

Donor Confidence Report

The results in this Donor Confidence Report are drawn from an ongoing Campbell Rinker survey of donor attitudes on giving. The sample size for the August 2015 poll is 400. Details about the study methodology and audience are found on the final page of this report.

Donor Confidence on the Decline

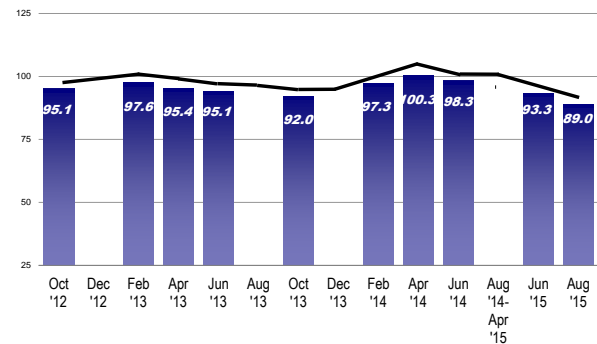
The Donor Confidence Index has decreased by 4.3 points since June to 89.0.

The Index takes into account donors' self-reported expectations about their giving, their view of the nonprofit sector, the nation's economic health, and several other factors.

Sector	Oct '13	Feb '14	Apr '14	Jun '14	Jun '15	Aug '15	2-Mo Chg
Overall	92.0	97.3	100.3	98.3	93.3	89.0	▼ 4.3
Political and Advocacy	94.2	99.1	104.8	101.0	98.3	99.4	▲ 1.1
Animal Rights	90.9	96.8	97.8	94.8	93.4	91.2	▼ 2.2
Faith-based	96.5	102.5	103.3	100.3	93.5	91.2	▼ 2.3
Hospitals & Hosp. Fnd.	94.3	96.8	102.9	97.4	90.2	87.4	▼ 2.8
Place of Worship	91.9	99.0	104.8	98.4	95.3	91.8	▼ 3.5
Education	94.6	100.8	102.2	100.0	94.3	90.2	▼ 4.1
Health and Medical	95.5	94.6	100.1	98.8	93.7	89.5	▼ 4.2
Social Service	94.0	101.1	100.1	102.0	95.9	91.5	▼ 4.4
Environmental	97.1	99.0	100.9	102.7	98.5	92.5	▼ 6.0
Int'l Relief and Development	98.0	100.4	106.8	104.8	98.5	91.5	▼ 7.0
Arts, Culture & Humanities	97.5	103.8	103.3	104.7	97.5	89.3	▼ 8.2

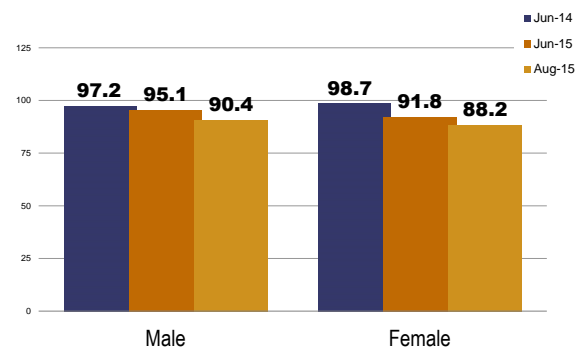
Index scores have fallen significantly across nearly all sectors. (Opinions from a donor alter the Index for any sector they supported.)

August 2015

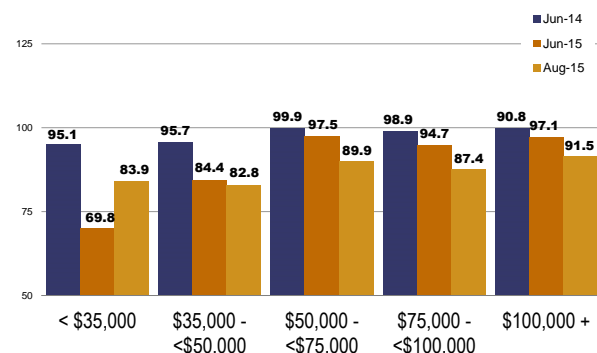


Donor Confidence by Gender, Age and Income

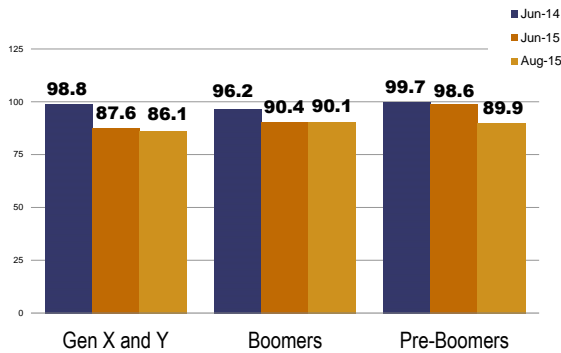
Since June, the Index has fallen 4.7 points among men (to 90.4) and 3.6 points among women (to 88.2).



Confidence has dropped among almost all income brackets. Those earning less than \$50,000 express the lowest confidence.



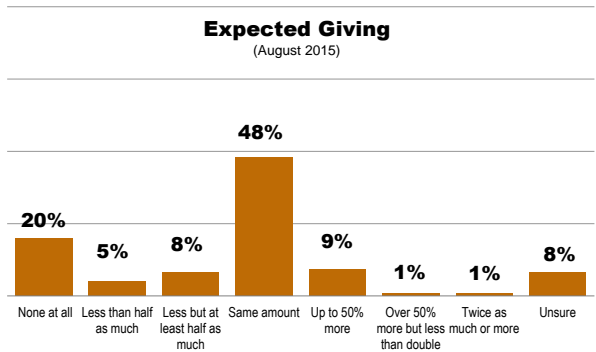
Since last issue, Index scores have dropped most among Pre-Boomers.



Expectations for Giving in 2015

In each Donor Confidence poll, Campbell Rinker asks U.S. donors whether they expect to give the same, more, or less in the present year compared with last.

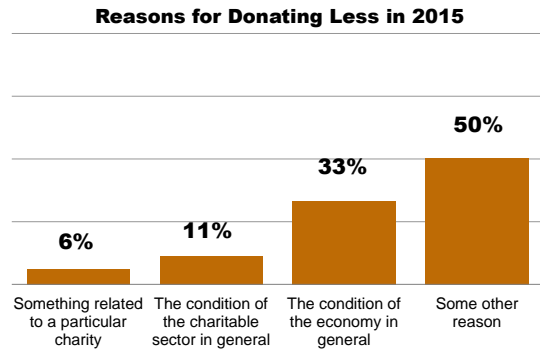
Approximately half of U.S. donors (48%) plan to give the same amount to charity in 2015 as last year. One in five (20%) expect to give none at all this year.



Reasons for Giving Less

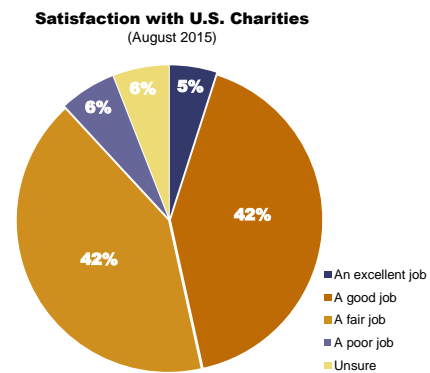
One in three donors who plan to give less (33%) point to the economy as the reason. Half report giving less due to reasons not

listed.



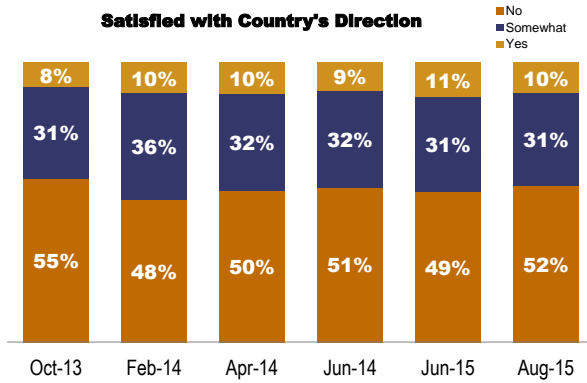
U.S. Nonprofit Approval Ratings

As of August 42% of donors say U.S. charities are doing a *good* job. Another 42% say charities are doing a *fair* job.

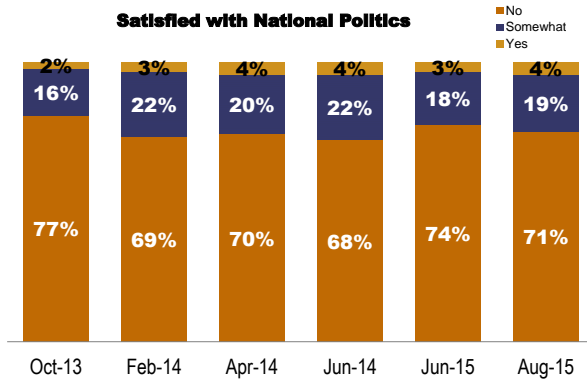


Donors Dissatisfied with Government

Holding steady, half of all donors (52%) say they are dissatisfied with the country's direction. An additional three in ten (31%) are *somewhat* dissatisfied.

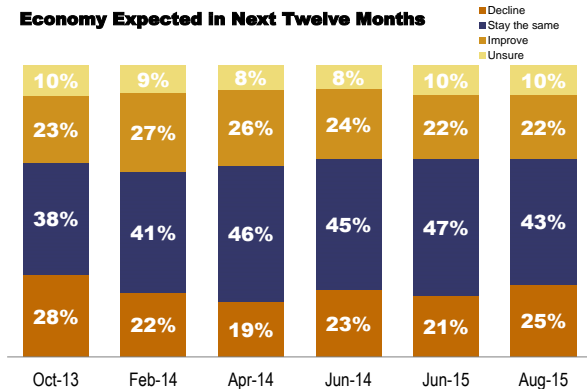


Approximately seven in ten donors remain unhappy with politics at the federal level.

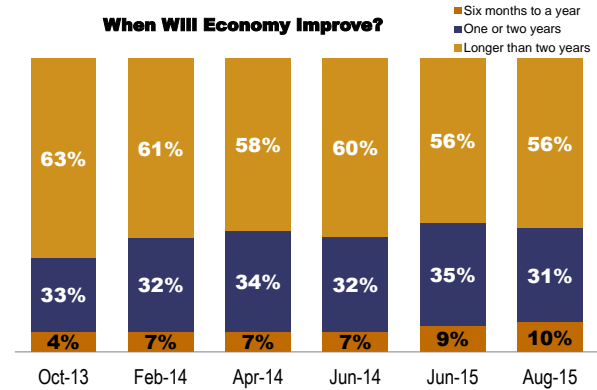


Economic Outlook

At present, 43% of donors expect the economy to remain the same over the next year. One in four (25%) believe it will decline.

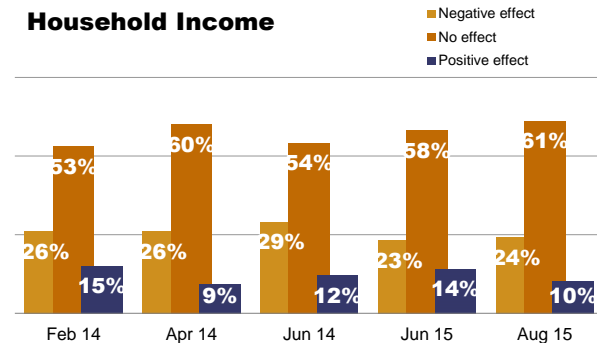


Fifty-six percent of donors feel the economy will require more than two years to improve.

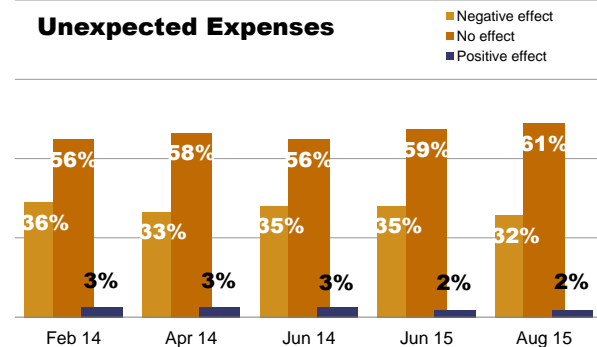


Impact of Income and Expenses

One in four donors (24%) currently say that changes in household income have had a negative effect on their giving over the last year.



About one in three donors (32%) say unexpected expenses had a negative effect on their giving.



Sector Spotlights

Campbell Rinker asked donors to indicate which of 11 nonprofit sectors they had supported in the last year. Within these results, ratings from one donor may contribute to the DCI in more than one nonprofit sector.

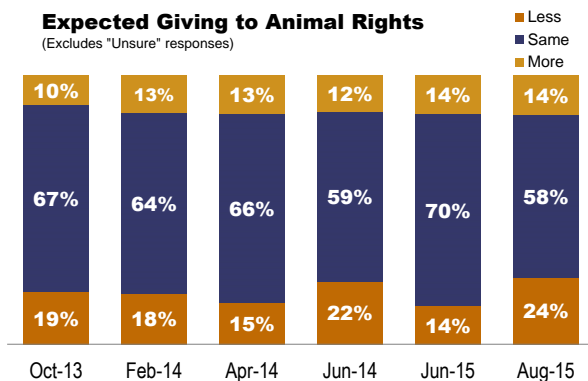
The sections below highlight the stated plans donors have for giving to each of the following nonprofit categories:

- Animal rights, protection, and training
- Arts, culture, and humanities
- Educational institutions and programs
- Environmental protection and preservation
- Faith-based charities, excluding places of worship
- Health and medical charities
- International relief, education, and sponsorship
- Not-for-profit hospitals and hospital foundations
- Places of worship
- Political organizations
- Social service organizations

Animal Rights & Protection

Since last issue, the DCI for Animal Rights charities has decreased by 2.2 points to 91.2.

Sector	Oct '13	Feb '14	Apr '14	Jun '14	Jun '15	Aug '15
Animal Rights	90.9	96.8	97.8	94.8	93.4	91.2
6-mo Avg.	93.9	93.4	95.2	96.5	95.3	93.1



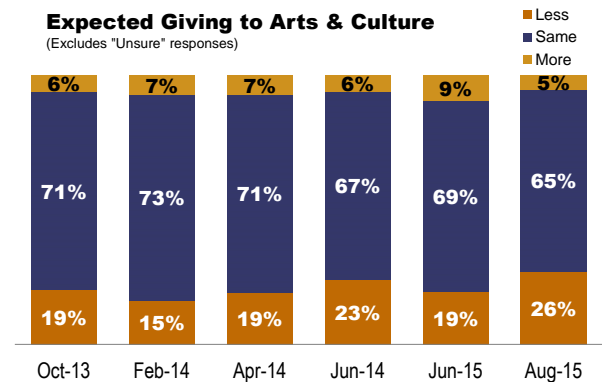
Nearly three in five donors (58%) plan to give the same amount to the sector in 2015. One in four (24%) plan to give less.

Arts, Culture, and Humanities

Falling by 8.2 points since June, the DCI for Arts and Culture organizations posts the largest drop for any sector this issue.

Sector	Oct '13	Feb '14	Apr '14	Jun '14	Jun '15	Aug '15
Arts & Culture	97.5	103.8	103.3	104.7	97.5	89.3
6-mo Avg.	99.2	99.9	101.5	103.9	101.8	97.2

Approximately two in three donors to Arts & Culture (65%) expect to give the same amount to the sector in 2015 as they did last year.



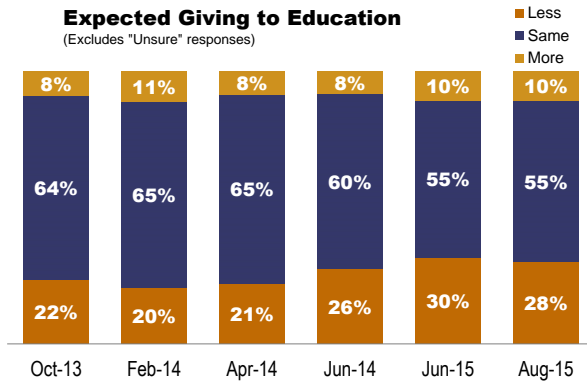
Educational Institutions & Programs

The Index for Education-related organizations has declined by 4.1 points since June to 90.2.

Sector	Oct '13	Feb '14	Apr '14	Jun '14	Jun '15	Aug '15
Education	94.6	100.8	102.2	100.0	94.3	90.2
6-mo Avg.	95.1	97.1	99.2	101.0	98.8	94.8

Currently, 55% of donors plan to give the same amount to Education this year. Almost three in ten (28%) plan to donate less.

Expected Giving to Education
(Excludes "Unsure" responses)

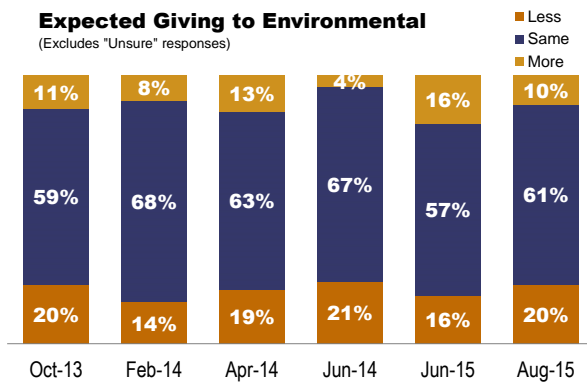


Environmental Protection

The Index for Environmental organizations has fallen by six points, from 98.5 in June to 92.5 today.

Sector	Oct '13	Feb '14	Apr '14	Jun '14	Jun '15	Aug '15
Environmental	97.1	99.0	100.9	102.7	98.5	92.5
6-mo Avg.	98.7	98.6	99.0	100.9	100.7	97.9

Expected Giving to Environmental
(Excludes "Unsure" responses)



Three in five donors to Environmental charities (61%) report plans to give the same amount to the sector in 2015. One in five expect to give less.

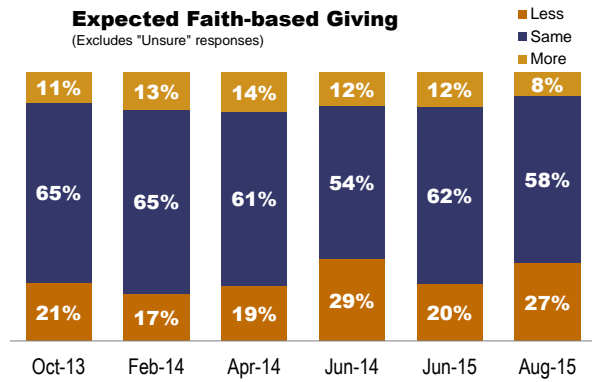
Faith-based Charities

At 91.2, the DCI among donors to Faith-based organizations has decreased by 2.3 points since June.

Sector	Oct '13	Feb '14	Apr '14	Jun '14	Jun '15	Aug '15
Faith-based	96.5	102.5	103.3	100.3	93.5	91.2
6-mo. Avg.	96.2	98.0	100.8	102.0	99.0	95.0

Fifty-eight percent of donors to Faith-based organizations plan to donate the same amount to the sector this year. More than one in four (27%) plan to donate less.

Expected Faith-based Giving
(Excludes "Unsure" responses)



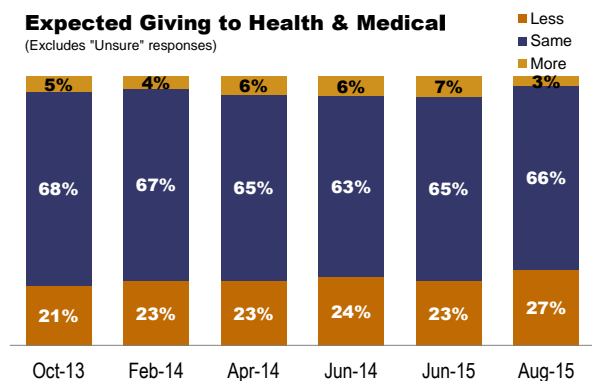
Health and Medical Charities

The DCI for Health and Medical charities has fallen 4.2 points to 89.5.

Sector	Oct '13	Feb '14	Apr '14	Jun '14	Jun '15	Aug '15
Health & Med.	95.5	94.6	100.1	98.8	93.7	89.5
6-mo. Avg.	94.7	95.1	96.7	97.8	97.5	94.0

Expectations for giving among donors to Health-related charities have remained very consistent over time. Two in three donors plan to give the same amount to the sector again this year.

Expected Giving to Health & Medical
(Excludes "Unsure" responses)

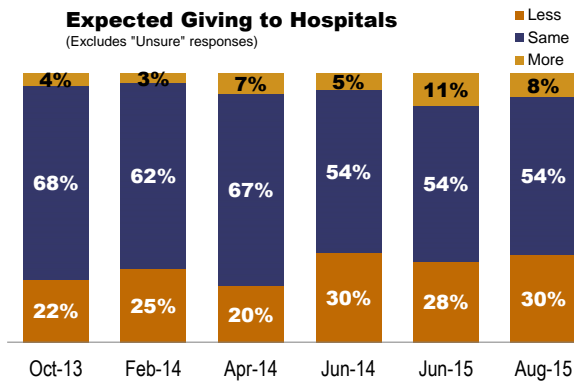


Hospitals & Hospital Foundations

Since June, the Index for Hospitals and Hospital Foundations has declined by 2.8 points.

Sector	Oct '13	Feb '14	Apr '14	Jun '14	Jun '15	Aug '15
Hospitals	94.3	96.8	102.9	97.4	90.2	87.4
6-mo. Avg.	95.3	95.7	98.0	99.0	96.8	91.7

Fifty-four percent of donors plan to give the same dollar amount to Hospitals & their Foundations in 2015 as they did in 2014. Three in ten (30%) plan to donate less, while eight percent plan to donate more.



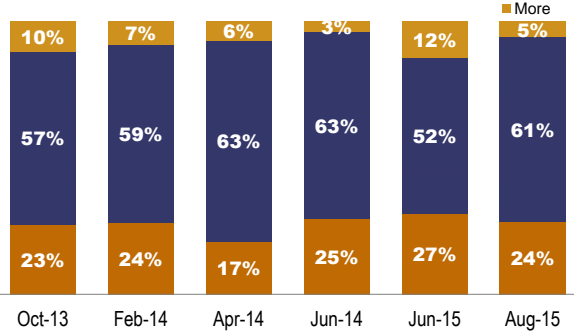
Int'l Relief & Sponsorship

The DCI for International Relief organizations is currently 91.5, dropping seven points in the last two months.

Sector	Oct '13	Feb '14	Apr '14	Jun '14	Jun '15	Aug '15
Int'l Relief and Development	98.0	100.4	106.8	104.8	98.5	91.5
6-mo. Avg.	100.2	98.9	101.7	104.0	103.4	98.3

Expected International Relief Giving

(Excludes "Unsure" responses)



Three in five donors (61%) expect to give the same amount to International Relief this year. About one in four (24%) expect to give less.

Places of Worship

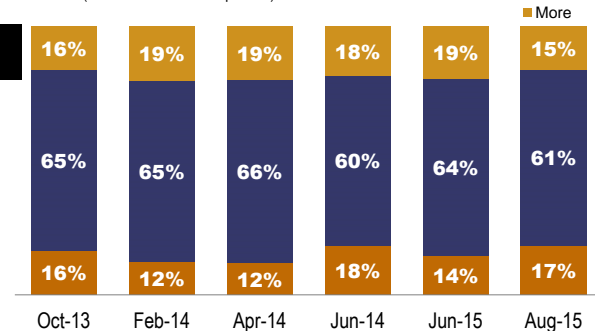
The Index score for Places of Worship has decreased by 3.5 points, from 95.3 in June to 91.8 in August.

Sector	Oct '13	Feb '14	Apr '14	Jun '14	Jun '15	Aug '15
Places of Worship	91.9	99.0	104.8	98.4	95.3	91.8
6-mo. Avg.	95.1	95.8	98.6	100.7	99.5	95.2

Three in five donors (61%) expect to give the same amount to Places of Worship in 2015 as they did in 2014. One in six (17%) plan to give less, while 15% plan to give more.

Giving to Places of Worship

(Excludes "Unsure" responses)

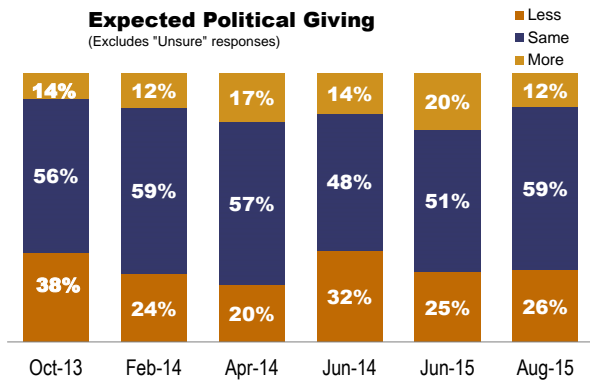


Political & Advocacy

Posting the only increase this issue, the DCI for Political and Advocacy organizations has risen 1.1 points to 99.4.

Sector	Oct '13	Feb '14	Apr '14	Jun '14	Jun '15	Aug '15
Political and Advocacy	94.2	99.1	104.8	101.0	98.3	99.4
6-mo. Avg.	95.2	95.2	99.4	101.6	101.4	99.6

As of August, 59% of Political donors report plans to give the same amount to the sector this year. Twelve percent report plans to give more. *We expect to see the proportion planning to give more increase in the coming months and into the 2016 election year.*



Social Service

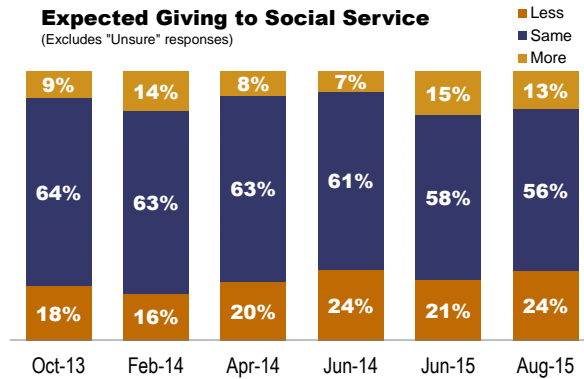
The DCI for Social Service charities has decreased by 4.4 points since June to 91.5.

Sector	Oct '13	Feb '14	Apr '14	Jun '14	Jun '15	Aug '15
Social Svcs	94.0	101.1	100.1	102.0	95.9	91.5
6-mo. Avg.	95.4	97.3	98.4	101.1	99.3	96.5

A majority of Social Service donors (56%) plan to give the same amount to the sector this year. One in four (24%) plan to give less.

Expected Giving to Social Service

(Excludes "Unsure" responses)



Methodology

This Donor Confidence Report poll was conducted August 2015 among 400 Internet respondents who either responded to our original February 2008 study or who have demonstrated similar habits and behaviors since then.

The Benchmark study that forms the basis for the Donor Confidence report was conducted as part of Campbell Rinker's ongoing DonorPulse survey in February 2008. This hybrid study of 3,312 US donors included 29% of respondent households from random telephone calling and the balance from an Internet panel reflecting national demographics.

To qualify to take the survey, responding households must have made a charitable contribution in the previous year and be at least 18 years old. Of the 3,312 responding donors, 726 self-identified themselves as Christian and 85 self-identified as adherents to non-Christian faiths.

The Donor Confidence Index is computed at the respondent level using an algorithm developed by Campbell Rinker that takes into account a donor's propensity to give again, their opinions and attitudes about the condition of the country, the nonprofit sector, their economic outlook, and their ongoing engagement in giving. The scores presented in this report represent a true longitudinal view of donors in August 2015 compared to the same pool of donors in previous reports.

Fewer respondents answered some questions. The following table summarizes the estimate of error at the 95% confidence level at various sample sizes.

Sample Size	Estimate of Error
100	±9.8%
200	±6.9%
300	±5.7%
400	±4.9%
500	±4.4%

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