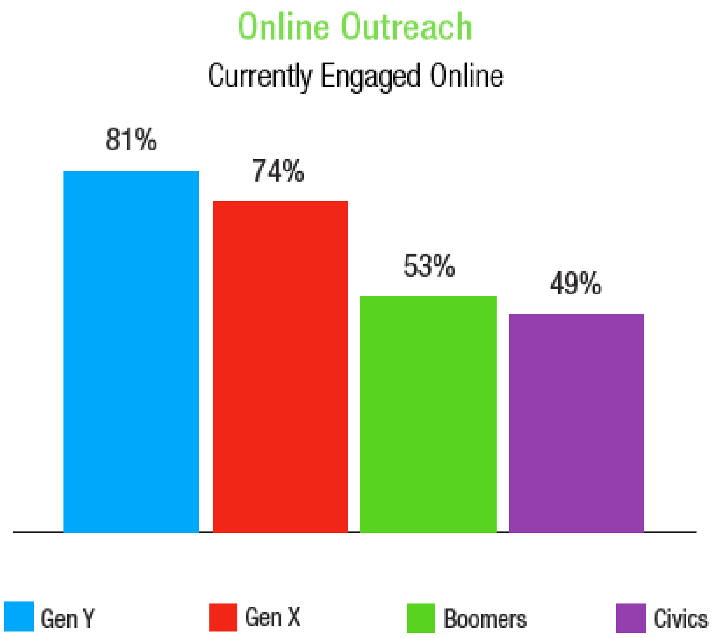
1. Overall giving grew approximately 1.6% in 2015
2. Online giving grew 9.2% in 2015 compared to 2014
3. Online donations were 7.1% of all fundraising in 2015
4. #GivingTuesday online donations were up 52% in 2015
5. Nearly 14% of online donations were made on a mobile device in 2015

According to Charitable Giving Report 2017 from Blackbaud Institute for Philanthropic Impact

https://institute.blackbaud.com/asset/2017-charitable-giving-report/

GAME CHANGERS

How does your organization fare?



According to Charitable Giving Report 2017 from Blackbaud Institute for Philanthropic Impact

https://institute.blackbaud.com/asset/2017-charitable-giving-report/

SECTION 7:

SEGMENTING THE DONOR MARKET - understanding Donor Motivation

GAME CHANGERS

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.

Source: Loosely based on The Seven Faces of Philanthropy : A New Approach to Cultivating Major Donors by Russ Alan Prince and Karen Maru File.

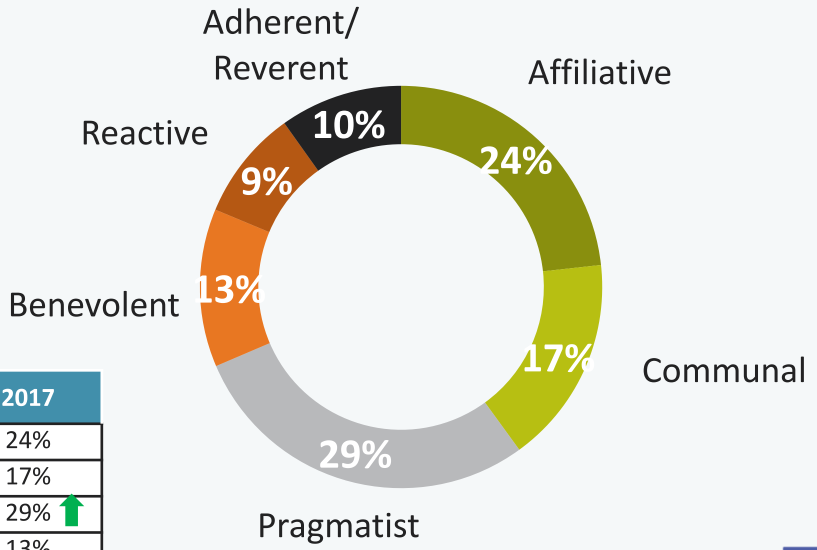
DONATION MOTIVATIONS – SEGMENTATION (1)

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%

DONATION MOTIVATIONS – SEGMENTATION (2)

24%

Affiliative

- Most likely to donate because they were asked by a family member, friend or employer.
- Most likely to say they enjoy and frequently attend fundraising events.
- Least likely to say the government should allocate more money to charities if it means increasing taxes.
- Most likely to say they donate the most to charities that they have benefitted from or have used in the past.
- Most likely to report being contacted for donations through a social media post.
- Higher ratings on crowdfunding being a preferred method for future fundraising.
- Least likely to prefer fundraising through a traditional request.

17%

Communal

- Most likely to give to social services charities including children/youth issues, food banks, and homeless shelters.
- Most likely to donate to charities that benefit their local community.
- Least likely to say they have volunteered in the past year.
- Most likely to believe the government should allocate more money to non-profit and charitable organizations.

29%

Pragmatist

- Most likely to have donated to a charity where a tax credit was provided.
- Highest average annual donation amount ($1292).
- Among the most likely to have donated to 3-4 causes.
- Prefers to be approached for donations by letter in the mail.
- Most likely to think charities are well-managed.
- Second most likely to think charities are responsible with the donations received.

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.

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.

More detailed comparative information about the six segments is provided in the Appendix.

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)

GAME CHANGERS

Q & A

CONCLUSION

IN CONCLUSION

Our challenge to each other

- ➢ PLAN FOR AND MAKE USE OF THE WHAT CANADIAN DONORS WANT STUDY TO BUILD PROFESSIONAL EXCELLENCE

- ➢ PLAN TO AND MAKE USE OF THE WHAT CANADIAN DONORS WANT STUDY TO STRENGTHEN OUR SECTOR AND OUR ORGANIZATIONS

- ➢ PLAN HOW AND MAKE USE OF THE WHAT CANADIAN DONORS WANT STUDY TO ENHANCE A CULTURE OF PHILANTHROPY AND BUILD A NEW NARRATIVE FOR FUNDRAISING AND ORGANIZATION EFFECTIVENESS

THANK YOU

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