

Donor Confidence Report

Issue 26, June 2013

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 2013 poll is 507. Details about the study methodology and audience are found on the final page of this report.

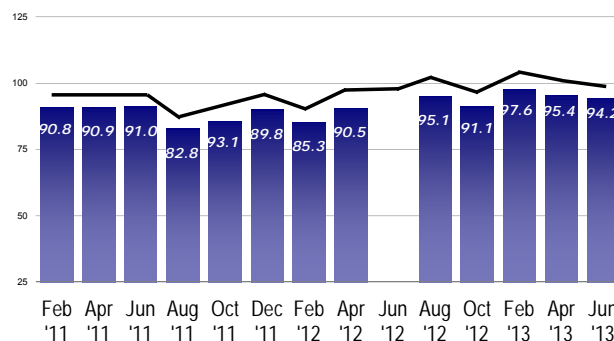
Donor Confidence Falls Slightly

The Donor Confidence Index (DCI) has fallen 1.2 points since April to 94.2.

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 '12	Aug '12	Oct '12	Feb '13	Apr '13	Jun '13	2-Mo Chg
Overall	90.5	95.1	91.1	97.6	95.4	94.2	▼ 1.2
Health and Medical	90.5	94.7	90.1	101.5	93.4	95.1	▲ 1.7
Education	94.9	98.1	95.5	101.4	94.6	96.0	▲ 1.4
Social Service	95.8	99.1	97.1	100.6	95.5	96.8	▲ 1.3
Hospitals & Hosp. Fnd.	92.2	95.8	92.0	100.4	95.4	96.1	▲ 0.7
Environmental	90.3	95.8	94.6	99.6	99.2	99.8	▲ 0.6
Place of Worship	92.5	96.0	90.6	99.4	96.9	96.4	▼ 0.5
Faith-based	92.2	100.7	93.0	104.0	97.2	94.9	▼ 2.3
Arts, Culture & Humanities	97.7	101.2	98.0	105.1	101.6	98.5	▼ 3.1
Animal Rights	90.8	90.9	90.6	100.5	98.3	92.4	▼ 5.9
Int'l Relief and Development	97.4	98.8	94.6	103.6	104.2	98.3	▼ 5.9
Political and Advocacy	94.0	101.1	98.4	96.9	99.1	92.2	▼ 6.9

Index scores have increased across five sectors and decreased across six sectors since last issue. (Opinions from a donor alter the Index for any sector they recall supporting.)



Donors not Glum, not Happy either

By Dirk Rinker

After flirting with signs of recovery in February 2013, the U.S. Donor Confidence Index has subsided to slightly more moderate levels during the mid-year polling season. The latest poll for June/July has the Index at an overall 94.2 – slightly weaker than last year at the same time just before the presidential election.

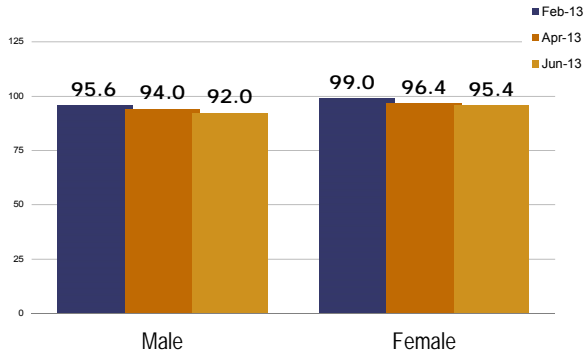
Among women – who comprise the majority of donors – Donor Confidence stands at 95.0. The Index is highest in households earning \$50-\$75K annually. The oldest donors (pre-boomers) tend to have a slightly more positive outlook than their younger counterparts.

These mixed signals arrive amid news of improving home values, slightly rising interest rates and lower household debt levels. While the unemployment rate has dropped slightly, millions fewer Americans are employed now than were at the start of the recession in late 2007, despite a larger potential workforce.

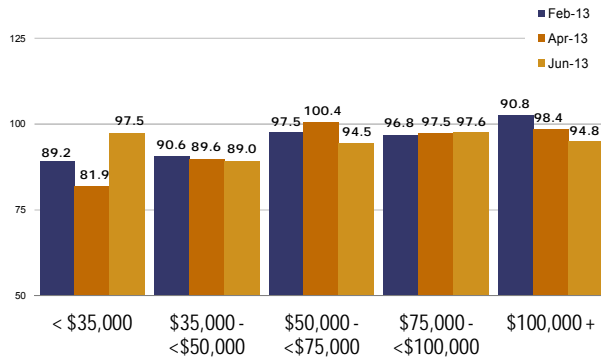
To capitalize on these trends charities might express cautious optimism in their donor contact. For instance, charities could tell donors that they also expect the economy to improve, and are doing their best to keep administrative costs low and make programs more efficient.

Donor Confidence by Gender, Age and Income

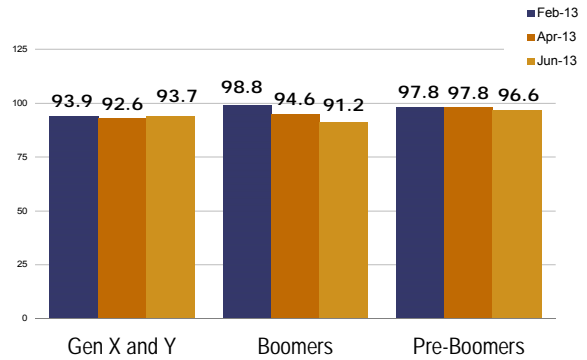
Since April, the DCI among women has dropped by one point, while the Index has dropped by two points among men.



Interestingly, confidence is up among donors from households with less than \$35,000 in income. Confidence is down among those earning \$35,000-\$75,000 and \$100,000+.



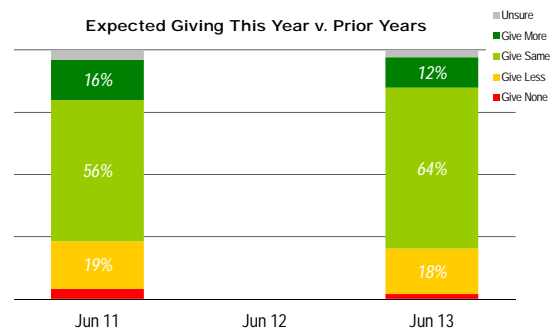
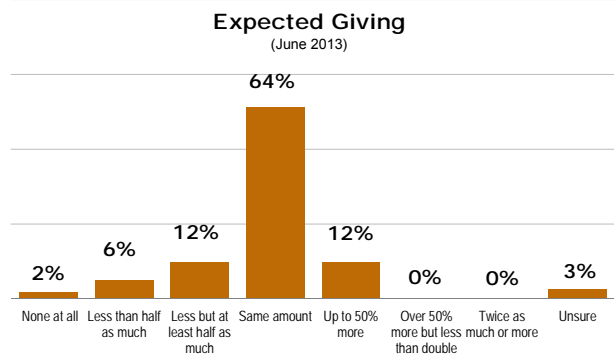
Index scores have fallen among Boomers and Pre-Boomers. The score for Gen X & Y donors has increased slightly.



Expectations for Giving in 2013

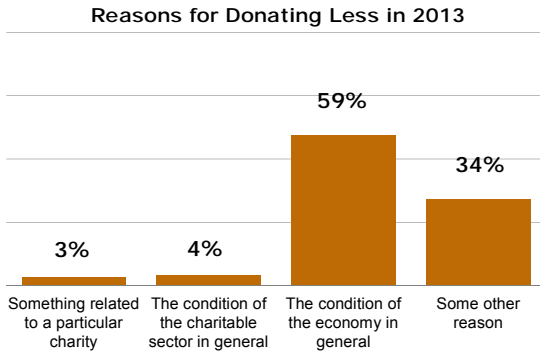
In each Donor Confidence poll, Campbell Rinker asks U.S. donors whether they expect to give the same, more, or less in the present year compared with last.

Today, nearly two in three U.S. donors (64%) plan to give the same amount to charity this year, while 12% plan to give more and 20% plan to give less.



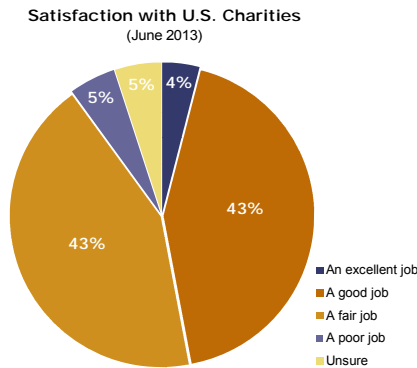
Reasons for Giving Less

Three in five donors (59%) cite the condition of the economy as their reason for giving less. One in three (34%) report giving less due to reasons not listed.



U.S. Nonprofit Approval Ratings

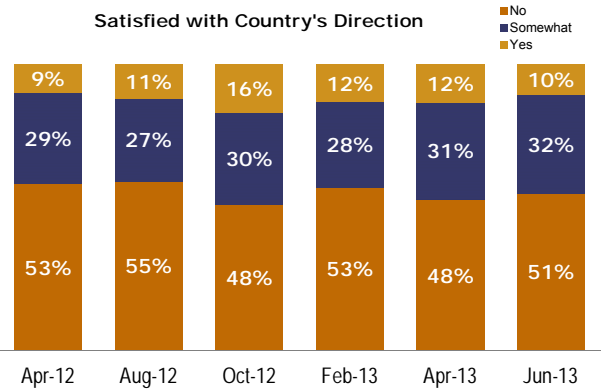
As of June, 43% of donors say U.S. charities are doing a *good* job, while another 43% say they are doing a *fair* job.



Dissatisfaction with Government Persists

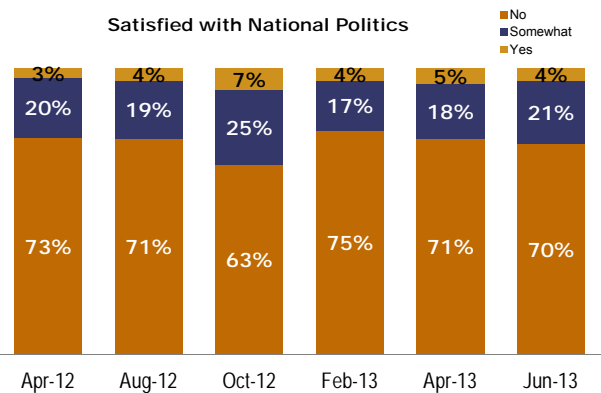
More than half of all donors (51%) express dissatisfaction with the country's direction. Just 10% report being entirely satisfied with the direction of our nation.

Satisfied with Country's Direction



Seven in ten donors (70%) are unhappy with politics at the federal level.

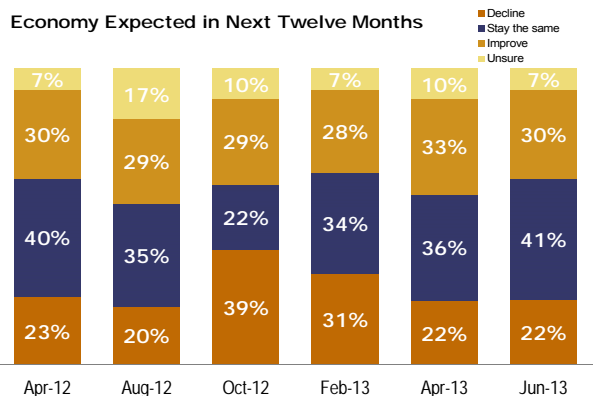
Satisfied with National Politics



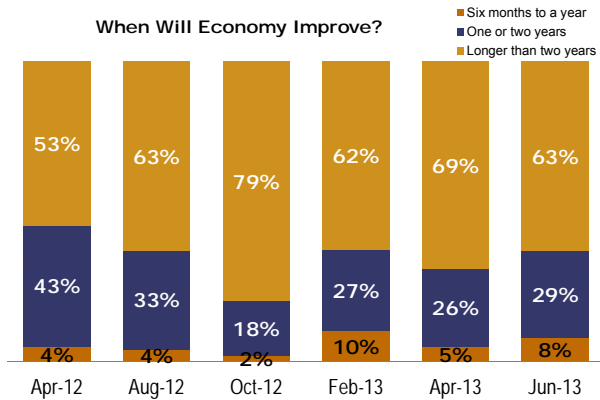
Economic Outlook

Presently, 41% of donors expect the economy to remain the same over the next year. Three in ten (30%) believe it will improve.

Economy Expected in Next Twelve Months

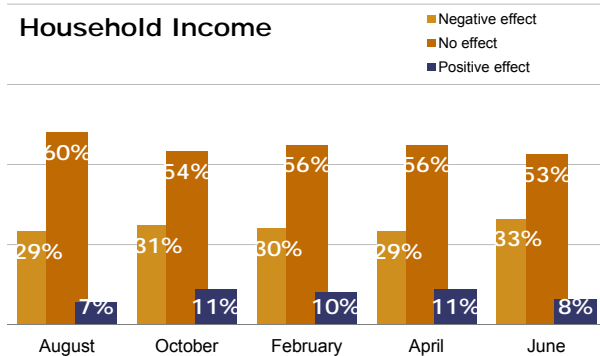


Sixty-three percent of donors expect the economy to recover in more than two years.

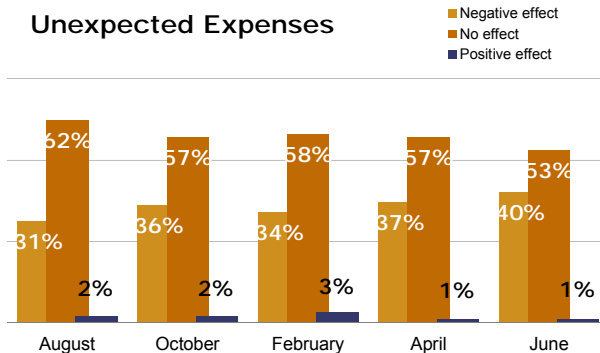


Lower Income and Higher Expenses

One in three donors (33%) report changes in household income having a negative effect on their ability to give.



Two in five (40%) report unexpected expenses having 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

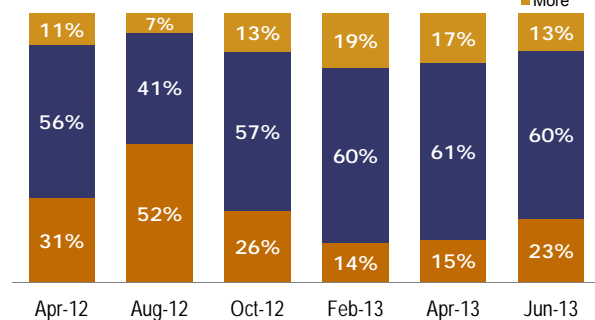
Animal Rights & Protection

The DCI for Animal Rights charities has decreased by 5.9 points since April to 92.4.

Sector	Apr '12	Aug '12	Oct '12	Feb '13	Apr '13	Jun '13
Animal Rights	90.8	90.9	90.6	100.5	98.3	92.4
6-mo Avg.	86.1	88.4	90.8	94.0	96.5	97.1

Expected Giving to Animal Rights

(Excludes "Unsure" responses)



Currently, 60% of Animal Rights donors plan to give the same amount to this sector throughout 2013, while 23% plan to give less and 13% plan to give more.

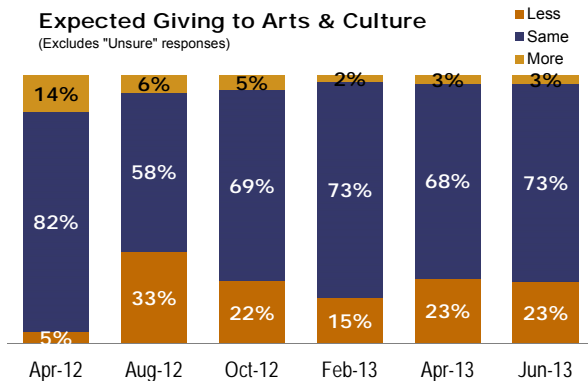
Arts, Culture, and Humanities

While the Index for Arts organizations has fallen 3.1 points since last issue, its June score

(98.5) and 6-month rolling average (101.7) remain quite high.

Sector	Apr '12	Aug '12	Oct '12	Feb '13	Apr '13	Jun '13
Arts & Culture	97.7	101.2	98.0	105.1	101.6	98.5
6-mo Avg.	92.5	95.6	99.0	101.4	101.6	101.7

Nearly three in four donors to Arts & Culture (73%) expect to give the same amount to the sector in 2013 as they did in 2012.

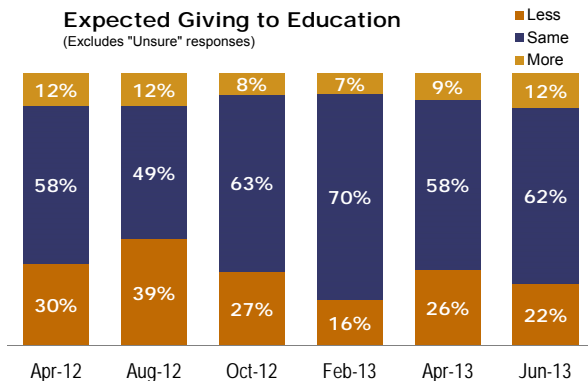


Educational Institutions & Programs

The DCI for Educational Institutions has risen 1.4 points since April to 96.0.

Sector	Apr '12	Aug '12	Oct '12	Feb '13	Apr '13	Jun '13
Education	94.9	98.1	95.5	101.4	94.6	96.0
6-mo Avg.	93.4	94.6	96.2	98.3	97.2	97.3

Today, 62% of donors plan to give the same amount to Education this year. More than one in five (22%) plan to give less.



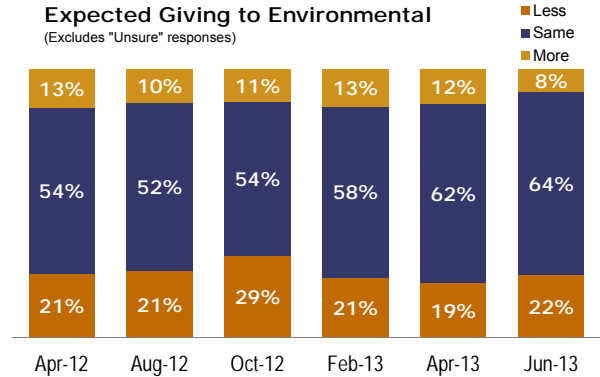
Environmental Protection

The DCI for Environmental organizations has remained mostly stable this year, ranging from 99.6 in February to 99.2 in April and 99.8 in June.

Sector	Apr '12	Aug '12	Oct '12	Feb '13	Apr '13	Jun '13
Environmental	90.3	95.8	94.6	99.6	99.2	99.8
6-mo Avg.	87.7	89.8	93.6	96.7	97.8	99.5

Expected Giving to Environmental

(Excludes "Unsure" responses)



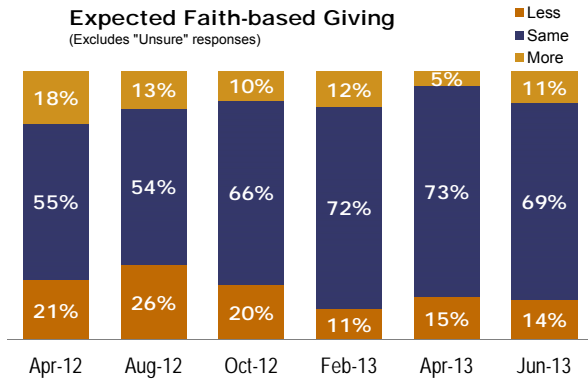
Nearly two in three donors to Environmental charities (64%) report plans to give the same dollar amount to the sector this year. One in five (22%) report plans to give less.

Faith-based Charities

The DCI among donors to Faith-based charities has fallen 2.3 points since April to 94.9.

Sector	Apr '12	Aug '12	Oct '12	Feb '13	Apr '13	Jun '13
Faith-based	92.2	100.7	93.0	104.0	97.2	94.9
6-mo. Avg.	91.4	93.6	95.3	99.2	98.1	98.7

This month, 69% of donors to Faith-based organizations report planning to give the same amount to the sector in '13. Fourteen percent plan to give less and 11% plan to give more.

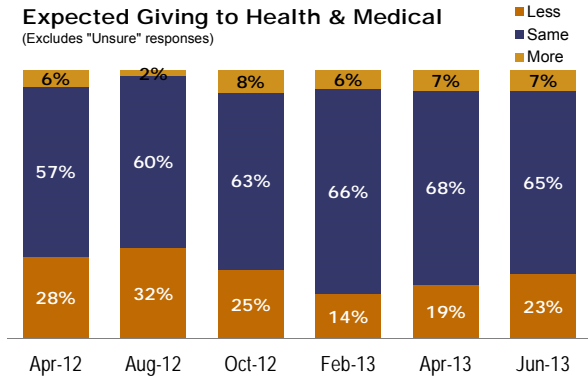


Health and Medical Charities

Up 1.7 points this issue, the Index for Health and Medical charities stands at 95.1.

Sector	Aug '12	Aug '12	Oct '12	Feb '13	Apr '12	Jun '13
Health & Med.	94.7	94.7	90.1	101.5	93.4	95.1
6-mo. Avg.	89.8	89.8	93.2	95.4	95.0	96.7

Approximately two in three donors to Health-related charities (65%) report plans to give the same amount during 2013 as they did in 2012.

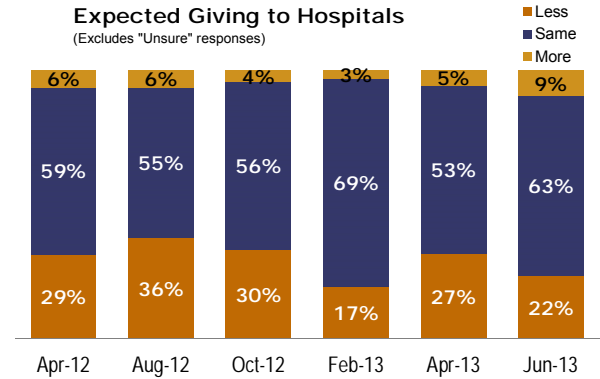


Hospitals & Hospital Foundations

The DCI for Hospitals and Hospital Foundations increased 0.7 points, from 95.4 in April to 96.1 today.

Sector	Apr '12	Aug '12	Oct '12	Feb '13	Apr '13	Jun '13
Hospitals	92.2	95.8	92.0	100.4	95.4	96.1
6-mo. Avg.	92.6	92.9	93.3	96.1	95.9	97.3

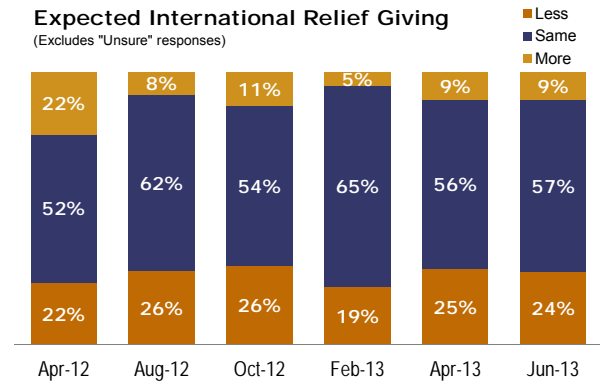
Sixty-three percent of donors expect to give the same dollar amount to Hospitals & their Foundations throughout 2013. More than one in five (22%) plan to give less, while nine percent plan to give more.



Int'l Relief & Sponsorship

The Index for International Relief charities has declined by 5.9 points since April to 98.3.

Sector	Apr '12	Aug '12	Oct '12	Feb '13	Apr '13	Jun '13
Int'l Relief and Development	97.4	98.8	94.6	103.6	104.2	98.3
6-mo. Avg.	95.0	95.5	96.9	99.0	100.8	102



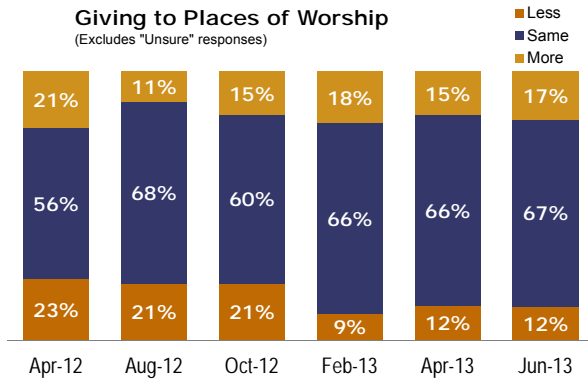
As of June, 57% plan to give the same amount to International Relief charities this year as last. One in four (24%) plan to give less.

Places of Worship

The Confidence Index for Places of Worship has decreased by 0.5 points to 96.4.

Sector	Apr '12	Aug '12	Oct '12	Feb '13	Apr '13	Jun '13
Places of Worship	92.5	96.0	90.6	99.4	96.9	96.4
6-mo. Avg.	91.1	92.3	93.0	95.3	95.6	97.6

Two in three donors to Places of Worship (67%) expect to give the same amount throughout 2013 as they did in 2012. One in six (17%) plan to give more.



Political & Advocacy

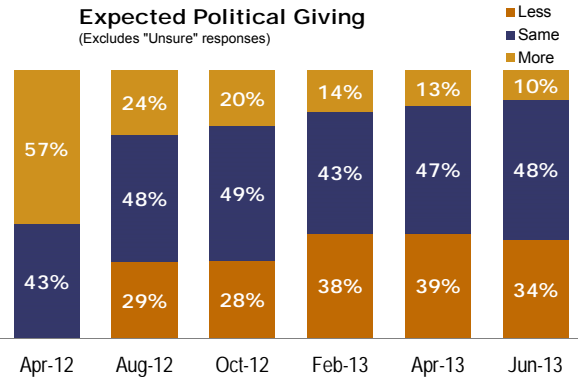
The DCI for the Political sector has declined by 6.9 points since last issue to 92.2.

Sector	Apr '12	Aug '12	Oct '12	Feb '13	Apr '13	Jun '13
Political and Advocacy	94.0	101.1	98.4	96.9	99.1	92.2
6-mo. Avg.	91.0	93.5	97.8	98.8	98.1	96.1

Today, 48% of Political donors plan to give the same to the sector this year, while 34% plan to give less.

Expected Political Giving

(Excludes "Unsure" responses)



Social Service

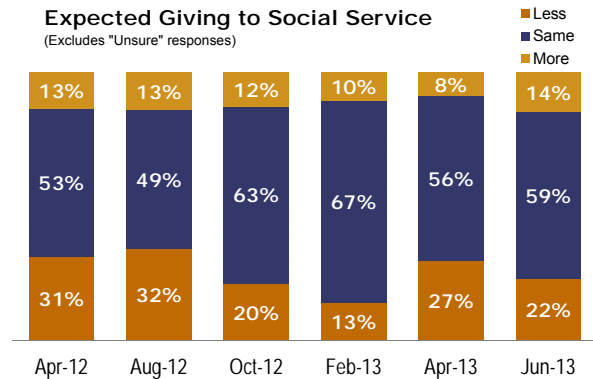
The Index for Social Service charities has increased by 1.3 points since April to 96.8.

Sector	Apr '12	Aug '12	Oct '12	Feb '13	Apr '13	Jun '13
Social Svcs	95.8	99.1	97.1	100.6	95.5	96.8
6-mo. Avg.	94.2	95.4	97.3	98.9	97.7	97.6

Nearly three in five Social Service donors (59%) plan to give the same amount to this sector in 2013. One in seven donors (14%) plan to donate more.

Expected Giving to Social Service

(Excludes "Unsure" responses)



Methodology

This Donor Confidence Report poll was conducted July, 2013 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 July 2013 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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