Campbell Rinker

Marketing Research for the Nonprofit World

Donor Confidence Report

Issue 11, June 2010

The results in this Donor Confidence Report are drawn from an ongoing survey of donor attitudes about giving by Campbell Rinker. The sample size for the June 2010 poll is 502. Details about the study methodology, audience may be found on the final page of this report.

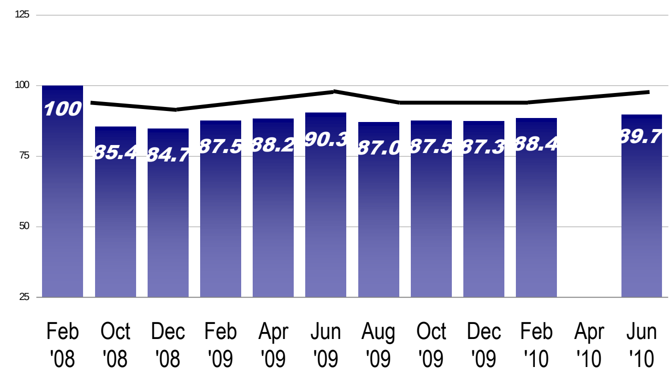
Donor Confidence Continues to Rise

The overall Donor Confidence Index (DCI) now stands at 89.7. This figure represents a 1.3 point increase from Campbell Rinker's last issue in February 2010.

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	Jun '09	Aug '09	Oct '09	Dec '09	Feb '10	Jun '10	2-Mo Chg
Overall	**90.3**	**87.0**	**87.5**	**87.3**	**88.4**	**89.7**	**▲ 1.3**
Animal Rights	91.9	87.2	87.0	85.2	86.8	88.9	▲ 2.1
Int'l Relief and Development	90.3	92.2	88.7	90.3	93.7	95.0	▲ 1.3
Health and Medical	91.0	86.2	88.5	91.3	87.8	89.0	▲ 1.2
Environmental	90.9	82.9	79.2	86.4	89.1	89.7	▲ 0.6
Education	91.2	87.9	90.9	89.7	88.5	88.5	- 0.0
Faith-based	87.0	90.1	92.2	93.1	94.9	94.1	▼ -0.8
Hospitals & Hosp. Fnd.	89.7	87.9	85.6	89.0	89.3	88.4	▼ -0.9
Social Service	89.1	87.9	86.7	90.8	89.3	88.4	▼ -0.9
Political and Advocacy	93.0	85.6	91.5	87.7	90.1	88.9	▼ -1.2
Place of Worship	90.4	88.6	91.6	90.7	91.1	88.9	▼ -2.2
Arts, Culture and Humanities	93.2	83.3	91.9	91.3	91.7	87.7	▼ -4.0

The performance of the Index within various sectors is shown in the table above, ranked by the change since February '10 with the overall Index listed first. Within individual nonprofit sectors, four scores have risen and six have fallen; one score has remained the same. Increases are noted in green and decreases in red. Positive or negative opinions from any single donor will impact the Index for all sectors they have supported.

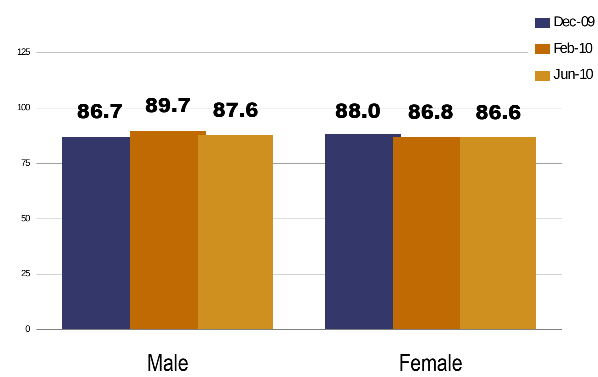


Confidence Edging Higher

The Donor Confidence Index peaked in June 2009, when it reached a level of 90.3. The current Index is just 0.6 points short of its highest level.

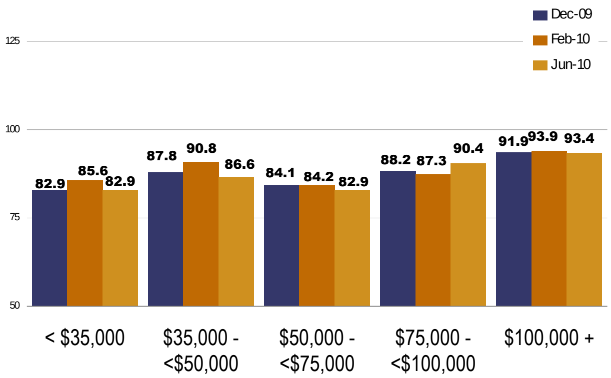
Donor Confidence by Demographics

Male donors once again exhibit higher confidence than female donors. Since February, both figures have dropped slightly.

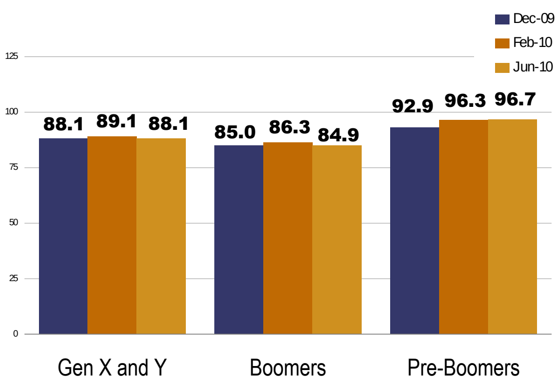


Giving households earning $100,000+ annually continue to post the highest Index scores. The score for this group stands at 93.4, down 0.5

points from four months ago. Those earning less than $35,000 and those earning $50,000 to less than $75,000 post the lowest scores at 82.9.



Pre-boomers continue to exhibit significantly high confidence levels. The score among this age group continues to rise, and is now up to 96.7. Boomers remain the age group with the lowest confidence level.

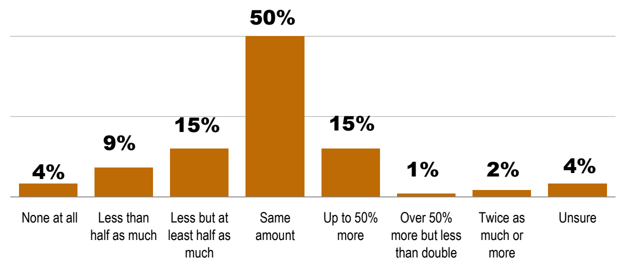


Donors Likely to Give the Same

Campbell Rinker asked U.S. donors whether they expected to give the same amount, more, or less in 2010 compared with 2009.

Half of all donors, 50%, expect to give the "same amount." Nearly three in ten, 28%, plan to give less and 18% plan to give more.

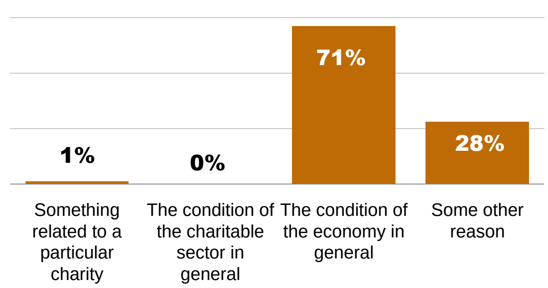
Expected 2009 Giving
(June 2010)



Economy is Number One Reason for Donating Less

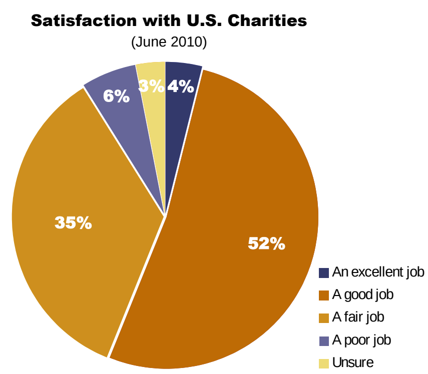
Seven in ten donors, 71%, credit the condition of the economy as the reason they will be donating less in 2010. No one responded that they would donate less as a result of the charitable sector in general.

Reasons for Donating Less in 2010



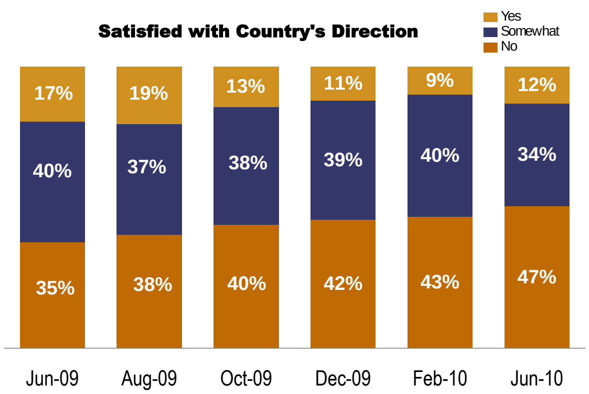
Nonprofit Approval Holds Steady

Fifty-six percent rated their satisfaction with U.S. charities as either "good" or "excellent."

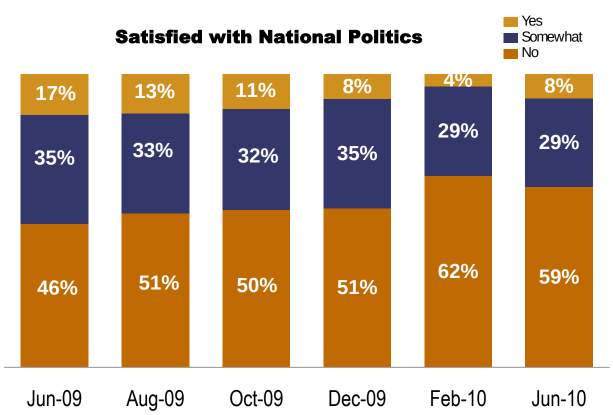


Donors Increasingly Dissatisfied with Country's Direction

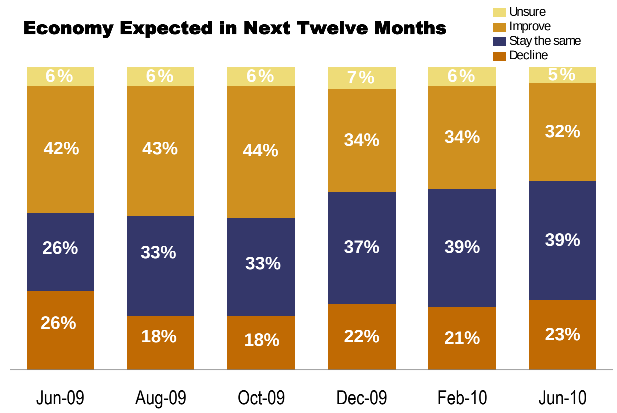
The proportion of donors dissatisfied with the country's direction has risen by another four percent since February. Approximately half of all donors, 47%, answered that they are not currently satisfied.



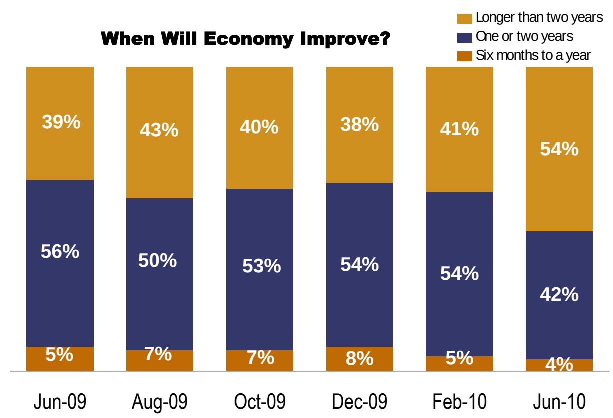
Six in ten donors, 59%, are dissatisfied with the political system at the national level.



Economic Improvement



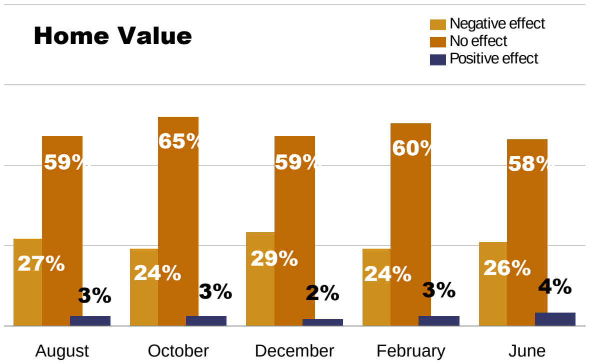
Nearly four in ten donors, 39%, expect the economy to remain the same through June 2011.

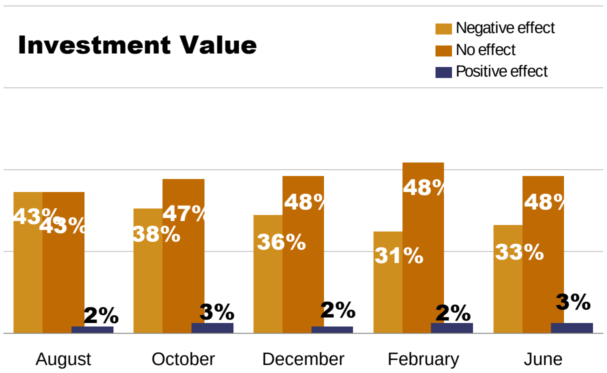


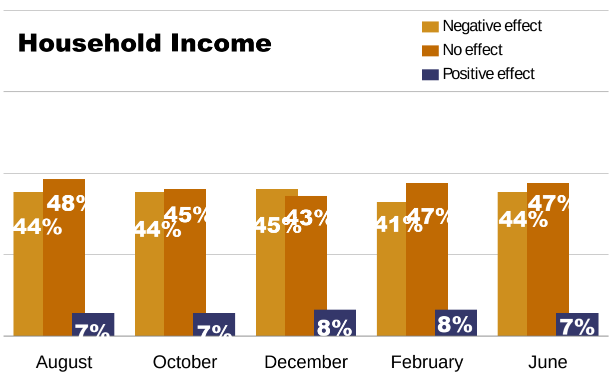
Over half of all donors, 54%, now expect economic recovery to occur more than two years from today.

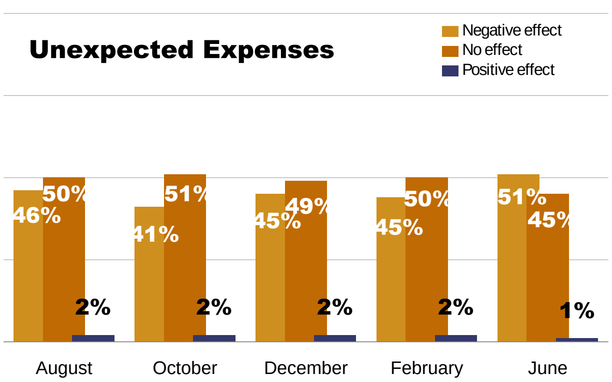
Unexpected Expenses Harm Giving

Unexpected expenses continue to have the greatest negative effect on giving. Half of donors (51%), say unexpected expenses are responsible for their decrease in 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.

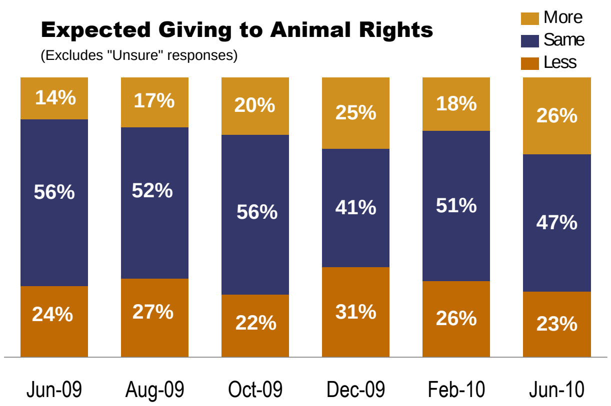
The sections below highlight the stated plans donor have for giving to each of the following nonprofit categories:

- 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

The DCI among donors to Animal Rights charities rose by 2.1 points in June to 88.9. This sector's score continues to rebound from a low experienced this past December.

Sector	Jun '09	Aug '09	Oct '09	Dec '09	Feb '10	Jun '10
Animal Rights	91.9	87.2	87.0	85.2	86.8	88.9
6-mo Avg.	88.0	88.1	88.7	86.5	86.3	87.0



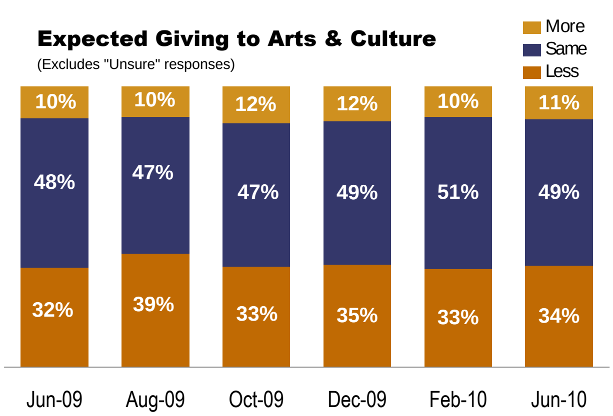
An eight percent increase since February, 26% of Animal Rights donors plan to donate more this year. Nearly half, 47%, plan to donate the same amount.

Arts, Culture, and Humanities

The Donor Confidence Index among Arts and Culture donors remained constant from October '09 through February '10. Since then, it has fallen by four points (the largest drop across all sectors this month).

Sector	Jun '09	Aug '09	Oct '09	Dec '09	Feb '10	Jun '10
Arts & Culture	93.2	83.3	91.9	91.3	91.7	87.7
6-mo Avg.	89.0	88.5	89.5	88.8	91.6	90.2

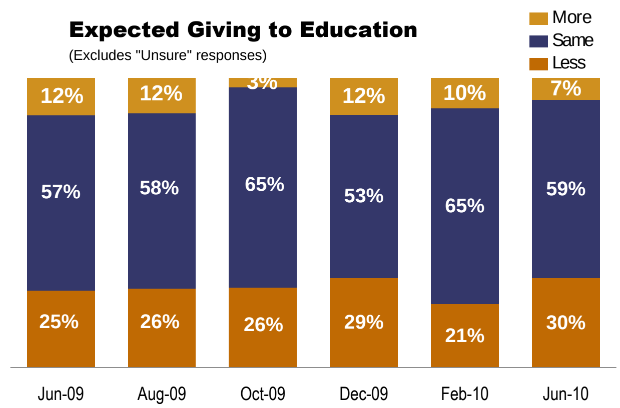
Expected giving among Arts donors has shown only minor fluctuations over the past year. One in three donors to this sector still plan to give less, while 49% plan to give the same.



Educational Institutions & Programs

Since February, the Index score for Educational Institutions has held at 88.5.

Sector	Jun '09	Aug '09	Oct '09	Dec '09	Feb '10	Jun '10
Education	91.2	87.9	90.9	89.7	88.5	88.5
6-mo Avg.	89.0	89.3	90.0	89.5	89.7	88.9



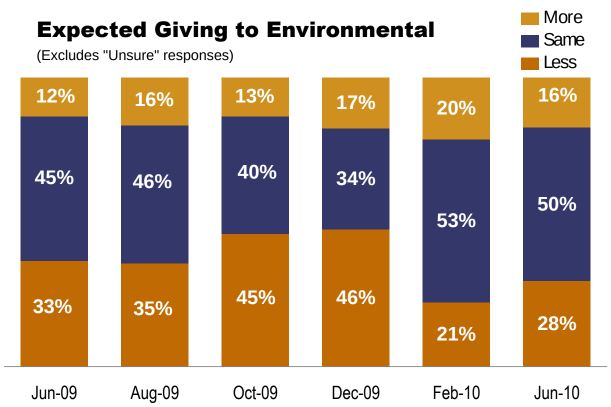
Six in ten Education donors, 59%, plan to give the same amount in 2010. Marking a nine percent increase since February, 30% plan to give less.

Environmental Protection

The DCI for donors to Environmental organizations has continued to rise over the past six months. The score is now 89.7, a 0.6 point increase since February.

Sector	Jun '09	Aug '09	Oct '09	Dec '09	Feb '10	Jun '10
Environmental	90.9	82.9	79.2	86.4	89.1	89.7
6-mo Avg.	87.8	87.4	84.3	82.8	84.9	88.4

Since late 2009, expected giving to Environmental charities has continued to show signs of improvement. Currently, 28% plan to donate less and 16% plan to donate more.

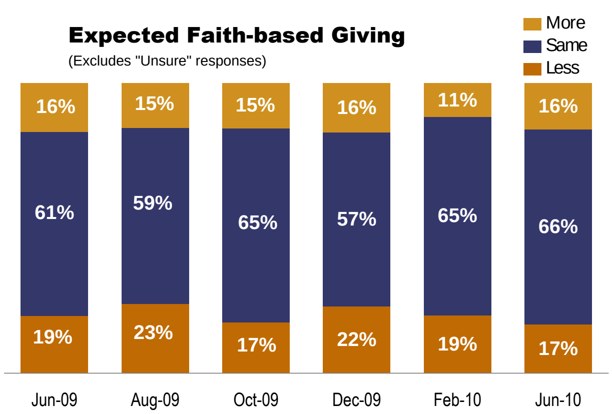


Faith-based Charities

Confidence among donors to Faith-based charities has dropped slightly since last issue. The DCI for this group is currently 94.1. Once again, donors to this sector display one of the most positive outlooks of any sector.

Sector	Jun '09	Aug '09	Oct '09	Dec '09	Feb '10	Jun '10
Faith-based	87.0	90.1	92.2	93.1	94.9	94.1
6-mo. Avg.	90.1	90.0	89.8	91.8	93.4	94.0

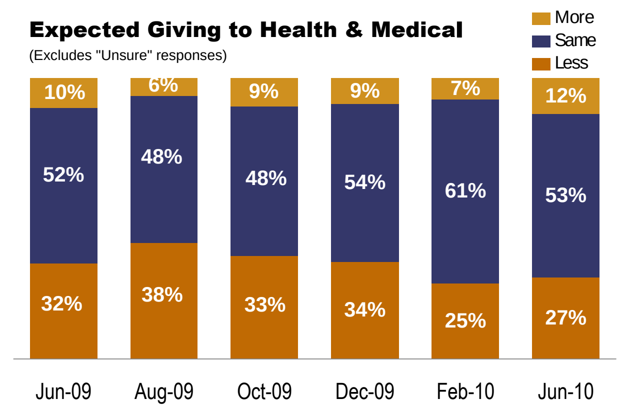
Two in three Faith-based donors, 66%, expect to give the same amount this year as last year.



Health and Medical Charities

The DCI for Health and Medical charities has increased by 1.2 points to 89.0.

Sector	Jun '09	Aug '09	Oct '09	Dec '09	Feb '10	Jun '10
Health and Medical	91.0	86.2	88.5	91.3	87.8	89.0
6-mo. Avg.	87.8	87.9	88.6	88.7	89.2	89.4



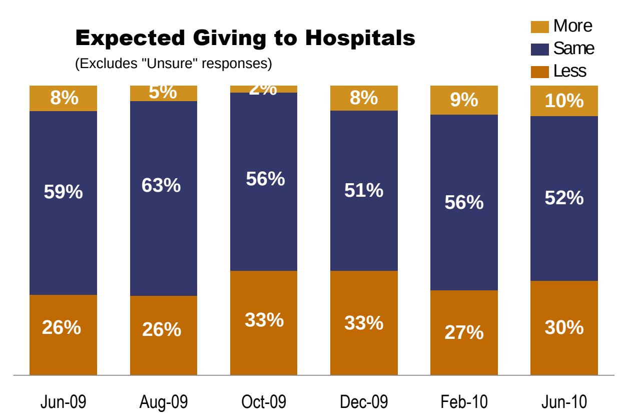
Up five percent since February, 12% of Health and Medical donors plan to give more throughout 2010. About half, 53% plan to give the same.

Hospitals & Hospital Foundations

The Donor Confidence Index for Hospitals and their Foundations has declined slightly since February, falling 0.9 points.

Sector	Jun '09	Aug '09	Oct '09	Dec '09	Feb '10	Jun '10
Hospitals	89.7	87.9	85.6	89.0	89.3	88.4
6-mo. Avg.	89.0	88.5	87.7	87.5	88.0	88.9

Approximately half of all donors to Hospitals and Hospital Foundations, 52%, expect to donate the same amount in 2010 as in 2009.

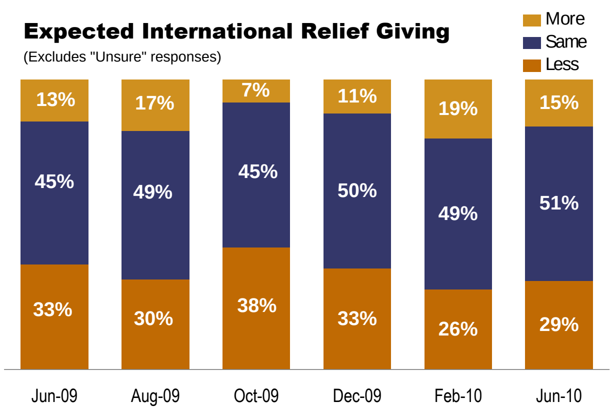


Int'l Relief & Sponsorship

Since last issue, the Index among donors to International Relief and Development charities has risen by 1.3 points.

Sector	Jun '09	Aug '09	Oct '09	Dec '09	Feb '10	Jun '10
Int'l Relief and Development	90.3	92.2	88.7	90.3	93.7	95.0
6-mo. Avg.	89.5	90.5	90.4	90.4	90.9	93.0

While confidence tends to track higher in this sector compared to others, donor expectations fluctuate widely from one poll to the next.



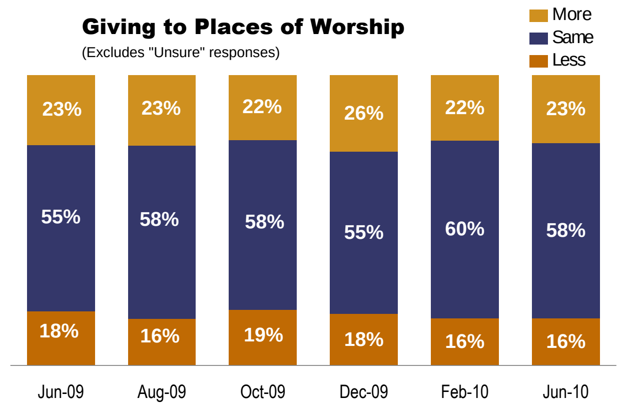
As of June '10, 29% plan to give less to this sector, while 15% plan to give more. Half plan to give the same amount.

Places of Worship

The DCI among donors to Places of Worship has decreased by 2.2 points since February.

Sector	Jun '09	Aug '09	Oct '09	Dec '09	Feb '10	Jun '10
Places of Worship	90.4	88.6	91.6	90.7	91.1	88.9
6-mo. Avg.	90.0	89.5	90.2	90.3	91.1	90.2

Six in ten donors, 58%, to this sector say they will give the same this year as last year. For the past year and a half, a consistent one in four donors have reported planning to donate more.

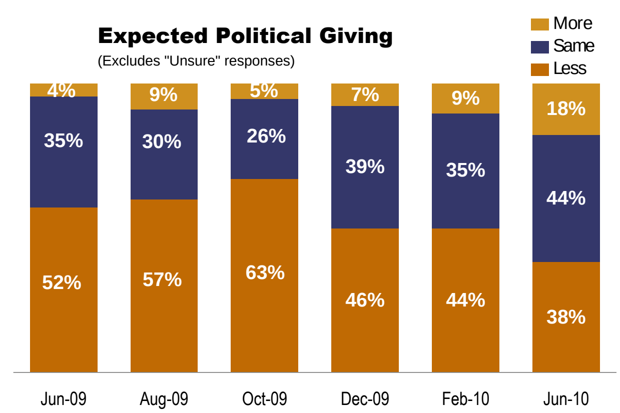


Political & Advocacy

Confidence among donors to Political organizations has declined by 1.2 points since last report.

Sector	Jun '09	Aug '09	Oct '09	Dec '09	Feb '10	Jun '10
Political and Advocacy	93.0	85.6	91.5	87.7	90.1	88.9
6-mo. Avg.	89.6	89.8	90.0	88.3	89.8	88.9

Rising significantly since last year, 18% of Political and Advocacy donors now expect to donate more. *This is possibly due to timing of primary elections in many states coinciding with the timing of this study.*

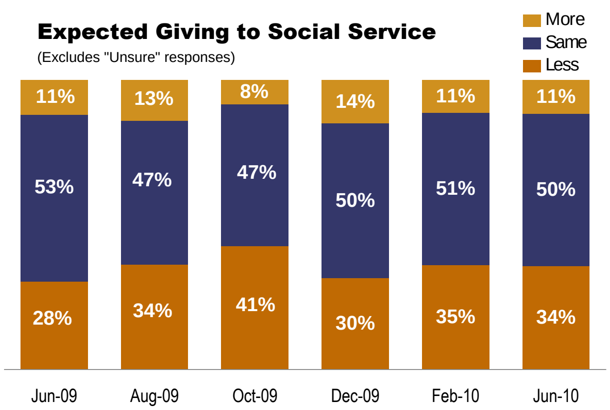


Social Service

In June, the DCI for donors to Social Service charities decreased by 0.9 points.

Sector	Jun '09	Aug '09	Oct '09	Dec '09	Feb '10	Jun '10
Social Svcs	89.1	87.9	86.7	90.8	89.3	88.4
6-mo. Avg.	88.6	89.0	87.9	88.5	88.9	89.5

Changing little since February, 50% of Social Service donors plan to donate the same amount to this sector as in 2009. One in ten, 11%, still plan to donate more.



Methodology

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 2007. Respondents were required to be at least 18 years old. Of the 3,312 responding donors, 726 self-identified as Christian and 85 self-identified as adherents to non-Christian faiths.

This Donor Confidence Report poll was conducted June _ - _, 2010 among 502 Internet respondents who had responded to the original February 2008 questionnaire.

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 June 2010 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
85	±10.6%
100	±9.8%
200	±6.9%
300	±5.7%
500	±4.4%