

Donor Confidence Report

Issue 30, June 2014

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 June 2014 poll is 507. Details about the study methodology and audience are found on the final page of this report.

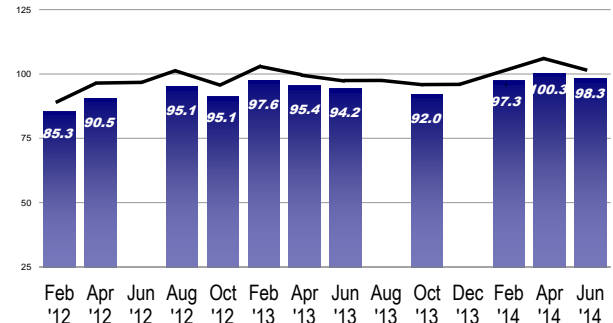
Confidence Dips Slightly

The DCI has decreased by 2.0 points since April to 98.3.

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.

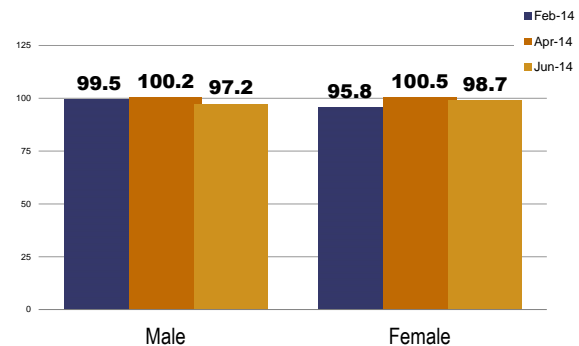
Sector	Apr '13	Jun '13	Oct '13	Feb '14	Apr '14	Jun '14	2-Mo Chg
Overall	95.4	94.2	92.0	97.3	100.3	98.3	▼ 2.0
Social Service	95.5	96.8	94.0	101.1	100.1	102.0	▲ 1.9
Environmental	99.2	99.8	97.1	99.0	100.9	102.7	▲ 1.8
Arts, Culture & Humanities	101.6	98.5	97.5	103.8	103.3	104.7	▲ 1.4
Health and Medical	93.4	95.1	95.5	94.6	100.1	98.8	▼ 1.3
Int'l Relief and Development	104.2	98.3	98.0	100.4	106.8	104.8	▼ 2.0
Education	94.6	96.0	94.6	100.8	102.2	100.0	▼ 2.2
Faith-based	97.2	94.9	96.5	102.5	103.3	100.3	▼ 3.0
Animal Rights	98.3	92.4	90.9	96.8	97.8	94.8	▼ 3.0
Political and Advocacy	99.1	92.2	94.2	99.1	104.8	101.0	▼ 3.8
Hospitals & Hosp. Fnd.	95.4	96.1	94.3	96.8	102.9	97.4	▼ 5.5
Place of Worship	96.9	96.4	91.9	99.0	104.8	98.4	▼ 6.4

Index scores have fallen in most sectors, but increased in Social Service, Environmental, and Arts, Culture & Humanities. (Opinions from a donor alter the Index for any sector they recall supporting.)

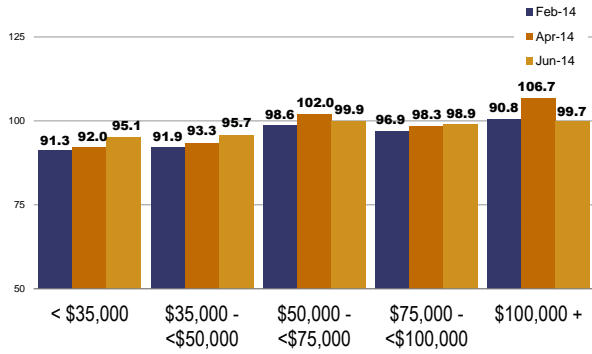


Donor Confidence by Gender, Age and Income

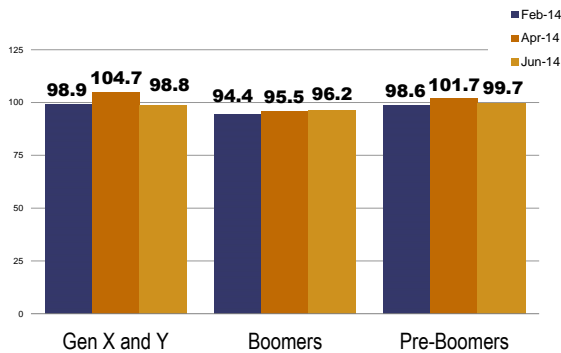
Since April, the DCI has dropped three points among men and fallen 1.8 points among women.



Interestingly, the greatest change in confidence among donors comes from households earning \$100,000+. Confidence in this group has decreased by seven points, while the level among those earning <\$35,000 has risen by 3.1 points.



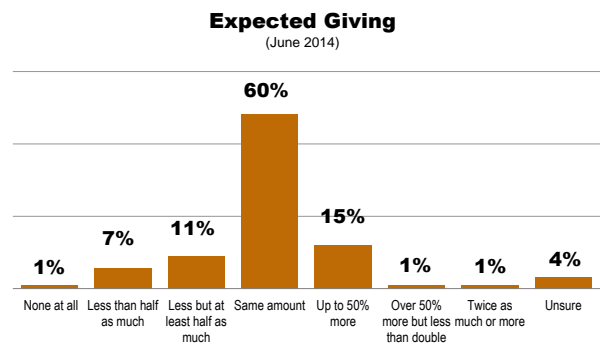
Index scores have dropped considerably among Gen X & Y donors, falling by 8.1 points. Scores among Boomers (+.7) and Pre-Boomers (-2) have remained relatively stable.



Expectations for Giving in 2014

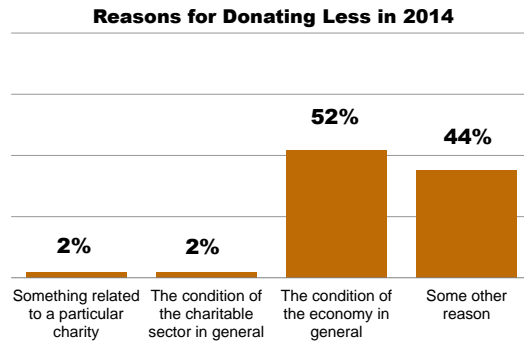
In each Donor Confidence poll, Campbell Rinker asks U.S. donors whether they expect to give the same, more, or less in the present year compared with last.

As of June, approximately three in five U.S. donors (60%) plan to give the same amount to charity this year. One in six plan to give less (18%) and 17% plan to give more.



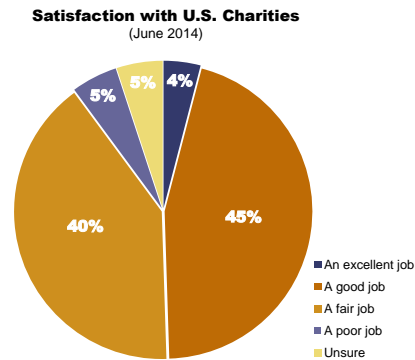
Reasons for Giving Less

Half of all donors who plan to give less (52%) point to the economy as the reason for their decreased giving. More than two in five (44%) report giving less due to reasons not listed.



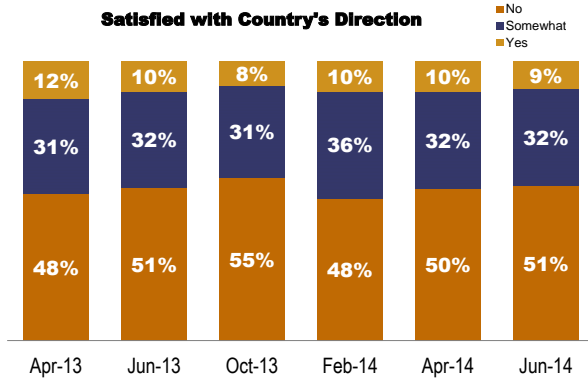
U.S. Nonprofit Approval Ratings

Currently, 45% of donors say U.S. charities are doing a *good* job. Forty percent say they are doing a *fair* job.

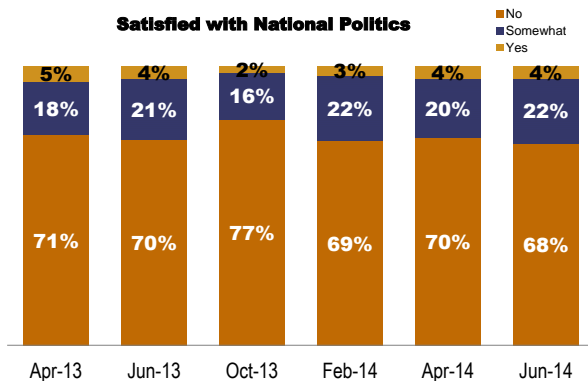


Donors Dissatisfied with Government

Half of all donors (51%) express dissatisfaction with the country's direction.

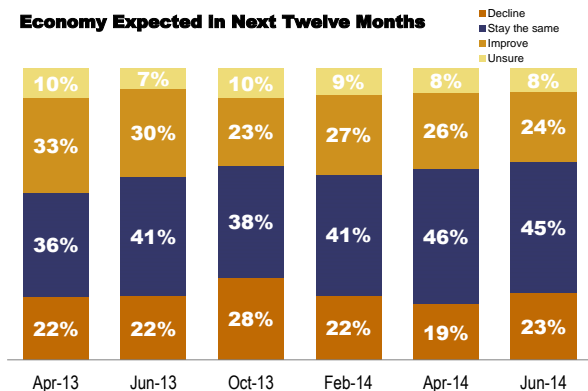


Nearly seven in ten donors remain unhappy with politics at the federal level.

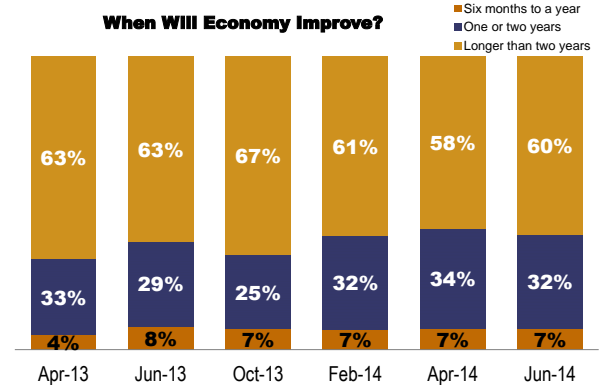


Economic Outlook

Today, 45% of donors expect the economy to remain the same over the next year. One in four (23%) believe it will decline.

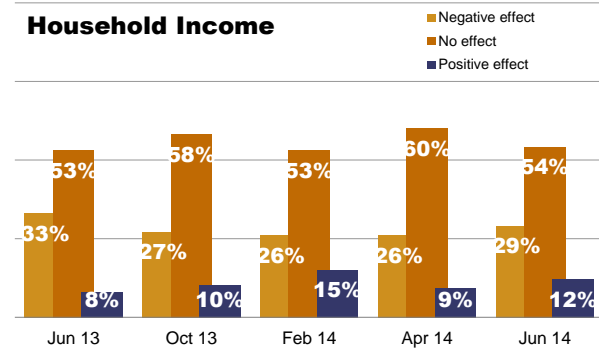


Three in five donors (60%) are optimistic that the economy will improve in more than two years.

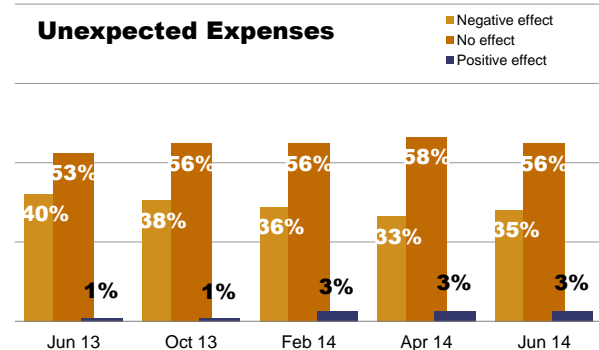


Impact of Income and Expenses

Since last issue, 29% of donors report that change in household income has had a negative effect on their giving.



More than one third (35%) report 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.

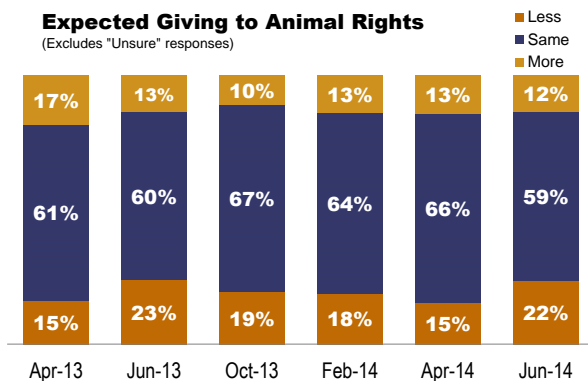
The sections below highlight the stated plans donors have for giving to each of the following nonprofit categories:

- 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 April, the DCI for Animal Rights charities has decreased by three points to 94.8.

Sector	Apr '13	Jun '13	Oct '13	Feb '14	Apr '14	Jun '14
Animal Rights	98.3	92.4	90.9	96.8	97.8	94.8
6-mo Avg.	96.5	97.1	93.9	93.4	95.2	96.5



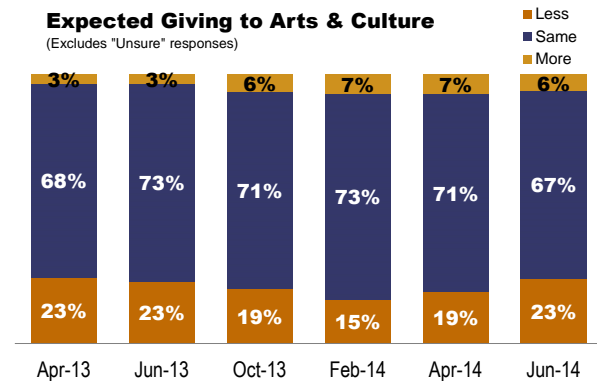
Since April, a greater number of Animal Rights donors (+7%) plan to give less to this sector this year, while 59% plan to give the same and 12% plan to give more.

Arts, Culture, and Humanities

The Index for Arts organizations has risen steadily, increasing by 6.2 points since June 2013. Its June score (104.7) and 6-month rolling average (103.9) remain high.

Sector	Apr '13	Jun '13	Oct '13	Feb '14	Apr '14	Jun '14
Arts & Culture	101.6	98.5	97.5	103.8	103.3	104.7
6-mo Avg.	101.6	101.7	99.2	99.9	101.5	103.9

Approximately two in three donors to Arts & Culture (67%) expect to give the same amount to the sector in 2014 as they did in 2013.

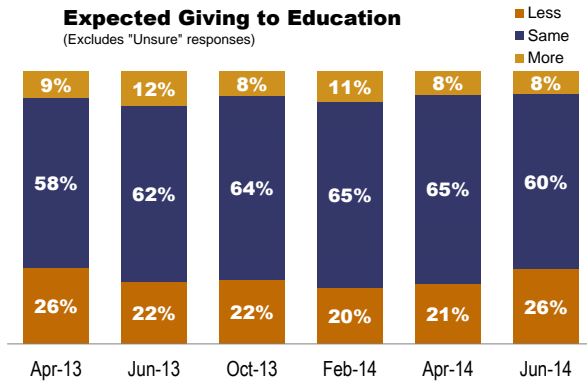


Educational Institutions & Programs

Though the DCI for Educational Institutions has dropped 2.2 points since April, it remains high at 100.0.

Sector	Apr '13	Jun '13	Oct '13	Feb '14	Apr '14	Jun '14
Education	94.6	96.0	94.6	100.8	102.2	100.0
6-mo Avg.	97.2	97.3	95.1	97.1	99.2	101.0

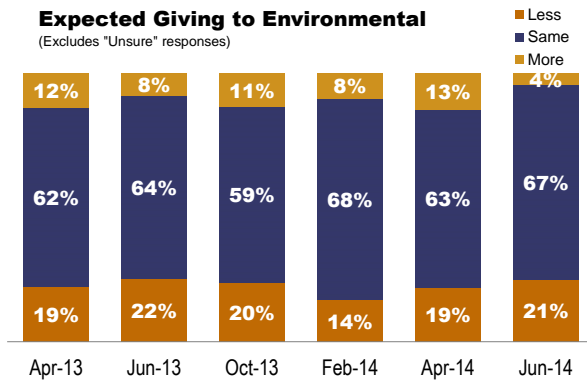
Today, 60% of donors plan to give the same amount to Education this year. About one in four (26%) plan to give less.



Environmental Protection

The DCI for Environmental organizations has continued to increase, reaching its highest score for the year at 102.7.

Sector	Apr '13	Jun '13	Oct '13	Feb '14	Apr '14	Jun '14
Environmental	99.2	99.8	97.1	99.0	100.9	102.7
6-mo Avg.	97.8	99.5	98.7	98.6	99.0	100.9



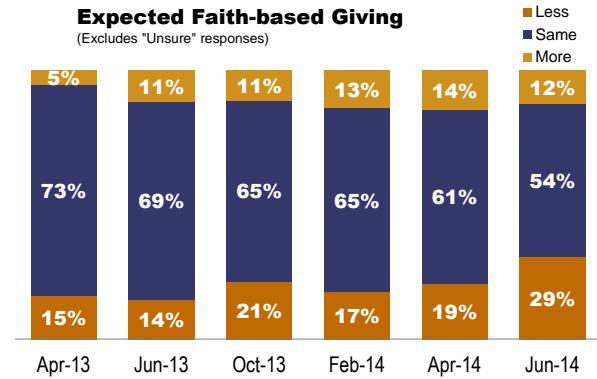
Two in three donors to Environmental charities (67%) report plans to give the same dollar amount to the sector this year. One in five (21%) report plans to give less.

Faith-based Charities

Since April, the DCI among donors to Faith-based charities has fallen 3 points to a total score of 100.3 in June.

Sector	Apr '13	Jun '13	Oct '13	Feb '14	Apr '14	Jun '14
Faith-based	97.2	94.9	96.5	102.5	103.3	100.3
6-mo Avg.	98.1	98.7	96.2	98.0	100.8	102.0

Up ten percent since April, three in ten (29%) donors to Faith-based organizations now plan to give less to the sector this year. Twelve percent plan to give more and 54% plan to give the same.

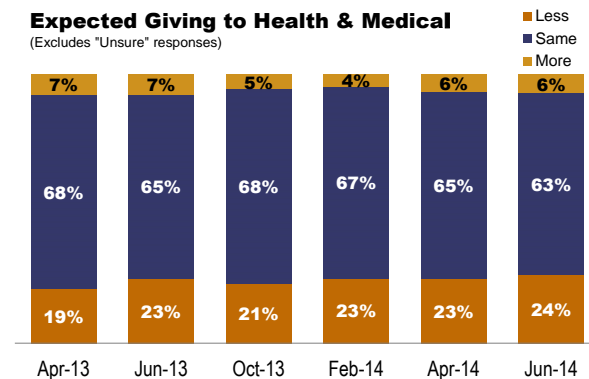


Health and Medical Charities

The Index for Health and Medical charities has fallen slightly this issue, now standing at 98.8.

Sector	Apr '13	Jun '13	Oct '13	Feb '14	Apr '14	Jun '14
Health & Med.	93.4	95.1	95.5	94.6	100.1	98.8
6-mo Avg.	95.0	96.7	94.7	95.1	96.7	97.8

Planned giving among donors to Health-related charities has remained very consistent this year, with 63% expecting to give the same amount during 2014 as they did in 2013.

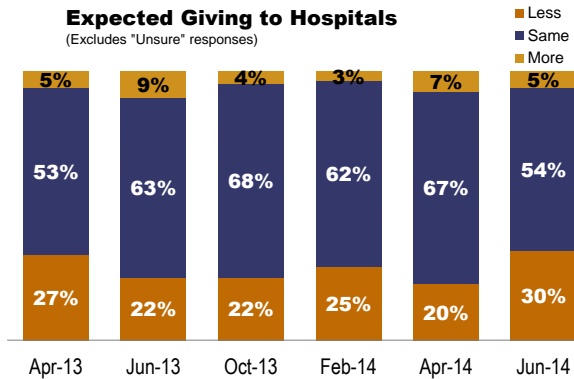


Hospitals & Hospital Foundations

Falling 5.5 points since last issue, the DCI for Hospitals and Hospital Foundations is at 97.4 today.

Sector	Apr '13	Jun '13	Oct '13	Feb '14	Apr '14	Jun '14
Hospitals	95.4	96.1	94.3	96.8	102.9	97.4
6-mo. Avg.	95.9	97.3	95.3	95.7	98.0	99.0

Fifty-four percent of donors expect to give the same dollar amount to Hospitals & their Foundations throughout 2013. Three in ten (30%) plan to give less, while five percent plan to give more.



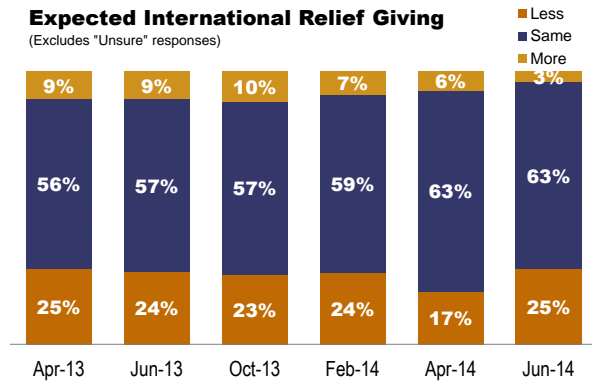
Int'l Relief & Sponsorship

Down by two points since April, the Index for International Relief charities still remains high at 104.8.

Sector	Apr '13	Jun '13	Oct '13	Feb '14	Apr '14	Jun '14
Int'l Relief and Development	104.2	98.3	98.0	100.4	106.8	104.8
6-mo. Avg.	100.8	102	100.2	98.9	101.7	104.0

Expected International Relief Giving

(Excludes "Unsure" responses)



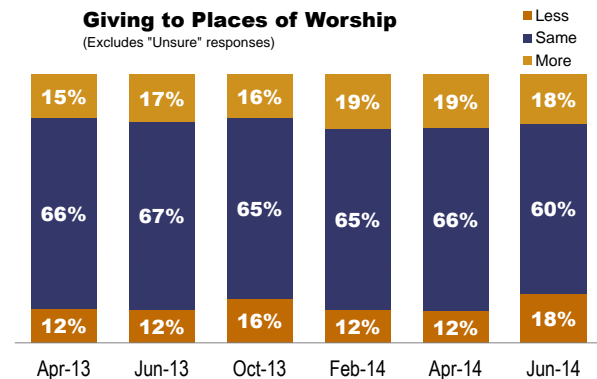
As of June, 63% plan to give the same amount to International Relief charities this year as last. One in four (25%) plan to give less.

Places of Worship

The Confidence Index for Places of Worship has decreased by 6.4 points to 98.4 this month.

Sector	Apr '13	Jun '13	Oct '13	Feb '14	Apr '14	Jun '14
Places of Worship	96.9	96.4	91.9	99.0	104.8	98.4
6-mo. Avg.	95.6	97.6	95.1	95.8	98.6	100.7

Three in five donors to Places of Worship (60%) expect to give the same amount throughout 2014 as they did in 2013. One in five (18%) plan to give more.

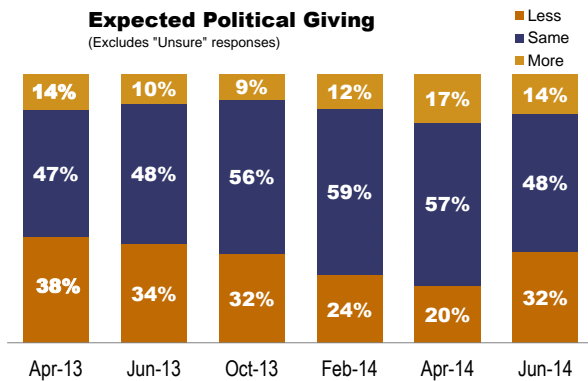


Political & Advocacy

Since last issue, the DCI for the Political sector has fallen 3.8 points to 101.0.

Sector	Apr '13	Jun '13	Oct '13	Feb '14	Apr '14	Jun '14
Political and Advocacy	99.1	92.2	94.2	99.1	104.8	101.0
6-mo. Avg.	98.1	96.1	95.2	95.2	99.4	101.6

Today, less than half (48%) of all Political donors plan to give the same amount to the sector this year, while 32% anticipate giving less.



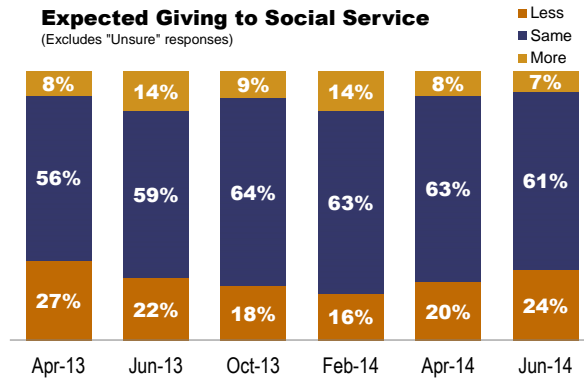
Social Service

The Index for Social Service charities has increased by nearly two points since April to 102.0.

Sector	Apr '13	Jun '13	Oct '13	Feb '14	Apr '14	Jun '14
Social Svcs	95.5	96.8	94.0	101.1	100.1	102.0
6-mo. Avg.	97.7	97.6	95.4	97.3	98.4	101.1

Nearly three in five Social Service donors (61%) plan to give the same amount to this sector in 2014. One in four donors (24%) plan to donate less.

Expected Giving to Social Service
(Excludes "Unsure" responses)



Methodology

This Donor Confidence Report poll was conducted June 2014 among 507 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 April 2014 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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