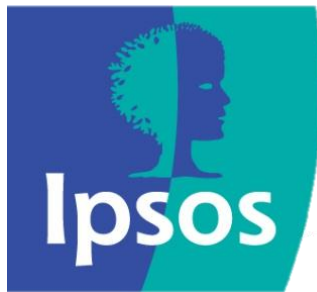


What Canadian Donors Want

Canadians looking for clear mission and evidence of impact; trust in the charitable sector is up; fewer donors giving, but amount of gifts is increasing; motivations for giving identify six Canadian donor types

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Toronto, ON – The 2015 survey of What Canadian Donors Want conducted by Ipsos on behalf of the Association of Fundraising Professionals shows that in challenging economic times, Canadians donate to charities that have a clear purpose and demonstrate corresponding impact and that trust in the charitable sector is growing. The study also finds that though there are fewer donations in 2015, the amount donated has increased. When looking at motivations of donors the study identifies six Canadian donor types.

Views and Attitudes of the Charitable Sector

Confidence in the charitable sector is significantly higher than that for the private and public sector (73% very/somewhat confident versus 63% and 62%, respectively). However, a total of four in ten (38%) Canadians believe that charities overstate how much they spend on the cause or programs they support (27%), including one in ten (11%) who believe charities intentionally mislead the public, while five in ten (52%) trust charities for the most part (48%) or completely (4%) in this regard. Another 10 percent do not offer an opinion.

But public trust in Canadian charities has increased by six percentage points since 2011 to 61 percent; 16 percent disagree with this view and 23 percent are neutral. There have also been directional increases in the numbers who now believe that charities act responsibly with the

donations they receive (63% agree vs. 18% disagree and 19% are neutral) and are well-managed (59% agree vs. 18% disagree and 23% are neutral).

Trust in the sector is important because the survey indicates that donors are looking for transparency and want to support charities that are efficient with their budgets and have a clear impact.

Of donors who have given in the past 12 months, 97 percent (53% strongly agree, 44% somewhat agree) say the charities to which they gave have a clear purpose and mandate; 96 percent (55% strongly agree, 41% somewhat agree) say the organization has a strong reputation and 95 percent (43% strongly agree, 52% somewhat agree) say the organization is successful in fulfilling its mandate.

Moreover, a growing number of donors, now more than eight in ten (83%), say it is important that they receive information on how their donation has made a difference (35% strongly agree, 48% somewhat agree). Fourteen percent disagree with the statement (9% somewhat disagree, 5% strongly disagree). Agreement with this statement is up six points from 2013.

Fewer donors than in 2013, now four in ten (38% - 11% strongly agree, 27% somewhat agree) indicate needing some kind of thanks or acknowledgement for their donation, they are less likely to donate to that charity in the future; almost six in ten (56% - 27% strongly disagree, 29% somewhat disagree) disagree with the statement. Agreement is down seven points from 2013.

Solicitations and Giving Decisions

Two-thirds (66%) of Canadians say they've made a financial donation to a charity or a non-profit organization in the past twelve months. This figure is down by four points since 2013,

and is the lowest figure reported since tracking began in 2007. The decline has come primarily among Canadians with middle education and lower household incomes. It is also down directionally in Alberta (from 77% to 67%) and Quebec (from 61% to 54%).

Among those who did not make a financial donation, there has been a directional increase in the number who say they can't afford it (includes those who said unemployed and student) - from 45% to 50%, and a three-point increase in those who say there are no charities worthy of their money (from 0% to 3%).

While there were fewer donors in 2015, those who did give are giving more. Donors gave an average of \$924 in 2015 compared to an average of \$726 in 2013.

Donors are most likely to donate to charities benefiting their local community (54%), followed by Canada as a whole (28%), the international community (8%) and developing countries (7%). Moreover, donations to local charities have increased five points, while donations to charities with a national focus have declined by seven points.

When asked about their likelihood to donate to the last charity they donated to, more than half (53%) say they are "very likely" to donate to this charity in the next 12 months. Another 36 percent are somewhat likely to do this; while one in ten (11% - 7% not very likely/4% not at all likely) say they are not likely to do this.

A sizeable minority of more than four in ten Canadians (44%) proactively seek out information on the cause/charity and contact them to donate, while about six in ten (56%) say the charity approaches them and they donate based on the information they receive. These figures are relatively unchanged from 2013.



When looking for information on charities they support, Canadians primarily access this information online (a total of 71% - 42% from the organization's website or 29% from a general online search), followed by from family/friends/co-workers (32%).

When it comes to requests for donation posted on social media, 15 percent of those on social media (32% of CanadaHelps donors) say they have donated in response to a request posted on social media. More than half (55%) say they are open to receiving social media donation requests mostly depending upon who sent it (33%) or on what charity it is (22%). Another three percent say they like receiving these requests. Four in ten (42%) dislike receiving these requests.

Types of Charities Benefitting from Canadian Donors

Disease-related and medical charities remain the most popular type of charity, although the percentage of donors contributing in this area fell from 54 percent in 2013 to 42 percent in 2015. The highest share of contributions, 48 percent, was made to places of worship, followed by disease and medical charities at 44 percent, and children/youth charities at 40 percent.

Donor Motivations

As in 2013, topping the list of why Canadians donated to the last charity they donated to is the desire to help those in need (35%).

Other reasons include it is the right thing to do (22%, up 5 points) and wanting to give back to the community (15%, down 4 points).

About one in ten say they donated because it feels good (9%), they've benefited from those services and want to give back (8%), and that it's part of their religious beliefs (7%).



This year a segmentation of donors was conducted. The research identified six 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 (representing 24% of donors)
- **Communal:** Donate to locally-based charities that benefit those in their community (representing 16% of donors)
- **Pragmatist:** Family tradition of donating to a specific charity and donate to a charity where a tax credit is provided (representing 25% of donors)
- **Benevolent:** Doing good is a moral obligation and want to help those in need (representing 13% of donors)
- **Reactive:** Do not strongly associate with charities they donate to, and wait to be approached to donate (representing 12% of donors)
- **Adherent/Reverent:** Donate to charities that share their beliefs or moral and motivated by their religious beliefs (representing 10% of donors)

CanadaHelps

This year, AFP partnered with CanadaHelps, a national nonprofit whose mission is to promote charitable giving in Canada. The What Canadian Donors Want survey also was conducted among donors who have a history of making donations using CanadaHelps. The purpose of including this group is to understand the differences and similarities between Canadians who donate online versus Canada's general population.

CanadaHelps donors are more likely than the general population to donate to more causes. Seventy-seven percent of CanadaHelps donors give to six or more causes compared to only 17 percent of the general population. In contrast, they are significantly less likely than the general population to donate to only one cause (0% vs. 22%) or to two to three causes (7% vs. 41%), and directionally less inclined to support between four to five causes (14% vs. 19%).

They are more likely than general population donors who gave in the last 12 months to say they are very knowledgeable about the charities they support (38% compared to 22%). Similar proportions of CanadaHelps donors and the general population say they are



somewhat knowledgeable (59% vs. 60%). In contrast, CanadaHelps donors are less likely than the general population to say they are not very (2% vs. 12%) or not at all (0% vs. 2%) knowledgeable.

Like their peers across Canada, CanadaHelps donors who gave in response to an invitation or post on social media say they gave because the posts came from someone they know (83% vs. 81% among the general population); two in ten say their donation was not in response to a request coming from someone they know (18% vs. 19% among the general population).

CanadaHelps donors also are invested in charities that they know to be efficient with donor dollars and effective in their work, but to a much more significant extent. Eighty-two percent of CanadaHelps donors are strongly motivated by a clear purpose and mandate compared to 53 percent of the general population; 18 percent and 44 percent, respectively somewhat agree with the statement.

The largest proportion of CanadaHelps donors say their most recent contribution was to a place of worship and they are more likely than their counterparts in the general population to have donated to this kind of charity (11% vs. 8%). They are also more likely to have given to international charities (13% vs. 7%) and to causes advancing the arts, culture (5% vs. 1%), and the environment (4% vs. 1%).

The general population survey of Canadians was conducted November 3-10, 2015. For this survey, a sample of 1,502 adults from Ipsos' Canadian online panel was interviewed online. Weighting was then employed to balance demographics to ensure that the sample's composition reflects that of the adult population according to Census data and to provide results intended to approximate the sample universe. The precision of Ipsos online polls is measured using a credibility interval. The general population survey is accurate to within +/- 2.5 percentage points, 19 times out of 20, had all Canadian adults been polled. The survey on the CanadaHelps sample is based on 955 donors who have a history of making donations using CanadaHelps and receive their marketing emails. This survey is accurate to within +/- 3.6 percentage points, 19 times out of 20, had all CanadaHelps donors been polled. The credibility interval will be wider among subsets of the population. All sample surveys and polls may be subject to other sources of error, including, but not limited to coverage error, and measurement error.



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