

## Donor Confidence Report

Issue 16, April 2011

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 April 2011 poll is 477. Details about the study methodology and audience are found on the final page of this report.

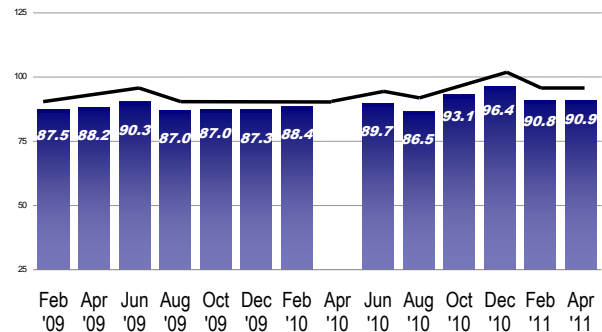
### Confidence On Hold

The overall Donor Confidence Index (DCI) has essentially held steady since February 2011, holding fast at a level of 90.9 compared to the Index of 90.8 seen in the last issue.

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.

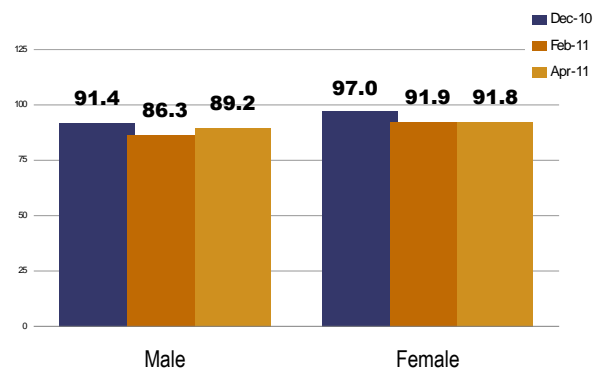
Sector	Jun '10	Aug '10	Oct '10	Dec '10	Feb '11	Apr '11	2-Mo Chg
<b>Overall</b>	<b>89.7</b>	<b>86.5</b>	<b>93.1</b>	<b>96.4</b>	<b>90.8</b>	<b>90.9</b>	<b>▲ 0.1</b>
Health and Medical	89.0	85.5	93.1	93.8	88.4	91.2	▲ 2.8
Environmental	89.7	87.3	92.4	92.9	90.8	93.5	▲ 2.7
Social Service	88.4	84.6	90.0	95.6	88.6	91.3	▲ 2.7
Place of Worship	88.9	87.6	93.0	94.6	90.0	92.0	▲ 2.0
Arts, Culture and Humanities	87.7	82.9	95.6	103.1	88.0	88.8	▲ 0.8
Education	88.5	87.0	93.4	97.7	93.8	93.8	----
Faith-based	94.1	88.9	91.2	97.3	92.8	91.8	▼ -1.0
Hospitals & Hosp. Fnd.	88.4	87.2	94.3	94.4	92.6	91.0	▼ -1.6
Int'l Relief and Development	95.0	88.9	95.7	102.1	95.7	92.2	▼ -3.5
Animal Rights	88.9	85.3	93.0	92.0	89.7	84.8	▼ -4.9
Political and Advocacy	88.9	82.5	92.7	98.7	91.3	85.5	▼ -5.8

The performance of the Index within various sectors is shown in the table above, ranked by the change since February '11. Since last issue, the Index has risen in five categories, fallen in five categories, and remained unchanged in one category. Health, environmental and social service organizations showed the strongest gains over the February results. Opinions from any single donor impact the Index for each sector they support.

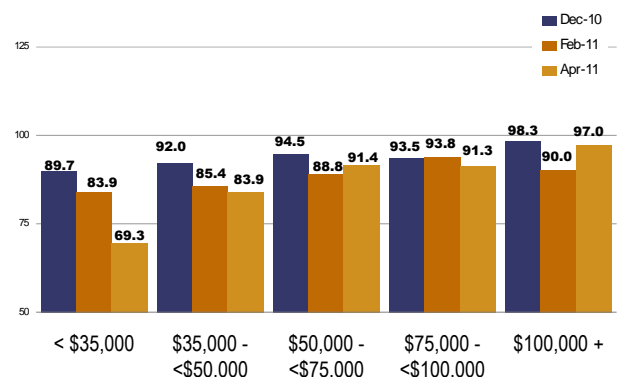


### Donor Confidence by Demographics

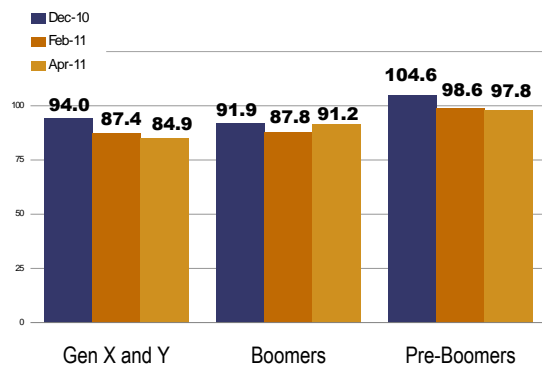
Women continue to exhibit higher confidence than men.



The April Index shows a decline in confidence among households earning less than \$50,000. Confidence among those with \$100,000+ annual income has jumped by seven points.



By a large margin, Generations X and Y are currently the least confident of all generations.



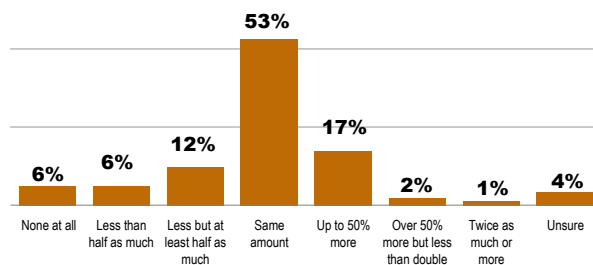
### Plans for Giving in '11

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

As of April, 18% of donors say they will donate less this year and 6% say they will donate none at all. Up one percent since February, 20% of donors now plan to give more.

### Expected Giving

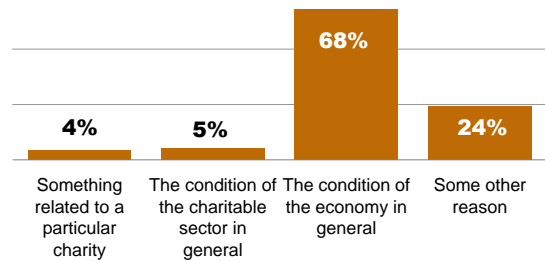
(April 2011)



### Economy Drives Giving Reductions

More than two in three donors (68%) cite the economy as their reason for donating less to charitable causes.

### Reasons for Donating Less in 2011

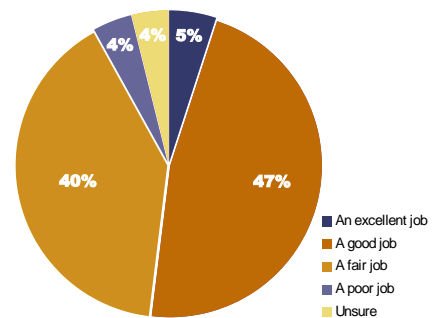


### Nonprofit Sector Approval Ratings

Approximately half of all American donors (52%) remain satisfied with U.S. charities. Another 40% feel that charities are doing a "fair job."

### Satisfaction with U.S. Charities

(April 2011)

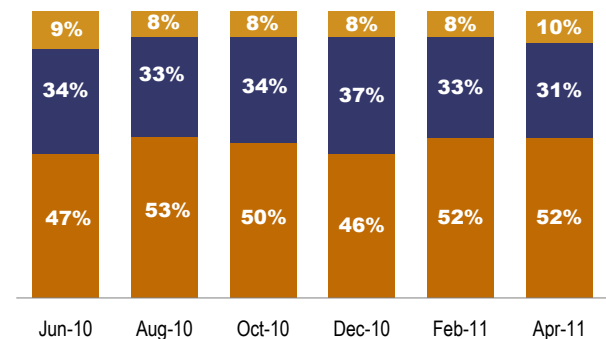


### Dissatisfaction with Government

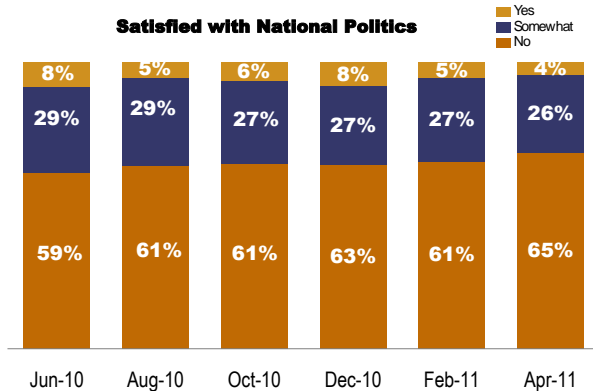
The proportion of donors dissatisfied with the country's direction has held at 52%.

### Satisfied with Country's Direction

Yes, Somewhat, No

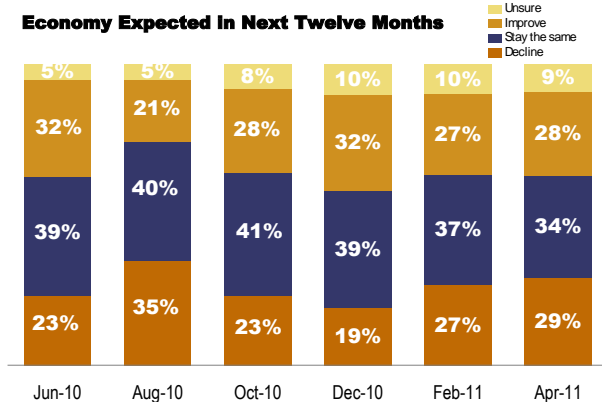


Dissatisfaction with the political system at the federal level has grown even higher to 65%, a four percent increase since February.

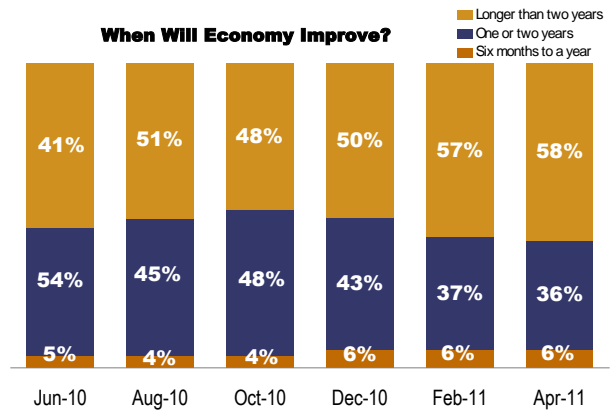


### Expectations for the Economy

Expectations for the economy have changed little since last issue. Today, 29% believe the economy will decline further, while 34% expect the economy to stay the same and 28% expect to see improvement.

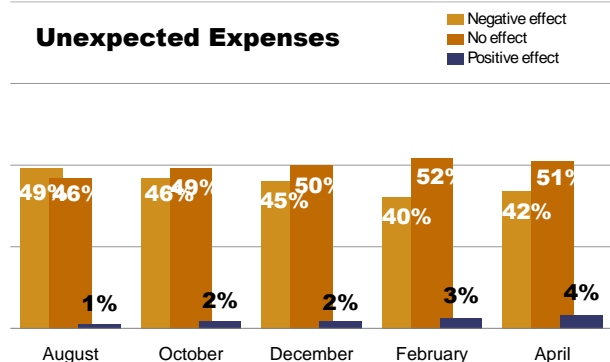
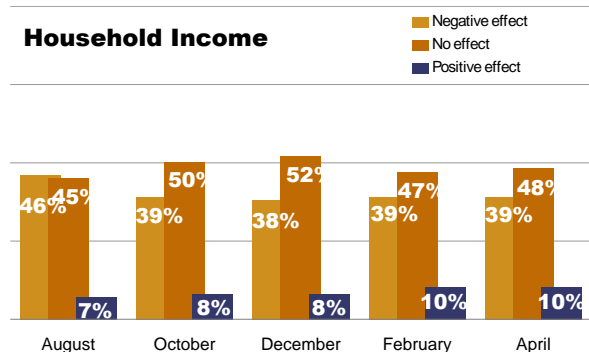


Nearly identical to February's results, 58% believe recovery will occur in more than two years, while 36% expect recovery in one to two years.



### Income and Expenses Hurt Donors

About two in five American donors continue to be negatively affected by unexpected expenses or changes in household income.



### 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.

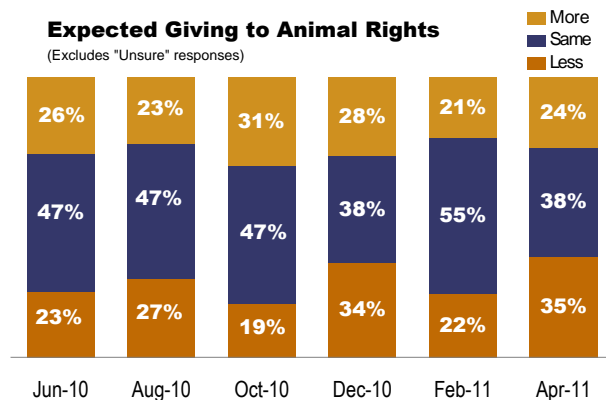
The sections below highlight the stated plans donors have for giving to each of the following nonprofit categories:

- 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

The DCI for Animal Rights organizations has fallen once again, dropping by 4.9 points in April.

Sector	Jun '10	Aug '10	Oct '10	Dec '10	Feb '11	Apr '11
Animal Rights	88.9	85.3	93.0	92.0	89.7	84.8
6-mo Avg.	87.0	87.0	89.1	90.1	91.6	88.8



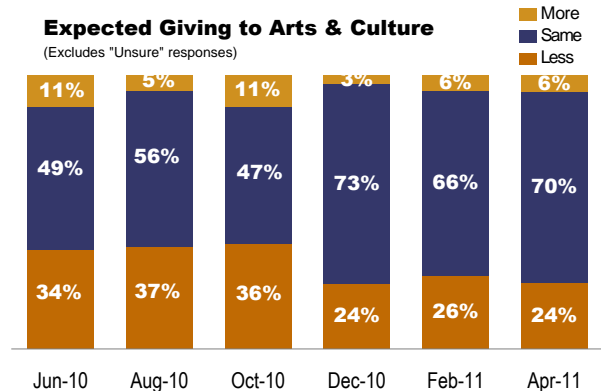
More than one in three Animal Rights donors (35%) plan to give less to this sector throughout 2011.

### Arts, Culture, and Humanities

The Index for Arts and Culture has yet to rebound from its significant 15.1 drop in February. As of this month, the sector's DCI score stands at 88.8.

Sector	Jun '10	Aug '10	Oct '10	Dec '10	Feb '11	Apr '11
Arts & Culture	87.7	82.9	95.6	103.1	88.0	88.8
6-mo Avg.	90.2	87.4	88.7	93.9	95.6	93.3

Seven in ten Arts donors (70%) plan to donate the same amount this year, while one in four (24%) plan to donate less.

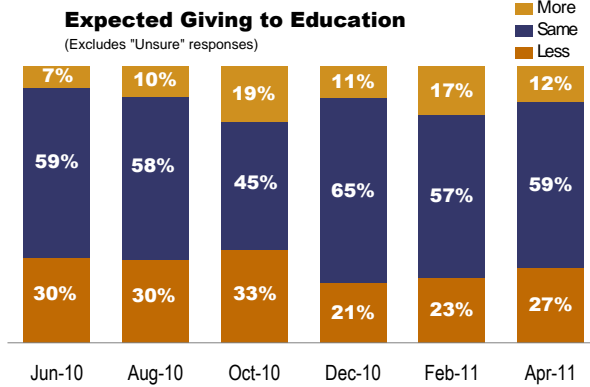


### Educational Institutions & Programs

The Confidence Index for Educational Institutions has not shifted since February.

Sector	Jun '10	Aug '10	Oct '10	Dec '10	Feb '11	Apr '11
Education	88.5	87.0	93.4	97.7	93.8	93.8
6-mo Avg.	88.9	88.0	89.6	92.7	95.0	95.1

Nearly three in five Environmental donors (59%) plan to give the same in 2011 as they did in 2010. More than one in four (27%) plan to give less.

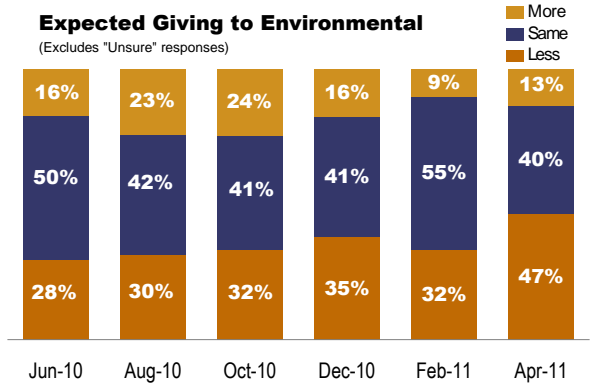


**Environmental Protection**

Confidence among Environmental donors has increased by 2.7 points since last issue.

Sector	Jun '10	Aug '10	Oct '10	Dec '10	Feb '11	Apr '11
Environmental	89.7	87.3	92.4	92.9	90.8	93.5
6-mo Avg.	88.4	88.7	89.8	90.9	92.0	92.4

Up 15% since February, 47% of donors to Environmental charities report planning to donate less this year than last. Two in five (40%) plan to give the same dollar amount.

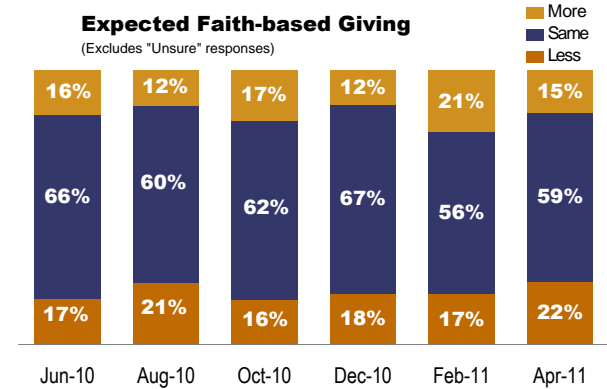


**Faith-based Charities**

The DCI for donors to Faith-based charities has decreased one point since February to 91.8.

Sector	Jun '10	Aug '10	Oct '10	Dec '10	Feb '11	Apr '11
Faith-based	94.1	88.9	91.2	97.3	92.8	91.8
6-mo Avg.	94.0	92.6	91.4	92.5	93.8	94.0

Down six percent from two months ago, 15% of donors now say they will give more to Faith-based organizations in 2011. Three in five (59%) plan to give the same amount.

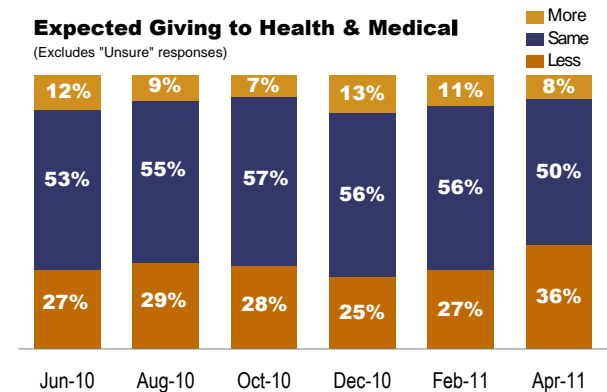


**Health and Medical Charities**

Rising by 2.8 points since February (the largest increase this issue), the DCI for Health and Medical charities stands at 91.2.

Sector	Jun '10	Aug '10	Oct '10	Dec '10	Feb '11	Apr '11
Health and Medical	89.0	85.5	93.1	93.8	88.4	91.2
6-mo Avg.	89.4	87.4	89.2	90.8	91.8	91.1

Currently, half of all Health and Medical donors plan to give the same as they did in 2010. Up nine percent since last issue, 36% now plan to give less to this sector.

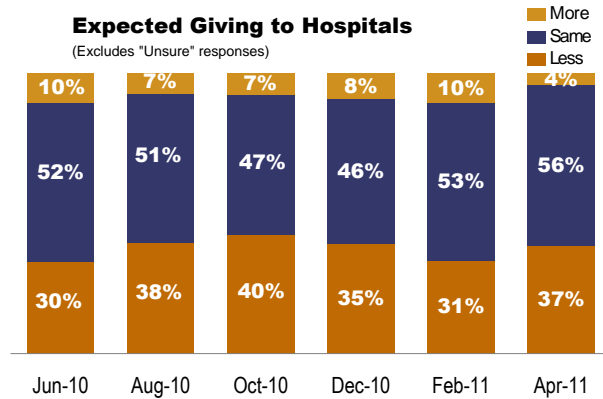


### Hospitals & Hospital Foundations

The Index for Hospitals and their Foundations has decreased by 1.6 points to 91.0.

Sector	Jun '10	Aug '10	Oct '10	Dec '10	Feb '11	Apr '11
Hospitals	88.4	87.2	94.3	94.4	92.6	91.0
6-mo. Avg.	88.9	88.3	90.0	92.0	93.8	92.7

The percentage of donors planning to give less to Hospitals rose six percent in April to 37%. Just four percent plan to give more to the sector this year.



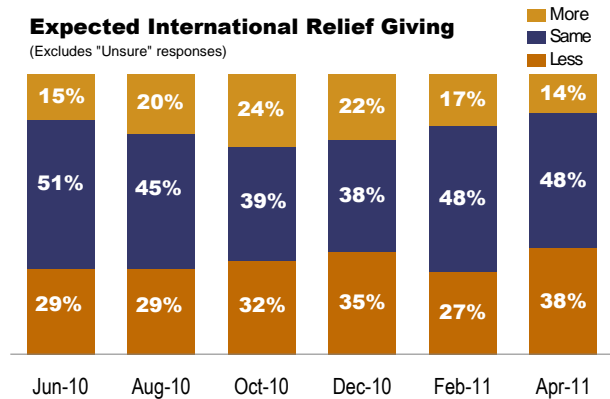
### Int'l Relief & Sponsorship

Confidence among donors to International Relief and Sponsorship charities has fallen further, since reaching an extreme high point in December. The DCI for this sector, as of April, is 92.2.

Sector	Jun '10	Aug '10	Oct '10	Dec '10	Feb '11	Apr '11
Int'l Relief and Development	95.0	88.9	95.7	102.1	95.7	92.2
6-mo. Avg.	93.0	92.5	93.2	95.6	97.8	96.7

### Expected International Relief Giving

(Excludes "Unsure" responses)



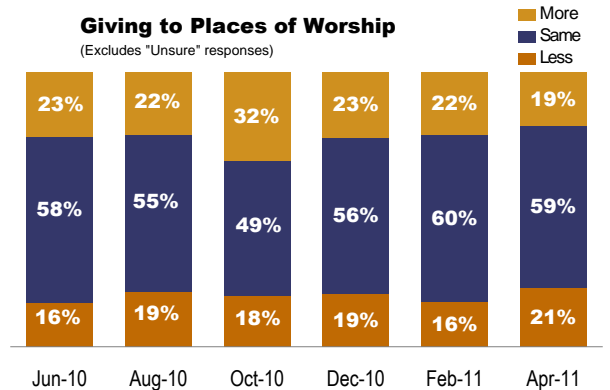
Today, 14% plan to give less to this sector, 48% plan to give the same amount, and 38% plan to give more.

### Places of Worship

Posting a two point increase since February, the Confidence Index for those who give to Places of Worship stands at 92.0.

Sector	Jun '10	Aug '10	Oct '10	Dec '10	Feb '11	Apr '11
Places of Worship	88.9	87.6	93.0	94.6	90.0	92.0
6-mo. Avg.	90.2	89.2	89.8	91.7	92.5	92.2

Approximately three in five donors (59%) plan to give the same amount to Places of Worship in 2011 as in 2010.

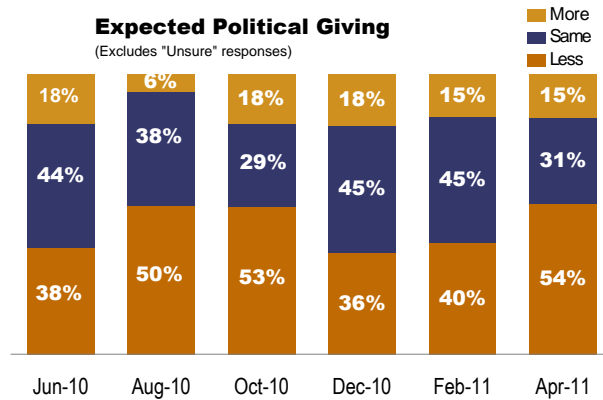


## Political & Advocacy

Falling 5.8 points since last issue, the DCI for Political and Advocacy organizations is a low 85.5.

Sector	Jun '10	Aug '10	Oct '10	Dec '10	Feb '11	Apr '11
Political and Advocacy	88.9	82.5	92.7	98.7	91.3	85.5
6-mo. Avg.	88.9	87.2	88.0	91.3	94.2	91.8

Over half of Political donors report planning to give less to this sector throughout 2011.

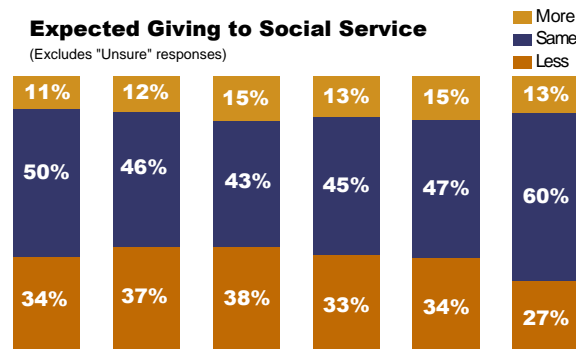


## Social Service

In April, the DCI for Social Service organizations increased by 2.7 points to 91.3.

Sector	Jun '10	Aug '10	Oct '10	Dec '10	Feb '11	Apr '11
Social Svcs	88.4	84.6	90.0	95.6	88.6	91.3
6-mo. Avg.	89.5	87.4	87.7	90.1	91.4	91.8

Down seven percent since February, 27% of Social Service donors plan to give less to the sector in 2011. Up 13% from last issue, 60% plan to donate the same amount this year.



## Methodology

This Donor Confidence Report poll was conducted April 18-22, 2011 among 477 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 2011 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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